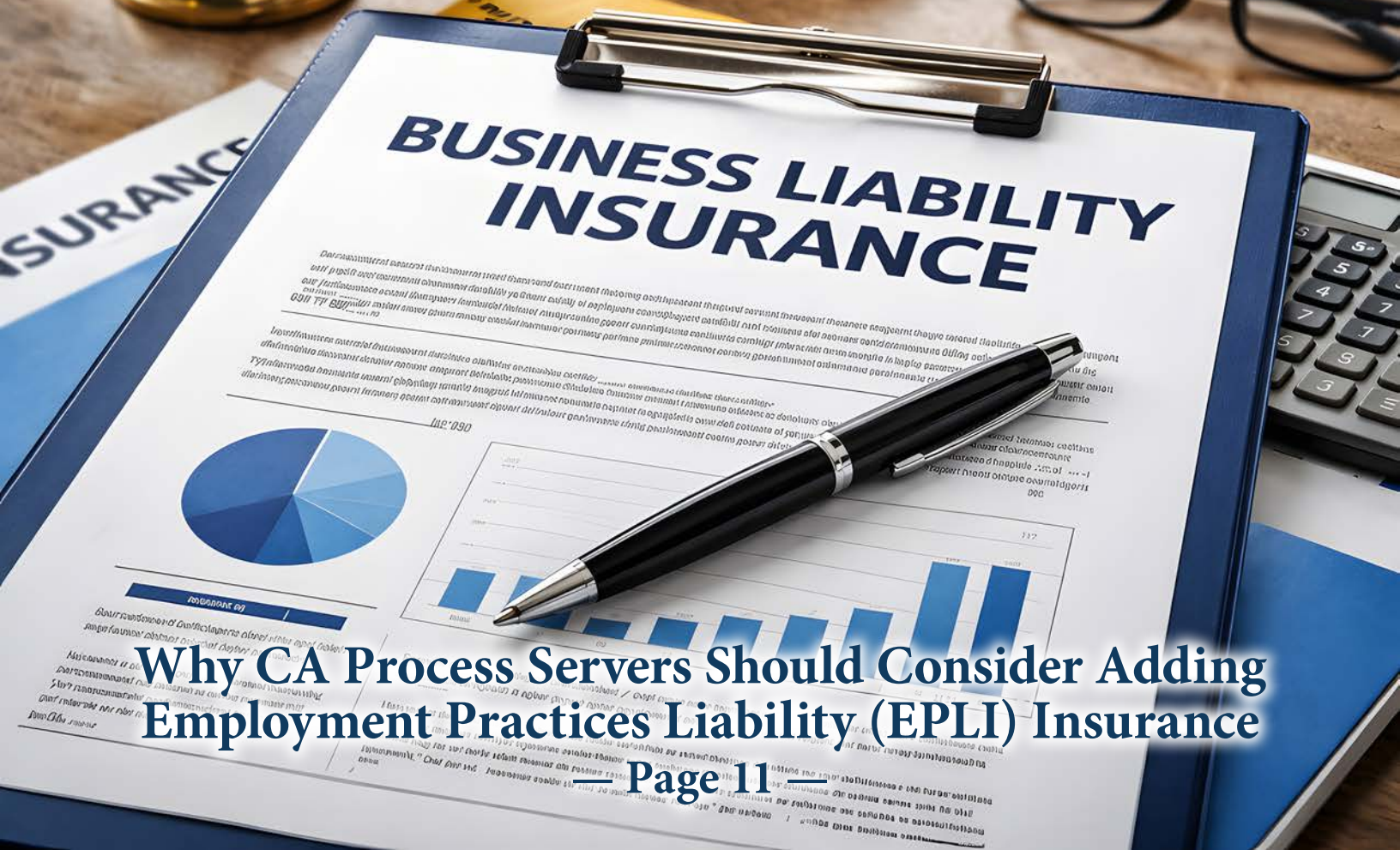




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California Association of Legal Support Professionals



Why CA Process Servers Should Consider Adding Employment Practices Liability (EPLI) Insurance

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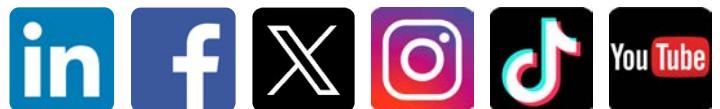
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President's Message

JACKIE JANNEY
2026 CALSPro President

Expanding Our Reach – CALSPro Connect

As we continue building momentum for the 2026 year, we are excited to share a major step forward in how **CALSPro** connects with our members and the legal support community across California.

CALSPro has expanded its outreach through the launch of the **CALSPro Connect Community**, strengthening our presence across multiple social media platforms to better engage, inform, and support both members and non-members within the legal support community.

Our profession is evolving, and so is the way we communicate. Social media gives us the ability to connect instantly, share knowledge, and bring our community together in ways that were never possible before. Through **CALSPro Connect**, we are creating a central hub where professionals can stay informed about industry developments, legislative updates, continuing education opportunities, conferences, and important discussions shaping the future of our field.

This expanded outreach allows us to reach new professionals entering the industry, experienced leaders, and partners who



support the work we do every day. It also provides a place where members can share ideas, learn from one another, and stay connected to the issues that matter most to our profession.

“
Our profession is evolving, and so is the way we communicate. Social media gives us the ability to connect instantly, share knowledge, and bring our community together in ways that were never possible before.
”

Our goal is simple: build a stronger, more informed, and more connected legal support community.

Through **CALSPro Connect** and our social media platforms, you will see:

- Legislative updates and advocacy news

- Industry insights and best practices
- Conference announcements and event highlights
- Continuing education opportunities and recruitment
- Member spotlights and professional recognition
- Discussions around compliance, technology, and the future of service of process. But, this platform is not just about sharing information – it is about participation.

We encourage everyone in our community to:

Follow us. Like and Subscribe to our channels.

Engage in the conversation.

When you like, comment, share, and take part, you help amplify the voice of your profession and strengthen the community that supports it.

Whether you're a long-time member, a new professional entering the field, or someone interested in learning more about the legal support industry, **CALSPro Connect** is designed to bring our community together.

Together we can continue to **Connect, Collaborate, Educate**, and advocate for the future of our profession.

Jackie Janney, President 🇺🇸



Capitol Report

MICHAEL D. BELOTE, ESQ. &
CLIFF COSTA, ESQ.

California Advocates, Inc.

A Wide-Open Governor's Race and What It Means for Sacramento

As the Legislature returns to Sacramento for the second year of the 2025–2026 session, the political environment surrounding it is anything but static. In addition to the usual churn of some 2,000 to 2,500 bills and thousands of amendments, California now finds itself in the midst of one of the most fluid and unpredictable gubernatorial contests in recent memory. With Governor Gavin Newsom termed out in 2026, the race to succeed him is fully underway and its outcome will shape the policy and political landscape in which CALSPro operates for years to come.

California's "top two" primary system adds a unique structural element to the contest. Under this framework, all candidates appear on the same primary ballot, and the two highest vote-getters advance to the November General Election, regardless of party affiliation. In a crowded field, that system can produce unexpected results. With a large number of Democrats and two credible Republicans competing for limited voter bandwidth, vote fragmentation is not merely theoretic it is central to the strategic calculus of every campaign.

For much of early 2025, the race was effectively on hold while former Vice President Kamala Harris considered entering. Once she declined, the field quickly expanded. Former Congresswoman Katie Porter initially appeared well-positioned, but establishment concerns about consolidation and electability emerged almost immediately. Efforts

to recruit Senator Alex Padilla did not materialize, and the dynamic shifted again when billionaire Tom Steyer entered in November, followed shortly thereafter by Congressman Eric Swalwell.

The Democratic field now includes Porter, Steyer, Swalwell, former U.S. Health and Human Services Secretary Xavier Becerra, former Los Angeles Mayor Antonio Villaraigosa, Superintendent of Public Instruction Tony Thurmond, former State Controller Betty Yee, and San Jose Mayor Matt Mahan, among others. On the Republican side, former Fox News host Steve Hilton and Riverside County Sheriff Chad Bianco have both consolidated meaningful support within their party.

Recent polling underscores just how unsettled the race remains. A recent survey from a Sacramento-based political thinktank shows Hilton at 14 percent, Porter at 13 percent, Bianco at 12 percent, Swalwell at 11 percent, and Steyer at 10 percent. Several other Democrats cluster in the mid-single digits, and 14 percent of voters remain undecided. No candidate has broken away from the pack. The data suggest that both Republican candidates are within striking distance of advancing to November; an outcome that would have been unthinkable in a conventional partisan primary but is entirely plausible under California's system.

Fundraising further complicates the landscape. Steyer has fundamentally altered the resource equation through

extraordinary self-funding, recently contributing \$28 million and bringing his total investment to \$66 million. That financial capacity, combined with key labor endorsements, provides him with organizational and media advantages. Villaraigosa, Porter, and Becerra have each posted multi-million-dollar totals, while the Republican candidates have raised credible sums sufficient to remain competitive in a fractured field.

The recent Democratic Party convention illustrated the fragmentation. No candidate achieved the 60 percent threshold necessary for endorsement, with Swalwell leading at just 24 percent. Notably, Becerra and Yee outperformed their public polling numbers among party delegates, highlighting a divergence between activist sentiment and broader voter preferences. Meanwhile, independent expenditure activity is ramping up, particularly around Matt Mahan, who has cultivated centrist donors and support networks, including significant engagement from Los Angeles business interests.

Under the top two system, the decisive question may not be who leads among Democrats, but whether that field consolidates quickly enough to prevent both Hilton and Bianco from advancing. At the time of this writing, candidates have until March 5 to finalize their candidacies, and the June 2 primary remains months away. With a significant undecided bloc

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Legislative Update

CHAD BARGER, **CALSPro Legislative Chair**

KRISTEN PUJOL, **Co-Chair**



As the second half of the 2025-26 California legislative session gains momentum, the CALSPro Legislative Committee remains actively engaged in its targeted advocacy. From rigorous bill reviews and analyses to the advancement of our own sponsored legislation, our team is working diligently to protect the interests of our members and broader industry. The following update outlines the most critical issues currently under review:

We are currently focused on the finalization and implementation of **AB747**. As the new standards for service of process go into effect on January 1, 2027, we are working to ensure the legislative framework we helped shape remain intact. Assembly Member Ash Kalra has sponsored Assembly Bill 2042 which proposes the clean-up amendments previously outlined in *CALSPro Press* Vol 19 (Winter 2026), and we are collaborating with his team to maintain consistency. A key priority is the bill's universal application; we are committed to ensuring these requirements apply to every individual serving process in the state. This 'no-exceptions' approach is essential to the spirit of the law and its core tenets of accountability and equity.

We are pleased to announce the introduction of **Assembly Bill 1742**, a CALSPro-sponsored measure authored by Assembly Member Phillip Chen on February 5, 2026. This new legislation

addresses the persistent challenge of gaining entry to guarded commercial buildings in the course of attempting to effect service of process.

Key Objectives of AB1742:

- **Right of Access:** Establishes a legal right of entry for process servers to commercial buildings that serve as the publicly registered business address or designated agent for service of process location.
- **Prohibition of Obstruction:** Prohibits security or reception personnel from obstructing or delaying the service of legal documents, ensuring that due process is not compromised by unauthorized gatekeeping.
- **Establishes Eligibility:** Specifically designates access-control personnel (such as security or concierge staff) as the "person apparently in charge" under circumstances where they refuse reasonable access and subjects them to substituted service rules below.
- **Statutory Expansion:** Proposes the addition of Section 415.70 to the Code of Civil Procedure (CCP) to authorize substituted service on building security or staff if entry is denied, while extending requirements currently outlined in CCP § 415.20.

As of February 23, 2026, our bill has been referred to the Committee on

Judiciary. You may review the full text and monitor the current progress of the bill via the [California Legislative Information portal](#).

Members and colleagues across the country recently received notice through CALSPro, NAPPS, and various social media channels regarding proposed amendments to Federal Rule of Civil Procedure 45. These amendments sought to expand service methods for subpoenas to include non-personal options, such as mailing.

Although the public comment period for the Advisory Committee on Civil Rules concluded on February 16, 2026, the proposal drew significant engagement, with 290 comments submitted by process servers, attorneys, and professional associations nationwide. We extend our gratitude to everyone who participated in the advocacy process and to organizations like CALSPro and NAPPS for providing critical guidance and awareness to the industry.

We would like to extend a special thank you to our President Jackie Janney for presenting a formal public comment on behalf of CALSPro and its members. We are currently awaiting the Advisory Committee's recommendation – a process that may take several months – and will

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continue to monitor the status of these proposed changes closely.

While we are on the topic of federal processes, you may be aware of the recent update to the USPS Domestic Mail Manual (DMM) pertaining to postmarks. Effective December 24, 2025, the USPS added Section 608.11 (Postmarks and Postal Possession) under 39 CFR Part 111. This regulation fundamentally changes how mail is dated: postmarks now reflect the date the mail is processed rather than the date it was received by the Post Office. Because this shift impacts deadlines for tax filings, ballots, and legal services, it creates a potential conflict with CCP § 1013(a). Specifically, the discrepancy between the date of deposit and the date of processing could be used to challenge the validity of service or undermine a server's declaration in Motions to Quash.

Our Legislative team is currently reviewing the California Code of Civil Procedure to determine the best course of action. Our goal is to ensure our rules of service remain aligned with these new USPS standards and to protect process servers

from evidentiary challenges. For now, we encourage you to review the full rule in the Federal Register. www.federalregister.gov/documents/2025/11/24/2025-20740/postmarks-and-postal-possession.

Finally, we would like to bring to your attention the 2026 California ballot initiative backed by Uber titled, Protecting Automobile Accident Victims from Attorney Self-Dealing Act. While framed as a consumer protection measure that caps attorney contingency fees at 25%, the opposition led by Consumer Attorneys of California (CAOC) warns that it could severely limit access to legal representation by making complex civil cases economically unfeasible for law firms. Consequently, this could result in a decrease in statewide automobile accident cases and a decline in demand for legal support services such as filings, service of process work and medical records discovery.

Although currently in the signature-gathering phase for the November 2026 ballot, the initiative is expected to qualify for the election. If passed, the potential consequences for our profession could

be significant. It is essential for us to stay informed about these forthcoming shifts to ensure our businesses are prepared for future changes in the legal landscape. We will continue to monitor the initiative's progress as the year continues.

We extend our sincere gratitude to our dedicated Legislative team and Advocates, whose commitment consistently makes a profound difference for our entire industry. It is a privilege to co-chair this committee alongside Chad Barger, and an honor to serve with the men and women of CALSPro's executive team, board of directors, and member volunteers.

We encourage you to stay engaged and reach out to our Legislative Committee with any suggestions or information you believe would benefit our advocacy efforts. Please feel free to contact us at legislative@calspro.org.

Sincerely,



Chad Barger, Committee Chair

— Find Us Online (click the icon) —



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Membership Update

MATT JANNEY, **CALSPro Membership Chair**

A Strong Start to 2026

The first two months of 2026 are already showing encouraging signs for CALSPro membership. We have welcomed six new members to the association, and our overall membership currently sits at about 80% of last year's total. Based on historical trends, I am optimistic that we will see another wave of renewals as we move into the second quarter.

While this level of renewal is generally consistent with what many associations

experience early in the year, it is worth noting that CALSPro continues to maintain a renewal rate that is higher than average. That consistency speaks volumes about the value our members see in the organization and the role it plays in supporting our industry.

Over the past year, many members have shared that one of the most meaningful benefits of CALSPro is our legislative advocacy, particularly our efforts surrounding AB 747. That work highlighted the importance of having a unified voice

representing process servers throughout California. At the same time, the value of CALSPro extends far beyond any single legislative issue. For more than 50 years, the association has worked to protect the profession, provide resources for members, and strengthen the community of professionals who make up this industry.

Looking ahead, we are preparing for our membership outreach campaign beginning in April. As part of this effort, mailers will be sent out across the state to reach professionals who may not yet be familiar with the benefits of CALSPro membership. We are excited to see the response from this campaign and hopeful that it will help introduce even more members of our industry to the work the association is doing.

Membership growth is always a team effort, and the continued support of our current members makes all the difference. The engagement, feedback, and participation we receive help keep CALSPro strong and moving forward.

As always, if you have any questions about membership or would like to get involved, please feel free to reach out to me or contact the CALSPro home office. We are always happy to connect. 📞





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- Professional Liability
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- Reps and Warranty Policies for M&A Transactions
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Larry Sukay – CALSPro Member

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Continuing Education Report

JEREMIAH JONES, **CALSPro Education Chair**

CALSPro Connect Live Launches and CCPS Momentum

The Continuing Education Committee has had an exciting start to our year, beginning with our first CCPS workshop of the year, followed closely by our first **CALSPro Connect Live** event.

CALSPro Connect Live Debuts

On March 3, we hosted our inaugural **CALSPro Connect Live** roundtable discussion titled, "What Reasonable Diligence Looks Like in Practice." More than 40 professionals joined us for this first event, including a strong number of non-members, which speaks to the need for practical, open dialogue within our industry.

CALSPro Connect Live was designed to create space for real world conversation. This is not a formal presentation or lecture format. It is a structured roundtable where experienced professionals share insight, discuss challenges, and explore how standards are applied in the field.

The discussion was led by featured host Robert Porambo, who guided the group through what courts truly evaluate when reviewing diligence, common mistakes servers make, spacing and variation of attempts, investigative steps that strengthen credibility, and how county expectations can differ.

The conversation then opened to the group, allowing participants to share experiences involving evasive defendants, publication challenges, drafting declarations, and practical judgment calls that impact whether service withstands scrutiny.

To help generate awareness and participation, we created short promotional videos that were distributed across CALSPro's social media platforms. These efforts helped expand our reach and contributed to the strong turnout for our first session. Based on the positive response, we are exploring additional ways to incorporate video into our educational offerings, including potential enhancements to the CCPS course itself.

We are currently working on confirming the date for our second **CALSPro Connect Live** roundtable discussion and are considering holding it in May. Additional details will be shared once finalized.

CCPS Workshop Held February 12

On February 12, we held our first CCPS workshop of the year, which also included a CALSPro Connect process server recruitment event. Building on feedback from our pilot programs last year, we are actively working to incorporate recruitment

events into many, if not all, of our CCPS workshops moving forward. The goal is to link education with opportunity by connecting newly trained or aspiring process servers with companies seeking qualified professionals.

We are proud to recognize the following individuals who earned their CCPS designation following this workshop:

Fabrizio Arevalo	Sarah Brommer
Alexander Ballo	Isabelle Caudillo
Jacqueline Christine de Jesus Monteiro Cosmo	Brandon Navarro
Victoria Diaz	Christina Peralta
Alexandra Dietz	Peter Rhima
Leslie Estrella	Cherise Rogers
Taylor George	Taylor Scarcella
Victoria Green	Sebastian Segundo
Jennifer Hernandez	Sheila Williamson
Keianna Hostetler	Amber Wright
Shanice Johnson	Ritong Iechad
Sina Marasigan	
Erika McFeggan	

Congratulations to each of these newly certified professionals for their commitment to excellence and continued advancement in our profession.

Our next CCPS workshop will be held virtually on Saturday, April 11. We encourage

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Conference Update

FRANK SMITHSON, **CALSPro Conference Chair**

Get Ready for Sacramento 2026!

We are thrilled to officially announce that the 2026 **CALSPro Conference** is headed to the beautiful **Embassy Suites Sacramento Riverfront Promenade** from **October 8–11, 2026**. Mark your calendars ([Calendar Invite](#)) now for an incredible weekend of networking, advocacy, and professional growth right in the heart of our state capital!

Shaping Our Education Sessions

Our Continuing Education Committee is already hard at work developing a cutting-edge curriculum to keep you ahead of the curve. We are currently planning vital sessions on:

- **AB 747 and the Requirements for Process Servers**
- **AI in the Legal Support Industry**
- **Session 3, TBD**
- **Session 4, TBD**

We want to hear from you!

CALSPro is a member-driven organization, and our best sessions often come from your direct feedback. If you have a specific topic or speaker idea you'd like to see on the 2026 roster, please share your thoughts with us through our [Contact Us page](#).

Save the Date for Registration

Ready to secure your spot? Official registration for the conference will open no later than June 1, 2026.

Keep an eye on your inbox and the CALSPro website for more details on early-bird rates and our full schedule of events as we get closer to the big weekend. We can't wait to see you in Sacramento! 📍





Advertising Report

STEPHEN RAHEB, **CALSPro Advertising Chair**

In collaboration with the CALSPro Connect Community, we are launching a powerful platform for agencies and vendors to connect with qualified process servers across the state and beyond. Our job listing board will now offer targeted visibility within our network, helping streamline recruitment and highlight meaningful opportunities in our profession.

We're also joining forces with the Social Media Committee and Connect Committee to maximize exposure through cross-channel promotions, spanning our newsletter, social platforms, and CALSPro digital events.

Lastly, we will be hosting Best Practices Roundtables, creating space for shared insights and dialogue around recruitment, service of process trends, and the evolving needs of legal support professionals.

If you're looking to advertise your services, job openings, or company offerings to the CALSPro network, now is the perfect time to get involved. Stay tuned for advertising packages and pricing in our next issue!

Let's connect, collaborate, and grow together. 🌐



Process Server Recruitment Opportunity

April 11 | Virtual Event

CALSPro is inviting member agencies to participate in the **CALSPro Connect Recruitment Event** taking place virtually on April 11 in conjunction with the live CCPS Workshop.

This event is designed to connect education focused, certification driven process servers with agencies that value professionalism and high standards within the industry.

Participating agencies will receive:

The opportunity to submit a 1 minute promotional video or presentation slides introducing your company and highlighting available opportunities. Your video or slides will be shown multiple times throughout the workshop.

Direct access in live breakout rooms to motivated process

servers who value education and professionalism and are actively seeking reputable companies to serve for.

Participation fee: \$75

If your company is interested in participating, please contact Jeremiah Jones at jejjones@magnals.com for registration details. 🌐



BUSINESS INSURANCE



Why CA Process Servers Should Consider Adding Employment Practices Liability (EPLI) Insurance



LARRY SUKAY, CCPS
Falcon West

California process servers play a crucial role in the legal system, delivering important legal documents such as summons, subpoenas, and complaints. While most are already aware of the need for General Liability and Professional Liability Insurance (also known as Errors & Omissions insurance), many may not have considered adding Employment Practices Liability Insurance (EPLI). EPLI covers claims arising from employee-related issues, an often overlooked area of risk in the process serving business.

Why is EPLI Necessary?

EPLI provides coverage for claims related to employment practices such as:

- Wrongful termination
- Discrimination (race, age, gender, etc.)
- Sexual harassment
- Retaliation
- Wage and hour disputes
- Wrongful discipline or demotion
- Failure to promote

Given the complexity of California's employment laws, even small employers like process servers are exposed to these risks. Regardless of how carefully you manage

your employees, misunderstandings, disputes, or legal violations can happen, leading to costly litigation.

Supplementing Existing Coverage

Most process servers already carry General Liability and Professional Liability (E&O) insurance to protect against bodily injury, property damage, and professional errors. However, these policies do not cover claims related to employment disputes.

- **General Liability Insurance:** Protects against third-party claims, such as

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physical injuries or property damage resulting from your work.

- **Professional Liability (E&O)**

Insurance: Covers negligence, errors, or omissions in the process of serving legal documents. This might include failing to serve a document properly, but it does not extend to employee-related claims.

EPLI fills this gap by covering claims made by current, former, or prospective employees, addressing a broader spectrum of risks that are increasingly common in today's workforce.

Unique Risks for Process Servers

Process servers operate in a field where employees are regularly interacting with clients and the public under sometimes high-stress conditions. Here are some specific employment-related risks process servers might face:

- **Discrimination and Harassment Claims:** Whether a server is an independent contractor or full-time employee, disputes may arise over perceived unfair treatment or discrimination. A process server may

claim discrimination based on race, gender, or age if they feel they've been unfairly treated in their assignments.

- **Wage and Hour Disputes:** California's strict wage and hour laws can expose employers to significant liability. Process servers often work irregular hours, and disputes about overtime, misclassification of employees, or missed meal breaks can easily lead to lawsuits.
- **Wrongful Termination:** If a process server is terminated and believes the reason was unjust, they may sue the company. In many cases, the legal costs of defending against such claims – even if they are unfounded – can be substantial.

The Cost of EPLI vs. The Cost of Litigation

The cost of defending an employment-related lawsuit, even a frivolous one, can be devastating to a small business. According to the Hiscox "Guide to Employee Lawsuits," the average cost to defend against an employment-related claim is around \$125,000, with 25% of these cases resulting in judgments of \$500,000 or more.

While the premium for EPLI depends on factors such as the size of your business, number of employees, and history of claims, it is typically much lower than the financial burden of an employment-related lawsuit. In fact, EPLI premiums can be a cost-effective way to manage the potentially crippling risks of legal action.

Protecting Your Business Reputation

A claim of wrongful termination or harassment can do more than drain your business's financial resources – it can also tarnish your reputation. In a profession where trust and credibility are paramount, even the hint of an employment dispute can cause clients to question the reliability and professionalism of your services.

By carrying EPLI, you not only protect your business from financial harm but also demonstrate to employees and clients that you take employment-related issues seriously and are committed to maintaining a fair and lawful work environment.

Conclusion

For CA process servers, Employment Practices Liability Insurance (EPLI) offers a critical layer of protection that goes beyond what General Liability and Professional Liability (E&O) insurance can provide. In today's litigious climate, EPLI helps safeguard against costly claims of wrongful employment practices, providing peace of mind and ensuring that your business is protected from potential lawsuits that could otherwise threaten its survival.

Considering the risks involved in dealing with employees in the legal service industry, adding EPLI to your insurance portfolio is a smart investment that can shield your business from significant financial losses and reputational damage. 🌐

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Capitol Report

– continued from page 2

and escalating independent expenditures, the race remains highly dynamic.

From a governance perspective, this volatility matters. California is already experiencing substantial institutional turnover. Term limits will sideline numerous experienced legislators including long-term Senate Judiciary Committee Chair Senator Tom Umberg, and 2026 will mark Newsom's final year in office. This turnover, combined with the most recent election, means that well over half of the Legislature has changed in just the past several cycles. That degree of churn places a premium on continuity, institutional memory, and relationships in Sacramento.

For CALSPro members, the takeaway is straightforward: political volatility at the top of the ticket compounds legislative uncertainty down ballot. As new legislators seek advancement and statewide candidates articulate policy agendas, advocacy must remain disciplined, informed, and constant. The bill introduction period for 2026 has now passed, and several measures of interest to CALSPro members have already been introduced and more will be amended soon. We will examine those key proposals and their potential operational impact in our next article. ●

Continuing Education Report – continued from page 7

members to share this date with staff and industry contacts who are preparing for certification or looking to strengthen their professional foundation.

Expanding Our Presenter Team

We are also pleased to share that our presenter pool continues to grow. This year, we welcomed three new presenters: Jackie Janney, Krystalyn Souza, and Kristian Pujol, who has returned after a brief break. In addition, Jonathan Schisler is serving as Co-Chair of the Continuing Education Committee and is training to assume leadership of the committee next year. Expanding our presenter base strengthens sustainability, brings fresh perspectives, and enhances the overall workshop experience. Those interested in presenting, assisting with administration, or helping develop course and video content are encouraged to contact me at jejones@magnals.com.

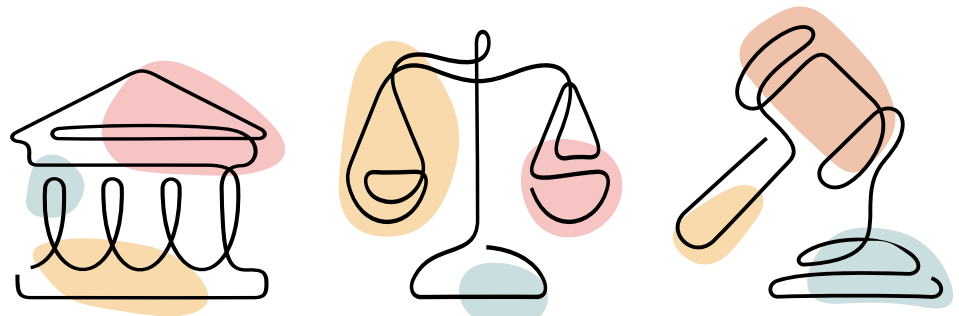
Looking Ahead

As we continue refining our programs, we are exploring the integration of additional video components into the CCPS course to further enhance engagement and retention. Between Connect Live, recruitment integration, expanded presenters, and curriculum enhancements, our focus remains on delivering meaningful, practical, and forward thinking education for California's process serving community.

Thank you to everyone who participated in the February CCPS workshop/Connect recruitment event, as well as the March Connect Live roundtable discussion. Your involvement is what makes these initiatives successful. ●

Jeremiah Jones

Continuing Education Chair



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