



CALSP^{ro} PRESS

California Association of Legal Support Professionals

Volume 16 / Issue 1 / Winter 2023



LEGISLATION

Legislation:

Highlights of Our History



MEMBERSHIP

Membership:

Member Benefits and Value



EDUCATION

Education:

A Worthwhile Investment



CONFERENCE

Conference:

September 22-24, 2023

Hilton San Diego Bayfront





INSIDE THIS ISSUE

- 2 President's Message**
- 3 Capitol Report**
- 4 Legislative Report**
- 5 Membership Update**
- 6 Conference Committee Update**
- 7 Continuing Education Report**
- 8 Board of Directors Meeting Notes**
- 10 Advertising Update**

Thank you to our Advertisers

InfoTrack Exchange -11

Top Priority - 13

eDelivery of your CALSPro Press

The CALSPro Newsletter is available in electronic format only! Make sure we have your current e-mail address, so you don't miss an issue: stephanie@caladmanagement.com

CALSPro is not responsible for the accuracy of any comments herein relating to their own case or actual law. All readers should do research as to the actual legality of any issue. Opinions, viewpoints, or articles published under a byline and appearing in this newsletter do not necessarily reflect the official position of this association. Acceptance of advertisements in no way constitutes professional approval or endorsement by CALSPro. No anonymous "Letters to the Editor" will be printed. Your name will be withheld upon request.

© Copyright 2023, California Association of Legal Support Professionals. No material may be reproduced without the express written consent of the publisher. Controlled circulation postage paid in Sacramento, CA.

**California Association of
Legal Support Professionals**
2520 Venture Oaks Way, Suite 150
Sacramento, California 95833
Phone: (916) 239-4065 • Fax: (916) 924-7323
Web site: www.calspro.org
E-mail: info@calspro.org



FIND US ON LINKEDIN,
FACEBOOK AND
TWITTER!



PRESIDENT'S MESSAGE

KRISTIAN PUJOL

2023 CALSPRO PRESIDENT

Sustainability and Continuity

The new year is here, and I am happy to report the association is off to an amazing start. Our CALSPRO cornerstones and committees have hit the ground running and progress is already underway in achieving our annual goals. As I outlined in the December eNews, the main drive and focus of our efforts in 2023 will be CALSPRO's *financial sustainability and continuity of our core legislative and education agendas*. So, what exactly does that really mean?

Our first goal, financial sustainability, is simply the ability to fund our association; to have the structure in place to provide ample revenue to cover expenses and meet annual budgets set by our Board of Directors now and in the future. Our main revenue stream has traditionally come from our membership dues, so it is imperative we continue to maintain or grow our membership, otherwise the alternative is to increase the dues amounts. During the pandemic we lost approximately one-third of our membership and had to depend on donations and sponsorships to help meet our expenses in 2020-2022.

As a result, our Blue-Ribbon Committee (established last year) will work this year to propose potential changes to our fees structure and/or recommend new revenue streams to help quell financial concerns for our future and bring more predictability and stability to our cash flows. This year once again, we are operating from a negative budget of approximately \$18,000.00; that is the equivalent of 39 active memberships. Fixing this inequity once and for all will be our main priority.

Our second goal, *continuing our legislative and educational agendas*, is of course dependent on the

first objective of procuring financial resources but is nevertheless already in action! As you will read in the following pages, much progress has already been made since we last met at Conference last September. I do not want to steal the limelight from our dedicated committee chairs but do want to recognize and highlight the following: our Legislative Committee and lobbying efforts have commenced with recent lively discussions with the LA County Sheriff's office (to address waiting times for opening Writ packages) and the California State Bar (to consider moving registration process to the state level). Our Membership Committee has helped raise the renewal process success rate to the highest in recent times. The Education Committee has a date set for an online CCPS seminar this month, and our Conference Committee has already secured a date and venue for this year's annual conference! Our Technology and Advertising committees have been busy at improving both our website and marketing opportunities for our members and vendors. The Newsletter Committee (as you are reading this) is always providing timely information and legal updates to our membership! Read through this new CALPRO Press volume and see for yourself all that your leadership does for you, and be sure to let others know about CALSPRO and our ongoing efforts.

Thank you,

A handwritten signature in black ink, appearing to read "Kristian Pujol". The signature is fluid and cursive, with a long, sweeping underline.



CAPITOL REPORT

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

Leadership Changes Loom Over 2023 Legislative Year

On December 5, 2022, the California Legislature returned to Sacramento to begin the new two-year 2023-2024 legislative session. During the official swearing-in ceremony, each chamber also elected their leaders for the session. The State Senate re-elected Senator Toni Atkins (D-San Diego) to serve as President pro tempore, a position she has held since 2018. The State Assembly, on the other hand, re-elected a Speaker but also elected his replacement which is scheduled to occur later this summer. It will be this leadership change which will loom large over this year's legislative activities and brings much uncertainty.

Speaker Anthony Rendon (D-Lakewood) and Assemblymember Robert Rivas (D-Hollister) faced off in a Speakership battle that has been closely watched by many. Last summer Assemblymember Rivas announced he had the necessary votes of the Assembly Democratic Caucus to be elected Speaker and a vote was scheduled for the following week. Speaker Rendon decided to contest this vote and the Caucus met for several hours. Ultimately, the Caucus decided to keep Speaker Rendon through the 2022 legislative year and let the newly elected Assembly Democrats make the leadership decision, meaning that the deciding votes for Speaker would be made by the 16 new people who would be elected later that November.

As reported by several news outlets, the Speakership battle ensued for months leading into the 2022 November Election. Each Speakership candidate trying to get as many of their supporters elected as possible. Just two days after Election Day, the new Democratic Caucus met in Sacramento for a multi-hour-long discussion and a deal was ultimately struck. Speaker

Rendon will remain in the leadership role until June 30, 2023, when Assemblymember Rivas will then become Speaker. Thus, the leadership vote on December 5th formalized this deal.

With the upcoming transition of leadership set to take over in mid-summer, this session is starting off with a lot of uncertainty as it will be the first time in over seven years that the Assembly will have a new speaker. With any transition of power, there are many questions, such as: Who will be making key committee chair appointments and committee assignments for the 2023 session? Will Speaker Rivas immediately replace chairs upon his July 1st takeover, which will be in the middle of Assembly committees review of Senate Bills? Who will chair the Assembly Judiciary Committee after Speaker Rivas takes over, a key committee with jurisdiction over CALSPro's legislative activities?

Right before the holiday break, Speaker Rendon announced that Assemblymember Brian Maienschein (D-Northern San Diego), a former practicing lawyer, is named Chair of the Judiciary Committee. CALSPro has a good relationship with him, and we look forward to working with him on our legislative priorities. Our best intel is saying that Mr. Maienschein was a Speaker Rendon appointment, and thus it is unknown whether Speaker Rivas will keep him as chair or not. Whomever is chair, they will have a significant impact on service of process in California and CALSPro stands ready to act.



CALSPRO Legislative Update

By Chad Barger, Legislative Chair

Unless you've been living under a rock, California has been hit by a series of storms that has brought more rain and snow than we have seen in over forty years. Since our current drought began in 2016, California has seen water rationing and restrictions in many of our cities. Farmers have only received ten percent of their normal water allotment, and crop demands have increased one hundred percent. While the string of recent storms has brought tremendous rain and snow fall, they have also caused flooding, disaster, and death. My heart goes out to the families and businesses that were affected by the floods and I'm asking CALSPRO members to step up and help with the recovery and donate to the Red Cross and other organizations that offer assistance to those in need.

The string of recent storms may have passed, but the storm is just beginning in our legislature with the introduction of thousands of new bills. As we have done since 1969, the CALSPRO legislative team will review each and every bill for any potential impact on us. We have all heard the saying, "The best offense, is a good defense." This saying goes hand in hand with our promise to protect and promote the legal support industry in California.

Last December, the board of directors and the legislative committee met to discuss current issues our members are facing and the best ways to resolve them. We also discussed new bills we would like to present and the best way to present them. After much deliberation,

the committee presented these items to the board for their approval.

• **Service at State Correctional Facilities, aka the Prison Service Bill:** This is a continuation of our prison service bill from the last session. Last year, we were only able to accomplish one of the three prongs we had hoped to accomplish. Prong two 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 on the first attempt. Prong three would clarify that service to a warden, sheriff, or jailer on behalf of an inmate would constitute personal service. Effectively allowing process servers to serve subpoenas and other personal service only documents.

• **Los Angeles County Sheriff Issue:** Members throughout the state have contacted us regarding the Los Angeles County Sheriff's office and their procedures for opening writ levies and garnishments. Currently, the sheriff's department will only accept ten openings from a single company per day. With a grand total of seventy openings, per day. Since this process is first come, first serve, anyone wanting to open a levy must arrive the night before and get in line and wait for the office to open the next day. This process is ridiculous and unsafe. We have been tasked with opening discussions with the new Los Angeles County Sheriff to find a compromise that better suits the public and his office.

Continued on page 12



CALSPRO Membership Update

by Larry Kirlin, Membership Chair

Benefits of being an ACTIVE CALSPRO member

Happy New Year CALSPRO members! I'm not someone who makes new years resolutions, but I do like to take a few minutes at the beginning of each year to reflect on the past year and what I might like to do differently in the new year. This year, I decided that 2023 was going to be a great year for me. Let me say that again. I decided 2023 was going to be a great year.

I can't predict or control the year. What I can do is take responsibility for my own attitude. I'm committed to stepping over speed bumps, avoiding negativity, and pressing on with my plan. What is my plan? To improve myself and the lives of people around me. I know I can't change the world on my own, but I'm certain I can have an impact on my small circle of friends, family and colleagues.

So, what exactly does this mean? I don't have a written plan with bullet points and metrics. What I'm talking about is attitude. I am choosing to avoid the vortex of negative conversations. It's easy. Our parents taught us all this simple lesson: "If you don't have anything positive to say, don't say anything at all." I'm also going back to another lesson I learned from my family. A spirit of volunteerism and community service. These two points lead me to CALSPRO and membership.

I am absolutely convinced that I've received more back from volunteering than I have ever given. Whether it be knowledge, experience, friendships, or billable assignments, I would not be where I am today without CALSPRO. These benefits are not listed on the website. You cannot pay extra for them. They are not guaranteed when you renew your membership. They are the fruits of active involvement. Don't take my word for it. Look around at the most active members of the association and let me know if you think they are successful. I already know the answer.

With all that said, what does 2023 look like for you? Will you make this a great year for yourself and your business? Will you step forward and take a more active role in the association? The decision is completely yours, but if you do, there is a whole family here to welcome you. Happy 2023!!!



CALSPRO Conference Update

By Dan Mora, Conference Chair

Save the Date – Batter Up!

We're excited to have a solid date and venue for this year's conference. Our goal is to host a top-notch event of fellowship and learning, and to attract both current and new legal service provider members. We want maximum participation!

This year we're excited for many reasons. First, who doesn't love San Diego? Second, who doesn't love baseball? Third, who doesn't need to grow their network and knowledge? Even if one of these amazing things grabs your attention, plan on attending and mark your calendar now.

When: September 22-24, 2023

Where: Hilton San Diego Bayfront

Who: All California legal service providers

Why: Networking, learning, sun, baseball

Yes, baseball! The Hilton Bayfront happens to be a block away from Petco Park, named the 2022 best MLB ballpark by USA Today, and the National League

Division Winning San Diego Padres. During our stay, the Padres are playing their final home series of the season against the St. Louis Cardinals.

Also, our very own past-President Robert Porambo, San Diego native and rabid Padres fan, will be honored with the **Bert Rosenthal Memorial Award**.

If you don't like Robert or baseball (shame) there's still plenty of activities near our venue. We're on the waterfront and walking distance to the historic Gaslamp District, San Diego's liveliest restaurants and nightlife. Coronado Beach, San Diego Zoo, Balboa Park, Sea World, Mission Beach, Point Loma, Old Town, and the best Mexican Food in California and the list goes on.

This conference is not to be missed!

If you would like more information, have feedback about how the conference can be valuable to you, or would like to help, please do not hesitate to contact me.



EDUCATION

Continuing Education Report
by Robert Porambo, Education Chair



Interested in Becoming A CCPS?

(CALSPRO Certified Process Server)

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

ONLINE WORKSHOP

Monday, February 20, 2023 | 10:00am - 3:00pm

VIRTUAL ONLY

REGISTER

**California Association of Legal Support Professionals
Board of Directors Meeting
September 23, 2022 - Santa Clara Room - San Jose Hilton**

MINUTES OF THE MEETING

I. CALL TO ORDER

Chairman of the Board, Larry Kirlin, called the meeting to order at 4:15 p.m.

II. PLEDGE OF ALLEGIANCE

Larry Kirlin led the Pledge of Allegiance.

III. APPOINTMENTS

Larry Kirlin appointed Andy Estin as the Parliamentarian and Tom Alkema as the Sergeant-at-Arms.

IV. SELF-INTRODUCTIONS

Self-introductions took place.

V. ROLL CALL

The roll was called, and the following individuals were present:

Ken Hastings, President and Director Kristian Pujol, Vice President and Director Steve Janney, Secretary-Treasurer Chad Barger, Director Tom Bowman, Director Jason Burke, Director Jackie Janney, Director Michael Kern, Director Larry Kirlin, Director Anita Pasillas, Director Robert Porambo, Director

Absent: Dan Mora, Director

Others Present: Tom Alkema; Tony Klein; Andy Estin; Kraig Vorsatz; Bob Musser; Mary Beaudrow; Cliff Costa; Melissa Cortez; Mark Schwartz; Jay Roll; Mike Belote; Jenny Blevins

VI. MINUTES OF THE PRIOR MEETING

A motion was made and seconded to approve the minutes of the August 9, 2022 Board of Directors meeting as submitted. The motion carried.

VII. PRESIDENT'S REPORT

Ken Hastings discussed the following items:

The board is the backbone of CALSPro, and the key to the success of the association. Expect conference to have a net income.

VIII. SECRETARY-TREASURER'S REPORT

Steve Janney indicated that he included his report in the agenda packet and the conference workbook. Steve indicated that the association will face financial challenges in 2023.

IX. CORNERSTONE REPORTS

Legislative Committee Report - Chad Barger referenced his written report in the agenda packet and also the conference booklet; he indicated that it has been a busy year. The following items were discussed:

1. Prison service bill did not pass.
2. Mike Belote discussed several legislative items and introduced fellow lobbyist, Cliff Costa.
3. Writ discussion: Uniform rule for accepting documents as it relates to Sheriffs
4. Membership Committee: Kristian Pujol announced that the goals for the year were met.

X. CONFERENCE COMMITTEE REPORT

Ken Hastings reported that the conference attendance goal was 60 attendees and the current count is 74 total attendees. The goal for sponsorship income was \$11,000.00, and over \$20,000.00 was received.

Tom Bowman acknowledged the Legislative Committee and their work.

XI. BERT ROSENTHAL MEMORIAL AWARD COMMITTEE REPORT

Jenny Blevins will report tomorrow.

XII. OLD BUSINESS

None

XIII. NEW BUSINESS

Andy Estin was contacted by a reporter (Jake Harper) who is writing a story about sewer service in California. Andy Estin discussed the related case Bay Area Legal Aid v. Achievable Solutions, Inc; A-United Attorney Service, Inc. et al and referenced the 27-page complaint. Mike Belote suggested to not over- react and suggested that someone monitor the court case, and to be careful about talking to the reporter. CALSPro stands behind the integrity of its members.

XIV. GOOD OF THE ORDER

Enjoy the conference.

Kristian welcomed members to the board meeting.

XV. ADJOURNMENT

The meeting was adjourned at 5:21 p.m.



Advertising Update

By Esteban Pujol, Advertising Chair

Advertising Trends in 2023

As the curtains have closed on the year 2022, what advertising trends will give way to significant ROI in 2023? Faced with so many challenges since the 2020 COVID-era, advertisers are seeking out new strategies to successfully connect with consumers, and the most compelling ad is the one that captures its target audience and drives engagement. If growth is a priority for your legal firm in 2023, the latest trends can be incredibly useful in helping you remain competitive in a crowded marketplace. A well-informed marketing plan considers what potential clients need, want and expect from the legal professionals. By staying apprised on what's new and adapting strategies accordingly, legal firms can significantly drive growth and keep a competitive edge. Here are the top trends we expect to see in 2023 and beyond:

- **Quality Content.** Today's trend is no longer about quantity of content, but rather quality. Content will always be the fuel that keeps a legal firm's business running, so advertisers are waking up to the idea that it's better to invest in a few quality pieces of content, than dozens of shallow pieces that generate minimal results. The focus should be on developing sticky, resourceful content that is useful to the reader. Today's content marketing is no longer about only inserting keywords into your website to generate better leads, but rather capturing your human audience as well as search crawlers.
- **Link Building.** Quality content and link building are synonymous in a sound marketing plan. Also known as backlinks, link building is all about getting other websites to link to pages on your website and is one of Google's most important ranking factors. The more high-quality backlinks a page has, the higher it

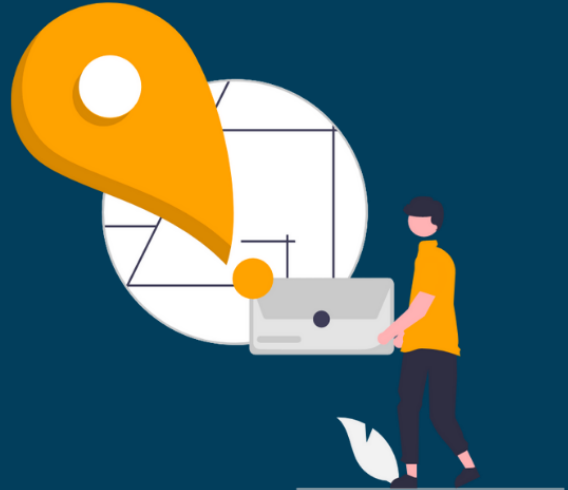
can rank. Google, Bing, Yahoo and other search engines consider backlinks as "votes of confidence" for the website generating the links. Each vote suggests your content is valuable, credible and useful.

- **Semantic Search and SEO.** Search engine tech has evolved, making semantic search essential for SEO. Today's most successful legal firms have recognized the shift and are now incorporating semantic search, which is a search engine's way of generating the most natural and contextual results for queries. It accounts for things like user intent and the relationship between words. It is a search engine's attempt to understand natural language, as a human would. With the rise of Siri, Alexa and other AI-assistants, the number of voice searches has risen by over 33%. By optimizing your content marketing to account for semantic search habits, advertisers can now tap into these searches and expand their lead potential.
- **In-Person Events.** According to leading studies, nothing replaces face-to-face marketing. Legal marketing professionals agree, hosted events and client meetings are the most effective tactics for generating and retaining customers. While social media and digital content marketing are primary tools for most advertisers, make sure to incorporate in-person opportunities to keep a well-balanced marketing campaign.

Did you know CALSPro has cost-efficient advertising solutions that specifically target legal professionals? Advertising opportunities include: Newsletter & eNews ads, enhanced membership listings, banner ads and coming soon, eBlast ads. Support your organization, market your business and increase your exposure. Contact CALSPro today for more information!

InfoTrack Exchange

Join the Exchange
network to start
earning and serving
more today.



How it works

- Every day, we receive hundreds of requests for service of process, court courtesy copy delivery, and document filing from customers of One Legal, Green Filing, InfoTrack, and other EFSPs.
- We dispatch these jobs to members of our network to complete.
- Joining our network is simple: Just demonstrate that you're a registered, professional process server with valid credentials and can pass a background check.
- We handle burdensome tasks like communicating with the customer and preparation of the proof of service so that you can focus on field work.
- Once the job's done, we pay you quickly according to our simple payment model.



Learn more and sign up at: trackers.infotrack.com

• **Process Server Registration through the State Bar:**

Several years ago, we presented a bill that would have moved process server registration from the county level to the state bar of California. At the request of the Chief Justice, we withdrew our bill and have been waiting for the right time to present it again. Previously, the state bar was in shambles and was dealing with their failure to properly deal with disgraced attorney, Thomas Girardi from defrauding his clients of millions of dollars. Now that the state bar has gone through an overhaul, our advocate, Mike Belote believes this year may be the time to present our idea again. The board has asked Mike Belote to enter discussions with the state bar before moving forward.

• **A New California Summons:** The idea of a new summons, which would more closely align with a federal summons was discussed. As California moves to an electronic environment, the need for a modern summons is rising. While this concept is still in the infancy stage, one idea was to have a summons issued for each named defendant and require the issuing party to provide the capacity of that party at the time of filing. Effectively eliminating the requirement for a process server to complete the capacity prior to service.

Finally, I want to thank the committee members for agreeing to serve the membership this term. The committee members are Kristian Pujol – Co-Chairman, Andy Estin, Tony Klein, Tom Bowman, Jackie Janney and me. I am very privileged to serve alongside these fine individuals who bring so much to the table. I'm confident with their help, 2023 will hold renewed hope and promise for our profession and our families.



CALSPRO COMMITTEES

ADVERTISING
Esteban Pujol
advertising@calspro.org

ASSAULT ADVISOR
Kraig Vorsatz
assaultadvisor@calspro.org

BY-LAWS
Tom Alkema
bylaws@calspro.org

CONFERENCE
Dan Mora
conference@calspro.org

CONTINUING EDUCATION
Robert Porambo
ccps@calspro.org

DISPUTE RESOLUTION
Jeremiah Jones
877/353-8281
dispute@calspro.org

FORMS
Tony Klein
415/495-4221
tony@attorneyserviceofsf.com

LEGISLATIVE
Chad Barger
legislative@calspro.org

MEMBERSHIP
Larry Kirlin
membership@calspro.org

NEWSLETTER
Anita Pasillas
apasillas@rapidlegal.com

TECHNOLOGY
Michael Kern
info@directlegal.com

WEBSITE
Michael Kern
info@directlegal.com



For near a quarter of century, Top priority in cooperation with CALSPro, has provided courier service to all CALSPro members that are also a member of pouch (E-System).

Look into and be a part of this network for a nominal fixed cost per month.

As a member of the system, courier stops at your place of business every day about the same time to pick up or drop off your mail. Every day you may;

- Send to one or all other members at no additional cost,
- Receive from one or all other members at no additional.

Once a member of E-System, you benefit from discounted rate for all other services we provide in California, Arizona and Las Vegas.

To fully explore the system & its benefits, contact us at cs.mgr@topprioritycouriers.com or simply call us. 951-781-1000.

CALSPro 2022-2023 Officers

PRESIDENT **Kristian Pujol**

415/475-6424 – ph
president@calspro.org

VICE PRESIDENT **Michael Kern**

213/483-4900 – ph
vicepresident@calspro.org

SECRETARY/TREASURER **Steve Janney**

951/369-8369 – ph
secretary@calspro.org

IMMED. PAST PRESIDENT **Ken Hastings**

951/296-2669 – ph
951/296-2770 – fax
kenh@hastingsls.com

2022-2023 Board of Directors

Chad Barger

661/327-8022 – ph
661/327-8179 – fax
legislative@calspro.org

Tom Bowman

408/295-3300 – ph
408/491-9772 – fax
tbowman@sterlingmadison.com

Ken Hastings

951/296-2669 – ph
951/296-2770 – fax
kenh@hastingsls.com

Jackie Janney

714/ 953-9451 – ph
jackiej@janneyandjanney.com

Michael Kern

213/483-4900 – ph
info@directlegal.com

Larry Kirlin

559/233-1993 – ph
888/943-1355 – fax
chairman@calspro.org

Dan Mora

556/805-9571 – ph
559/805-9571 – fax
dan@gemini.legal

Robert Porambo

619/685-4223 – ph
619/685-4294 – fax
rporambo@knoxservices.com

Esteban Pujol

805/322-1370 – ph
esteban.pujol@steno.com

Kristian Pujol

415/475-6424 – ph
kpujol@onelegal.com

Kraig Vorsatz

707/321-6077 – ph
gotchalegal@aol.com

Legislative Advocate
Michael D. Belote, Esq.

Administrator
Jennifer Blevins, CMP
jennifer@caladmanagement.com

Membership/Co-Administrator
Stephanie Schoen
stephanie@caladmanagement.com

Publications
Jen Gross, CMP
jen@caladmanagement.com

Communications
Maddy Dowler
maddy@caladmanagement.com

Webmaster
Michael Cochran
michael@caladmanagement.com

CCPS
Natalie Sinclair
natalie@caladmanagement.com

Advertising
Kelly Hoskins
kelly@caladmanagement.com

Accounting
Tricia Schrum, CPA
tricia@caladmanagement.com

*Association Management Services
provided by California Advocates
Management Services (CAMS)*

California Association of Legal Support Professionals

2520 Venture Oaks Way, Suite 150, Sacramento, California 95833
Phone: (916) 239-4065 • Fax: (916) 924-7323 • Web site: www.calspro.org • E-mail: info@calspro.org