



CALSPRESS

California Association of Legal Support Professionals

Volume 15 / Issue 3 / Fall 2022



LEGISLATION

Legislation:

Highlights of Our History



MEMBERSHIP

Membership:

Member Benefits and Value



EDUCATION

Education:

A Worthwhile Investment



CONFERENCE

Conference:

September 23-25, 2022

The Hilton San Jose





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PRESIDENT'S MESSAGE

KEN HASTINGS

2022 CALSPRO PRESIDENT

It has been an honor to serve as CALSPRO President for the past two years. While my second term is coming to a close, the end of the Ken Hastings presidency comes to an end and another presidency begins. Knowing who is running for office, I know CALSPRO's future will remain in good hands.

The election process started several weeks ago with nominations. Michael Cochran and the CAMS team aided us in utilizing our new website to facilitate these nominations with great success. CAMS then reached out to nominated members to ask for their acceptance for the positions in which they were nominated. The result of this effort was recently displayed when the election ballot was sent to all voting members. If you haven't voted yet, please take a moment to do so. Your participation in the CALSPRO election process is important.

Nominated persons eligible to vote for are as follows:

Executive Officers:

President – Kristian Pujol

Vice President – Michael Kern

Secretary/Treasurer – Steve Janney

Directors:

Robert Porambo • Michael Kern • Chad Barger • Larry Kirlin • Thomas Bowman • Kristian Pujol • Jackie Janney • Dan Mora • Jason Burke • Kraig Vorsatz • Esteban Pujol

Over the past two years, I have been privileged to work with outstanding CALSPRO members, leaders, and many other industry professionals. You should all be made aware of how lucky we are to have such a dedicated and caring group of people looking out for our businesses and industry. They have spent hundreds of hours, specifically devoted to the success of CALSPRO and the viability of our professions and industry. They are a watchdog, never leaving their post, and maintaining

	Number of Employees	Dues Pricing
Tier 1	1 employee (self-employed)	\$250.00
Tier 2	2 to 5 employees	\$500.00
Tier 3	6 to 25 employees	\$1000.00
Tier 4	26 to 50 employees	\$1750.00
Tier 5	Over 50 employees	\$2500.00

Proposed membership tiers

a vigilant guard. I hate to imagine where we would be without them.

One group that spent a great deal of time working for the betterment of CALSPRO this year was the "Blue Ribbon Committee". As a reminder, the sole focus of this committee is to explore how best to keep CALSPRO in the black for the foreseeable future and make recommendations to the board of directors to that extent. This group engaged in multiple meetings over several months. These meetings were mostly comprised of brainstorming sessions that brought together many ideas.

In the end, the committee's findings were three-pronged. One, increase the number of educational opportunities for the association and its members. Two, revamp the membership dues structure (I'll get to more about that in a minute). Three, improve the quality of presenters and speakers at the Annual Conference.

So, the committee wasted no time in trying to implement change right away. If you haven't noticed, there has been a tremendous amount of new educational opportunities, including the CCPS Workshop and Process Server 102. In addition to this, there were many opportunities to hear and learn from many of our newest vendor members regarding the products and services they offer.



CAPITOL REPORT

MICHAEL D. BELOTE, ESQ.
CALIFORNIA ADVOCATES, INC.

The Tides

According to the American Museum of Natural History, the earth is really old. Like, from the results of radiometric dating, approximately 4.543 billion years old, although that specific a number certainly does not sound like an approximation. Presumably ocean tides were advancing and receding for much or all of this time.

So it might well be asked, what does this have to do with CALSPro and the California legislature? Only that in politics, similar to the natural world, things come and go, like the tides. When the clock struck midnight on August 31, the legislature concluded the 2021-2022 session, which will give way to the 2023-2024 session commencing in December, following the November general elections.

So what came and went this year? The first was the pandemic. After a very difficult period when the legislature actually shut down for several months, and then resumed on a largely remote basis, the legislative process has resumed with a relative sense of normalcy. This is a very positive development, because for a variety of reasons, the act of lawmaking is far better conducted in person than over Zoom.

Next is the Capitol building itself. The state is in the process of tearing down the Annex portion of the Capitol, which was built in the late 1950s and is asbestos-ridden, non-ADA compliant, and in general, a real mess. The legislature has largely moved to temporary quarters a block and a half south of the Capitol, and will return to the main building when major renovations are complete, likely five years or so off.

And then there are the legislators themselves. For the first time since term limits were enacted in 1990, we are seeing legislators resign or decide not to seek re-election, even though they have time remaining under their term limit. We expect approximately 35 of the 120 districts to be filled with new representatives after the November elections, and perhaps another 40 new faces after the 2024 elections. Why are legislators leaving early? Pandemic burnout is certainly part of the reason.

Not to overplay the tides analogy, but another thing coming and going is state revenue. After years of budget surpluses resulting from gains in the stock market, we clearly are experiencing at least a stock market correction. California is hugely dependent upon income taxes, particularly on the wealthy, and when capital gains dry up, so too does state revenue. For the first time in several years, tax revenues are now coming in below projections. This year the state benefited from a jaw-dropping \$97.5 billion surplus, but it is very clear that this will not be the case in the near future at least. If the state budget goes into the red, policymakers will be looking at new revenue sources. A discussion of sales tax on services is likely to be among the options discussed.

With all of this coming and going, CALSPro and its predecessor organization CAPPs have been something of a context. Created specifically to protect the attorney service industry, CALSPro had an excellent year in 2022. Through the hard work of the Legislative Committee chaired by Chad Barger, the association achieved amendments to AB 2791, which could have limited service of writs only to sheriffs; prevented enactment of SB 937, which would have allowed electronic service of subpoenas of business records without any limitations except consent by the recipient of the subpoena; and achieved enactment of CALSPro-sponsored AB 1974, requiring all California penal institutions to designate a person to accept service on behalf of incarcerated individuals.

Every year multiple issues come up in California, and CALSPro is equipped to respond. The California Codes are replete with provisions regulating the service of various documents and notices, and additional issues arise on the registration acts, independent contractor, tax, trespass, liability and countless other matters.

CALSPro may not be present in another 4.543 billion years, but the association has staying power and deserves the support of everyone making a living in this industry. Please join!



CALSPRO Legislative Update

By Chad Barger, Legislative Chair

The 2021-2022 legislative year has been very busy, but CALSPRO has continued to see great success in protecting our industry. In my last report, I brought your attention to Senate Bill 937. The bill was of great concern because it would allow for deposition subpoenas that command only the production of business records to be served by overnight delivery, facsimile transmission, or electronic means, in addition to traditional hand delivery. In our conversations with the bill's sponsor, Senator Ochoa Bogh, our advocate Mike Belote was able to convince her to withdraw the bill and work with us over the next year to develop something better. She agreed and the bill was withdrawn. This is a victory for CALSPRO.

I also brought your attention to Assembly Bill 2791. This bill would require a marshal or sheriff, including their department or office, to accept an electronically signed writ, notice, or other process and would prohibit a marshal or sheriff, including their department or office, from requiring an original or wet signature on a writ, notice, or other process. The bill would require a marshal or sheriff, including their department or office, to allow a writ, notice, or other process for service to be transmitted to the department or office by email or fax and would prohibit a marshal or sheriff, including their department or office, from charging and collecting a fee for the transmission of the writ, notice, or other process for service. The bill would prohibit a marshal or sheriff, including their department or office, from reviewing the substance of a writ, notice, or other process for

service, and would require a marshal or sheriff to serve a writ, notice, or other process if specified criteria are met. Also, the bill was worded in such a way that it could be interpreted by some Sheriff's departments that they are the only ones who could serve writs. After our March meeting with the Assembly Judiciary consultants and voicing our concerns, the bill's author received advice from Leg Counsel that authorizing writs to be transmitted electronically could potentially open Pandora's box. Since this bill was presented by domestic violence supporters, the sponsor agreed to remove all language concerning writs. In turn, giving CALSPRO another victory.

We also sought legislation to remove the registration of branch offices, under the Professional Photocopier registration statutes 22450. Typically, these types of minor changes are done in the Legislature's Business and Professions Code omnibus bill. Every year this omnibus bill switches between the Assembly and the Senate and this year the Senate Business and Professions Committee is taking the lead. Since the last time the Senate had the omnibus bill, a new Chair has been appointed and the Committee's view is that omnibus provisions must make technical fixes only, nothing truly substantive. Removing the branch office is considered substantive enough that the Committee is recommending that our change be included in the Judiciary omnibus bill; however, by the time the Committee got back to our



CALSPRO Membership Update

by Kristian Pujol, Membership Chair

On Offense for Conference

As we approach the Fall and the year begins to wind down, I am reminded of all we accomplished this year legislatively to help protect and promote our legal support industry. Not only did we make significant progress on our Prison Bill AB 1974 (albeit with some amendments), but we also defeated several proposed bills that posed potential threats to our business interests. I am very proud of the work all our cornerstone committees accomplished and am looking forward to our annual conference to celebrate our triumphs and discuss what is up next in 2023.

As you may or may not know, every year we alternate conference locations from NorCal to SoCal for the sake of making the conference accessible to all. In 2020, our conference had been scheduled to be in the beautiful city of San Jose but due to the COVID-19 pandemic, we were obligated to cancel and reschedule (for this year). We have not held a conference in Northern California in four years, so we are excited about the opportunity to see many of our NorCal colleagues this year representing Silicon Valley, the Bay, our capital, and all northern counties. Many members like myself will be traveling from Southern California for this great event meant to bring us together as an industry for education, networking, planning, and legislative updates.

As the conference looms, I implore you to help CALSPRO spread the word about our Annual Conference in San Jose this month. Reach out to colleagues, affiliates, employees, and/or customers who reside in northern California and invite them to come, participate, and help support our industry. Our President and conference committee put together an empowering lineup of panelists and speakers to address key topics that will focus on helping us stay relevant in the ever-changing economic and legal landscape. Our keynote speaker from Echelon Front (on New York Times Best Seller's list) will be a special treat and will provide amazing insight on leadership skills, organizational strategy, and how to create winning teams to achieve victory in the workplace (as in war). Hoorah!

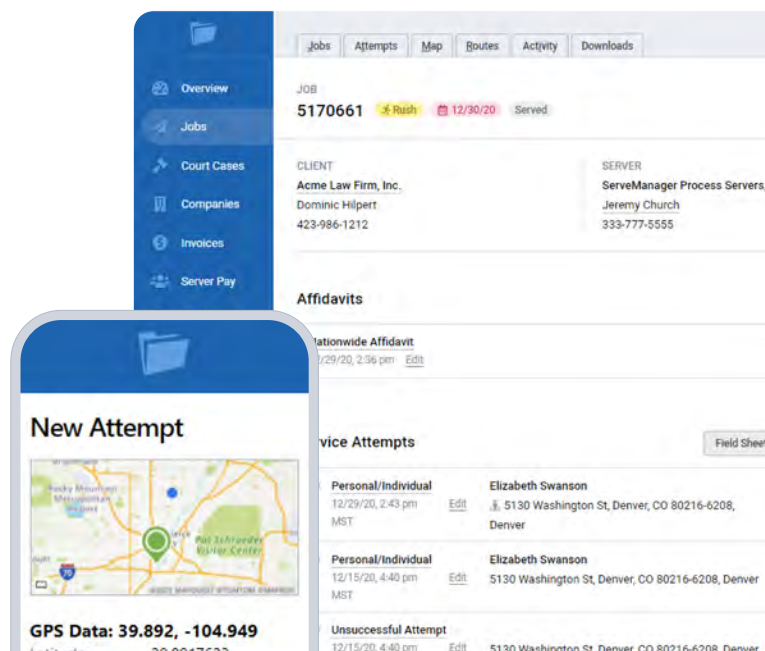
As I was calling members and inviting people to the conference last month, I surprisingly came across a crucial information gap and misunderstanding from a past member. They told me over the phone at first that they were not interested in joining CALSPRO because they no longer needed the pouch; they said it was "old technology" and that was the sole reason for becoming a member back in the day. I almost fell off my chair and asked him to please hear me out for a few minutes as I excitedly explained our historic and active legislative program and the several bills this year, we were able to successfully influence regarding subpoenas, sheriff writ packages, jail services, photocopying, and CMRA services. I did admit the pouch is still a great service for companies who choose to supplement electronic transmission or have multiple offices or offer services requiring original documents and/or attorney checks. But the point of CALSPRO is to help its members remain relevant and in business. The way to ensure this happens is by supporting CALSPRO's efforts through membership, donations, volunteering, sponsorships, educational seminars, and attending our annual conferences. I am hoping for this past member whose business was doing well (and for many others who reap the benefits of our efforts unknowingly) to be enlightened by attending conference or joining CALSPRO and reading our publications! Remember it is up to YOU to help educate our comrades in this battle, including competitors who are also dependent on stability and friendly laws to continue operating. The aim is truly for the benefit of our industry, for all companies (large and small), to avoid collectively becoming casualties of new technologies, emergency judicial orders, changing regulations, and adverse legislation. The dangers are there; it is up to us to gather the troops and mobilize the necessary resources to give us a fighting chance.



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Ed Dietz
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EDUCATION

Continuing Education Report by Larry Kirlin, Education Chair

It has been a very busy few months for the education committee. On July 30th, Michael Kern led a CCPS class of 28 live and remote students from his office in Los Angeles. Jackie Janney administered the class. We originally had 31 people registered for the class, with eight open seats for in-person. Six people attended in person. A total of 22 took the exam, with 10 passing. It seems that remote instruction is preferred by most students, so we will keep that in mind when scheduling classes in 2023.

We held our first mini-webinar in May and completed our last session in mid-August. Below is a list of the topics and speakers.

- On May 18th, George Knecht with Green Filing kicked off our webinar series with 19 registered participants.
- Jonathan Nill with Legal Connect on June 22nd with 15 registered.
- June 29th, Michael Kern with Direct Legal led a course on marketing techniques. It was a very popular course, with 27 registered.

- Vendor member Jeffrey Horne with Philadelphia Insurance led a course on Bonds on July 17th. It was a small class, with only a handful of registrations.

- On August 10th, Vendor Member Nick Ost diek with J.D. Ost diek Insurance, Inc. gave a presentation on Healthcare, Benefits, and Retirement plans.

- On August 17th Mark Manchester with Rezak Meyer covered several highly-requested advanced process service topics. We had about 50 people turn out for that session.

Each webinar, except Nick's, was recorded and is available on the CALSPro website. Some of the PowerPoint slides are also available. <https://calspro.memberclicks.net/webinars>

Although the mini-webinars do not generate income for CALSPro, they do offer educational topics and give our vendor members a forum to discuss their services. The webinars also demonstrate that CALSPro is an active organization and provides educational benefits beyond the CCPS courses.

California Association of Legal Support Professionals

Bert Rosenthal Memorial Award

By Jenny Blevins
Committee Chair



Each year the Bert Rosenthal Committee meets and makes nominations for recipients of the Bert Rosenthal Memorial Award. This prestigious award is presented to an individual or entity who, through the years, has given the utmost of service and dedication in promoting our industry.

This award is named after Bert Rosenthal, who was a founding member of the association and one of the most respected. He had a clear understanding of the role the legal professional plays in our justice system. He encouraged the involvement of all, mentoring many younger members. He had both the character and the strength to challenge everyone to work for the common good of our profession. He exemplified everything for which this award stands.

The committee consists of the current CALSPro President, all past presidents who are members in good standing of the association, and past recipients of the award. A recipient must be selected by two-thirds of the eligible voting members of the committee. Should a recipient be chosen, the name will be announced during the banquet at the CALSPro Conference on September 24, 2022 at the Hilton Hotel in San Jose, CA. It is tradition that the recipient shall present their acceptance speech at the following year's Conference.

Past Rosenthal Recipients

1978 Bert Rosenthal (In Memoriam)
1979 Michael Buter
1980 Andrew R. Estin
1981 Richard J. Green
1982 Not Awarded
1983 Carl Strang
1984 Hugh Hallenberg
1985 Connie R. Melvin
1986 Jaunita Tanzer
1987 Not Awarded
1988 Not Awarded
1989 Elaine J. Erdman
1990 Thomas J. Bowman, Jr.
1991 Michael O. Price
1992 Joseph H. Karotkin

1993 Not Awarded
1994 Frederic A. Blum
1995 Tony Klein
1996 Not Awarded
1997 Paul R. Anderson
1998 Robert A. Cook
1999 Jeffery H. Karotkin
2000 Edward R. Wasserman
2001 Robert D. Alkema
2002 Al Crowe
2003 David S. Nill
2004 Mark L. Schwartz
2005 Ronald Ezell
2006 Paul Tamaroff
2007 Jerry Topolos

2008 Jack Janney (posthumous)
2009 Herbert E. Hoffman
2010 Not Awarded
2011 Steven Janney
2012 Mike Belote
2013 Brett Peters
2014 John Perez
2015 Jennifer Blevins
2016 Michael Kern
2017 Not Awarded
2018 Chad Barger
2019 Not Awarded
2020 Not Awarded
2021 Not Awarded

The nominees for 2022 are:

Cliff Jacobs
Larry Kirlin
LegalConnect
Robert Porambo

CLIFF JACOBS



Cliff Jacobs is in his 32nd year as a legal support professional. His background includes attending Rutgers University where he earned a Bachelor of Science degree in Administration of Justice; and then to NYU to complete his grad work in an Intensive Studies Paralegal Diploma Program where he graduated third in his class. In the spring of 1988 Cliff moved from the East Coast to California. Acclimating to a very different lifestyle, he was deciding whether to go to Law School, or to use his degrees for something else “legal”-related as he searched for a job to begin his career.

Cliff accepted a position in 1990 as a route person and court runner for Personal Attorney Service (PAS) in Van Nuys. In the mornings he ran a route, and in the afternoons, he was a Bankruptcy Court runner. Thus began his trek upward from a humble beginning. After three months, he was promoted to bankruptcy supervisor at PAS. In the late 1990s, Cliff injured his ankle, requiring him to keep his foot elevated for six weeks. While stuck in the office during this time, management used him to troubleshoot assignments and interact with clients; discovering that he was quite adept at both. When he could walk again, he was promoted to Court Service

Supervisor and was also assigned to the “Out of County” department as the assistant manager. Six months later, Cliff was promoted to Out of County Manager covering 55 California counties, and all 49 other States. He stayed at PAS until 2009.

Cliff’s employment path led him to One Legal in 2009, where he became their National Affiliate Relations Manager for 7 years; and then joined First Legal in January 2017, where he opened their new North Bay Office. Recently promoted, he is training in a new capacity at First Legal, where he will be joining a special team of very knowledgeable and dedicated individuals encompassing every aspect of the Legal Support Profession. He continues to grow individually, and within our profession, dedicating himself to being “Of Service”, always putting the best interest of the profession and clients first.

While Cliff was in his 10th year at PAS, they hired Jeff Karotkin as General Manager; and Jeff’s level of participation in CAPPS inspired Cliff to attend Board meetings and learn more about the Association. Jeff provided guidance about getting more involved and making a difference; and in 2004, Cliff became the CAPPS Los Angeles Area Governor, which provided him an opportunity to understand at a much greater level the importance of what CAPPS meant to the Legal Support Profession. Cliff became the Area Governor Coordinator for the State under the tutelage of Wendy Bowman; in 2006, he officially joined the Association as a member, and received the “Rookie of the Year” award for his efforts and commitment to the association. In 2007, Cliff was elected to the Board of Directors. Then, in 2008 Cliff took on the Continuing Education Committee as the chairman; and due to his strong work ethic and dedication,

received the “Member of the Year” award in 2009, and again in 2012.

From 2007 through 2017, Cliff served continuously as a Board member or Officer of CALSPro. He has chaired several committees such as Technology, Membership, and Continuing Education; and served on the transition team tasked with evolving our Arbitration and Grievance Committee into the Dispute Resolution Committee. He served as Vice President of CALSPro in 2012, 2013 and 2014, as President for the 2014-15, and 2015-16 terms, and as Immediate Past President and Membership Chair for the 2016-2017 term. He is currently a member of the Continuing Education Committee. He also has represented CALSPro at the NAPPS Annual Conference for the past three years; and while at NAPPS conferences, Cliff was responsible for personally recruiting over 25 new CALSPro members. Always striving to contribute to the profession, Cliff is currently in his 3rd year serving on the NAPPS Promotion and Growth, as well as the Arbitration and Grievance Committees.

The three things most dear to Cliff about CALSPro and our profession are his participation in both Strategic Planning sessions (2007 and 2017); serving 10+ years on the Continuing Education Committee, and the close friendships developed over the years. Cliff is truly honored to be a Rosenthal nominee.

LARRY KIRLIN



Fresno State Graduate, Electrical Engineering/Marketing

Master Chief Petty Officer (Retired), US Navy Reserves, 1984-2009

Began working in the legal support industry as a mobile photocopier in 1991.

Member of CALSPro since 2008. Served as president for two years and many terms on the board. Chaired and/or served on almost every committee.

Worked in all aspects of the industry and held the positions of account manager, branch manager, sales manager, regional manager and co-owner.

Recruited by First Legal to open offices in the Central Valley. Promoted to Regional Manager responsible for Bakersfield, Fresno, Modesto, Redding, Sacramento, Tucson and Ventura.

Given a second assignment as eProducts Manager in 2014. In 2021, he was given the responsibility to manage First Legal's Service of Process products.

Married to Rebecca with six children between them. Lives in Fresno CA.

LEGALCONNECT



In 2016, the legal industry was amid a digital transformation. More courts were implementing court case management systems with electronic filing. More law firms were eFiling their documents to maintain court compliance and increasingly using legal technology to automate their practice and go paperless. This was placing a burden on legal support service providers to change the way they did business.

And thus, LegalConnect was founded to bridge that gap, as well as help other litigation support service providers use technology that they were unable to build internally. Built from the ground up, LegalConnect was designed specifically for the legal support services industry by an attorney service founded in 1994 that blazed the digital trail over ten years prior to its inception.

Today, LegalConnect is a premium legal technology company that automates the processing of legal documents for law firms. Headquartered in Chino Hills, California, the company is a leading certified eFiling Service Provider to courts in 30 California counties, with more on the way, and has more than 100 litigation support service providers, 14,000 law firms, and 16,000 legal professionals using its platform. Combining deep industry expertise, innovative technology, and a robust channel partner network, LegalConnect is transforming the way the litigation support industry exchanges electronic documents, data, and payments, to streamline how law firms manage work, and for the effective and expeditious administration of justice.

ROBERT PORAMBO



Robert Porambo began his career in the legal support industry in 1981 and has been with Knox Attorney Service the entire time. He began working in the accounting department and soon within 4 years was the Accounts Receivables Manager. In 1989 he was promoted to manage the process department. In 1995 he invested in Knox and became a shareholder. In 2016, he was promoted to Chief Financial Officer.

He has been married to his much better half, Liz for the past 12½ years. Between him and Liz they have 6 amazing children, along with 7 grandchildren.

He has served CALSPro over the years in numerous capacities including: Board of Directors, Committee Chairs, Treasurer, Vice-President and President.

Robert loves to camp, play softball and over-the-line, have family dinners, and visiting Major League Baseball parks (to date has been to 23 stadiums).

CALIFORNIA ASSOCIATION OF LEGAL SUPPORT PROFESSIONALS
Board of Directors Meeting
June 11, 2022 – Hilton Garden Inn LAX – El Segundo
MINUTES OF THE MEETING

PRESIDENT'S REPORT

Ken Hastings discussed the following items:

- Referenced written report distributed at the meeting – the Ugly, The Bad, and The Good
- Reminded everyone of the mission of CALSPRO.
- Membership survey results with 28 responses.
- Budget looking good
- CCPS attendance low- 4 people at the recent workshop
- Cornerstones doing well.
- Working on the conference.
- NAPPS Conference – new member outreach – four people from CALSPRO attended
- Membership is still down, but trending well.
- CFC activity and non-member removal.
- Concerns about future leadership and grooming future leaders.
- Blue Ribbon Committee activities.
- Thanks to CAMS, especially Michael Cochran.
- Thanks to California Advocates, especially Cliff Costa.
- Recognized Stephanie Schoen at CAMS for her hard work.

SECRETARY-TREASURER'S REPORT

- Steve Janney reported that the association has met 91% of budgeted income and is close to making membership dues income projections; he referenced his written report and reviewed various budget line items.
- Steve indicated that CALSPRO has received the grant money from NAPPS of \$8,735.23 and asked that the board consider returning the money to NAPPS.
- Upon motion by Tom Bowman, seconded by Jackie Janney, CALSPRO shall return the grant money of \$8,735.23 to NAPPS. The motion failed.
- Steve reported that CALSPRO received the \$10,000.00 donation from InfoTrack, and thanked Kristian Pujol for his support.
- The April 2022 balance sheet shows total current assets of \$78,188.65.
- The board discussed new member outreach efforts.
- Upon motion by Jason Burke, seconded by Ken Hastings the Secretary-Treasurer's report shall be approved. The motion carried.

CORNERSTONE REPORTS

Membership Committee – Kristian Pujol referenced his written report; the current membership count is 190 compared to 116 from the prior year; provided outreach efforts recap; there are 37 non-renewals, 20 of which were Active members, and all were contacted by committee members. Kristian has worked with CFC to ensure that the CFC customers are currently paid CALSPRO members. Outreach efforts to 155 NAPPS members in California, who

are not yet CALSPro members have proven successful thus far. Kristian attended the NAPPS Conference to promote CALSPro.

Larry Kirlin reported that he reached out to a process server who had the CALSPro logo on their website but they are not a member, and they will join.

Legislative Committee Report – Chad Barger reported that there was a Legislative Committee meeting this morning, and he thanked the committee and the legislative advocates for all of their hard work. There were no action items from the committee.

Coalition to Improve Court Access – David Nill indicated that CICA is talking to courts as they go live, and good conversations are ongoing. The legislative bill, AB 2961, looks like it will go through to clarify e-service. Larry Kirlin discussed CALSPro representation at CICA, and CICA indicated that the current CALSPro Legislative Committee Chair can attend the CICA meetings but there was no approval of an official CALSPro seat at CICA.

Blue Ribbon Committee – Robert Porambo distributed a written report and discussed the committee's idea of a new membership dues structure schedule based on the number of full-time employees. Ken Hastings noted the hard work of the committee and indicated there is so much more work to do. Ken urged the board to submit ideas, join the committee, and provide the committee with feedback. Robert Porambo also noted the importance of having great speakers at the Conference.

Continuing Education – Larry Kirlin referenced his written report and noted that there is a good agenda planned for webinars; vendors are being highlighted via webinars; plus, members will present education-related webinars. Also, some of the webinars are being recorded and will be incorporated into an on-demand webinar library via the website. Larry Kirlin noted the Blue-Ribbon Committee wants to do a lot of education which may be a lot of work for the Education Committee Chair.

Technology/Website – Michael Kern provided an update as to the continued work on the CALSPro website and the new banner ad promoting the CALSPro App. Michael is working closely with Michael Cochran at CAMS for all of the website work. Michael is pleased that the work on the website moves along quickly.

CONFERENCE COMMITTEE REPORT

- Jackie Janney noted that the Blue Ribbon Committee is part of the Conference Committee this year for ideas. Hot topics include employment; cyber-security, and Jackie asked for ideas for speakers. Michael Kern suggested Kevin Ripa who spoke on cyber-security at the NAPPS Conference. Larry Kirlin noted that his brother is a cyber-security expert for the banking industry, and he can do a virtual presentation; Larry also lined up an e-recording vendor and a collection agency who signed up as a vendor to do presentations. Steve Janney suggested a session on financing and a session on employee benefits.
- Steve Janney also suggested the idea of inviting new members to the Conference to attend for free and the cost would come out of the new member's dues. The purpose is to show the value of CALSPro to new members.
- Upon motion by Chad Barger, seconded by Robert Porambo, to allow for any new Active member to receive a complimentary registration to attend the current-year conference for free. The motion carried unanimously.
- Tom Alkema suggested assigning a "mentor" to the new member while at the conference.

BERT ROSENTHAL MEMORIAL AWARD COMMITTEE REPORT

Chair, Jenny Blevins, reported that the committee was also meeting on 6/11/22.

OLD BUSINESS - None

NEW BUSINESS – None

GOOD OF THE ORDER

- Steve Janney announced the pending birth of Taylor Rose Janney, his new granddaughter who will be born soon.
- Tom Bowman announced that the current 58.5 cents per mile you can claim on your tax returns is increasing to 62.5 cents on July 1, 2022.
- Ken Hastings credited the board today for discussions and to Larry Kirlin for running an amazing meeting.
- Congratulations to Chad Barger on being a grandfather.

Ways Legal Support Professionals Can Effectively Reduce Stress

By Rachel Chaples, Communications Coordinator at Tristar Software



The constant stress of meeting a tight court deadline and the needs of clients can take its toll on the mind and body. It may be difficult to find time to take care of yourself when outside of the office you are also commuting and tending to family members. Here are some ways to reduce mental chaos in a matter of minutes, so YOU can stay productive and HAPPY at work!

1. What always helps me is going for a walk. I enjoy starting my morning with a 20-minute walk around the neighborhood before everyone wakes up. Zooming around in our cars and answering phone calls creates unnatural stress, so disconnect to reconnect to yourself whenever possible. Walking releases endorphins, which in turn minimizes anxiety and boosts energy levels. It only takes fifteen minutes to improve your mood and get your head on straight! So, take a break and walk around the block whenever you can. You won't regret it.

2. Another way to minimize stress is by taking deep breaths. Breathe in slowly through your nose until your lungs fill completely and then slowly let it all out

of your mouth. Yogic breathing five to ten times in a row will melt your stresses away.

3. Believe it or not but there are many stretches you can do from your desk. Neck, back, and wrists can all be stretched without getting out of your seat. Stretching loosens up the ligaments and increases blood flow. Increased blood flow promotes relaxation.

4. Try making a to-do list because you can't handle everything at once. Writing lists reminds the mind that you are in control of completing future tasks. Lists also free up space in your brain for what is important right now, so you can let the less important tasks simmer on the back burner.

5. We've all felt overwhelmed because, well, life can be stressful. Sometimes all you need to do is pause and reset your thinking. Various studies have shown regular meditation to effectively reprogram the brain and alleviate stress levels. By training the mind to be a passive observer we become less reactive by reframing how stress is perceived. There are many free mobile apps you can try as well! I use Smiling Mind which was created by an Australian non-profit.

6. Another great way to elevate your mood is to call up a friend! You don't have to dump your stresses on them because even a 10-minute chat about a social topic will boost your executive functions. Friends make us laugh and laughter improves our mental state and immune systems!

7. Try essential oils in your office or use a little roll-on essential oil perfume for a quick pick-me-up. Purchasing a diffuser with lemon, chamomile, lavender, cedarwood, or bergamot works too. Research has

Continued on page 14

shown aromatherapy positively alters brain waves and behavior.

8. When I'm in a slump I listen to NPR or an educational podcast because getting inspired motivates me to be a better person. So, if you find yourself stressed then maybe it's time to recalibrate by finding some inspiration! If it works for me then why not you too?

9. Go outside and take a breath of fresh air! Getting some sunlight and away from a screen for a few minutes is enough to reset your stress levels.

10. Listen to music that is 60 beats a minute to regulate your heart rate! Classical music is a good choice because it's slow and quiet.

There are many other ways to minimize stress like hanging out with animals, reading something you enjoy, or taking a power nap. I listed what works best for me, but it's different for everyone. Stress should not be a normal part of daily life and in fact, shortens your lifespan significantly.

Bottom line: Put your mental health first and listen to what you need because only YOU truly know how it feels to be YOU.

legislative advocates the Judiciary omnibus bill was considered closed and their chair was not adding anything of substance which hasn't been reviewed by a policy committee. Given these circumstances, our advocate, Mike Belote has recommended seeking this removal of branch offices next year in a bill sponsored by CALSPRO.

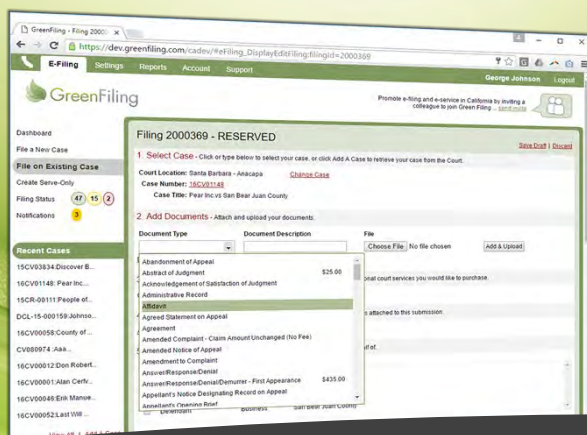
Our final item is the Assembly Bill 1974, sponsored by CALSPRO. Our objective with AB 1974 is to do three things: The first item is to clarify that Penal Code Section 4013 which currently applies to county jail facilities should also apply to state prisons. The second item would allow a process server to satisfy reasonable diligence under CCP 415.20 by leaving the summons and complaint with the warden, sheriff, or jailer. The final items would clarify that the service of a subpoena can be left with the warden, sheriff, or jailer. Currently, AB 1974 addresses the first of the three objectives by expressly referencing wardens. Unfortunately, AB 1974 was recently amended to remove the diligence language because of concerns raised by the Assembly Public Safety Committee. Because AB 1974 amends a Penal Code Section, the bill is under the jurisdiction of the Public Safety Committees in each house and the Committee's consultants are less familiar with civil filings and service of process. Our legislative advocates report that a new consultant in the Assembly Public Safety Committee continues to raise issues with the remaining objectives. Our advocate, Mike Belote, recommended we continue the effort after this session adjourns and get any further changes back into the committee jurisdiction of the Judiciary Committees, which are more familiar with service of process.

This has been a remarkably busy legislative year and I can't thank the committee and our advocate team enough. Unfortunately, not everything we wanted was able to happen this year, however, we have a path forward and a clear direction for the next legislative session. It continues to be a privilege to serve as your legislative chair and I hope to continue to do so, in the future. I look forward to seeing everyone in September, at our Annual Conference in San Jose.





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- 1) Once your branded portal is set up you may allow your customers to register an account and e-file new cases and pleadings directly from your web site. Your portal will also be listed on the Odyssey eFileCA web site as a certified EFSP, as well as on any court web sites where EFSPs are listed.
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- 3) Configurable options to provide your customers free trials, discounted pricing, or options to request additional services (e.g. courtesy copy delivery or service of process).
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- 6) Green Filing will provide a means to run detailed weekly filing activity reports for those users who are filing through your portal. You may set the e-filing service fee on your portal as you see fit.
- 7) Green Filing will submit a monthly invoice to the attorney service firm billing for all filings submitted through the firm's portal.

Call (602) 380-8049 or email george@greenfiling.com for more information.

An attempt to bring new, fresh and better speakers to the conference began immediately. Several industry leaders will be speaking as well as business professionals who will educate us on topics from e-recordings, cybersecurity, collections and why prepayment is important. But the biggest highlight is the appearance of keynote speaker Codey Gandy from Echelon Front. This is a big deal as far as I'm concerned. Founders of Echelon Front, Jacko Wilink and Leif Babin are the authors of two New York Times bestsellers, *Extreme Ownership*, and *The Dichotomy of Leadership*.

That brings me to membership dues restructuring. If you recall, CALSPro had a summit in Sacramento back in 2017 to brainstorm and discuss the future of CALSPro. One of the things that came out of those meetings was dues restructuring. There was no universal acceptance of the proposed changes due to the "unknown" factor of how these changes would impact the bottom-line concerning finances. Now in 2022, looking once again at dues restructuring, I wanted to make sure that we had hard data to back up any decisions. Unfortunately, we ran out of time for 2022 to propose any changes to the dues structure because of the lack of hard data and the 60-day notice requirement for any proposed by-law changes.

The proposal would create new membership categories based on the number of employees and look something like the chart on the previous page.

Please be aware that this topic will come up at the conference and I implore you to speak up and share your thoughts. The leadership and new board members must know where you stand and know what you think.

With all of that said, I'm looking forward to conference weekend and all of the fun events like the Friday Night Offsite Event at San Pedro Social with its networking and education opportunities. If you haven't already done so, visit www.calspro.org to sign up for the conference and reserve your rooms today.

This being my last President's Message for the CALSPro Press, I'd like to conclude by saying thank you to all of those who have helped make my presidency meaningful. I truly appreciate your support over the past two years. It has been my pleasure to serve you.

As always, stay safe and stay healthy my friends.

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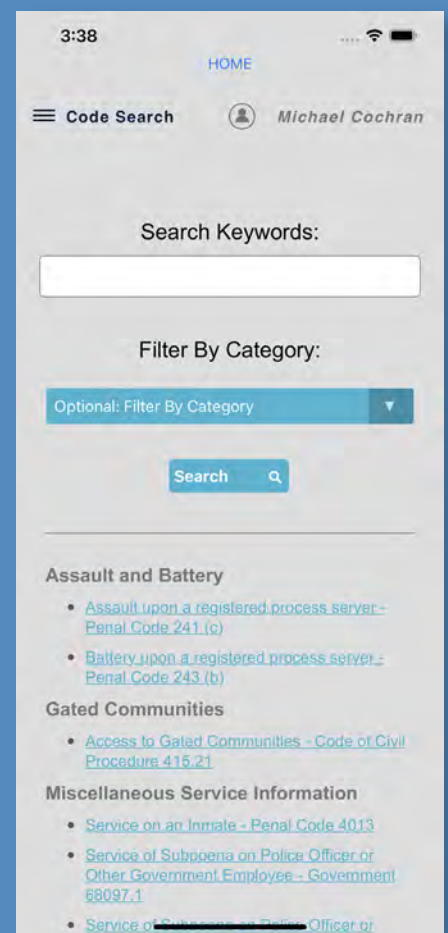
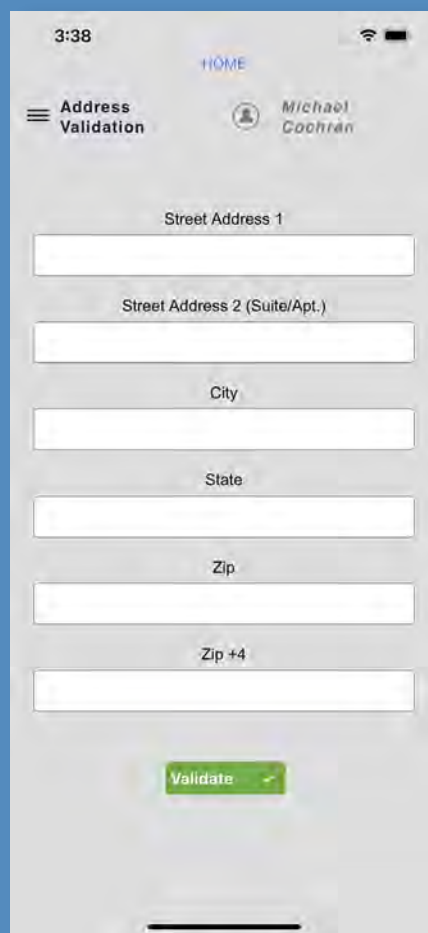
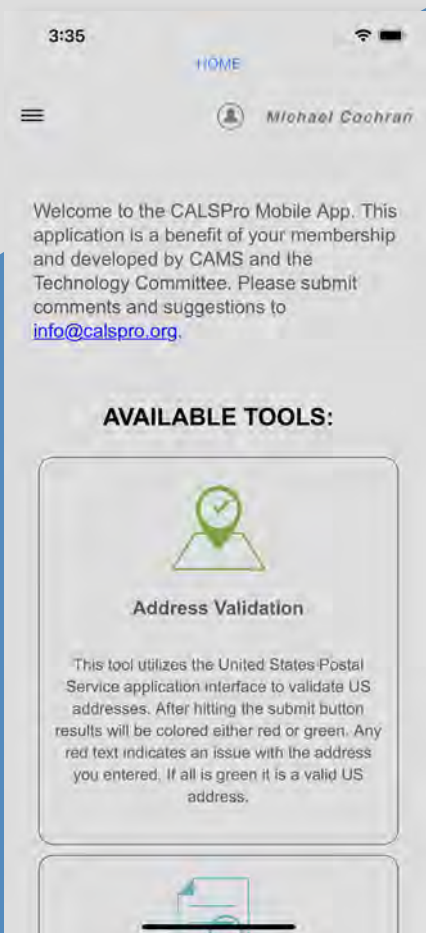
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The CALSPro App

- ADDRESS VALIDATION
- CODE SEARCH
- WITNESS FEE CALCULATOR
- SERVING GUIDELINES

app.calspro.org



v1.1 New Features
Secure login and reset





CALSPRO Conference Update

By Jackie Janney, Conference Chair

Registration is open for the 2022 CALSPRO Conference!! The conference committee has been hard at work, and we are so excited to see you at the Hilton San Jose from September 23rd to the 25th, 2022.

We have a fun and educational weekend planned for everyone. Friday morning there will be the 25th Annual Jack C. Janney Memorial Golf Tournament to begin the conference. Friday night there is a welcome reception, followed by bowling at San Pedro Social.

Even if you don't bowl, come catch up with everyone!! We have a full day Saturday beginning with the annual business meeting. We have multiple speakers planned for Saturday including motivational speaker Codey Gandy from Echelon Front. Saturday night is our awards banquet and Sunday you can take an in-person CCPS class followed by the exam.

Don't miss the chance to network and learn with your fellow CALSPRO members, register today!!

<https://calspro.org/annual-conference/>

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*Association Management Services
provided by California Advocates
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A man in a dark suit stands with his back to the camera on the peak of a large, dark, textured rock. He is holding a black briefcase in his right hand. In the background, a sprawling city skyline is visible under a clear blue sky. The city features numerous skyscrapers and buildings, with a bridge visible in the distance. The overall scene conveys a sense of leadership and vision.

REMAINING RELEVANT THROUGH LEADERSHIP

SEPTEMBER 23-25, 2022 | HILTON SAN JOSE

54TH



CONFERENCE



Hilton San Jose

300 Almaden Blvd., San Jose CA 95110
(408) 287-2100

Hotel Reservations:

The discounted nightly guest room rate for Conference attendees is \$179.00 plus taxes, fees and assessments. Please make your reservations by September 1, 2022 to receive this discounted rate.

Please make your guest room reservations by visit <https://www.hilton.com/en/attend-my-event/sjcshhf-cal-7f7d58e6-6b43-4358-b434-45a0b2059632/> or calling the hotel directly at 408-287-2100 and ask for the CALSPro discounted rate.

Please follow this link to learn more about current hotel information, dining and activity hours, COVID information and amenities: <https://www.hilton.com/en/hotels/sjcshhf-hilton-san-jose/>

California Association of Legal Support Professionals

2520 Venture Oaks Way, Suite 150, Sacramento, CA 95833
(916) 239-4065 - phone • (916) 924-7323 - fax
www.calspro.org • info@calspro.org

Conference Pricing

FULL REGISTRATION – MEMBER

On or before September 9th \$425

After September 10th \$525

FULL REGISTRATION – NON-MEMBER

On or before September 9th \$500

After September 10th \$600

SIGNIFICANT OTHER REGISTRATION

Friday Welcome Reception \$75

Friday San Pedro Social \$50

Saturday Lunch Only \$85

Saturday Banquet Only \$120

Saturday Education & Lunch (no banquet) \$175

All Above Events \$425

Register here:

<https://calspro.memberclicks.net/annual-conference-registration-form/#/>

Annual Business Meeting

The Annual Business Meeting will be held on Saturday, September 24th from 8:00 a.m. – 8:45 a.m. The purpose of the business meeting is to conduct the business of the association and allow members an opportunity to participate and get involved in the many industry and association activities. This is an important component of the conference, and all members are asked to attend.

Complimentary Conference Registration for 2022 New Members!

New 2022 Active members receive complimentary registration to attend this year's Conference. This is the perfect opportunity to meet your colleagues from throughout the state, receive amazing education, and learn about the latest trends and laws that affect your practice. If you joined CALSPRO in 2022, please complete the registration form and check the new member box. If you are a member who joined prior to 2022, thank you for your membership; please share this valuable information with a non-member colleague. Interested individuals can join now by visiting <https://calspro.org/membership/join-calspro/>. Thank you!

INTERESTED IN BECOMING A CCPS (CALSPRO CERTIFIED PROCESS SERVER)?

... or just need to renew your certification or fine tune your serving skills?

The exam is offered for free to those who attend the conference and pay for the CCPS workshop as well as those re-testing. Non-conference attendees must pay full price for the workshop and exam.

Be sure to sign up for the workshop & exam on Sunday, September 25, 2022

Please complete the separate registration form to enroll.

25th ANNUAL CALSPRO JACK C. JANNEY MEMORIAL GOLF TOURNAMENT

Friday, September 23, 2022

8:30 am Check-In

9:27 am Tee-Off

Los Lagos Golf Course

2995 Tuers Road

San Jose, CA 95121

\$150⁰⁰ per person; includes green fees, cart, and lunch.

Transportation on own. Los Lagos is located 6.3 miles from the Hilton San Jose.

Registration cutoff September 10th.

Register Now.

**Awards for
1st, 2nd & 3rd place
teams**

PERUSE THE SILENT AUCTION ITEMS AND BE A LUCKY BIDDER!

**Winners will be announced at the
Saturday Night Banquet**

Please see the sponsorship page to donate to the auction, which is a very important fundraiser for CALSPRO.

Conference Schedule

FRIDAY, SEPTEMBER 23, 2022

8:30 AM

25TH ANNUAL CALSPRO JACK C. JANNEY MEMORIAL GOLF TOURNAMENT

Tee Times Begin at 9:27 a.m.

Los Lagos Golf Course
2995 Tuers Road
San Jose, CA 95121
<https://www.playloslagos.com/>

4:00 P.M. – 5:30 P.M.

2021-2022 BOARD OF DIRECTORS MEETING

4:30 P.M. – 7:30 P.M.

REGISTRATION OPEN/EXHIBITOR SET UP

5:30 P.M. – 7:00 P.M.

WELCOME RECEPTION AT THE HILTON SAN JOSE

7:30 P.M. – 9:30 P.M. – LET'S GET SOCIAL AT SAN PEDRO SOCIAL

This offsite event, which is included in your full registration package price, will offer food, beverages, games, bowling and lots of fun! Conference name badge required for admittance. The San Pedro Social is located just a half-mile from the Hilton San Jose; be sure to register in advance to attend. <https://sanpedrosocial.com/>

SATURDAY, SEPTEMBER 24, 2022

7:00 AM – 8:00 AM

CONTINENTAL BREAKFAST

7:00 AM – 5:00 PM

REGISTRATION AND EXHIBITS OPEN

8:00 AM – 8:45 AM

ANNUAL BUSINESS MEETING

Call to Order and Roll Call, President's Report, Secretary-Treasurer's Report, Committee Reports and ratification of the officers and Board of Directors election.

8:45 AM – 9:30 AM

LEGISLATIVE UPDATE

Legislative Update with Mike Belote, Esq. & Cliff Costa, Esq. of California Advocates, Inc.

9:30 AM – 9:45 AM

EXHIBITOR BREAK

Make appointments with vendors during these breaks for more in depth knowledge of goods and services.

9:45 AM – 10:45 AM

SESSION: TECHNOLOGY PANEL: SECURITY, EFFICIENCY, & COST

Industry leaders and subject matter experts discuss the most important and impactful technology topics affecting your business, including security and efficiency, disaster preparedness and legal exposure.

Dan Mora, Photocopy Committee Chair, Gemini Legal

10:45 AM – 11:00 AM

EXHIBITOR BREAK AND EXHIBITOR PRESENTATIONS

11:00 AM – 11:30 AM

COLLECTIONS SESSION

In this session, we will discuss identifying when a customer becomes a debtor, timing on invoicing and placement, collection tips & tricks, and maintaining

your relationship with your customers and avoiding repeat debtors.

*Kimberly Nieto
Ken Koski*

11:30 AM – 12:00 PM

PREPAYMENT

Steve Janney is the CEO of Janney and Janney Legal Support Services. He will be discussing the benefits of transitioning to a guaranteed payment model along with how to transition and some of the pitfalls of transitioning. Steve has extensive experience in this challenging project, having led Janney & Janney from a model of presenting a statement at the end of the month to collecting daily for assignments completed. Steve will take questions as time allows.

12:00 PM – 1:00 PM

LUNCH

1:00 PM – 2:30 PM

KEYNOTE SPEAKER PRESENTATION

The answer: Effective or ineffective. The question: What are the two types of leaders? This is indisputable, absolute and not debatable. Which one are you? At Echelon Front the mission straight forward. Educate, train, mentor, and empower leaders and organizations to achieve total victory. Through their unique perspective as battlefield leaders and commanders, they will provide insight into what happens on a battlefield and how decisions made in war are no different than those made in the workplace. Authors of 2 NY Times Best Sellers, present an opportunity to understand what it is to be and the challenges of being a leader."

2:30 PM – 2:45 PM

EXHIBITOR BREAK

2:45PM-3:15PM

E-RECORDING

Tibault DeFrate, CSC E-Recording

3:15PM – 3:30PM

EXHIBITOR BREAK

3:30PM – 4:30PM

SESSION: CYBERSECURITY

4:30PM – 5:00PM

2022-23 BOARD OF DIRECTORS MEETING

6:30 PM – 7:30 PM

COCKTAIL RECEPTION & SILENT AUCTION

7:30 PM – 9:30 PM

BERT ROSENTHAL MEMORIAL AWARD PRESENTATION, ANNUAL AWARDS, INSTALLATION

SUNDAY, SEPTEMBER 25, 2022

8:00 AM

REGISTRATION

8:00 AM – 9:00 AM

CONTINENTAL BREAKFAST

9:00 AM – 1:00 PM

CCPS WORKSHOP AND EXAM

CODEY



Codey Gandy is a former U.S. Marine, and currently a leadership instructor, speaker, strategic advisor for Echelon Front. Codey spent just over 5 years working as a ground combat leader for various units in the Marine Corps. He brings unmatched experience in demonstrating combat leadership in dynamic environments, building winning teams, and developing relationships across all levels of an organization. Codey has seen first-hand the power of the leadership lessons taught at Echelon Front.

He brings a unique front-line perspective as he served in several levels of enlisted leadership, starting as a front-line designated marksman and finished his time in service as a Platoon Sergeant. In his role, he constantly was finding innovative ways to improve training and challenge his guys in preparation for the real-world battlefield. Upon his discharge from the Marine Corps, Codey joined Echelon Front while providing unmatched experience and unique perspective into combat leadership, front-line leadership, and creating winning teams. He serves as the Experiential Training Program's Operation Manager, 1st Responder Training Lead, leadership instructor, speaker, and strategic advisor at Echelon Front.



GANDY





Sponsorship Opportunities

Please return via fax:

916-924-7323

We have MANY sponsorship opportunities at the upcoming CALSPPro Conference. Check it out!

CONFERENCE SPONSORSHIP:

● Silver Sponsor – \$250

Includes: listing in Conference on-site program, verbal acknowledgment at luncheon, logo display inside a future issue of the *CALSPPro Press*.

● Gold Sponsor – \$500

Includes: logo printed on Conference signage, listing with logo in Conference on-site program, verbal acknowledgment at luncheon, logo display inside a future issue of the *CALSPPro Press*.

● Platinum Sponsor – \$1,000

Includes: one exhibit table, logo printed on Conference signage, listing with logo in Conference on-site program, verbal acknowledgment at luncheon and installation banquet, logo display inside a future issue of the *CALSPPro Press*, 2 complimentary tickets to luncheon and banquet.

● VIP Keynote Sponsor – \$2,500 (2 available)

Includes: one exhibit table, logo printed on Conference signage, listing with logo in Conference on-site program, verbal acknowledgment at luncheon and installation banquet, logo display inside a future issue of the *CALSPPro Press*, 2 complimentary tickets to luncheon and banquet, \$20 in 5050 raffle tickets, Conference registration reduced to \$300/each for unlimited additional full conference registrations for employees or family members.

Total amount of sponsorship: \$ _____

Company: _____

Contact Person: _____

E-Mail: _____ Phone: _____

Billing Address: _____

City, State, Zip: _____

Name of Card Holder _____

Last 4 Digits of Card # _____ Amount to be charged \$ _____

Signature of Card Holder _____

Credit Card # _____

Exp. Date _____ CID # _____

EVENT SPONSORSHIP:

All Include: logo printed on Conference signage, listing with logo in Conference on-site program, verbal acknowledgment at luncheon and installation banquet.

■ **Silent Auction Item** *(Please bring your auction item/basket with you.)*

■ **Silent Auction Donation** *(Donate & we'll purchase an item for you.)*

■ **Friday Night Cocktails – \$250** *(2 available)*

■ **Friday Night Food – \$250** *(2 available)*

■ **Friday Night Off-Site Event – \$500** *(5 available)*

■ **Saturday Night Cocktail Party (Drinks) – \$500** *(2 available)*

■ **Saturday Night Cocktail Party (Appetizers) – \$500** *(2 available)*

GOLF SPONSORSHIP:

All Include: logo printed on Conference signage, listing with logo in Conference on-site program, verbal acknowledgment at luncheon and installation banquet. Additional benefits listed with each line item.

■ **Continental Breakfast Sponsor – \$400** *(1 available)*

■ **Morning Break Sponsor – \$250** *(1 available)*

■ **Tee Prize Sponsor – \$400** *(1 available)*

■ **Tee Hole Sponsor – \$75** *(multiple available)*
Includes: Logo printed on Tee of your Choice.

■ **Closest to the Hole Sponsor – \$200** *(1 available)*
Includes: Logo printed on contest markers.

■ **Putting Contest Sponsor – \$400** *(1 available)*
Includes: Logo printed on contest markers.

■ **Lunch Sponsor – \$400** *(1 available)*

■ **Raffle Prize Sponsor – \$500** *(1 available)*

■ **Golf Cart Sponsor – \$300** *(1 available)*
Includes: Logo printed on golf cart sign.

CALSPRO

Annual Conference

September 23-25, 2022

Hilton San Jose

Registration Form

Register online!

www.calspro.org

Company Name: _____

Address: _____ City: _____ State: _____ Zip: _____

Phone Number: _____ Fax: _____ E-mail: _____

Attendee Name:

(Print the way you would like your name badge to read)

Full Registration – Member

☐ Registration \$425

"Member" includes employees of a current Member. Full registration includes all conference events.

I will attend:

- ☐ San Pedro Friday Social
☐ Saturday Banquet

Full Registration – Non-member

☐ \$500

Significant Other

- ☐ All events \$425
☐ Friday Welcome Reception \$75
☐ Friday San Pedro Social \$50
☐ Saturday Lunch Only \$85
☐ Saturday Banquet Only \$120
☐ Saturday Edu. & Lunch (no banquet) \$175

Golf Tournament

☐ \$150

CCPS Workshop- See Separate Form

Full registration costs increase \$100 on September 10th.

☐ I am a 2022 new member.

Total: \$ _____

Attendee Name:

(Print the way you would like your name badge to read)

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☐ Registration \$425

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☐ Saturday Edu. & Lunch (no banquet) \$175

Golf Tournament

☐ \$150

CCPS Workshop- See Separate Form

Full registration costs increase \$100 on September 10th.

☐ I am a 2022 new member.

Total: \$ _____

Please feel free to make copies of this form for additional registrations.



ONLINE:
www.calspro.org



VIA FAX:
 (916) 924-7323



VIA MAIL:
 2520 Venture Oaks Way, Suite 150
 Sacramento, CA 95833

PAYMENT OF FEES:

GRAND TOTAL: \$ _____

☐ Check (payable to **CALSPRO**)

☐ AmEx ☐ Visa ☐ MasterCard Last 4 Digits of Card #: _____

Cardholder Name: _____ Address: _____

Signature: _____

Card Number: _____ Exp. Date: _____ 3-4 Digit Security Code: _____