Manual of Policies and Procedures

2025-2026

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California Association of Legal Support Professionals

Manual of Policies and Procedures

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SECTION I. PURPOSE OF MANUAL

The Manual of Policies and Procedures ("the Manual") of the California Association of Legal Support Professionals (CALSPro) is established to serve as a comprehensive guide for the association's governance, administration, and daily operations. The Manual provides the framework for consistent, transparent, and accountable management of all CALSPro activities, ensuring that the association's actions reflect its mission, core values, and long-term strategic objectives.

1. Intent and Function

The intent of this Manual is to clearly define the structure, duties, and responsibilities of CALSPro's Officers, Executive Committee, Board of Directors, Committee Chairs, Committees, Cornerstones, and Central Office. It outlines the operational standards and procedural uniformity by which CALSPro conducts its affairs, facilitates communication among leadership and members, and ensures that decisions are made in accordance with established policies, ethical principles, and the association's Bylaws.

This Manual functions as both a reference and a training tool for current and future association leaders. It is designed to preserve institutional knowledge, establish consistency in decision- making, and promote continuity through leadership transitions. Each section serves as a detailed resource for understanding the processes that guide CALSPro's governance, administration, and service to its members and the broader legal support community.

2. Historical Context

This Manual originated in 2008 following the association's name change from the California Association of Photocopiers and Process Servers (CAPPS) to the California Association of Legal Support Professionals (CALSPro). It evolved from the former Manual of Operations, which served as the foundational document for CAPPS governance and committee organization. The transition
represented not merely a change in name, but a reflection of the association's broader scope, expanded mission, and growing role in representing the diverse professions that comprise the legal support industry.

The creation of the CALSPro Manual signified a deliberate move toward modern governance—one that emphasized accountability, uniform standards of practice, and the formal documentation of association policies and procedures. Over time, it has become an essential component of CALSPro's commitment to operational excellence and professional integrity.

3. Scope and Application

The Manual applies to all organizational levels and components of CALSPro, including but not limited to its Officers, Executive Committee, Board of Directors, Committee Chairs, individual Committees, Cornerstones, and the Central Office. It is to be referenced and followed in all matters of policy implementation, decision-making, committee operations, and association management.

Each section within this Manual defines specific policies, procedures, and operational protocols that support CALSPro's mission to advance professionalism, education, and legislative advocacy for California's legal support community.

All CALSPro officers, directors, and committee members are expected to adhere to the policies outlined herein to ensure procedural uniformity, organizational consistency, and operational integrity across the association.

4. Review and Maintenance

As a working and living document, this Manual shall be maintained, reviewed, and updated on a regular basis to remain relevant and effective.

The Central Office shall ensure that all revisions approved by the Executive Committee or the Board of Directors are accurately recorded, distributed, and archived.

The Executive Committee shall conduct an annual review of the Manual to evaluate the accuracy and applicability of its contents.

Amendments may be proposed by any Officer, Committee Chair, or Board Member when necessary to improve clarity, reflect new legislation, or adapt to the evolving needs of the association.

All updates must remain consistent with CALSPro's Bylaws, which take precedence over any policy or procedure contained within this Manual. Where conflicts arise, the Bylaws shall govern.

SECTION II. PURPOSE OF ASSOCIATION

The California Association of Legal Support Professionals (CALSPro) is a 501(c)(6) mutual-benefit, member-driven organization dedicated to advancing, protecting, and promoting the professions of legal support services, process serving, court filing, e-filing, and professional photocopying throughout the State of California.

CALSPro's fundamental purpose is rooted in the continued defense and enforcement of the Due Process Clause of the United States Constitution, which ensures that all parties to legal actions are properly and lawfully notified. The Association advocates for a judicial system where notice and filings are executed by qualified, independent third-party professionals who uphold integrity, accuracy, and fairness in every service and filing of legal documents.

1. Historical Background

CALSPro was originally incorporated as the California Association of Photocopiers and Process Servers (CAPPS). In 2008, the Association formally changed its name to CALSPro to better reflect the growing diversity of its members and the expanding range of services they provide to the legal support community.

This evolution marked a significant step forward, positioning CALSPro as a comprehensive professional body representing the full spectrum of legal support professionals, including process servers, photocopiers, court filers, e-filers, and other industry stakeholders committed to due process, transparency, and professionalism.

2. Legislative Commitment

CALSPro has a long-standing tradition of legislative advocacy, serving as the industry's unified voice within California's legislative and regulatory landscape. The Association actively monitors, reviews, and responds to proposed laws and administrative rules that affect its members and the broader legal support industry.

Through the efforts of its Legislative Committee and Legislative Advocates, CALSPro has successfully opposed numerous measures such as bills proposing service by mail or restricting access to e-filing systems that would undermine constitutional due process or diminish the essential role of independent legal support professionals.

The Association works closely with policymakers, court administrators, and technology providers to ensure that electronic filing and service systems uphold the same standards of accountability, verification, and transparency as traditional service methods. CALSPro advocates for legislation and technology that enhance efficiency while protecting the rights of all parties involved in the judicial process.

3. Organizational Foundation and Cornerstones

CALSPro defines its mission and operations through four organizational cornerstones, which together form the foundation of the Association's strength and direction:

Legislative – Advocating for the preservation and advancement of laws and technologies that protect due process, ensure access to justice, and safeguard the independence of legal support professionals in both traditional and alternative service.

Membership – Promoting unity, diversity, and professional collaboration among members while fostering growth, engagement, and mutual support. The Membership Cornerstone serves as the foundation of CALSPro's member-driven identity, ensuring every professional in the industry feels represented, valued, and supported through outreach, benefits, and volunteer opportunities.

Continuing Education – Providing educational programs, certifications, and resources designed to equip members with up-to-date knowledge of laws, ethics, and technology, including e-filing platforms, court integrations, compliance procedures, and best practices.

Conference – Hosting the Annual CALSPro Conference, regional workshops, and community engagement events that serve as the central hub for professional development, networking, and strategic collaboration within the legal support industry. The CALSPro Conference provides members and guests with opportunities to connect with industry experts, judicial and legislative officials, and technology partners through keynote sessions, training seminars, panel discussions, roundtable forums, and hand...

Together, these four cornerstones uphold CALSPro's commitment to excellence, education, and leadership in the legal support field.

4. Purpose as Defined by the Bylaws

According to Article II of the CALSPro Bylaws, the official purpose of the Association is to:

Promote and protect the private process serving, court filing, e-filing, professional photocopying, and legal support professionals; to preserve the requirement for independent third-party due process as it relates to giving notice; to promote the principles and policies set forth within the Bylaws; and to encourage the use of private process serving, e-filing, and third-party court filing service providers.

SECTION III. ADMINISTRATION

1. Management / Central Office / Legislative Advocate

The California Association of Legal Support Professionals (CALSPro) is managed by an Association Management Company (AMC) — California Advocates Management Services (CAMS), a division of California Advocates, Inc. (hereinafter referred to as "CAMS").

CAMS shall maintain the Central Office of CALSPro in accordance with the governing documents of the Association and the laws and regulations of the State of California.

Central Office Location:
California Association of Legal Support Professionals
2750 Gateway Oaks Drive, Suite 310
Sacramento, CA 95833
Phone: 916.239.4065 | Fax: 916.924.7323
Website: www.calspro.org
Email: info@calspro.org

The Central Office staff includes the following staff members who serve CALSPro:

Will Hixson, Interim Administrator
Tricia Schrum, CPA, Accountant
John Berkowitz, Publications Director
Michael Cochran, Webmaster
Mike Sturdivant, CMP, Meeting Planner
Ron Ackland, Membership Coordinator
Jake Snoke, Association Coordinator
Kelly Hoskins, Advertising & CCPS Program

Legislative Advocates:
Cliff Costa, Esq. and Mike Belote, Esq.
California Advocates, Inc.
1112 11th Street
Sacramento, CA 95833
Phone: 916.441.5050 | Fax: 916.441.5859
Email: mbelote@caladvocates.com / ccosta@caladvocates.com

Legislative information specific to CALSPro may be found at www.calspro.org or www.caladvocates.com.
User ID: calspro | Password: 401

2. Governing Documents

The Governing Documents of the Association shall include:

Articles of Incorporation (Filed December 19, 2007)

Bylaws

Best Practices

Code of Ethics

Manual of Policies and Procedures

3. Leadership Record-Keeping

Purpose:

The purpose of this policy is to establish a standardized process for creating, maintaining, and preserving the official annual record of all CALSPro Board of Directors committees, ad hoc, committees their chairs, vice-chairs, and appointed members. Including special task force committees.

This ensures transparency, historical accuracy, and organizational continuity for future boards, committee leaders, and association members.

The official record shall be stored at both the CALSPro Central Office and on the official CALSPro website for member access.

Scope:

This policy applies to all CALSPro Board of Directors standing committees, ad hoc committees, task forces, and appointed positions as recognized annually by the CALSPro Board of Directors.

This includes all chairs, vice chairs, board liaisons, and appointed committee members.

This procedure is followed each year immediately following the Annual Conference or whenever the Board updates appointments.

Responsibilities:

President – Confirms all appointed committee chairs and members following board approval.

Secretary – Oversees the creation, accuracy, and preservation of the official annual record.

Central Office – Maintains the master archive and ensures the record is uploaded to the CALSPro website.

Committee Chairs – Provide updated rosters for any changes.

Website – Publishes and maintains the online version of the official record.

Procedure:

The President completes all committee appointments following the Annual Board Meeting.

The Secretary compiles the official record using the approved standard record-keeping format.

The Secretary verifies committee names, chairs, board members, liaisons, and all appointees for accuracy.

The completed official record is submitted to Central Office for permanent archival.

Central Office uploads the document to the official CALSPro website under the designated "Committee Listings / Leadership" section.

Central Office updates both internal and online versions

Record Format Requirements:

Each annual record must include:

- Committee Name
- Chair
- Board Liaison
- Appointed Members
- Year of Appointment

Duties - only names and positions.

The format must match the standardized CALSPro record-keeping template for consistency across years.

Files shall be stored as PDF Word for archival and web-posting purposes.

Storage Retention

Central Office shall maintain a permanent archive of all annual committee records dating back to the inception of CALSPro or earliest available history.

The current year's record must always be accessible on the official CALSPro website.
Historical records may also be published online when appropriate for transparency.

Digital files must be backed up by Central Office according to CALSPro's document-retention standards.

No record may be altered without board approval and documentation of the change.

This policy shall be reviewed annually by the Board of Directors for revisions or updates.

4. Document Retention and Destruction

Purpose

The purpose of this Policy and Procedure is to establish standards for the retention, storage, protection, and destruction of Association documents, records, and information. Proper information management promotes transparency, accountability, legal compliance, operational efficiency, and preservation of the Association's historical materials.

Scope

This Policy and Procedure applies to all Association documents, records, and information created, received, maintained, stored, transmitted, or controlled by the California Association of Legal Support Professionals (CALSPro), regardless of format or medium.

Association Documents, Records, and Information

- Paper documents and files

- Electronic documents and digital files
- Email communications
- Text messages and electronic messaging related to Association business
- Photographs and images
- Audio and video recordings
- Meeting agendas and minutes
- Contracts and agreements
- Financial documents
- Membership information
- Legislative and committee materials
- Website content
- Social media content
- Cloud-based storage
- Electronic databases
- Intellectual property
- Articles of Incorporation
- Bylaws
- Policies and Procedures
- Board and Executive Committee records
- Conference and event materials
- Historical archives
- Correspondence and official communications
- Any other document or information created, received, maintained, stored, or transmitted on behalf of CALSPro.

Policy

CALSPro shall maintain all Association documents, records, and information in accordance with applicable law, the Association's Bylaws, and accepted nonprofit governance practices. All CALSPro policies requiring the retention of documents, records, or information shall be governed by this Policy and Procedure.

Procedures

CALSPro shall maintain all Association documents, records, and information in accordance with applicable law, the Association's Bylaws, and accepted nonprofit governance practices. All CALSPro policies requiring the retention of documents, records, or information shall be governed by this Policy and Procedure.

a. Creation and Maintenance

All Association documents, records, and information shall be created, maintained, organized, and safeguarded.

b. Storage

Association documents, records, and information may be maintained in paper or electronic format using appropriate security and backup procedures.

c. Retention

Association documents, records, and information shall be retained as required by applicable law, the Association's Bylaws, operational necessity, contractual obligations, or as otherwise determined by the Board of Directors.

d. Litigation Hold

Destruction of relevant Association documents, records, or information shall immediately cease when litigation, an audit, governmental investigation, arbitration, or other legal proceeding is pending or reasonably anticipated.

e. Destruction

When no longer required, Association documents, records, and information shall be securely destroyed or permanently deleted while protecting confidential information.

f. Historical Materials

Documents, records, and information determined by the Board of Directors to possess historical, legal, or archival significance shall be retained permanently.

Policy

Responsibilities

Board of Directors

The Board of Directors shall oversee compliance with this Policy and Procedure and approve any amendments.

Review

This Policy and Procedure shall be reviewed by the Board of Directors at least every three (3) years or sooner if required by changes in applicable law, the Association's Bylaws, or governance best practices.

5. Official Position

Any official position — spoken, written, or published — by any Officer, Director, Member, or Contractor must have prior approval of the President and/or the Executive Committee.

Any comments or statements issued by the Legislative Advocate or Administrator on urgent matters shall be handled on a case-by-case basis in coordination with the President.

Any political support, legislative, or regulatory position must have prior approval of the President and/or the Executive Committee.

Any correspondence produced on CALSPro letterhead, digital, or electronic must be copied to both the Central Office and the President.

6. Master Calendar

A Master Calendar shall be established by the Central Office no later than January 1 of each year. This calendar shall be presented to the Board of Directors, posted on the website, and included in all other

appropriate publications and announcements to the membership.

7. Conference

The Annual Conference shall be held each year, typically in September or October, unless the dates conflict with major cultural or national holidays.

The location and dates of the Conference shall be determined at the discretion of the Board of Directors, following a recommendation from the CALSPro Conference Committee.

The Conference may rotate between Southern California and Northern California/Nevada to promote member accessibility and participation.

The Administrator shall be authorized to sign venue contracts upon review and approval by the President.

8. Board of Directors Meetings

An established number of Board of Directors meetings shall take place each year, with dates included on the Master Calendar.

Meeting dates for the upcoming year shall be determined and approved by the Board at its December meeting.

Members in good standing are welcome to attend Board meetings; however, only elected Directors may vote.

Board meeting agenda packets shall be emailed to each member of the Board and each Committee Chair in advance of each meeting.

Committee Chairs shall submit a written strategic report to the Central Office no later than ten (10) days before each Board meeting.

The Central Office shall take and maintain the minutes of each meeting and circulate draft minutes to the Board within two (2) weeks.

Upon approval, the Central Office shall prepare a Board Meeting Summary Report or “Call to Order” to be posted on the website.

The Board agenda packet shall also be made available to members by written email request within ten (10) days following each meeting.

9. Contractors

All contractors and vendors shall have binding agreements in place, reviewed and/or renewed according to the terms of each contract.

The President is authorized to sign such contracts upon Board approval.

10. Notices

All official notices required under the CALSPro Bylaws shall be issued in accordance with the procedures set forth in the Bylaws.

11. Conflict of Interest Waiver / Appendix 1 Form

Purpose

The purpose of this Policy and Procedure is to promote integrity, transparency, and public confidence in the California Association of Legal Support Professionals (CALSPro). This policy establishes standards for identifying, disclosing, and appropriately managing actual, potential, and perceived conflicts of interest to ensure that all Association decisions are made in the best interests of CALSPro and its membership.

Scope

This policy applies to all members of the Board of Directors, Officers, Committee Chairs, Committee Members, volunteers, contractors, consultants, and any individual authorized to act on behalf of CALSPro.

Policy

Individuals serving CALSPro shall perform their duties honestly, ethically, and in the best interests of the Association. No individual shall use their position within CALSPro for personal, professional, or financial gain or participate in any matter where their judgment may be influenced, or appear to be influenced, by a conflict of interest. Any actual, potential, or perceived conflict of interest shall be promptly disclosed and managed in accordance with this Policy and Procedure.

Definition of a Conflict of Interest

A conflict of interest exists whenever an individual's personal, financial, business, family, or professional interests could reasonably influence, or appear to influence, that individual's judgment, decision-making, or actions while acting on behalf of CALSPro. Conflicts may be actual, potential, or perceived and should be disclosed whenever there is reasonable doubt.

Examples of Conflicts of Interest

- Having a financial interest in a vendor, contractor, or organization seeking to do business with CALSPro.
- Participating in decisions that directly benefit the individual's employer, business, client, or immediate family member.
- Accepting gifts, favors, discounts, or other benefits that could reasonably influence Association decisions.
- Using confidential Association information for personal, business, or competitive advantage.
- Directing Association business, contracts, sponsorships, or opportunities to one's own business or an affiliated organization.

Procedures

a. Disclosure

Individuals covered by this policy shall promptly disclose any actual, potential, or perceived conflict of interest to the President or the Board of Directors as soon as the conflict becomes known.

b. Recusal

An individual with a disclosed conflict of interest may provide factual information if requested but shall not participate in deliberations, shall abstain from voting, and may be requested to leave the meeting during discussion and voting.

c. Board Determination

The Board of Directors shall determine whether a conflict of interest exists and what actions, if any, are necessary to protect the interests of the Association.

d. Annual Disclosure

Each Director, Officer, Committee Chair, and any other individual designated by the Board shall complete and sign a Conflict-of-Interest Disclosure Form upon assuming office, annually thereafter, and whenever a material change in circumstances occurs.

e. Records Retention

Conflict of Interest Disclosure Forms and any documentation related to disclosures or recusals shall be maintained in accordance with the Association's Records Retention Policy, as provided by the CALSPro Bylaws.

Responsibilities

Board Members, Officers, Committee Chairs, Committee Members, volunteers, and others acting on behalf of CALSPro are responsible for complying with this policy, promptly disclosing conflicts of interest, and adhering to any determination made by the Board of Directors.

Conflict of Interest and Waiver Form

Purpose:

This form is designed to help ensure that decisions made by the Board of Directors of the California Association of Legal Support Professionals ("CALSPro") are free from undue influence and that all directors act in the best interests of the Association in accordance with its mission and fiduciary duties under California law.

1. Acknowledgment of Duty

As a member of the Board of Directors, Officer, Committee Chair, Committee Member, volunteer, contractor, consultant, and any individual authorized to act on behalf of CALSPro, I will perform my duties honestly, ethically, and in the best interests of the Association. I will act in good faith, placing the interests of the Association above personal or professional interests. I further acknowledge that:

a. I shall not use my position for personal gain or for the benefit of another organization or individual.
b. I shall disclose any actual or potential conflict of interest promptly and fully.
c. I understand that "conflict of interest" includes any situation in which my personal, business, or financial interests could reasonably appear to influence my judgment or actions.

Please list below any relationships, transactions, positions, or circumstances that could create a conflict of interest (examples include: ownership interest in a vendor or partner company, employment or consulting roles with industry entities, family relationships, or financial interests that may conflict with CALSPro business).

Please check one:
☐ No known conflicts at this time.
☐ Yes, conflicts at this time. If so, please explain:

_____

_____

Annual and Ongoing Disclosure

I agree to promptly update this disclosure form should any situation arise during my term that might create an actual or potential conflict of interest. I understand that annual reaffirmation is required as part of CALSPro's governance policy.

2. Waiver and Recusal

In the event of a disclosed conflict, I agree that:

2.1 I will recuse myself from any discussion, decision, or vote where the conflict exists.
2.2 The Board may determine whether a waiver is appropriate under the circumstances consistent with CALSPro's Bylaws.
2.3 Any waiver must be approved by disinterested directors and documented in the meeting minutes.

3. Certification and Signature

By signing below, I certify that:

3.1 I have read and understand this Conflict of Interest and Waiver Disclosure Form.

3.2 I have disclosed all known conflicts to the best of my knowledge.

3.3 I agree to comply with CALSPro's policies and California nonprofit law regarding conflicts of interest.

Printed Name: _____

Position/Role: _____

Signature: _____ Date: _____

12. Social Media and Digital Communications

CALSPro shall maintain an active and coordinated presence across all approved social media platforms to promote communication, education, engagement, and transparency among members and the broader legal support community.

The Connect Committee shall be responsible for:

Managing, maintaining, and monitoring all official CALSPro social media accounts.

Providing, drafting, and submitting content for review and approval by the Board of Directors or the President as required.

Ensuring that all posts align with the Association's mission, values, and communications policy.

CALSPro shall maintain official accounts on the following platforms: Facebook

(established 2010)

X (formerly Twitter) (established 2012)

Instagram (established 2018)

YouTube (official CALSPro video channel) TikTok

(for educational and outreach content)

LinkedIn (for professional and recruitment purposes)

Any other social media or digital communication outlet approved by the Board of Directors.

The member portal and community forum Roundtable

sessions and interactive online events

Coordination of all digital content posted on CALSPro's website and media channels
All blog posts, blogs, or digital content shall be reviewed and approved by the Connect Committee Chair and/or the President before publication. Approved content shall also be cross-posted to CALSPro's official social media channels.

The Connect Committee Chair shall report quarterly to the Board of Directors on engagement metrics, outreach success, and proposed initiatives to expand CALSPro's digital presence.

SECTION IV. FINANCIAL

1. Fiscal Year

The fiscal year of the California Association of Legal Support Professionals (CALSPro) shall begin on January 1 and end on December 31 of each calendar year. This period shall define the financial reporting cycle for all association accounting, budgeting, and auditing purposes.

2. Membership Dues / Schedule (2025-2026)

The membership year of the Association shall also run from January 1 through December 31. Membership dues shall be reviewed annually by the Board of Directors and may be adjusted by a majority vote during any properly noticed board meeting.

Associate Member – $120.00
Supporting Member – $50.00 Honorary
Member – No Charge (N/C) Retired
Member – No Charge (N/C) Vendor
Member – $385.00

The Active Member category shall be divided into five sub-categories based on the number of Full- Time Equivalent (FTE) Employees within the member company.

Category	Number of FTE Employees	Voting Rights (Individual Votes)	2025-2026 Dues Amount
Category 1	1–2 Employees	Up to 1 Vote	$250.00
Category 2	3–5 Employees	Up to 2 Votes	$500.00
Category 3	6–10 Employees	Up to 3 Votes	$850.00
Category 4	11–25 Employees	Up to 6 Votes	$1,700.00
Category 5	26+ Employees	Up to 10 Votes	$3,400.00

Board Approved September 2025

3. Active Membership Policies and Procedures

3.1 Each member company shall self-report the number of full-time equivalent (FTE) employees.
3.2 Each company shall designate a point of contact (not required to be a member) for the purpose of confirming employee counts and membership details.
3.3 A name must be assigned to each authorized vote; that individual becomes an Active Member.
3.4 The Active Member must be an employee of the company and meet all membership eligibility requirements.
3.5 Each Active Member shall be entitled to an individual listing in the CALSPro membership directory or database at the location where they work.

3.6 Unassigned votes are forfeited and may not be carried over.
3.7 Vote assignments or changes must be submitted at least two (2) weeks prior to any voting event to allow for processing.
3.8 Votes may not be assigned or changed during a voting event, such as the Annual Business Meeting.
3.9 The Active Membership category is fixed for the calendar year. Changes in employee count during the year do not affect dues.
3.10 Membership dues shall not be pro-rated or refunded.
3.11 No additional fees shall be required with the submission of a membership application.
3.12 The Board of Directors shall set annual dues at its first meeting of the fiscal year.
3.13 Membership incentives, discounts, referral programs, or promotional dues adjustments may be established by the Board of Directors.
3.14 Dues invoices shall be issued electronically in November of each year for the upcoming membership term.

4. Bank Accounts

Bank accounts may be established upon written approval of the President, Secretary-Treasurer, and Administrator/Central Office. Such actions shall be reported to the Board of Directors at its next scheduled meeting.

Authorized signatories on all CALSPro bank accounts shall include the President, Vice President, Secretary-Treasurer, Administrator, or CPA. All checks shall require two authorized signatures, one of which must be that of an elected officer.

A motion shall be made and approved by the Board of Directors annually, designating by name those authorized to sign checks. A copy of this motion shall be provided to each financial institution where association accounts are maintained.

Account balances shall be reported on the financial statements presented at each board meeting and made available to members upon request.

5. Bond and Insurance

CAMS shall maintain appropriate bonding and insurance coverage for handling funds or assets belonging to CALSPro.

The Association shall also maintain and review annually the following insurance policies as necessary:

Directors and Officers (D&O) Insurance

General Liability Insurance

Any additional coverage deemed necessary by the Board of Directors

6. Financial Statements

The Central Office shall prepare and submit financial statements to the Secretary-Treasurer and President on a regular basis and no less than four (4) times per year.

After review of any variances or discrepancies, the financial statements shall be forwarded to the Budget Committee, Executive Committee, and the Board of Directors for final review and acceptance.

7. Spending Criteria and Expense Reimbursements

7.1 No volunteer position within CALSPro shall receive payment or compensation.

7.2 Ordinary operational expenses within the approved budget shall be paid by the Central Office twice per month.

7.3 Any member requesting to incur an expense must complete and submit an Expense Approval Form to the Central Office prior to incurring the expense.

7.4 All reimbursements or expense payments must be accompanied by an Expense Reimbursement / Check Request Form, available from the Central Office.

7.5 Expense reimbursement requests must be submitted within the same calendar year in which the expense occurred. Requests submitted in the following year may be denied.

7.6 All expenditures must comply with approved budget line items, unless specifically authorized by the Board of Directors or the Executive Committee.

7.7 The Central Office shall maintain accurate records of all disbursements, including receipts, invoices, and supporting documentation, in accordance with generally accepted accounting principles (GAAP).

8. Financial Oversight

The Budget Committee and Secretary-Treasurer shall ensure that all financial practices of the Association conform to the following principles:

Fiscal accountability and transparency

Timely reporting and reconciliation Proper

authorization for expenditures Compliance

with Board-approved budgets

All fiscal policies and procedures shall be reviewed annually as part of CALSPro's commitment to ethical governance and responsible stewardship of member funds.

SECTION V. MEMBERSHIP

1. Membership Year

The membership year of the California Association of Legal Support Professionals (CALSPro) shall be defined as January 1 through December 31. Membership shall be administered in accordance with the Association Bylaws and processed under the policies and procedures outlined in the current membership documents maintained by the Central Office.

2. Membership Categories

Membership classifications, eligibility requirements, and voting privileges shall be defined in the CALSPro Bylaws. All applications for membership must comply with the criteria established therein.

Members are encouraged to refer to the most current version of the CALSPro Bylaws for a detailed description of all membership categories and their respective rights and privileges.

3. Dues Renewal and Invoicing

Dues renewal statements shall be distributed to all members each year in November for the upcoming membership term.

The renewal of annual membership dues for all categories shall be conducted in accordance with the Bylaws and any policies adopted by the Board of Directors.

Membership renewal payments must be received no later than February 1 each year to maintain uninterrupted membership status.

All rights and privileges of membership shall be forfeited if annual dues are not received by the February 1 deadline.

4. New Member Applications and Approval

Applications for new membership shall be reviewed by the Membership Committee to ensure compliance with established membership criteria.

The Membership Committee shall recommend approval or denial of membership applications to the Board of Directors for final ratification.

Upon approval, the Central Office shall process and record the new member’s information in the official membership database and notify the applicant of their acceptance.

5. Membership Reporting

The Central Office shall prepare a membership statistics report for each scheduled Board of Directors meeting. This report shall include current membership totals, category breakdowns, and changes in membership status since the previous report.

The report shall be distributed as part of the Board Meeting Agenda Packet for review and discussion by the Board.

6. Forfeiture of Membership Rights

All rights, privileges, and benefits of membership shall be suspended or forfeited if annual dues are not received by February 1 of each calendar year. Reinstatement of membership shall be subject to payment of all outstanding dues and compliance with any reinstatement policies adopted by the Board of Directors.

SECTION VI. STRUCTURE

Organizational Structure

The structure of the California Association of Legal Support Professionals (CALSPro) shall be consistent with the provisions of the Association Bylaws and the California Corporations Code.
CALSPro's leadership framework consists of the Officers, Executive Committee, Board of Directors, and Committee Chairs, who collectively ensure the effective governance and administration of the Association.

1. Officers and Executive Committee

The Officers and Board of Directors are elected annually by the membership in accordance with the Association Bylaws. Each Director shall serve a one-year term, commencing upon their official swearing-in at the Annual Conference.

The rules contained in the current edition of Robert's Rules of Order Newly Revised shall govern the Association in all cases to which they are applicable and in which they are not inconsistent with the Bylaws, Articles of Incorporation, California law, or this Manual of Policies and Procedures.

The Officers, together with the Chairperson of the Board of Directors, shall comprise the Executive Committee.

a. Duties of the President

1. Appoints all Committee Chairs and serves as an ex-officio member of each committee.
2. Ensures that all Officers, Directors, and appointed parties fulfill their responsibilities as set forth in this Manual and the Bylaws.
3. Presides over the Annual Conference and all official membership meetings.
4. Carries out all policies and directives adopted by the Board of Directors.
5. Signs or authorizes the signing of all official contracts or agreements on behalf of CALSPro.
6. Presides over Board meetings in the absence of the Board Chair. (If the President is not a Board member, they shall have no voting rights.)
7. Notifies the Board Chair of any emergencies requiring immediate action or special meetings.
8. Submits a President's Message for publication in each issue of the CALSPro Newsletter.
9. Assigns to each Executive Committee member specific committees to oversee and ensures contact at least three weeks before each Board meeting to confirm reports are ready.
10. Ensures the minutes of the Annual Conference are transcribed and distributed within 30 days following the event.
11. Prepares and submits an end-of-year procedural summary to be passed to the succeeding President.
12. Ensures that all official actions of the Board of Directors, Executive Committee, and membership are approved through a properly adopted motion and vote, unless otherwise authorized by the Bylaws.

b. Duties of the Vice President

1. Assumes the duties and authority of the President in the event of the President's absence, disability, or unavailability.

2. Oversees all committees assigned by the President and coordinates publication of Board meeting summaries in the CALSPro Newsletter.
3. Serves as an ex-officio member of all committees assigned by the President.
4. Prepares and submits an end-of-year procedures and recommendations document for the incoming Vice President.

c. Duties of the Secretary-Treasurer

1. Maintains complete records of all Board of Directors proceedings.
2. Maintains custody of the corporate seal and affixes it to official documents as required.
3. Supervises the maintenance of the corporate records of CALSPro.
4. Ensures that all adopted bylaw amendments are published in the first Newsletter following the Annual Conference.
5. Submits post-conference updates to the Certified Public Accountant (CPA), listing all newly elected Officers, Directors, and approved Bylaw changes.
6. Presents a written financial report at each Board meeting.
7. Carries out other duties as authorized by the Board of Directors.
8. Issues annual dues renewal notices no later than November.
9. Sends delinquency notices to members who have not renewed by January 31, warning of forfeiture of membership rights.
10. Provides the Membership Chairperson with a list of delinquent members by February 1.
11. Maintains complete and accurate financial records, including books, ledgers, and all supporting documentation.
12. Appoints two co-signatories and, whenever possible, countersigns all checks together with one other authorized signer.
13. Maintains and provides at each Board meeting an updated balance sheet and profit & loss statement.
14. Ensures the timely filing of annual tax returns by required deadlines.
15. Serves as Chairperson of the Budget Committee and the Investment Committee.
16. Prepares and presents a written Treasurer's Report at the Annual Conference.
17. Prepares an end-of-year procedural summary for the succeeding Secretary-Treasurer.

d. Duties of the Immediate Past President

1. Serves as a member of the Board of Directors and Executive Committee for one (1) year following their term as President.
2. Arranges for the presentation of a plaque honoring the outgoing President at the Annual Conference.
3. Oversees committees assigned by the President and coordinates the publication of Board meeting summaries and governance updates on the CALSPro website.

2. Board of Directors

The 2025-2026 Board of Directors, serving a one-year term will be available via CALSPro website: https://calspro.org/, email: info@calspro.org, mail: 2750 Gateway Oaks Drive, Ste. 310, Sacramento, CA 95833.

Responsibilities

a. Elects a Chairperson of the Board at the first Board meeting following the Annual Conference. The Chairperson may appoint or request the election of a Vice Chairperson.
b. Establishes and implements association policy throughout the year.
c. Performs all duties as set forth in the Manual and the Bylaws.
d. May remove or replace any Officer in accordance with the Bylaws, provided that the Officer receives written notice of the proposed action, an opportunity to respond, and any procedural protections required by the Bylaws and applicable law.
e. Ensures all Directors attend Board meetings or provide prior notice for absences.
f. At the end of the year, the Chairperson shall prepare an exit summary and procedural guide for the incoming Chairperson.

3. Chairperson of the Board

a. Chairs at least four (4) meetings per year, with all dates and locations announced at the second meeting of the year (typically December).
b. Coordinates with the Management Company to prepare and distribute meeting agendas and notices to Directors and Committee Chairs.
c. Ensures that all Committee reports are submitted and reviewed during each Board meeting.
d. Appoints a Sergeant-at-Arms and Parliamentarian to serve at Board meetings. The Parliamentarian serves solely in an advisory capacity to the Chair and shall not make rulings or vote in that capacity.
e. Notifies all Board members of emergencies and may call special Board meetings as permitted under the Bylaws.
f. Prepares and submits an end-of-year procedural summary for the next Chairperson.

4. Board Meeting Procedures and Expectations

a. The Chairperson calls the meeting to order. Meetings should start promptly to ensure professionalism and productivity.
b. The Corporate Secretary takes attendance, recording all attendees and absentees to verify quorum.
c. Self-introductions are conducted for all attendees and guests. Guests are encouraged to participate and ask questions as appropriate.
d. Approval of previous meeting minutes is completed early in the meeting. Minutes serve as the official record of Board actions and should be reviewed carefully before approval.
e. The Treasurer's Report is presented and discussed. Variances from the budget may prompt motions to amend or adjust budgeted items.
f. Committee Reports are presented by Committee Chairs or their designees. Inactive committees should not present reports unless necessary.
g. Unfinished Business from previous meetings is reviewed and resolved.

h. New Business is introduced for discussion and consideration. Informal consensus may be used to gauge support; however, all official actions of the Board shall be approved through a properly adopted motion and vote.
i. Announcements are made regarding upcoming meetings and association events.
j. A motion to adjourn formally concludes the meeting.
k. The Chairperson may modify the order of business when necessary for the efficient conduct of Association business, provided that all required business is addressed and members are treated fairly.

l. Committee Chairs

m. Each committee shall be assigned a Committee Chair, who is responsible for conducting committee business and ensuring timely reporting to the Board.
n. A written strategic report shall be submitted to the Central Office at least ten (10) days prior to each Board meeting.
o. Committee Chairs, in collaboration with the President, shall appoint committee members within 60 days of their appointment. Each committee must include more than one member.
p. At the end of each year, each Committee Chair shall prepare an Exit Statement summarizing accomplishments, recommendations, and ongoing projects.
q. The Exit Statement shall be submitted to the President and Central Office for distribution to the incoming Committee Chair.
r. Committee recommendations requiring Board action shall be presented in the form of a motion through the Committee Chair or designated representative.

The 2025-2026 Committee Chairs, serving a one-year term, are as follows:

Advertising
Anti-Trust Compliance
Assault Advisor/Dispute Resolution
Budget & Finance/Investment
Bylaws
Coalition to Improve Court Access
Conference
Continuing Education
Forms
Historical Preservation
Legislative
Membership
Newsletter
Nominating
Photocopy
Connect Committee
Bert Rosenthal Memorial Award
Technology/Website

SECTION VII — CORNERSTONES / CHARTERS

Cornerstones Overview

CALSPro defines itself through four organizational Cornerstones:

- Legislative
- Membership
- Conference
- Continuing Education

Each Cornerstone shall contain committees, as follows:

Legislative	Membership	Continuing Education	Conference
Legislative	Membership	Continuing Education	Conference
Assault Advisor/ Dispute Resolution	Advertising	Technology/Website	
C.I.C.A.	Newsletter		
Forms			
Bylaws	Historical Preservation		
Photocopy			

Each Cornerstone is overseen by an Executive Committee member or appointed Board member. The President shall make Cornerstone appointments by December 1 each year.

Representative Committees per Cornerstone include:

- Legislative: Legislative, Dispute Resolution, C.I.C.A. (Coalition to Improve Court Access), Forms, Bylaws, Photocopy
- Membership: Membership, Advertising, Newsletter, Historical Preservation
- Continuing Education: Technology, Website, Connect
- Conference: Annual Conference Committee

1. Legislative Committee

Charter

The Legislative Committee shall consist of the Chairperson (as appointed by the President of the Association), the President of the Association, the Vice President of the Association and two members of the association chosen by the Legislative Chairperson.

Purpose

Protect the legal support industry from adverse legislation and promote positive legislation that advances the profession.

Responsibilities

Maintain contact with the Legislative Advocate and supervise their activity on behalf of the Association.

Review pending relevant legislation with the Advocate and report to the Board of Directors on items that may impact the industry.

Notify the President immediately of any emergencies and request a special Board meeting if time permits and direction is needed.

Reporting

Present a written report of the proposed legislative program for the year at the second Board meeting of the new Board, or as soon as possible but not later than the third meeting.

Ensure the Capitol Report is prepared and submitted for each Association newsletter. Prepare Legislative Committee reports for each Board meeting and the Annual Conference. Report to the Executive Committee member assigned by the President.

2. Membership Committee

Charter

Membership shall consist of the Chair appointed by the President of the Association, the chairman of the Dispute Resolution Committee and two members of the association chosen by the Membership Chair.

Purpose

Ensure the Association's viability through growth and retention of membership.

Responsibilities

Review all incoming applications for membership to ensure conformity to Association standards.

Develop and implement a plan to market the Association to potential members.

Develop and implement a plan to increase the value of membership to current members. Oversee the annual membership renewal process.

Procedures

Submit a detailed plan and budget to the Board of Directors and Budget Committee to promote membership in the coming year.

Submit all contracts to the President for signature.

Oversee all membership benefits programs.

Reporting

Submit an article regarding Association membership for each newsletter publication. Prepare a Membership Committee report for scheduled Board meetings and the Annual Conference.

3. Annual Conference Committee Charter

The Annual Conference Committee shall consist of the Chairperson as appointed by the President of the Association, an appointed person from the administrative office, a member of the Continuing Education committee, a member of the Membership committee, a member of the Technology Committee, a member of the Legislative committee and an at large member selected from the membership of the association by the Annual Conference Chairperson.

Committee Members

Committee will consist of Chairperson (appointed by the President), Continuing Education, Membership, Legislative, Technology, and members appointed by the Membership Chair.

Purpose

Plan and produce the Annual Conference with focus on: Networking; Legislative review; Continuing Education; Annual Business Meeting.

Responsibilities

Select the site of the Annual Conference with Board approval.
Work with the Management Office to present the Annual Conference.
Provide multiple networking opportunities and activities.
Design and implement a program to meet stated purposes within the approved budget. Advertise and promote the Conference to the Association as a whole.
Ensure Conference materials are distributed at least 90 days prior to the event.

Reporting

Present a written report at each regularly scheduled Board meeting.
Ensure an article regarding the upcoming Conference is prepared for each newsletter publication.
Announce at the Annual Conference the city and location of the next Annual Conference.

4. Continuing Education Committee Charter

Membership

The Continuing Education Committee shall consist of a Chairperson appointed by the President, the Technology Chairperson, and at least two members appointed by the Continuing Education Chair.

Purpose

Help members keep current with legal and technology requirements and maintain professionalism across the legal support profession.

Governance Provison

The Board shall conduct its meetings in accordance with Robert's Rules of Order Newly Revised, except where superseded by the Association Bylaws, applicable law, or this Manual.

Responsibilities

Develop, plan, organize, and continuously operate an updated and effective training/education program aligned with the committee's purpose.

Ensure training topics are appropriate and applicable to member needs.

Procedures

Submit a detailed plan and budget for the coming year to the Board of Directors and Budget Committee.

Submit all contracts to the President for signature.

Consult with the Legislative Chair on any new topics requiring training.

Reporting

Submit an article regarding continuing education for the newsletter each quarter.

Submit a quarterly report to the Board of Directors.

Submit a year-end report to the Annual Conference.

5. Budget Committee Charter

Membership

Committee consists of the President; Chairperson of the Board; Secretary/Treasurer; Legislative Chair; Conference Chair; Membership Chair; Continuing Education Chair; Newsletter Chair; Website Chair; Immediate Past President; and the Management Company. The Budget Committee is chaired by the Secretary/Treasurer or a President's appointee.

Purpose

Assist the Management Company with budget decisions and help the Administrator develop the annual budget, including allocation categories and amounts for the following fiscal year.

Responsibilities

Review cost information presented by the Management Company for Association operations.

Prepare and submit the proposed budget for the following year to the Board prior to the end of the current calendar year.

Reporting

Prepare and submit a proposed dues structure for the following membership year to the Board prior to the end of the current calendar year.

6. Board of Directors

Charter Membership

The Board shall consist of eleven (11) Directors — ten (10) elected by the membership and the Immediate Past President (one-year term). If there is no Immediate Past President, eleven (11) members shall be elected to serve.

Purpose

Conduct Association business in accordance with the Bylaws and applicable law; approve strategy and policy from the Executive Committee; and monitor achievement of those aims.

Responsibilities

Elect a Chairperson at the first Board meeting immediately following the Annual Conference. Remove and replace any Officer who fails to perform duties in accordance with the Bylaws. Attend all Board meetings and participate in CALSPro functions within the Director's local area. Participate in at least one committee.

Read and review materials before each scheduled Board meeting and submit questions/concerns to the Chairperson prior to the meeting.

7. Dispute Resolution Committee Charter

Membership

The Dispute Resolution Committee shall consist of the Chairperson (as appointed by the President of the Association), the Membership Chair and at least two members of the association chosen by the Dispute Resolution Chair.

Purpose

Uphold and maintain industry standards and ethical business practices as set forth in the Bylaws, Code of Ethics, and Manual of Policies and Procedures.

Scope

Provides a non-litigation avenue for members to resolve disputes and a procedure to revoke membership for abuse of Association membership terms. Not a substitute for court or law- enforcement remedies; significant debt or alleged criminal conduct may require referral to authorities.

Hears two complaint types: (1) Monetary disputes; (2) Unethical/Unprofessional conduct disputes. Available to current members in good standing; complaints against former members are allowed if lapse is no more than twelve (12) months from filing. Committee members who are parties must recuse; if Chair recuses, the President serves or appoints a temporary Chair.

Reporting

Submit an article for the newsletter each quarter. Submit a written report to the Board of Directors. Submit a year-end report for the Annual Conference.

Required Forms

Available on the CALSPro website: Notice of Pending Complaint; Nonpayment Complaint; Dispute Resolution Transmittal Form (Mandatory).

Reliable Notice (Defined)

Reliable notice includes: (1) Electronic delivery (fax/email) and regular mail; (2) Electronic delivery

(fax/email) and pouch; (3) Overnight mail service (UPS, FedEx, etc.); (4) Certified mail; or (5) Personal service. Due dates are calculated from the transmission date on the Transmittal Form (required, including date and method of delivery).

Procedures — Monetary Disputes

- Obtain forms from the CALSPro website and the Dispute Resolution Chair's contact information.
- Attempt to collect; if unpaid after reasonable efforts, send Notice of Pending Complaint and Transmittal Form to respondent and copy the Chair (respondent has 10 days to pay).
- If unpaid, file a complaint with the Chair including: signed Nonpayment Complaint; Transmittal Form; Notice of Pending Complaint; supporting documentation.
- Chair delivers complaint to respondent (10 days to respond).
- Chair delivers response to complainant (5 days to rebut).
- Chair facilitates information exchange and encourages dialogue; Committee may review data and offer resolution options.
- If agreement reached, Chair prepares summary and distributes to parties and Administrator (include due dates/amounts).
- If no progress, Chair issues notice of intent to render a decision with deadline and warning regarding potential expulsion for failure to cooperate.
- If no response by deadline, Committee meets and renders decision (amount due; censure/suspend/revoke membership; publication). Decision goes to President for approval; upon approval, Chair sends decision to parties and Administrator.
- Chair may extend timelines for good cause.

Procedures — Unethical/Unprofessional Conduct

- Member files written complaint with particulars and supporting documentation.
- Chair delivers complaint to respondent (10 days to respond).
- Chair delivers response to complainant (5 days to rebut).
- Chair facilitates information exchange; Committee may review data and offer options.
- If agreement reached, Chair summarizes and distributes to parties and Administrator.
- If no progress, Chair issues notice of intent to render decision with deadline and warning regarding potential expulsion for failure to cooperate.
- When convening to decide, President and Bylaws Chair also attend; Committee may censure/suspend/revoke membership and publish decision; prior complaints may be considered. Decision goes to President for approval; upon approval, Chair sends decision to parties and Administrator.
- Chair may extend timelines for good cause.

Appeal

Appeals must be received within ten (10) days from the transmission date of the Dispute Resolution Decision as indicated on the Transmittal Form. The notice of appeal must include all supporting declarations and documentation. The Chair shall immediately deliver copies to the President and Chair

of the Board. The Board will render a decision at the next scheduled or a special meeting. The Board's decision is final and not subject to further appeal.

Retention of Complaints

Upon resolution or disposition, the Chair forwards the file to the Administrator for retention, retains digital files for the Chair's term, and delivers them to the incoming Committee Chair as needed.

Conclusion

Failure to comply with the Association Bylaws, this Manual, or rulings of the Dispute Resolution Committee and/or Board of Directors constitutes grounds for suspension, expulsion, or other sanction. The Committee and/or Board may take necessary action to fulfill this policy, including granting extensions and reconsiderations.

8. Nominating Committee Charter

Policy approved by the Board of Directors June 3, 2023

Note: Dependent on a late September or October Annual Conference.

Nominating Chairperson

The President designates a Nominating Chair by July 1 each year. The Chair shall not be a candidate for Director, President, Vice President, or Secretary-Treasurer and works with the Administrator to oversee nominations and elections.

Nominations

Administrator collects nominations from membership by July 10; nominations due August 1st. Eligibility is verified and willingness to serve is confirmed. Eligible members submit willingness-to- serve statements and bios by August 15.

Eligibility

Only voting members (Active, Honorary, Retired) in good standing are eligible. A member must be in good standing for one (1) year (or admitted at the last Annual Conference). To run for President: at least three consecutive years in good standing and two years as an Officer or Director.

Ballots and Voting

Directors and Officers are elected by secret ballot, possibly electronic. No proxy or representation voting. Administrator, overseen by the Nominating Chair, provides a ballot and bio list by September 1 to voting members. Ballots must be received by September 10 at the principal office or other designated location.

All Board seats are filled in one combined vote. Candidates with the most votes fill seats in order until all seats are filled. Ties for the last seat trigger a run-off among tied candidates. Each voting member receives one ballot; ballots with two or more votes for the same candidate are void.

Counting and Reporting of Results

The Nominating Chair and Administrator act as election inspectors, open ballots or inspect electronic

results, and count ballots before the Annual Business Meeting. Results are reported during the Annual Business Meeting and recorded by nominee name. In the event of a tie for any elected position, a runoff election shall be conducted among the tied candidates in accordance with the Bylaws and election procedures adopted by the Board.

Term

Directors are elected to one (1) year terms. Officers and Directors serve from the close of the Annual Conference until the close of the succeeding Annual Conference.

Timeline

July 1 — Nominating Chair established.
July 10 — Solicitations to serve sent to membership (email). August 1 — Nominations due from membership.
August 15 — Willingness-to-serve forms and bios due from nominees.
September 1 — Ballots and bios sent to the membership.
September 10 — Ballots due from the membership.
Prior to the Annual Business Meeting — Ballots counted/verified. During the Annual Business Meeting — Results reported.

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Advertising Committee

Policy and Procedure

1. Purpose

The CALSPro Advertising Policy establishes guidelines for promoting member businesses and services through approved CALSPro channels. The purpose of this policy is to amplify member visibility through impactful and member-focused advertising that supports growth, innovation, and the shared values of CALSPro and the legal support industry.

2. Scope

This policy applies to all advertising distributed or displayed through CALSPro-managed platforms, including but not limited to:

2.1 The CALSPro website
2.2 The CALSPro newsletter
2.3 Official CALSPro social media accounts
2.4 The CALSPro Connect community platform

Advertising opportunities are available exclusively to Active, Supporting, Vendor, and Associate Members in good standing.

3. Policy

3.1 Maintain the professionalism and integrity of CALSPro and its members.
3.2 Reflect accurate and ethical business practices.
3.3 Be approved by the Advertising Committee or designated CALSPro representative before publication.
3.4 Comply with all applicable laws, regulations, and CALSPro guidelines.
3.5 Clearly identify the advertiser and maintain transparency in sponsorships or promotions.

4. Procedures

4.1 Submission: Members wishing to advertise must submit content in the format and by the deadline established by the Advertising Committee.
4.2 Review and Approval: The Committee or designated representative will review all submissions for compliance with CALSPro's standards and approve, request edits, or deny publication as appropriate.
4.3 Placement and Scheduling: Approved advertisements will be placed according to the current advertising schedule and published on designated platforms.
4.4 Payment: Advertising fees, if applicable, must be paid in full prior to publication.
4.5 Duration and Renewal: Advertising runs for the agreed-upon term; renewals require updated approval and payment.

5. Responsibilities

5.1 Advertising Committee: Oversees implementation of this policy, manages advertising schedules, and ensures compliance.
5.2 Committee Chair: Reviews and approves final content prior to publication.
5.3 CALSPro Board: Retains authority over final policy updates and fee structure.

6. Review and Revision

This policy shall be reviewed annually by the Advertising Committee and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Anti-Trust Compliance Committee

Policy and Procedure

1. Purpose

The CALSPro Anti-Trust Compliance Committee is established to ensure that the association operates in full compliance with the Decision and Order of the Federal Trade Commission (FTC) issued on April 3, 2014, and to maintain adherence to all applicable federal and state antitrust laws.

The purpose of this committee is to protect CALSPro, its members, and its leadership from engaging in, or appearing to engage in, any conduct that could violate antitrust regulations or the FTC Decision and Order. The committee ensures that CALSPro's policies, communications, and activities remain transparent, lawful, and consistent with the association's mission to promote professionalism and ethical business practices within the process serving and legal support industry.

2. Scope

This policy applies to all actions, communications, and operations of CALSPro, including those of its Board of Directors, committees, members, officers, and staff.

The Anti-Trust Compliance Committee shall consist of the following members:

2.1 The Vice President, who serves as Chair of the Committee.
2.2 Anti-Trust Compliance Officer.
2.3 CALSPro Central Office representative.
2.4 The Chair of the Membership Committee.
2.5 The Chair of the Continuing Education Committee.
2.6 The Chair of the Bylaws Committee.
2.7 Additional members as appointed by the Vice President, as deemed necessary.

This committee will collaborate with the Anti-Trust Compliance Officer and CALSPro Central Office to maintain active and ongoing compliance with the FTC Decision and Order for the duration of its term and as required by law.

3. Policy

3.1 Ensure continued compliance with the FTC Decision and Order issued April 3, 2014, which remains in effect for a period of twenty (20) years, with a compliance oversight period of five (5) years.
3.2 Review all CALSPro activities, communications, and publications to ensure that no actions, policies, or statements may be interpreted as anti-competitive or in violation of federal or state antitrust laws.
3.3 Coordinate with the Anti-Trust Compliance Officer to conduct regular reviews of association documents, meetings, and training materials.

3.4 Provide guidance to committees, officers, and members regarding compliance expectations and procedures.

3.5 Ensure that all members and leadership receive periodic education regarding antitrust laws and the FTC Decision and Order.

3.6 Maintain accurate records and documentation of compliance activities, training, and communications.

4. Procedures

4.1 Committee Oversight and Meetings: The Vice President (Chair) shall coordinate with the Anti-Trust Compliance Officer and the CALSPro Central Office to schedule meetings as necessary to review compliance activities and monitor association operations. The committee shall meet at least annually and additionally as needed if compliance concerns or potential violations are identified. Minutes shall be maintained for all committee meetings and stored in CALSPro's official records.

4.2 Review and Monitoring: The Anti-Trust Compliance Officer shall regularly monitor CALSPro's communications, events, and publications for potential compliance risks. The Central Office shall ensure that all necessary reports and documentation are submitted to the FTC or other governing bodies if required. The Committee shall review CALSPro's bylaws, policies, educational content, and membership communications to confirm that no anticompetitive language or activities are present.

4.3 Education and Communication: The Committee, in collaboration with the Continuing Education Committee, shall develop and provide antitrust compliance training for CALSPro members, officers, and staff. Educational materials shall include explanations of the FTC Decision and Order, prohibited conduct, and best practices for avoiding antitrust violations. The Anti-Trust Compliance Officer shall provide annual compliance reminders to the Board of Directors and Central Office staff.

4.4 Reporting: The Anti-Trust Compliance Officer shall prepare an annual compliance report for submission to the CALSPro Board of Directors, outlining the status of compliance activities, any findings, and corrective measures if needed. Any potential violations or issues identified shall be reported immediately to the CALSPro President and Board of Directors for review and action.

5. Responsibilities

5.1 Vice President (Committee Chair): Leads the committee and ensures all meetings and reports are conducted according to this policy. Appoints additional members as needed to support compliance oversight. Coordinates with the Compliance Officer and Central Office on all compliance matters.

5.2 Anti-Trust Compliance Officer (M: Monitors all CALSPro operations, communications, and publications for compliance. Advises the committee and Board of Directors on legal obligations and compliance strategies. Prepares annual and interim compliance reports.

5.3 CALSPro Central Office: Maintains records, reports, and documentation required for compliance with the FTC Decision and Order. Coordinates logistics, communications, and recordkeeping for committee meetings.

5.4 Committee Members: Participate in reviews, training, and compliance monitoring activities. Report any potential antitrust concerns to the Committee Chair or Compliance Officer.

5.5 CALSPro Board of Directors: Provides oversight and ensures organizational compliance with the FTC Decision and Order and applicable antitrust laws.

6 Review and Revision

This policy shall be reviewed annually by the Anti-Trust Compliance Committee Chair in collaboration with the Anti-Trust Compliance Officer and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Assault Advisor Committee

Policy and Procedure

1. Purpose

The CALSPro Assault Advisor position is established to monitor, document, and raise awareness of assaults and safety incidents involving process servers and members of the process serving and legal support community.

The purpose of this role is to collect data, promote safety, and provide education to CALSPro members by maintaining an accurate record of assault incidents and communicating trends, prevention strategies, and safety resources through reports and newsletter contributions.

2. Scope

This policy applies to all activities and responsibilities of the Assault Advisor, including:

2.1 Receiving and documenting reports of assaults or threats against process servers and legal support professionals.

2.2 Maintaining a secure database of reported incidents.

2.3 Identifying and analyzing trends in workplace safety and field incidents.

2.4 Submitting informational and educational articles for publication in the CALSPro Newsletter and other association communications.

2.5 Collaborating with law enforcement, industry professionals, and CALSPro committees to promote safety awareness and training initiatives.

2.6 Advising the CALSPro Board of Directors of significant incidents, trends, or policy recommendations related to safety and risk prevention.

3. Policy

3.1 Maintain a confidential and organized database of assault incidents involving process servers and legal support professionals.

3.2 Serve as the primary point of contact for CALSPro members reporting safety incidents or concerns.

3.3 Promote awareness and provide updates on safety issues through periodic reports and published articles.

3.4 Submit educational and safety-related articles to the CALSPro Newsletter at least once per

publication cycle.

3.5 Provide the Board of Directors with an annual summary of recorded incidents, patterns, and recommendations for prevention.

3.6 Support legislative or educational efforts that enhance safety protections for process servers and legal support professionals.

4. Procedures

4.1 Incident Reporting and Documentation: The Assault Advisor shall receive reports of assault or threats from members via official CALSPro communication channels. Each report shall include, when possible: date and location of the incident, description of the event, outcome or response actions, and any follow-up with law enforcement or safety authorities. The Advisor shall log each report into a secure and confidential database maintained under CALSPro's oversight.

4.2 Data Management and Confidentiality: All collected information shall be treated as confidential and stored securely. The Advisor shall redact personal or identifying details before any data is shared publicly. Access to the database shall be restricted to the Assault Advisor and designated CALSPro officers as authorized by the Board.

4.3 Newsletter and Member Communication: The Assault Advisor shall submit regular articles for the CALSPro Newsletter focusing on field safety practices, recent incidents and lessons learned (with anonymity preserved), and strategies for personal safety and risk management in process serving. Additional updates or alerts may be distributed through CALSPro's digital platforms as needed.

4.4 Board Reporting: The Assault Advisor shall present an annual written report to the Board of Directors summarizing the number and nature of reported incidents, emerging trends or regional concerns, and recommended safety or policy initiatives.

5. Responsibilities

5.1 Assault Advisor: Maintains the database of assault incidents and ensures data integrity. Serves as liaison for safety-related communications and awareness efforts. Provides timely reports and newsletter submissions. Ensures confidentiality and professionalism in handling sensitive incident information.

5.2 CALSPro Board of Directors: Reviews reports and recommendations from the Assault Advisor. Supports policy initiatives and education efforts related to safety and assault prevention.

5.3 CALSPro Committees (as applicable): Collaborate with the Assault Advisor to incorporate safety content into training, education, and legislative initiatives.

6. Review and Revision

This policy shall be reviewed annually by the Assault Advisor and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Bylaws Committee

Policy and Procedure

1. Purpose

The CALSPro Bylaws Committee is established to review, evaluate, and recommend amendments to the Association's Bylaws to ensure they remain accurate, consistent, and reflective of CALSPro's mission, values, and operational needs.

The committee is responsible for reviewing all proposed amendments for form, clarity, and consistency with existing Bylaws, and for ensuring members receive proper notice of proposed amendments prior to the Annual Meeting.

2. Scope

This policy applies to all Bylaws amendment proposals, reviews, recommendations, and communications conducted by the Bylaws Committee, including but not limited to:

2.1 Reviewing proposed amendments for accuracy, consistency, and compliance.
2.2 Coordinating with the Secretary-Treasurer, Board of Directors, and membership regarding amendment submissions and publication.
2.3 Preparing written reports and verbal presentations for the Annual Meeting.
2.4 Maintaining procedural continuity and guidance for future committee chairs.

3. Policy

3.1 Ensure all proposed amendments are submitted, reviewed, and published within the timelines established by the Association.
3.2 Evaluate each amendment for clarity, conflict, and consistency with existing provisions.
3.3 Confer with the author(s) of proposed amendments to confirm intent and ensure accurate publication.
3.4 Provide written and verbal recommendations at the Annual Meeting, presenting both pro and con perspectives on each proposal.
3.5 Maintain neutrality and objectivity in evaluating proposed changes.
3.6 Document and retain procedural guidance for continuity across committee terms.

4. Procedures

4.1 Amendment Submission Process: Proposed amendments must be submitted to the Secretary-Treasurer at least sixty (60) days prior to the Annual Meeting. Upon receipt, the Secretary-Treasurer shall forward one copy to the Bylaws Committee Chair within fifteen (15) days, but not less than forty-five (45) days prior to the Annual Meeting.
4.2 Publication Process: The Bylaws Committee shall review all proposals and return final recommendations to the Secretary-Treasurer for publication. The proposed amendments shall be published to the membership at least thirty (30) days prior to the Annual Meeting.
4.3 Amendment Review Process: The Committee shall review each proposed amendment for proper form and potential conflicts with other Bylaws. The Committee shall recommend necessary adjustments to ensure internal consistency and confer with the amendment's author to confirm the final version for publication.

4.4 Reporting and Presentation: The Chair shall prepare a written report for the Annual Meeting summarizing all proposals, with both supporting (pro) and opposing (con).

viewpoints. The Chair shall present all proposed amendments verbally to the membership during the Annual Conference.

4.5 Post-Conference Documentation: The Chair shall prepare a written article for the CALSPro newsletter summarizing adopted amendments and procedural highlights. At the end of the committee term, the Chairperson shall prepare a procedural guide and list of recommendations to assist the incoming Committee Chair.

5. Responsibilities

5.1 Chairperson: Oversees committee activities and ensures compliance with submission timelines. Reviews proposed amendments for form and consistency. Coordinates with the Secretary-Treasurer and amendment authors. Prepares and delivers the Annual Meeting report and presentation.

5.2 Committee Members: Review proposed amendments and provide feedback to the Chairperson. Assist in drafting recommendations and identifying inconsistencies. Support communication and publication of amendment information.

5.3 Secretary-Treasurer: Receives proposed amendments and coordinates distribution to the Committee Chair. Ensures timely publication of proposed amendments to the membership.

6. Review and Revision

This policy shall be reviewed annually by the Bylaws Committee and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Coalition to Improve Court Access (C.I.C.A.) Committee

Policy and Procedure

1. Purpose

The Coalition to Improving Court Access (C.I.C.A.) and CALSPro's collaborative partnership exist to protect and enhance fair and equal access within California's evolving electronic filing (eFiling) and digital court systems. This policy establishes the framework for joint advocacy and cooperation between CALSPro and C.I.C.A. to ensure uniform standards, fairness, transparency, and open access across the state's judicial landscape.

2. Scope

This policy applies to all advocacy, communication, and collaboration activities between CALSPro and C.I.C.A., including:

2.1 Legislative and regulatory initiatives involving electronic filing and digital court systems.

2.2 Coordination with judicial branches, technology vendors, and legal service providers.

2.3 Development of educational materials, position statements, and compliance resources.

2.4 Participation in public forums, panels, or stakeholder meetings representing the coalition.

3. Policy

3.1 Advocate for uniform statewide standards in eFiling and digital court access.

3.2 Promote fair competition and transparency among electronic filing service providers (EFSPs).

3.3 Encourage collaboration between courts, technology partners, and legal professionals to improve access and compliance.

3.4 Support legislation and policy changes that ensure the public's right to equal access to court records and filings.

3.5 Maintain professional integrity, neutrality, and transparency in all communications and advocacy efforts.

4. Procedures

4.1 Coordination: The C.I.C.A. Chair or CALSPro Legislative Committee Liaison shall coordinate meetings, updates, and strategy sessions with coalition members and relevant partners.

4.2 Communication: All official statements, press releases, and policy recommendations shall be reviewed and approved by both the CALSPro Legislative Committee and the C.I.C.A. leadership before publication or distribution.

4.3 Documentation: Records of meetings, correspondence, and legislative updates shall be maintained and reported to the CALSPro Board of Directors quarterly.

4.4 Collaboration: Joint initiatives such as training sessions, webinars, or legislative hearings shall be scheduled and promoted through CALSPro and C.I.C.A. communication channels.

5. Responsibilities

5.1 Maintain open and ongoing communication between C.I.C.A. and the CALSPro Legislative Committee.

5.2 Provide regular updates regarding coalition discussions, initiatives, and developments relevant to CALSPro's mission, membership, and legislative advocacy.

5.3 Serve as a conduit and liaison for collaboration — sharing ideas, identifying overlapping goals, and coordinating joint efforts where appropriate.

5.4 Contribute professional experience and association perspective to strengthen mutual understanding and partnership between both organizations.

5.5 Promote CALSPro's role as a collaborative partner in improving access to justice, maintaining due process, and upholding professional standards in the legal support industry.

6. Review and Revision

This policy shall be reviewed annually by the CALSPro Legislative Committee and C.I.C.A. leadership and submitted to the CALSPro Board of Directors for approval of any revisions or updates.

Forms Committee

Policy and Procedure

1. Purpose

The CALSPro Forms Committee is established to monitor and evaluate changes to industry-related forms as issued by the Judicial Council of California or other governing authorities that impact the legal support and process serving industry.

The purpose of this committee is to ensure CALSPro members are informed, compliant, and prepared for any form revisions or procedural updates affecting the execution and filing of legal documents throughout the state.

2. Scope

This policy applies to all activities related to the review, communication, and dissemination of form-related updates within CALSPro, including but not limited to:

2.1 Monitoring all official forms, including changes to Judicial Council forms that affect process serving, legal filings, and related legal support services.
2.2 Collaborating with the Legislative Committee to assess the impact of form updates on laws, rules, and court procedures.
2.3 Advising the CALSPro Board of Directors of form changes requiring further review or response.
2.4 Notifying CALSPro members of updates or revisions that influence day-to-day operations and compliance.
2.5 Maintaining a record of significant form revisions for historical and reference purposes.

3. Policy

3.1 Monitor Judicial Council publications and other official sources for form revisions.
3.2 Communicate relevant changes to the Legislative Committee for policy or procedural consideration.
3.3 Provide timely updates to the CALSPro Board of Directors and membership through official communication channels.
3.4 Recommend educational updates or training opportunities when major form changes affect business practices.
3.5 Maintain a neutral and factual stance in reporting and documenting form modifications.

4. Procedures

4.1 Monitoring: Committee members will routinely review the Judicial Council's website, court notices, and other authoritative sources for new or revised forms.
4.2 Notification: Upon identifying a form change, the committee shall notify the CALSPro Board of Directors and the Legislative Committee promptly.
4.3 Review and Collaboration: The committee will work with the Legislative Committee to

evaluate the impact of each change and determine if member guidance or advocacy is necessary.

4.4 Member Communication: Once reviewed, the committee will publish updates through CALSPro newsletters, the website, and CALSPro Connect to inform the membership.

4.5 Recordkeeping: The committee will maintain an archive of all relevant form changes, including summaries of revisions and effective dates, for future reference.

5. Responsibilities

5.1 Forms Committee Chair: Oversees the monitoring process and ensures timely communication with the Legislative Committee and CALSPro Board. Coordinates the publication of updates for members.

5.2 Committee Members: Review Judicial Council updates and court communications for changes affecting CALSPro members. Assist in drafting form summaries and notices for publication.

5.3 Legislative Committee: Collaborates with the Forms Committee to assess legislative or procedural implications of new or amended forms.

5.4 CALSPro Board: Provides oversight and ensures timely approval and distribution of official communications related to form updates.

6. Review and Revision

This policy shall be reviewed annually by the Forms Committee and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Historical Preservation Committee

Policy and Procedure

1. Purpose

The CALSPro Historical Preservation Committee is established to collect, preserve, and maintain the historical records, documents, and memorabilia that represent the legacy and growth of the California Association of Legal Support Professionals (CALSPro) and the process serving and legal support industry.

The purpose of this committee is to ensure that CALSPro's history, milestones, and achievements are accurately documented, archived, and shared with members, future leadership, and the public.

2. Scope

This policy applies to all activities related to the collection, preservation, display, and documentation of CALSPro's historical assets, including but not limited to:

2.1 Maintaining archives of significant association documents, meeting minutes, photographs, awards, publications, and memorabilia.

2.2 Collecting and cataloging items that reflect CALSPro's contributions to the process serving and legal support profession.

2.3 Preserving physical and digital records that highlight CALSPro's legislative achievements, leadership, and historical milestones.
2.4 Coordinating with the CALSPro Board of Directors, committees, and members to obtain and preserve relevant materials.
2.5 Planning and executing historical projects, such as the 50th Anniversary Historical Book and future commemorative events.

3. Policy

3.1 Serve as the custodian of CALSPro's historical records and memorabilia.
3.2 Ensure that materials are preserved in a safe, organized, and accessible manner—both in physical and digital formats.
3.3 Document and catalog contributions and milestones of CALSPro and its members.
3.4 Promote awareness of CALSPro's history through exhibits, publications, and anniversary projects.
3.5 Encourage member participation in contributing historical content, photos, and memorabilia.
3.6 Maintain an ongoing record of association activities, leadership transitions, and organizational achievements.

4. Procedures

4.1 Collection and Documentation: The committee shall collect historical materials from members, officers, and committees, including photographs, publications, newsletters, and significant documents. All collected items shall be cataloged with a brief description, date, and contributor information.
4.2 Preservation: Physical materials shall be stored in a secure, climate-controlled environment under the care of the CALSPro Central Office or another designated location approved by the Board. Digital files, including scanned images and electronic records, shall be backed up regularly and stored securely to prevent loss or damage.
4.3 Historical Projects and Exhibits: The committee may plan and produce special projects highlighting CALSPro's history, such as commemorative books, videos, or displays for annual conferences. The committee successfully produced the 50th Anniversary Historical Book in October 2018, serving as a model for future historical documentation and publications.
4.4 Collaboration and Communication: The committee shall coordinate with the Newsletter Committee and Website Committee to feature historical articles, photos, and stories in CALSPro publications and online platforms. The committee may also work with the Conference Committee to develop historical displays or presentations during major CALSPro events.
4.5 Recordkeeping: An updated inventory of all archived items shall be maintained and reviewed annually. Copies of all historical materials shall be cataloged and retained according to CALSPro's record retention policy.

5. Responsibilities

5.1 Committee Chair: Oversees all historical preservation activities and ensures compliance with this policy. Coordinates with other committees and the Board of Directors regarding historical content and displays. Leads special projects, such as commemorative publications or

anniversary celebrations.

5.2 Committee Members: Assist with collecting, cataloging, and maintaining historical materials. Support the creation of historical displays, exhibits, and publications. Encourage member participation in contributing historical content.

5.3 CALSPro Board of Directors: Provides oversight, budget authorization, and guidance for preservation and publication efforts. Approves major historical projects or commemorative initiatives.

5.4 CALSPro Central Office: Maintains and safeguards all physical and digital historical records in accordance with CALSPro policy.

6. Review and Revision

This policy shall be reviewed annually by the Historical Preservation Committee Chair and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Investment Committee

Policy and Procedure

1. Purpose

The CALSPro Investment Committee is established to provide oversight, analysis, and guidance regarding the association's investment portfolio and fiscal strategy.

The purpose of this committee is to protect, manage, and optimize CALSPro's financial assets through responsible investment decisions that align with the association's mission, budgetary goals, and long-term sustainability. The committee shall collaborate with the Secretary-Treasurer, Central Office, Budget Committee, and CALSPro President to ensure that investment actions and recommendations reflect sound fiscal management and transparency.

2. Scope

This policy applies to all investment-related activities and decisions undertaken by the Investment Committee on behalf of the association, including but not limited to:

2.1 Monitoring the performance of CALSPro's investment accounts and financial instruments.

2.2 Reviewing and analyzing market trends, economic indicators, and portfolio performance.

2.3 Providing recommendations to the CALSPro Board of Directors regarding investment strategy, diversification, and risk management.

2.4 Coordinating with the Secretary-Treasurer and Central Office to ensure accurate financial reporting and compliance with approved investment policies.

2.5 Convening meetings as required when market conditions trigger specific review actions.

3. Policy

The Investment Committee shall ensure that all investment decisions and recommendations are guided by the principles of prudence, accountability, and long-term financial stability.

The CALSPro Investment Policy establishes the following guideline:

If at any time the financial market corrects by 10% or more from any recent high point, this event shall automatically trigger a meeting of the CALSPro Investment Committee to review the situation and determine if any portfolio adjustments or protective actions are warranted.

3.1 Conduct investment reviews and meetings promptly when market fluctuations meet or exceed the 10% correction threshold.
3.2 Maintain regular communication with the Central Office to monitor portfolio activity and market performance.
3.3 Evaluate the association's investment allocations, ensuring proper diversification and alignment with the organization's financial goals.
3.4 Prepare and present reports and recommendations to the Board of Directors following each meeting or significant market event.
3.5 Ensure compliance with CALSPro's approved fiscal policies, state and federal reporting requirements, and ethical standards of financial stewardship.

4. Procedures

4.1 Monitoring and Communication: The Central Office shall provide periodic updates to the Investment Committee regarding portfolio performance and significant financial market changes. The Secretary-Treasurer shall ensure that account statements and financial summaries are distributed to committee members on a scheduled basis.
4.2 Trigger Event Response: Upon notification that the market has experienced a 10% correction or greater, the Investment Committee Chair shall convene a meeting of the committee within a reasonable timeframe. During the meeting, members will review market conditions, assess potential impacts on CALSPro's investments, and determine if reallocation or adjustment is necessary. Recommendations will be drafted and submitted to the Board of Directors for consideration and approval.
4.3 Coordination and Reporting: The Investment Committee shall work collaboratively with the Budget Committee, Secretary-Treasurer, Central Office, and President to ensure fiscal alignment and communication of any proposed actions. Following each meeting or review, the committee shall submit a written report summarizing findings, analysis, and recommendations to the Board of Directors.
4.4 Recordkeeping: The Central Office shall maintain records of all investment-related correspondence, meeting minutes, reports, and recommendations.

5. Responsibilities

5.1 Investment Committee Chair: Coordinates meetings and ensures that the committee responds promptly to market triggers. Works closely with the Secretary-Treasurer and Central Office to obtain up-to-date financial data. Oversees the preparation of reports and recommendations for the Board of Directors.
5.2 Committee Members: Participate in market reviews and financial discussions. Evaluate portfolio performance and assist in formulating recommendations. Ensure transparency,

accountability, and confidentiality in all financial matters.

5.3 Secretary-Treasurer: Provides financial summaries and investment data to the committee. Serves as a liaison between the committee, Budget Committee, and Central Office.

5.4 Central Office: Keeps the Investment Committee apprised of financial activity and portfolio changes. Ensures timely notification to allow sufficient time for the committee to meet.

6. Review and Revision

This policy shall be reviewed annually by the Investment Committee Chair and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Newsletter Committee

Policy and Procedure

1. Purpose

The CALSPro Newsletter Committee is established to publish and distribute the CALSPro Newsletter as an official online communication tool of the Association.

The purpose of the committee is to inform, educate, and engage CALSPro members by providing timely updates on association business, legislative activity, educational opportunities, and industry developments related to the process serving and legal support profession through digital publication and online access.

2. Scope

This policy applies to all activities related to the creation, publication, and online distribution of the CALSPro Newsletter, including editorial planning, content management, and coordination with other committees.

The newsletter shall be published a minimum of four (4) times per year and made available online through CALSPro's website, email, and member communication platforms.

Each online issue shall include, at minimum, the following sections and features:

2.1 President's Message

2.2 Legislative/Capitol Report

2.3 Articles for Each Cornerstone: Legislative, Membership, Education, and Conference

2.4 Calendar of Activities: Dates and locations for the balance of the year

2.5 Know Your Bylaws: (Bylaws Chair contribution)

2.6 Educational Article: (Education Chair contribution)

2.7 Membership Shorts: (Membership Chair contribution)

2.8 Permanent List of Officers

2.9 Permanent List of Directors

2.10 Permanent List of Committee Chairs

2.11 List of New Members

2.12 Capsulated Items: Highlights from the last Board of Directors meeting

2.13 Advertisements

3. Policy

3.1 Publish and distribute the newsletter electronically on a quarterly basis.
3.2 Ensure that all required content elements are included in each online edition.
3.3 Maintain editorial standards reflecting CALSPro's mission, professionalism, and neutrality.
3.4 Coordinate with other committees and officers for accurate and current content.
3.5 Ensure all material submitted for publication is reviewed for accuracy and appropriateness.
3.6 Submit any controversial or potentially defamatory content to the President for review prior to online publication.

4. Procedures

4.1 Editorial Planning and Content: The Editor or Committee Chair will develop a publishing schedule at the beginning of each calendar year to ensure timely online releases. Members of the Board of Directors may be assigned specific newsletter issues to which they are expected to contribute an article. Committee Chairs and Officers shall submit written updates and articles according to the editorial schedule. All content shall be reviewed for grammar, formatting, and consistency prior to online publication.
4.2 Content Review: If any article, letter, or submission is deemed controversial or may involve what could be construed as a personal attack on a person or group, the Editor or management office must submit the item to the President for review and approval before publication.
4.3 Design and Online Publication: The Newsletter Committee shall coordinate layout, digital design, and online publication with the CALSPro management office. Each issue shall be published and accessible online through CALSPro's official website, and distributed electronically via email to all members. Archived editions shall be maintained for public or member access on the CALSPro website.
4.4 Advertising and Announcements: Advertisements from members or approved vendors may be included in each online newsletter consistent with CALSPro's advertising policies. All advertising must comply with CALSPro standards and be approved by the Committee Chair or President before publication.
4.5 Distribution: The online newsletter shall be distributed electronically to all CALSPro members in good standing and archived for future reference on CALSPro's digital platforms.

5. Responsibilities

5.1 Newsletter Committee Chair / Editor: Oversees content development, editing, layout, and publication. Coordinates article submissions with Committee Chairs, Officers, and Board Members. Ensures compliance with publication schedules and content standards. Submits questionable or controversial material to the President for review.
5.2 Committee Members: Assist with content collection, article editing, and digital formatting. Contribute ideas for online features and recurring content.
5.3 President: Reviews and approves any material flagged by the Editor or management office as controversial or sensitive. Provides an official message for each online issue.
5.4 Board of Directors: Members contribute articles assigned and support communication efforts by promoting newsletter content among members.

6. Review and Revision

This policy shall be reviewed annually by the Newsletter Committee Chair and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Photocopy Subcommittee

Policy and Procedure

1. Purpose

The CALSPro Photocopy Subcommittee operates under the Legislative Committee and is established to protect, promote, and enhance the interests and needs of members engaged in the process serving and legal photocopy profession.

The purpose of this subcommittee is to monitor, advocate, and educate on issues, legislation, and regulations affecting photocopying services in the legal support and process serving industry.

The subcommittee is committed to protecting and advancing the legal document and evidence procurement process in accordance with the California Code of Civil Procedure and the Evidence Code, and to representing professional photocopier service providers as defined under California Business and Professions Code Sections 22450–22463. This includes promoting lawful, ethical, and standardized practices that ensure accuracy, privacy, and accountability in the handling and reproduction of legal documents.

2. Scope

2.1 This policy applies to all activities conducted by the Photocopy Subcommittee under the oversight of the Legislative Committee, including but not limited to:

2.2 Monitoring legislation, regulations, and court rules that impact photocopy services within the legal and process serving community.

2.3 Reviewing and recommending policy positions or legislative responses to the Legislative Committee and CALSPro Board.

2.4 Coordinating educational programs, articles, or materials to inform members about photocopy industry developments and compliance requirements.

2.5 Engaging with external stakeholders, such as government agencies, professional associations, and industry partners, to advocate for fair and consistent photocopy practices.

2.6 Providing guidance and updates to CALSPro members on issues such as privacy, cost recovery, and document handling standards.

3. Policy

3.1 Ongoing advocacy and protection of the legal photocopy profession’s interests.

3.2 Consistent communication with the Legislative Committee regarding developments in photocopy-related legislation.

3.3 Collaboration with process servers and other legal support professionals to ensure alignment of practices and industry standards.

3.4 Support for education, compliance, and professionalism across the photocopy and process serving industries.

3.5 Representation of CALSPro's members in legislative, regulatory, and industry discussions affecting photocopy operations.

4. Procedures

4.1 Legislative Monitoring: The subcommittee will monitor state and local legislative proposals, regulations, and judicial rules that may impact the photocopy profession. Proposed actions or responses will be submitted to the Legislative Committee for review and recommendation to the CALSPro Board of Directors.

4.2 Coordination with Legislative Committee: The subcommittee reports directly to the Legislative Committee Chair, providing updates, recommendations, and summaries of relevant issues. Joint meetings may be scheduled to address overlapping topics or legislative concerns affecting both photocopy and process serving sectors.

4.3 Education and Communication: The subcommittee will prepare periodic updates, articles, or training materials for publication through CALSPro's communication channels, including the newsletter, website, and CALSPro Connect. Educational presentations may be developed for CALSPro conferences or webinars to promote best practices and compliance.

4.4 Industry Advocacy: The subcommittee may represent CALSPro in discussions or coalitions addressing statewide issues related to the photocopy profession. Any official position or statement must receive prior approval from the Legislative Committee Chair and the CALSPro Board of Directors.

4.5 Reporting: The subcommittee will submit written reports summarizing its activities, legislative monitoring, and recommendations to the Legislative Committee and CALSPro Board as requested or at least annually.

5. Responsibilities

5.1 Subcommittee Chair: Oversees all Photocopy Subcommittee activities. Coordinates with the Legislative Committee Chair and ensures timely communication of updates. Leads preparation of reports, publications, and educational materials.

5.2 Subcommittee Members: Review legislation and regulatory developments affecting the photocopy profession. Assist in drafting recommendations, position statements, and outreach efforts. Contribute to member education and awareness initiatives.

5.3 Legislative Committee Chair: Provides oversight, support, and ensures alignment between the Photocopy Subcommittee and CALSPro's legislative priorities.

6. Review and Revision

This policy shall be reviewed annually by the Photocopy Subcommittee Chair and submitted to the Legislative Committee for approval of any updates or revisions before presentation to the CALSPro Board of Directors.

Bert Rosenthal Memorial Award Committee

Policy and Procedure

1. Purpose

The Bert Rosenthal Memorial Award Committee is established to honor individuals who have made outstanding contributions to CALSPro and the process serving and legal support profession.

The purpose of this committee is to uphold the integrity and tradition of the Bert Rosenthal Memorial Award by selecting recipients who exemplify professionalism, leadership, and dedication to the advancement of the process serving and legal support industry.

2. Scope

This policy applies to all activities related to the nomination, evaluation, and selection of recipients for the Bert Rosenthal Memorial Award. The Committee is comprised of:

2.1 Past recipients of the Bert Rosenthal Memorial Award,
2.2 The current CALSPro President, and
2.3 Past Presidents of CALSPro who are members in good standing.

The Committee is responsible for reviewing nominations, evaluating qualifications, and selecting one recipient annually according to the established award criteria and committee rules.

3. Policy

3.1 Operate independently from the CALSPro Board of Directors in its selection process.
3.2 Review all nominations submitted according to the official criteria established by CALSPro.
3.3 Evaluate nominees based on their service, leadership, and contributions to CALSPro and the process serving and legal support community.
3.4 Maintain confidentiality regarding all deliberations and voting results.
3.5 Ensure that the award is presented annually at the CALSPro Annual Conference, unless the committee determines no qualified candidate meets the criteria for that year.

4. Procedures

4.1 Nomination Process: Nominations may be submitted by any CALSPro member in good standing according to the established deadline. All nominations must include supporting information outlining the nominee's achievements, contributions, and service to the association and the process serving and legal support profession.
4.2 Review and Selection: The Committee Chair shall distribute nominations to committee members for review. Committee members will evaluate nominees based on established criteria and provide input to the Chair. The final selection shall be determined by a majority vote of the committee members.
4.3 Confidentiality: All deliberations, discussions, and voting records shall remain confidential. The names of nominees, other than the selected recipient, shall not be disclosed publicly.
4.4 Award Presentation: The selected recipient shall be recognized during the CALSPro Annual Conference. The Committee Chair or designee shall prepare remarks or a presentation summarizing the recipient's contributions and achievements to the process serving and legal support industry.

4.5 Recordkeeping: The Committee Chair shall maintain records of past recipients, nomination forms, and selection notes in accordance with CALSPro record retention guidelines.

5. Responsibilities

5.1 Committee Chair: Coordinates the nomination, review, and voting process. Communicates with the CALSPro President regarding presentation arrangements. Prepares an annual summary report for inclusion in the conference proceedings.

5.2 Committee Members: Review all nominations objectively. Participate in discussions and voting according to committee rules. Maintain confidentiality regarding all committee proceedings.

5.3 CALSPro President: Serves as an active member of the committee. Supports coordination of the award presentation at the Annual Conference.

6. Review and Revision

This policy shall be reviewed annually by the Bert Rosenthal Memorial Award Committee Chair and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Steering Committee (as needed)

Policy and Procedure

1. Purpose

The CALSPro Steering Committee (as needed) is established to serve as an advisory body to the President and to undertake special projects or assignments at the direction of the President or the Board of Directors.

The purpose of this committee is to provide strategic input, evaluation, and recommendations that support CALSPro's goals, strengthen leadership decision-making, and ensure continuity of operations on special initiatives or organizational matters.

2. Scope

This policy applies to all activities and assignments undertaken by the Steering Committee (as needed) at the request of the President or the Board of Directors, including but not limited to:

2.1 Advising the President on matters of policy, planning, and association priorities.

2.2 Undertaking special projects or studies as assigned by the President or the Board.

2.3 Coordinating with relevant committees to ensure consistency and alignment with CALSPro's mission and objectives.

2.4 Preparing reports and recommendations for presentation to the Board or membership.

2.5 Providing procedural continuity and guidance to future committee leadership.

3. Policy

3.1 Provide informed, unbiased advice to support executive and strategic decision-making.
3.2 Conduct research, analysis, or special assignments as directed by the President or Board.
3.3 Prepare written reports summarizing findings, recommendations, and project outcomes.
3.4 Ensure transparency, accountability, and collaboration in all committee activities.
3.5 Maintain accurate documentation of committee actions, projects, and recommendations for future reference.

4. Procedures

4.1 Assignment and Approval: The President or the Board of Directors shall assign special projects to the Steering Committee (as needed). The committee shall only undertake assignments that have been formally approved by the President.
4.2 Advisory Function: The committee shall provide guidance and recommendations to the President on issues affecting CALSPro's operations, goals, or strategic direction.
4.3 Reporting: A written Steering Committee Report shall be prepared and presented to the Board of Directors for each project completed. A separate written report shall also be prepared for presentation at the Annual Conference, summarizing committee activities, findings, and recommendations.
4.4 End-of-Year Summary: At the conclusion of each year, the Chair shall prepare a list of procedures, insights, and helpful recommendations to assist the next incoming Chair in maintaining committee continuity.

5. Responsibilities

5.1 Committee Chair: Leads and coordinates all committee activities. Communicates directly with the President regarding assignments, updates, and recommendations. Prepares written reports for both the Board of Directors and the Annual Conference.
5.2 Committee Members: Participate in assigned projects and provide feedback or analysis as needed. Assist in drafting reports and ensuring project objectives are met. Contribute to the year-end summary and knowledge transfer process.
5.3 President: Assigns projects or requests input from the Steering Committee (as needed). Reviews and approves recommendations or reports before presentation to the Board or membership.

6. Review and Revision

This policy shall be reviewed annually by the Steering Committee Chair and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Strategic Planning Committee

Policy and Procedure

1. Purpose

The CALSPro Strategic Planning Committee is established to evaluate, anticipate, and enhance the evolving needs of the association's membership.

The purpose of this committee is to build a shared understanding of CALSPro's organizational focus, develop long-term and short-term goals, and implement strategies that guide CALSPro's direction, growth, and stability.

This committee is responsible for conducting member surveys, analyzing industry trends, identifying future opportunities and risks, and developing a unified strategic plan that supports the mission and vision of CALSPro.

2. Scope

This policy applies to all strategic planning activities conducted or coordinated by CALSPro, including but not limited to:

2.1 Membership needs assessments
2.2 Annual planning sessions
2.3 Long-range strategic plan development
2.4 Cross-committee goal alignment
2.5 Evaluation of association programs, events, and member resources
2.6 Recommendations for organizational improvements and future initiatives

The Strategic Planning Committee shall collaborate with the Board of Directors, committee chairs, and the Central Office to ensure all strategic initiatives align with CALSPro's mission and objectives.

3. Policy

To maintain a forward-looking and member-driven association, the Strategic Planning Committee shall:

3.1 Conduct member needs surveys periodically.
3.2 Establish and prioritize organizational goals.
3.3 Develop and maintain a multi-year strategic plan.
3.4 Facilitate unified goal-setting across committees.
3.5 Provide guidance and recommendations to the Board.

All recommendations and proposed strategic initiatives shall be reviewed by the Board of Directors for approval.

4. Procedures

4.1 Strategic Assessment and Data Collection:
4.2 The committee shall gather data through member surveys, feedback, benchmarking, and trend analysis.
4.3 Identify primary strategic themes, create measurable goals, and present to the Board.
4.4 Draft a plan outlining vision, goals, KPIs, timelines, and responsibilities.
4.5 Coordinate with all committees to ensure shared understanding and alignment.

5. Responsibilities

5.1 Strategic Planning Committee:

5.2 Conducts surveys, research, and strategic plan development.
5.3 Committee Chair:
5.4 Leads sessions and oversees methodology.
5.5 Committee Members:
5.6 Participate in analysis and drafting.
5.7 Board of Directors:
5.8 Approves plans and provides oversight.

6. Review and Revision

This policy shall be reviewed annually by the Committee and submitted for Board approval.

Technology Committee

Policy and Procedure

1. Purpose

The CALSPro Technology Committee is established to increase member awareness and adoption of emerging technologies within the legal support industry. The committee's primary objective is to research, evaluate, and communicate technology trends, tools, and best practices that enhance operational efficiency, compliance, and service delivery for CALSPro members.

2. Scope

This policy applies to all technology-related initiatives, programs, and communications led or managed by the Technology Committee, including but not limited to:

2.1 Identifying and sharing technology updates relevant to process serving and legal support and Process serving operations.
2.2 Evaluating software, applications, and tools that impact industry practices.
2.3 Coordinating educational content, webinars, or demonstrations that promote technology awareness.
2.4 Supporting CALSPro members with information on system integration, automation, and data security.
2.5 Collaborating with other CALSPro committees to align technology initiatives with overall organizational goals.

3. Policy

3.1 Monitor and report on technological developments that affect the legal support community.
3.2 Provide recommendations to the CALSPro Board of Directors on emerging tools, best practices, and industry standards.
3.3 Promote technology-driven efficiency and compliance through education and advocacy.
3.4 Maintain vendor neutrality and transparency when evaluating or recommending technology solutions.
3.5 Ensure that all technology initiatives align with CALSPro's commitment to integrity, fairness, and member value.

4. Procedures

4.1 Research & Analysis: The committee will regularly review industry publications, vendor updates, and legislative changes impacting technology use within the legal support field.

4.2 Communication: Technology updates will be shared through CALSPro's official communication channels, including newsletters, the website, CALSPro Connect, and social media.

4.3 Education & Training: The committee will organize workshops, webinars, or technology roundtables to help members understand and implement new tools effectively.

4.4 Vendor Relations: When appropriate, the committee may invite technology vendors or experts to present unbiased educational content that benefits members.

4.5 Reporting: Summaries of activities, findings, and recommendations will be submitted to the CALSPro Board of Directors for review and feedback.

5. Responsibilities

5.1 Technology Committee Chair: Oversees committee operations, meeting agendas, and strategic planning. Ensures initiatives align with CALSPro's goals and policies. Coordinates with other committees for cross-functional technology integration.

5.2 Committee Members: Research and evaluate technology trends and solutions. Contribute to educational content, recommendations, and presentations. Assist in gathering feedback from members regarding technology needs and adoption barriers.

5.3 CALSPro Board: Provides oversight, approves technology-related initiatives, and ensures budgetary alignment.

6. Review and Revision

This policy shall be reviewed annually by the Technology Committee and submitted to the CALSPro Board of Directors for approval of any revisions or updates.

Membership Committee

Policy and Procedure

1. Purpose

The CALSPro Membership Committee is established to promote, maintain, and grow membership within the California Association of Legal Support Professionals (CALSPro). The committee serves as the primary body responsible for recruitment, retention, and engagement of members, ensuring the continued vitality and diversity of the organization.

The purpose of the Membership Committee is to develop strategies that encourage membership growth, enhance member satisfaction, and strengthen the association's connection with professionals in the legal support industry through outreach, communication, and recognition programs.

2. Scope

This policy applies to all activities and functions of the Membership Committee, including but not limited to:

2.1 Recruiting new members from across the legal support, process serving, and affiliated professional communities.
2.2 Developing and implementing member engagement programs.
2.3 Managing membership data, applications, renewals, and classification categories.
2.4 Communicating the benefits of membership through promotional materials, events, and outreach.
2.5 Encouraging active participation in CALSPro events, training programs, and committees.
2.6 Recommending improvements to membership benefits and onboarding processes.
2.7 Coordinating with other CALSPro committees to ensure alignment and mutual support of association objectives.

3. Policy

The Membership Committee shall:

3.1 Promote awareness of CALSPro's mission, values, and member benefits to potential and current members.
3.2 Maintain accurate membership records and ensure timely processing of new applications and renewals in cooperation with the CALSPro office or administrative staff.
3.3 Develop and recommend strategies for membership retention, re-engagement of lapsed members, and recruitment of new industry professionals.

3.4 Encourage diversity, equity, and inclusivity in the membership base to reflect the broad range of professionals in the field.
3.5 Provide regular updates and reports to the Board of Directors, including membership statistics, outreach outcomes, and strategic recommendations.
3.6 Recognize and celebrate member achievements and milestones through CALSPro communications and events.
3.7 Collaborate with the Marketing, Legislative, and Conference Committees to promote CALSPro at industry events and professional gatherings.

4. Procedures

4.1 Membership Applications and Renewals:
The committee shall oversee the review and approval process for new member applications, ensuring all submissions meet the eligibility criteria established in CALSPro's bylaws. Renewal notices shall be distributed in accordance with the association's annual schedule, and follow-up communication shall be made to encourage timely renewals.
4.2 Member Outreach and Engagement:
The committee shall develop outreach campaigns to engage potential members through

targeted communication, social media presence, industry conferences, and referral programs. Committee members may participate in events to represent CALSPro and share membership benefits directly with professionals.

4.3 Data Management and Reporting:
All membership data shall be securely maintained and regularly updated. Confidentiality shall be observed at all times. The committee shall provide quarterly reports to the Board, including membership counts, retention rates, and new member metrics.

4.4 Member Recognition and Feedback:
The committee shall recommend recognition programs (e.g., Member Spotlights, Longevity Awards) and periodically collect member feedback through surveys or interviews to identify opportunities for improvement in membership experience.

4.5 Coordination and Communication:
The Membership Chair shall maintain open communication with the CALSPro Board of Directors, Administrative Office, and other committees. Meeting minutes and action items shall be recorded, and progress reports shall be presented during Board meetings.

5. Responsibilities

5.1 Membership Committee Chair:
Leads the committee, sets meeting agendas, assigns responsibilities, and ensures timely completion of goals. Acts as liaison between the committee and the Board of Directors.

5.2 Committee Members:
Actively participate in recruitment, outreach, and engagement efforts; contribute to promotional content; and assist in maintaining accurate member data and contact with prospective members. Support the committee by managing membership databases, processing applications and renewals, and providing logistical support for outreach and communication efforts.

5.3 Board of Directors:
Oversees and approves membership policies, strategies, and recommendations presented by the committee. Supports initiatives to grow and retain membership.

6. Review and Revision

This policy shall be reviewed annually by the Membership Committee and submitted to the CALSPro Board of Directors for approval of any revisions or updates.

Conference Committee

Policy and Procedure

1. Purpose

The CALSPro Conference/Sponsorship Committee is established to promote, manage, and coordinate sponsorship opportunities available through CALSPro educational programs, events, and conferences.

The purpose of this committee is to enhance member engagement, vendor visibility, and financial support for CALSPro initiatives through transparent and mutually beneficial sponsorship programs. These opportunities allow sponsors to support continuing education, networking events, and the growth of the process serving and legal support profession.

2. Scope

This policy applies to all sponsorship activities coordinated or approved by CALSPro, including but not limited to:

2.1 CCPS (Certified California Process Server) Class Sponsorships
2.2 Conference Sponsorships
2.3 Special Event Sponsorships
2.4 Digital and Advertising Sponsorship Packages

The Conference/Sponsorship Committee shall work in collaboration with the Advertising Chair, Education Committee, Conference Committee, and Central Office to coordinate sponsor participation, rates, and recognition benefits.

3. Policy

CALSPro offers sponsorship opportunities for Vendor Members to support CCPS training classes. Sponsorship packages include the following benefits and conditions:

3.1 Sponsorship rates shall be determined annually by the Conference/Sponsorship Committee and approved by the Board of Directors.
3.2 Current options per class or for a full calendar year.
3.3 Sponsor's logo displayed on all CCPS class announcements.
3.4 Sponsor's logo featured on the title page of the CCPS PowerPoint presentation.
3.5 Verbal acknowledgment of the sponsor during each CCPS class session.
3.6 Sponsors to provide promotional materials to be distributed to attendees.
3.7 Access to the list of class attendees following each sponsored event.
3.8 Conference sponsorships are available to Vendor Members and Associate Members.
3.9 Sponsorship levels, benefits, and pricing are determined annually by the Conference Committee.
3.10 Sponsorship benefits may include but are not limited to: logo placement on conference materials and signage, acknowledgment during sessions, booth or exhibit opportunities, and digital recognition on CALSPro's website and social media channels.

4. Procedures

4.1 Rate Determination and Approval: The Conference/Sponsorship Committee, in coordination with the Advertising Chair and Central Office, shall review sponsorship pricing annually. Proposed rates and benefits must be approved by the CALSPro Board of Directors before implementation.

4.2 Sponsor Outreach: The Advertising Chair is responsible for contacting vendor members and prospective sponsors throughout the year to offer sponsorship opportunities and advertising options. The Central Office shall maintain and distribute official sponsorship materials, including rate sheets and application forms. Sponsors shall submit all required information (logos, artwork, payment, and promotional content) to the Central Office within specified deadlines.

4.3 Recognition and Delivery: The committee shall ensure sponsors receive full recognition according to their sponsorship level, including digital acknowledgment, signage, and verbal mentions during events. All promotional materials must be reviewed and approved by the Conference/Sponsorship Committee or Central Office before distribution.

4.4 Post-Event Reporting: Following each CCPS class or conference, the Conference/Sponsorship Committee shall confirm that all sponsor obligations were fulfilled and benefits delivered. The Central Office shall provide sponsors with a summary of their exposure and a list of attendees, if applicable. Sponsors shall receive appreciation letters or certificates of recognition following major events.

5. Responsibilities

5.1 Conference/Sponsorship Committee: Establishes sponsorship packages, rates, and policies. Coordinates sponsor engagement with other committees. Ensures sponsor recognition and benefit fulfillment.

5.2 Advertising Chair: Leads outreach efforts to secure sponsors throughout the year. Promotes advertising and sponsorship opportunities to members and vendors. Collaborates with the Central Office to manage sponsor relations.

5.3 Central Office: Maintains sponsorship records, rate sheets, and contracts. Handles sponsor invoicing, payments, and logistical coordination. Publishes sponsor logos and content in official communications.

5.4 Education Committee: Coordinates with sponsors for CCPS class participation and ensures recognition at each event.

5.5 Conference Committee: Coordinates sponsor benefits, signage, and acknowledgments during conferences.

5.6 Board of Directors: Reviews and approves sponsorship rates, policies, and major agreements.

6. Review and Revision

This policy shall be reviewed annually by the Conference/Sponsorship Committee and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Website Committee

Policy and Procedure

1. Purpose

The CALSPro Website Committee is established to develop and maintain a current, comprehensive, interactive, and value-added website that serves both the membership and the legal support, process serving, and photocopier community.

The purpose of this committee is to ensure the CALSPro website functions as an informative, accessible, and dynamic communication platform that promotes CALSPro's mission, supports member engagement, and reflects professionalism across the legal industry.

2. Scope

This policy applies to all activities related to the design, maintenance, content management, and functionality of the official CALSPro website, including but not limited to:

2.1 Managing and updating web content, graphics, and announcements.
2.2 Ensuring accuracy and timeliness of information published on the site.
2.3 Coordinating updates related to events, training, membership, and legislative initiatives.
2.4 Overseeing integration with CALSPro Connect, member portals, and social media links.
2.5 Working with vendors, developers, or designers on enhancements or technical issues.
2.6 Ensuring compliance with accessibility standards and CALSPro's branding guidelines.

3. Policy

3.1 Provides accurate, relevant, and up-to-date information for members and the public.
3.2 Reflects the professionalism, values, and objectives of CALSPro.
3.3 Enhances user experience through intuitive design and accessible navigation.
3.4 Promotes member benefits, association initiatives, and industry education.
3.5 Maintains compliance with privacy, accessibility, and data protection standards.
3.6 Encourages collaboration between committees to ensure consistent and unified communication.

4. Procedures

4.1 Content Management: Committee members will review and update content regularly to ensure accuracy and relevance. All new pages, announcements, and edits must be approved by the Website Committee Chair prior to publication.
4.2 Technical Maintenance: The committee will coordinate with CALSPro's web host, developer, or IT consultant to maintain site security, performance, and reliability. Backups and software updates shall be conducted routinely.
4.3 Design and Functionality: Periodic evaluations will be conducted to identify opportunities for improvement in design, layout, and user experience. Recommendations for new features or integrations shall be submitted to the CALSPro Board of Directors for approval.

4.4 Communication and Coordination: The committee shall collaborate with the Social Media, Advertising, and Technology Committees to ensure content consistency across all CALSPro platforms. Members may submit website updates or requests to the committee through an established submission process.

4.5 Monitoring: Analytics will be reviewed quarterly to assess traffic, engagement, and content performance, with reports presented to the CALSPro Board of Directors.

5. Responsibilities

5.1 Website Committee Chair: Oversees site management, approvals, and strategic development. Coordinates committee meetings and ensures alignment with CALSPro's goals. Liaises with developers, designers, and other committees as needed.

5.2 Committee Members: Contribute content updates, verify information accuracy, and recommend improvements. Ensure all posted material adheres to CALSPro's standards and policies.

5.3 CALSPro Board: Provides oversight, budget authorization, and final approval for major updates or redesigns.

6. Review and Revision

This policy shall be reviewed annually by the Website Committee and submitted to the CALSPro Board of Directors for approval of any updates or revisions.

Connect Community Committee

Policy and Procedure

1. Purpose

The CALSPro Connect Community Platform is established to support collaboration, communication, professional development, and digital engagement for CALSPro members. The platform provides opportunities for networking, education, recruitment, industry outreach, social media engagement, and collaboration among process servers, legal professionals, and industry leaders.

This policy defines the framework for the operation, participation, management, and digital communications of the CALSPro Connect Community to ensure it remains a secure, inclusive, professional, and value-driven community for all members. The Connect Community shall serve as the primary governing body for CALSPro's digital engagement, social media presence, and online community initiatives.

2. Scope

2.1 Job recruitment fairs

2.2 Interactive roundtables

2.3 Workshops and training sessions

2.4 Educational media, vlogs, blogs, and podcasts

2.5 Digital billboards and announcements
2.6 Member networking and collaboration initiatives
2.7 Official CALSPro social media accounts and platforms, including Facebook, LinkedIn, X (Twitter), Instagram, TikTok, YouTube, and future platforms approved by the CALSPro Board of Directors
2.8 Legislative updates, event promotions, member spotlights, educational campaigns, and public awareness initiatives

Participation is open to Active, Vendor, Supporting, and Associate Members in good standing.

3. Policy

3.1 Providing an inclusive, professional, and respectful environment for member engagement, networking, and collaboration.
3.2 Promoting education, mentorship, professional standards, and shared growth within the legal support community.
3.3 Encouraging ethical communication, professionalism, and positive public representation across all digital and social media channels.
3.4 Supporting career development, recruitment, industry partnerships, and member engagement opportunities.
3.5 Managing and enhancing CALSPro's digital presence through coordinated social media outreach and community engagement initiatives.
3.6 Ensuring all digital communications and social media content reflect the mission, vision, values, and objectives of CALSPro.
3.7 Providing accurate, educational, legislative, and industry-relevant information to members and the public.

4. Procedures

4.1 Content Development - Educational, promotional, and social media materials, including vlogs, blogs, event posts, legislative updates, videos, and digital campaigns, shall be reviewed and approved by the CALSPro Connect Committee prior to publication.
4.2 Event Coordination - Job fairs, roundtables, workshops, webinars, and digital engagement initiatives will be scheduled by the Committee in coordination with the CALSPro Board of Directors or relevant committees.
4.3 Member Participation - Members may register, participate, or submit content through approved CALSPro Connect channels. Participation must comply with CALSPro community standards and professional conduct expectations.
4.4 Digital Billboards and Announcements - All advertisements, promotional materials, sponsorship content, and announcements must be pre-approved and relevant to CALSPro's mission, educational goals, and member interests.
4.5 Monitoring and Moderation - The Committee shall monitor discussions, comments, and digital interactions to ensure adherence to professionalism, decorum, and compliance with CALSPro policies.
4.6 Social Media Management - The CALSPro Connect Committee shall oversee and maintain official CALSPro social media accounts and digital engagement platforms. Content may include educational materials, legislative updates, event promotions, member spotlights, recruitment

initiatives, and industry resources.

4.7 Content Scheduling and Analytics - The Committee shall maintain a digital content calendar aligned with CALSPro initiatives, conferences, educational programming, and legislative activities. Analytics and engagement reports may be reviewed periodically to evaluate effectiveness and improve outreach strategies.

4.8 Public and Media Inquiries - Any media inquiries, public concerns, or sensitive communications received through CALSPro Connect or social media platforms shall be referred to the CALSPro Board of Directors or appropriate committee for review and response.

5. Responsibilities

5.1 CALSPro Connect Committee - Oversees platform operations, social media management, event scheduling, digital engagement, and content management.

5.2 Committee Chair - Ensures all content, communications, and activities align with CALSPro's mission and objectives; approves digital postings; coordinates cross-committee collaboration; and oversees implementation of this policy.

5.3 Committee Members - Assist in developing, reviewing, scheduling, and monitoring content and engagement activities consistent with CALSPro standards.

5.4 CALSPro Board - Provides oversight, policy approval, strategic direction, and budgetary authorization for CALSPro Connect Community initiatives.

6. Review and Revision

This policy shall be reviewed annually by the CALSPro Connect Committee and submitted to the CALSPro Board of Directors for approval of any revisions or updates. The Connect Community Policy and Procedure shall supersede and incorporate all prior standalone Social Media Committee policies and procedures.