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California Association of Legal Support Professionals

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President's Message

KEN HASTINGS 2021 CALSPRO PRESIDENT

can't believe it's been a year already since I became President. Time definitely flies by faster and faster the older I get. My oldest daughter has a full-time job and my youngest just started at San Jose State University this Fall. I wish I had something that would slow things down... just a little. Anyway, on to business. I wanted to take this opportunity to share a few things that have highlighted the past year as well as take a look at what is coming in the next several months. Not to mention, your attendance at conference that is just next week.

So, of course, we have all had to deal with our second year of Covid-19. We have all been waiting for the shoe to drop regarding UD's and Foreclosure cases. The Supreme Court of the United States (SCOTUS) struck down the CDC and President of the United States (POTUS)' request for an extension of the "Eviction Moratorium" leading the way for some states to start ramping up those types of cases. However, obviously our state was not one of them. In fact, our Governor has stated that he wanted to extend the eviction moratorium in California. It seems that the legislature may have other plans because they have already recessed. They are not expected to return until January 3rd, 2022. So, could this finally be the end of the holdout/standoff?

Legislatively, you would think that CALSPro had an easier legislative year. Not true at all. In fact, CALSPro has actually been busier due to Covid-19. With the legislature only submitting approximately 2500 bills, which is far less than normal, CALSPro has had to take a hold in place and plan for the future mentality. I'll leave the plan for next year up to Chad Barger, your Legislative Chairman and Mike Belote our advocate. CALSPro and CICA were able to, however, submit language that would clean up CCP 1010.6 regarding electronic service of process. You should know that CALSPro is constantly monitoring this situation in an attempt to ensure CALSPro and its members remain relevant to Due Process.

We saw the introduction of E-Recording this year. Several of our members were able to get certified and from my understanding it has provided an additional revenue stream that is quite lucrative. I have always wanted our members to find ways to offer additional or ancillary services, adding to their bottom lines. If you haven't already taken the time to get educated about this process, maybe now is the time?

CALSPro now has a newly designed website with a completely new backend. We have invested in back-end software from Member Clicks that we believe will streamline many of the tasks that our home office and committee chairs deal with on an annual basis. Thus, freeing up time performing repetitive tasks and allowing us to work on new subjects that were not previously broached due to lack of time. The new site has a members only section that allows you to pay your dues, register for conference and CCPS Workshops. It also has a feature that allows you to edit your own membership listing immediately upon the unfortunate event that there is an error.

Did you happen to see the new link on the CALSPro site that allows for purchasing of CALSPro branded merchandise? This is a new feature that was just started a couple of weeks ago. There are many great looking polos, hats and face coverings to choose from. If you haven't already visited the "CALSPro Merch" section of the website, give it a look. Remember that with any purchase you are supporting CALSPro. Ten percent of all sales go back to CALSPro as a fundraising event. This all helps add to the bottom line and keep us in the black.

Looking ahead, we have conference in our immediate future. We had a blast with excellent comments regarding



CAPITOL REPORT

MICHAEL D. BELOTE, ESQ.

CALIFORNIA ADVOCATES, INC.

Compromise Reached on Remote Proceedings

eptember 10 represented the end of yet another largely remote legislative year in Sacramento. With COVID outbreaks continuing to infect legislators, staff and security, the Capitol building itself was officially open, but in many ways effectively closed. Most lobbying had to be accomplished electronically throughout 2021, whether by Zoom, or once in a while, by the tried and true method of the telephone.

For this and other reasons, the sheer number of new laws for the year will once again be smaller than "normal". In a typical year, the legislature approves perhaps 1200-1400 bills for the Governor's signature. Of those, maybe 12-15% are vetoed, meaning that roughly 1000 new laws are entered into the California Codes. Because of COVID, the total last year was dramatically down to lower than 400. As the pandemic continues, it appears that the 2021 total will be more than last year, but still less than a typical year. We will know more when Governor Newsom concludes his signatures and vetoes by the deadline established in the Constitution, occurring this year on October 10.

Just as the legislature has had to fashion procedures to conduct business remotely, so too have courts. As prior columns have detailed, the authority to conduct remote hearings and even trials has been one of the prominent debates in the Capitol this year. In the final days leading up to September 10, compromise language was included in SB 241 (Umberg), which was signed by the Governor on September 22 and becomes effective on January 1, 2022.

A brief reminder on the remote proceedings issue. Last year the state Supreme Court issued Emergency Rule of Court 3, which contained a broad grant of authority for courts to employ technology in the conduct of remote hearings and trials. The provisions of Rule 3 remain in effect as long as the Governor's declaration of emergency relating to COVID, plus 90 days. If the emergency declaration ended today, and by the way there is no indication from the Governor that it will end anytime soon, the Supreme Court's emergency rule would expire sometime around the end of the year.

Because the pandemic continues to affect courts, the Judicial Council

crafted proposed language creating permanent authority for remote proceedings. For much of the year, lawyers and judges have argued that the ability to conduct proceedings electronically is critical to address the COVID backlog in the court system. Others, particularly public labor unions representing court reporters and interpreters, argued that remote appearances have not worked well, and that audibility problems have made it difficult for people to be heard, resulting in problems creating records of proceedings, and ultimately threatening due process for litigants.

The language contained in SB 241 reflects a compromise, brokered by the Governor's office, Judicial Council and the legislative leadership, on which the major stakeholder groups in the remote proceedings debate are satisfied. The language is incorporated into new Code of Civil Proceedings Section 367.75, which provides a largely consent-based approach to permitting remote hearings and trials, with special provisions relating to audibility challenges. Importantly, the provisions of CCP Section 367.75 will remain in effect



CALSPro Legislative Update

By Chad Barger, Legislative Chair

This Year's Legislative Session has Ended

awmakers in Sacramento maintained a steady pace securing last-minute amendments and votes to get their remaining bills across the finish line before the September 9th deadline for any bill to be passed to the Governor. The Governor has a 12day period to act on measures in his possession on or before September 9th. Bills received by the Governor on or after September 10th are subject to a 30-day period for the Governor to either sign or veto. Any bills not affirmatively signed or vetoed by the Governor during these periods will become law.

Given the legislature is still in a pandemic mode, our prison service bill was sidelined for the year with the intent to present it for consideration upon the legislature's return to Sacramento in January 2022. However, tremendous progress

has been made with amending the business and professions code 22351, which pertains to registered process servers, and with codes 22450 and 22451, which apply to registered photocopiers. The amendment to B&P Code 22351, would add a registrant's email address to the application process. The amendment to B&P Code 22450 would remove the final sentence, which states: "A professional photocopier shall be registered pursuant to this chapter by the county clerk of the county in which he or she resides or has his or her principal place of business, and in which he or she maintains a branch office". It also would amend B&P Code 22451 to include the email address of the registrant. We have received positive feedback and support for the changes and fully expect this to take place this session. On September 30, 2021, the California eviction moratorium will expire. The courts are preparing for a flood of unlawful detainer actions throughout the state. Gov. Newson has announced over \$5 billion dollars would be available for rent relief to pay 100% of back rent owed. California estimates between 240,000 to 500,000 households could be affected by foreclosure or eviction.

Our advocate and committee members have been monitoring several bills that could possibly have an impact on our industry. Specifically, AB 1143 (Restraining Orders), AB 830 (Licensed Professionals and Vocations), AB 515 (Trespass), SB 807 (Enforcement of Civil Rights), and SB 241 (e-Service), just to name a few. You can always find a list of active legislation we are

Continued on page 22



Membership or Censorship?

ith our annual conference right around the corner, it feels both exciting to finally be able to get together with our colleagues and friends; but also disheartening that the year is coming to an end with the Covid crisis persisting in many places and continuing to affect our way of life. Many of us have lost loved ones and experienced big losses in 2021 - a year we all hoped would shut the door on the pandemic. As with our private lives, our CALSPro membership drive suffered as well with a shortfall of about twenty percent from our budgeted membership goal for 2021 (205 of 245 forecasted members) and twelve percent less from last year's final membership count (232 members). It is no surprise that membership declined as numerous companies closed, moved away, or merged. And although it is understandable that membership would decrease some during a pandemic and result in less funds, what is most concerning for our committee is the shortage in representation and participation. New membership always yields more diversity, enthusiasm and even refocus

and redirection due to new ideas and membership needs. Of course, with larger numbers the more powerful we become.

After our last Strategic Planning Session in 2017, the goal for the association was to increase its membership by bringing down the price of membership (offering affordable options like monthly financing and a new Independent Contractor category) and offering additional benefits to our members (like frequent eNewsletters, Blogs, a Members Only webpage, and a Mobile App, as examples). Consequently, in both 2018 and 2019 the association membership grew with over 100 new members in this two-year period! The main drivers were increasing flexibility, inclusivity, and communication by reaching out to more out-of-state companies, Independents, Photocopiers, Private Investigators, Legal Secretaries, and more. Our committee went after RPS county lists, mailed brochures, and attended NAPPS conferences as well. In 2020 we set our membership goals in that same spirit (before knowledge of the upcoming global pandemic), and yet we adapted and still managed to make eighty percent of our membership drive. Another casualty from 2020 manifested in very close Bylaw amendment vote (by those who attended the annual virtual conference) which essentially eliminated the Independent Contractor category from our membership options. In 2021, only four out of nineteen independent contractors renewed their memberships as active members (and this was at a special introductory rate).

There is a Bylaw amendment being proposed at this year's annual conference advocating for the reduction in number of board members that I wanted to bring to your attention in case you did not get the memo. When making Bylaw amendments CALSPro reserves the right to either make the amendment with a unanimous vote by the Board of Directors (in accordance with California corporation law) or as we have done before, put it up for a vote to the general membership at the annual conference (where two-

Continued on page 6

thirds will be required to pass) to be more democratic. The amendment, as proposed, is essentially reducing the number of Board members from eleven to seven. Like with our membership, I am of the conviction that first, the more opinions and ideas we have on the Board of Directors, the more solutions with different perspectives will be proposed and available. Second, I am also of the belief that the more seats we have available, the better representation we will have. and the more inclined members will be to run for the board (especially against incumbents), creating a more inclusive feeling of equal opportunity amongst the membership. Lastly, the more seats available on the Board, the more likely new board members will be afforded the opportunity to learn and be mentored by other experienced board members (just as I was), including some of our very well-respected veterans whom I still

call often when I have questions via AT&T (Andy, Tom and Tony).

If the main argument for a smaller board is that there are not enough people out there to fill the seats, I would disagree as I personally know there are many capable people out there. They only need a little push to get involved and, this year amidst a pandemic, we had two newly elected female members join the Board of Directors. Now if the argument (for the passage of the Bylaw amendment) is that the association is going to fund travel expenses for the proposed smaller board (perhaps to incite and/ or help new members partake in the CALSPro decision making process as board members), I would consider it a descent compromise; but that is not the case. As many of you know, CALSPro is a non-profit organization, and its Board (unlike NAPPS) is strictly self-funded as all board members pay for their own expenses, meals, and travel. Our small budget is predominantly earmarked for our legislative advocacy program and association management fees to ensure we meet all California rules and regulations while advocating and protecting our interests. We have been around for over 50 years and counting, so unless we are dramatically changing our financial structure, why would we want to have less representation on the board? Ultimately, the more minds we have on the board, the more voices will be heard, the more ideas, perspectives, opportunities, and solutions will present themselves, and the more representation across our general membership will be realized. Let's not lose sight of the goals and principles we set out to achieve in the summer of 2017.







CALSPro Conference Update

By Jackie Janney, Conference Chair

Get Ready for Rancho Mirage!

egistration is open for the 2021 CALSPro conference!! We are so excited to be able to meet in person again and hope to see all of you at the Omni Rancho Las Palmas in Rancho Mirage October 8th-10th.

The conference committee has been working hard to plan a fun and educational conference. Friday morning there will be the 24th Annual Jack C. Janney Memorial Golf Tournament to get conference off to a fun start. Friday night will be the welcome reception with live music, followed by a casino night. We have a full day Saturday beginning with the annual business meeting. We have multiple speakers planned for Saturday including a legislative update with Chad Barger and Mike Belote, Esq., a proofs/affidavits/unlawful detainer update by Tony Klein, a keynote session with a special guest from the Judicial Branch and more. Saturday

night will be a great chance to catch up with everyone we have not been able to see in a couple years at the awards banquet. Sunday, you can join us for the CCPS workshop and exam or spend some time enjoying all the fun the resort has to offer.

Don't miss the chance to network and learn with your fellow CALSPro member, register today!! Register here: https://calspro.memberclicks. net/annual-conferenceregistration-form#/





EDUCATION

Continuing Education Report by Larry Kirlin, Education Committee

we have held four CCPS webinars in 2021. We've had 48 people attend the class, with 28 taking the test and 13 earning their CCPS designation. I remember not too long ago having bigger numbers than that for a single class in Southern California. Things sure are different today.

Thank goodness we decided to offer webinars a few years ago because it allowed us to continue to offer training when in-person meetings were impossible. In fact, I love the webinars. Yes, you lose the face-to-face, but from a practical standpoint, webinars are more convenient for everyone involved.

Yes, I'd like to return to in-person classes again but only if we can draw enough attendees to make financial sense.

One more thing that makes webinars better is the flexibility. We can have the instructor, administrator and students all be in different parts of the state. Previously, everyone had to travel, or wait for a class in their area. Right now, we have four instructors and two administrators. That means each instructor only has to teach one class per year. Four hours from your computer is a lot better than travel, hotel, set up, tear down, etc. Trust me, I've done it both ways and live classes are a

ton of work. It makes me appreciate my predecessors more than ever.

So, what's next? Well, we will have four or five classes in 2022. I also plan to have at least two mini-webinars. I like the idea of an hour lesson on marking the summons and another hour on doing proofs. We could also ask the various software providers to show us their platforms and what makes each one the best. I'm open for suggestions if anyone would like us to present another topic.

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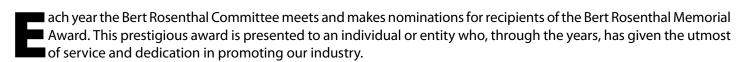








By Jenny Blevins Committee Chair



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

The committee consists of the current CALSPro President, all past presidents who are members in good standing of the association, and past recipients of the award. A recipient must be selected by two-thirds of the eligible voting members of the committee. Should a recipient be chosen, the name will be announced during the banquet at the CALSPro Conference on October 9, 2021 in Rancho Mirage. It is tradition that the recipient shall present their acceptance speech at the following year's Conference.

Past Rosenthal Recipients

4070	Don't Donouth of the Monor views				
19/8	Bert Rosenthal (In Memoriam)	1993	Not Awarded	2008	Jack Janney (posthumous)
1979	Michael Buter	1994	Frederic A. Blum	2009	Herbert E. Hoffman
1980	Andrew R. Estin	1995	Tony Klein	2010	Not Awarded
1981	Richard J. Green	1996	Not Awarded		Steven Janney
1982	Not Awarded	1997	Paul R. Anderson		Mike Belote
1983	Carl Strang	1998	Robert A. Cook		Brett Peters
1984	Hugh Hallenberg	1999	Jeffery H. Karotkin		John Perez
1985	Connie R. Melvin		Edward R. Wasserman		Jennifer Blevins
1986	Jaunita Tanzer	2001	Robert D. Alkema		Michael Kern
1987	Not Awarded	2002	Al Crowe		Not Awarded
1988	Not Awarded	2003	David S. Nill		Chad Barger
1989	Elaine J. Erdman	2004	Mark L. Schwartz		Not Awarded
1990	Thomas J. Bowman, Jr.	2005	Ronald Ezell		Not Awarded
1991	Michael O. Price	2006	Paul Tamaroff	2020	110t/11ful wew
1992	Joseph H. Karotkin	2007	Jerry Topolos		Continued on page 11

The nominees for 2021 are:

Mary Beaudrow Cliff Jacobs Larry Kirlin LegalConnect Robert Porambo

MARY BEAUDROW



Mary is a native San Franciscan. She fell into the attorney service business in 1975, when during her summer break from high school, Jerry Topolos, owner of Preferred Legal Services, Inc. hired her. Mary's late sister Karen Shrewder was Jerry's secretary at the time and he did this as a favor to her. She remembers her first job was typing up "dog" reports. Mary came back the following summer and she was one of four girls who had a walking route through downtown San Francisco, then they would meet up to do their court filings at the Clerk's Office in City Hall. She continued to work at PLS during her senior year in high school, and after graduation, Mary was accepted into the nursing program at San Francisco State University. Even during her time at SF State, she would continue to work at PLS during the winter and summer breaks. Sometime in 1982, Mary started working full time at PLS until May 2000.

Mary's various positions at PLS were handling all of the small claims services, and next she handled all of the out of county services. In 1994, Mary was promoted to Office Manager which as part of her duties was dispatching the process servers and bike messenger. Office Manager, which included dispatching the process servers, and bike messengers. She held this position until she left in 2000.

Mary left PLS in May 2000 to go work for Fax & File Legal Services, Inc (now known as One Legal). During her time at Fax & File, she realized that she needed to take a different path in her legal support career. In August 2002, she started working at the San Francisco office of Morrison & Foerster LLP and currently her position is Senior Docket Coordinator. Mary continues to work at MoFo and recently celebrated her seventeen-year anniversary there. One of the reasons she was hired by MoFo was because of her work in the legal support business, which brought a wealth of knowledge in the area of process serving and court filings. As part of her job, she handles court filings on a daily basis for the attorneys at the firm, which has allowed her to continue interacting with her CALSPro friends.

Mary has been an active member of CAPPS/CALSPro from 1989 to 2003. These days her membership status is of being a supporting member in the association. Immediately after joining in 1989, she started attending conferences and board meetings on a regular basis. Mary served in several capacities such as Area Governor, Director, Secretary/

Treasurer, Vice President, and two terms as President. In 2007 and 2017, she was also took part in the strategic planning sessions, which resulted in the association's name changing to CALSPro and created online voting of the board of directors and officers.

Mary is the Past President of Legal Secretaries, Incorporated, where she held that office from 2014-2016. These days Mary serves as Treasurer for the National Docketing Association, and its conference chair.

Mary feels very lucky to have grown up in the legal support service and to have developed close friends with several members along the way. She knows she wouldn't be the person she is today without her involvement in CALSPro as it provided an opportunity for her to step outside the box.

CLIFF JACOBS



Cliff Jacobs is in his 31st year as a legal support professional. His background includes attending Rutgers University where he earned a Bachelor of Science degree in Administration of Justice; and then to NYU to complete his grad work in an Intensive Studies Paralegal Diploma Program, where he graduated third in his class. In the spring of 1988 Cliff moved from the

East coast to California. Acclimating to a very different lifestyle, he was deciding whether to go to Law School, or to use his degrees for something else "Legal" related as he searched for a job to begin his career.

Cliff accepted a position in 1990 as a route person and court runner for Personal Attorney Service (PAS) in Van Nuys. In the mornings he ran a route, and in the afternoons he was a Bankruptcy Court runner. Thus began his trek upward from a humble beginning. After three months, he was promoted to bankruptcy supervisor at PAS. In the late 1990's Cliff injured his ankle, requiring him to keep his foot elevated for six weeks. While stuck in the office during this time, management used him to troubleshoot assignments and interact with clients; discovering that he was guite adept at both. When he could walk again he was promoted to Court Service Supervisor and was also assigned to the "Out of County" department as the assistant manager. Six months later, Cliff was promoted to Out of County Manager covering 55 California counties, and all 49 other States. He stayed at PAS until 2009.

Cliff's employment path led him to One Legal in 2009, where he became their National Affiliate Relations Manager for 7 years; and then joined First Legal in January 2017, where he opened their new North Bay Office. Recently promoted, he is training in a new capacity at First Legal, where he will be joining a special team of very knowledgeable and dedicated individuals encompassing every

aspect of the Legal Support Profession. He continues to grow individually, and within our profession; dedicating himself to being "Of Service", always putting the best interest of the profession and clients first.

While Cliff was in his 10th year at PAS, they hired Jeff Karotkin as General Manager; and Jeff's level of participation in CAPPS inspired Cliff to attend Board meetings and learn more about the Association. Jeff provided guidance about getting more involved and making a difference; and in 2004, Cliff became the CAPPS Los Angeles Area Governor, which provided him an opportunity to understand at a much greater level the importance of what CAPPS meant to the Legal Support Profession, Cliff became the Area Governor Coordinator for the State under the tutelage of Wendy Bowman; and in 2006, officially joined the Association as a member, and received the "Rookie of the Year" award for his efforts and commitment to the association. In 2007, Cliff was elected to the Board of Directors. Then, in 2008 Cliff took on the Continuing Education Committee as the chairman; and due to his strong work ethic and dedication, received the "Member of the Year" award in 2009, and again in 2012.

From 2007 through 2017, Cliff had served continuously as a Board member or Officer of CALSPro. He has chaired several committees such as Technology, Membership, and Continuing Education; and served on the transition team tasked with evolving our Arbitration and Grievance Committee into the

Dispute Resolution Committee. He served as Vice President of CALSPro in 2012, 2013 and 2014, as President for the 2014-15, and 2015-16 terms, as Immediate Past President and Membership Chair for the 2016-2017 term. He is currently a member of the Continuing Education Committee. He also has represented CALSPro at the NAPPS annual conference for the past three years; and while at NAPPS Conferences, Cliff was responsible for personally recruiting over 25 new CALSPro members. Always striving to contribute to the profession, Cliff is currently in his 3rd year serving on the NAPPS Promotion and Growth, and Arbitration and Grievance Committees.

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

LARRY KIRLIN



Fresno State Graduate, Electrical Engineering/Marketing

Master Chief Petty Officer (Retired), US Navy Reserves, 1984-2009 Began working in the legal support industry as mobile photocopier in 1991.

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

Worked in all aspects of the industry and held the positions of account manager, branch manager, sales manager, regional manager and equity partner

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

Given a second assignment as eProducts Manager in 2014 followed by a third assignment in 2021 as Process Service Product Manager.

Married to Rebecca with six children between them plus one dog (Riley). Lives in Fresno CA.

LEGALCONNECT

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

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

Today, LegalConnect is a premium legal technology company that automates the processing of legal documents for law firms. Headquartered in Chino Hills, California, the company is a leading certified eFiling Service Provider to courts in 25 California counties. with more on the way, and has more than 100 litigation support service providers, 14,000 law firms, and 16,000 legal professionals using its platform. Combining deep industry expertise, innovative technology, and a robust channel partner network, LegalConnect is transforming the way the litigation support industry exchanges electronic documents, data, and payments, to streamline how law firms manage work, and for the effective and expeditious administration of justice.

ROBERT PORAMBO



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

He has been married to his much better half Liz for the past 11 ½ years. Between him and Liz they have 6 amazing children, along with 6 grandchildren with currently in the oven to make number 7!

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

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



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CALIFORNIA ASSOCIATION OF LEGAL SUPPORT PROFESSIONALS Board of Directors Meeting June 12, 2021, Capitol View Room – Hyatt Regency, Sacramento, CA MINUTES OF THE MEETING

PRESIDENT'S MESSAGE

Ken Hastings acknowledged the joy of being in person and thanked everyone for attending the meeting.

SECRETARY-TREASURER'S REPORT

Andrew Gowing presented the May 2021 financial report. The balance sheet shows total assets of \$60,064.59. Membership dues income is at 81.4% of budget, but don't expect to get too much more membership dues income. Ken Hastings noted there is still a campaign to get new members.

COMMITTEE REPORTS

Legislative – Chad Barger reported that the committee met this morning, and there are no action items for the board.

Photocopy – Tom Alkema discussed CIOX and an e-mail he received relating to Evidence Code 1158 which is used when obtaining medical records. This was brought to the board's attention for informational purposes.

Coalition to Improve Court Access (CICA) – David Nill reported that CICA meets regularly to discuss access to the court; Riverside is scheduled to go live on July 1, 2021; Family Law in Los Angeles is expected to go live on August 1; and David discussed the status of other courts; almost half of the counties are doing some form of electronic service.

Forms – Tony Klein referenced the new small claims forms that were included in the agenda packet; the forms go into effect on August 1, 2021.

Continuing Education – Andrew Gowing referenced the written report and reported that there are three CCPS workshops coming up. Larry Kirlin reported that he has asked Tony Klein to do a webinar for CALSPro, and First Legal offered to sponsor it, and the webinar would be available at no charge to CALSPro members. Tony Klein is open to doing an educational webinar, however, he would like to work out the details relating to the subject matter, and also the logistical details. This webinar would be outside the scope of CCPS, and the board is in favor of having Tony Klein do a webinar. This webinar will be available to non-members for a charge; possibly the idea to charge the price of membership to attend the webinar, and membership is included with the webinar.

Advertising – Robert Porambo noted the e-blasts are going out to solicit advertising.

Membership – Michael Kern discussed membership recruitment efforts; Ken Hastings reminded the board of the committee's plan that continues throughout the year. Jenny Blevins reported that MemberClicks is ready to launch with the new website. The board discussed the ability to allow members to auto renew. Mike Belote noted the importance of following the law regarding auto renew and noted pending legislation relating to auto renew.

Technology/Website – Ken Hastings noted technology was put on hold for a little while; blogs were stopped but should start again with the new website; help will be needed with the Vlogs, and Ken would like members to do Vlogs; Michael Kern indicated that he would like to have a group picture of CALSPro members on the home page.

Jenny Blevins discussed the following items:

- Thanked Michael Kern and Ken Hastings for their work on the new website.
- CALSPro purchasing the Divi theme license (website development theme)—\$249.00 one-time fee—will be paid out of the website fundraising income.
- \$49.00 plug in per year for the premium cache plug in will be paid out of the website expense line item.
- \$35.00 calendar module fee will be paid out of the website expense line item.
- Jenny Blevins acknowledged the work of the webmaster and noted the new site will go live on June 17, 2021. Jenny asked for clarification regarding the website fundraising income of \$3,286.40 and how those funds are being handled. The board confirmed to send the webmaster payment after the appropriate plug-ins and applications for the new website are purchased.

Conference – Jackie Janney welcomes help for conference. Jenny Blevins noted there will be a conference committee meeting on Monday, June 14th, 2021 at 4pm via Zoom.

NEW BUSINESS

Ken Hastings discussed the challenge of filling the board, and possibly reducing the board size from 10 to 8, and to also allow the officers to be voting board members. Ken Hastings will work on language for the proposed bylaw amendment.

GOOD OF THE ORDER

- Mike Belote invited today's attendees to the California Advocates new office building before dinner.
- Ken Hastings acknowledges Kristian Pujol and Mark Manchester and to keep them in our thoughts and prayers.
- Tom Bowman's daughter is graduating from college

President - continued from page 2

our last visit to Rancho Mirage and the Omni Rancho Las Palmas. I am sure that this time will be no different. We hope to allow you opportunities for education, networking, the annual business meeting and of course plenty of fun. Jackie Janney has put together a great looking conference and wouldn't you know...Casino night is back!

Following conference and the swearing in of the new board of directors, CALSPro will once again enter a time of the year when we are running on all cylinders. We will immediately begin working on next year's membership

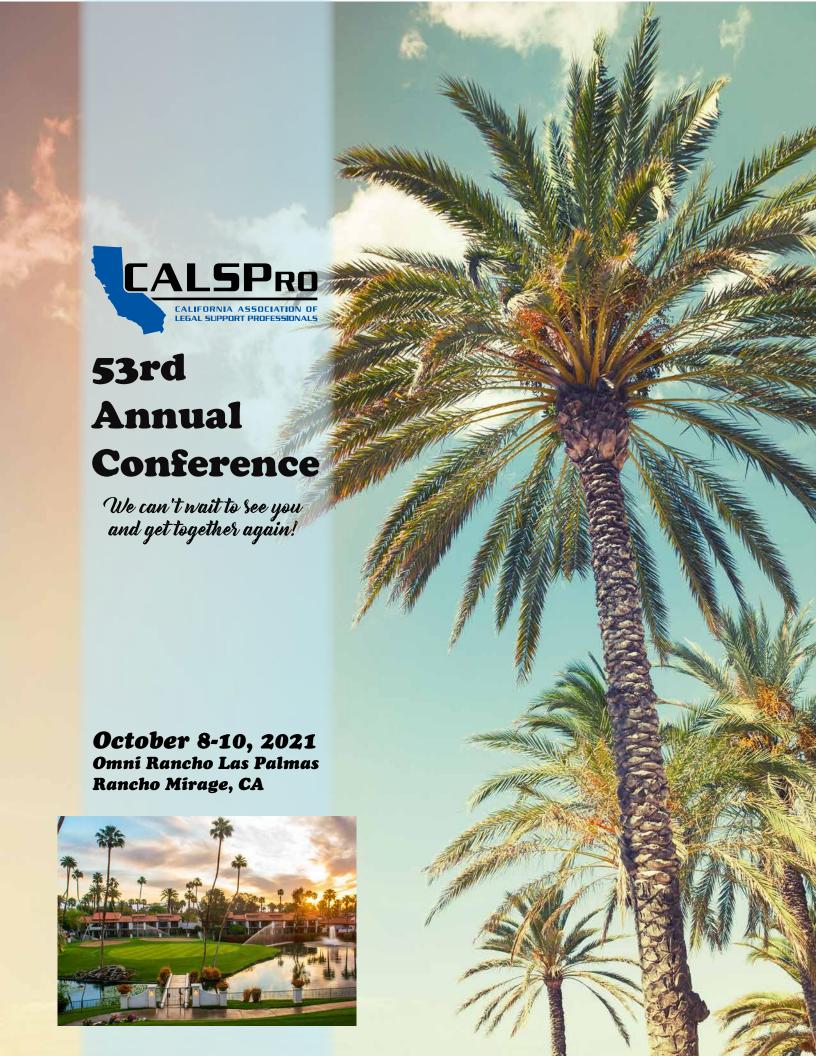
drive which always takes a lot of time and effort. I would implore you to be ready for the drive and get your dues in early. This will make a huge impact on how CALSPro can and will operate in 2022.

It will be a busy year, I'm sure. CALSPro will once again be in need of volunteers to help support our agenda and aspirations. If you haven't already or have always wanted to serve as a CALSPro committee chair, committee member or have other ideas for volunteering, now is the time. CALSPro has always been there for us. Acting

like a type of insurance that protects its members. Maybe it's time to give back? It would be nice to see some new faces helping, planning and leading CALSPro this coming year.

I'd like to add a special thank you to all of the volunteers this past year. You have all made being president much easier. Without you, there is no CALSPro. Here's to 2021 and an even better 2022!

Lty Hostige





Omni Rancho Las Palmas Resort & Spa 41000 Bob Hope Dr, Rancho Mirage, CA 92270

(760) 568-2727

Hotel Reservations:

The discounted nightly guest room rate for Conference attendees is \$189.00 for Vista Rooms plus taxes, fees and assessments. Please make your reservations by 5:00 p.m. local time on September 14, 2021 to receive this discounted rate.

In addition to the nightly guest room rate, there is a \$8.00 nightly Resort Charge (reduced from \$38.00) which includes self and valet parking, Internet in guestrooms, and entrance to the fitness center.

Please make your guest room reservations by calling the resort at 1-800-THE-OMNI or by using this direct link: https://www.omnihotels.com/hotels/palmsprings-rancho-las-palmas/meetings/calspro-2021-10072021

Please follow this link to learn more about current hotel information, dining and activity hours, COVID information and amenities: https://www.omnihotels. com/hotels/palm-springs-rancho-las-palmas/property-details/updated-policiesservices

Hotel Details

Enjoy a relaxing oasis with a backdrop of mountains and palm trees at Omni Rancho Las Palmas Resort & Spa in Rancho Mirage, California. Just a few miles from Palm Springs, the resort offers an ideal escape in the Coachella Valley. Revel in timeless comforts, classic conveniences and modern technologies that have made the luxury resort a desired destination for a sun-drenched getaway.

California Association of Legal Support Professionals

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

Conference Pricing

FULL REGISTRATION - MEMBER

On or before Septemb	er 30th\$40	0
After September 30th	\$50	0

FULL REGISTRATION - NON-MEMBER

On or before September 30th	. \$450
After September 30th	\$550

SIGNIFICANT OTHER REGISTRATION

Friday Welcome Reception\$6	0
Saturday Lunch Only\$7	'5
Saturday Banquet Only\$12	:5
Saturday Day Only (no banquet)\$27	'5
All Above Events\$27	'5

Register here:

https://calspro.memberclicks.net/annual-conferenceregistration-form#/

24th ANNUAL CALSPro JACK C. JANNEY MEMORIAL GOLF TOURNAMENT

Friday, October 8, 2021 8:30 am Check-In 9:00 am Tee-Off

Omni Rancho

Las Palmas Golf Course 41000 Bob Hope Dr,

Rancho Mirage, CA 92270

\$125⁰⁰ per person; includes green fees, cart, and lunch.

Registration cutoff September 30th.
Register Now.



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

Annual Business Meeting

The Annual Business Meeting will be held on Saturday, October 9th from 8:30 a.m. – 9:30 a.m. The purpose of the business meeting is to conduct the business of the association and allow members an opportunity to participate and get involved in the many industry and association activities. This is an important component of the conference, and all members are asked to attend.

PERUSE THE SILENT AUCTION ITEMS AND BE A LUCKY BIDDER!

Winners will be announced at the Saturday Night Banquet

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

Interested in Becoming A CCPS (CALSPro Certified Process Server)?

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

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

Be sure to sign up for the workshop & exam on Sunday, October 10, 2021

Please complete the separate registration form to enroll.

Conference Schedule

Friday, October 8, 2021

9:00 A.M.
24TH ANNUAL CALSPro JACK
C. JANNEY MEMORIAL GOLF
TOURNAMENT

Omni Rancho Las Palmas Golf Course

3:30 P.M. – 8:00 P.M. REGISTRATION OPEN

3:30 P.M. – 8:00 P.M. EXHIBIT SET-UP

4:30 P.M. – 6:00 P.M. BOARD OF DIRECTORS MEETING

6:30 P.M. – 8:00 P.M.
WELCOME RECEPTION
OUTDOORS ON THE SUNRISE
TERRACE

8:00 P.M.- 10:00 P.M. CASINO NIGHT

SATURDAY, OCTOBER 9, 2021

7:30 A.M. – 5:00 P.M.
REGISTRATION AND EXHIBITS
OPEN

7:30 A.M. – 8:30 A.M.
CONTINENTAL BREAKFAST IN THE
EXHIBIT AREA

8:30 A.M. – 9:30 A.M. ANNUAL BUSINESS MEETING

Call to Order, Self-Introductions, Committee Reports, Proposed Bylaw Amendments, Election Results Ken Hastings, President, Hastings Legal Services, Temecula

9:30 A.M. – 10:15 A.M. KEYNOTE SESSION – COURT UPDATE

Special guests from the Judicial Branch will join us to discuss what we've learned from the pandemic and what it means going forward. You don't want to miss this very important session.

10:15 A.M. - 10:30 A.M. BREAK

10:30 A.M. – 11:00 A.M. LEGISLATIVE UPDATE WITH CHAD BARGER AND MIKE BELOTE, ESQ.

Chad Barger, Committee Chair, Attorneys Certified Services, Bakersfield Mike Belote, Esq., Legislative Advocate, California Advocates, Inc., Sacramento

11:00 A.M. – 11:30 A.M. COALITION TO IMPROVE COURT ACCESS (CICA) UPDATE

David Nill, Coalition Representative, LegalConnect

11:30 A.M. – 1:00 P.M.

NETWORKING LUNCHEON BUFFET
AND RECOGNITION OF BERT
ROSENTHAL MEMORIAL AWARD
RECIPIENTS AND NOMINEES

1:00 P.M. – 2:30 P.M. PROOFS/AFFIDAVITS/UNLAWFUL DETAINERS UPDATE

Tony Klein, Forms Committee Chair, Attorney Service of San Francisco

2:30 P.M. – 2:45 P.M. BREAK

2:45 P.M. – 3:15 P.M. AN INTRODUCTION TO CRYPTOCURRENCY

Matt Janney, Janney & Janney Legal Support Service, Monterey Park

3:15 P.M. – 4:15 P.M. LET'S TALK A LITTLE E!

Interested in the latest data that matters regarding upcoming eFiling courts and case types? Want to know more about how technology, like ePayments and eSignatures, has transformed the world, including ours? Join Jonathan Nill, Director of Partner Success and Mark Schwartz, Director of Business Development, at LegalConnect, for a fun discussion. Mark Schwartz, LegalConnect, Chino Hills Jonathan Nill, LegalConnect, Chino Hills

4:30 P.M. – 5:00 P.M.
MEETING OF THE 2021-2022
OFFICERS AND BOARD OF
DIRECTORS

6:30 P.M. – 7:30 P.M.
COCKTAIL RECEPTION AND
SILENT AUCTION

7:30 P.M. – 9:30 P.M.
INSTALLATION AND AWARDS
BANQUET

SUNDAY, OCTOBER 10, 2021

8:00 A.M. – 9:30 A.M. REGISTRATION AND EXHIBITS OPEN

8:00 A.M. – 9:00 A.M.
CONTINENTAL BREAKFAST IN THE
EXHIBIT AREA

9:00 A.M. – 2:30 P.M.
CALSPro CERTIFIED PROCESS
SERVER (CCPS) WORKSHOP AND
EXAM

Separate registration required; lunch on own.

COVID-19 PRECAUTIONS

Please be aware that we are working closely with the venue and our partners to create a safe, worry-free and comfortable in-person experience for all attendees. We are monitoring the COVID-19 pandemic and tracking guidelines that may affect the onsite environment, and we will update you with any additional information you need to be aware of to attend the in-person program. Please follow this link for local COVID information: https://covid19.ranchomirageca.gov/.



Sponsorship Opportunities

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

CONFERENCE SPONSORSHIP:

Pearl Sponsor - \$250

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

Ruby Sponsor – \$500

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

Diamond Sponsor – \$1,000

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

EVENT SPONSORSHIP:

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

- **Silent Auction Item** (*Please bring your auction item/basket with you.*)
- Silent Auction Donation (Donate & we'll purchase an item for you.)
- **Education Session Sponsorship \$500** (3 available)
- **Friday Night Welcome Event \$250** (4 available)
- **Saturday Morning Continental Breakfast \$350** (3 available)
- Saturday Night Cocktail Party (Drinks) \$500 (2 available)
- Saturday Night Cocktail Party (Appetizers) \$500 (2 available)
- Refreshment Break \$250 (3 available)

GOLF SPONSORSHIP:

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

- **Continental Breakfast Sponsor \$400** (1 available)
- **Morning Break Sponsor– \$250** (1 available)
- **Tee Prize Sponsor \$400** (1 available)
- Tee Hole Sponsor \$75 (multiple available) Includes: Logo printed on Tee of your Choice.
- Closest to the Hole Sponsor \$200 (1 available) Includes: Logo printed on contest markers.
- Putting Contest Sponsor \$400 (1 available) Includes: Logo printed on contest markers.
- Lunch Sponsor \$400 (1 available)
- Raffle Prize Sponsor \$500 (1 available)
- Golf Cart Sponsor \$300 (1 available) Includes: Logo printed on golf cart sign.

E-Filing & E-Recording *Made E-Z.*

Ready to save time, trees, and money by using e-filing and e-recording services? The CPS e-filing portal is user friendly, cost efficient, and accepted at California mandated e-filing courts. As a family-owned company, our local team of experts are here to help you every step of the way. Make the jump into e-services today.



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only until July 1, 2023, providing an 18-month window with a Judicial Council study and report at the end. It means that the subject of remote proceedings will continue to be debated next year and the first part of the following year.

Of course, how courts are operating is of more than general interest to CALSPro members, but SB 241 contains at least one more issue directly relevant to attorney services. Language had been included in the bill amending CCP Section 1010.6, the basic code section dealing with electronic filing and service of non-jurisdictional notices on opposing counsel. The bill had proposed that all notices under this section be served electronically by courts. It was unclear whether the language was intended to apply only to documents already required to be served by courts, or to all 1010.6 documents. Fortunately,

clarifying language was inserted into the bill on September 3, limiting the reach of the language to those documents already required to be served by the courts. Senator Umberg and his staff were an absolute pleasure to work with on SB 241, and he deserves enormous credit for shepherding the remote proceedings bill through the legislative process.

SB 241 contains other features that will be discussed at the CALSPro conference in Rancho Mirage, along with other bills of interest to attorney services. By that time we will also know the fate of hundreds of other bills awaiting action on the Governor's desk. Join us!

Michael Autof

Legislative - continued from page 4

monitoring on the CALSPro website, under the "Legislation" menu.

With our annual conference just around the corner, I'd like to take this opportunity to thank the committee members for their dedication and efforts that made this past year a success. The members are Kristian Pujol – Co-Chairman, Andy Estin, Tony Klein, Tom Bowman, Jeff Karotkin, and Ken Hastings, as president. It has been my honor, to serve this great association

with you. May you be blessed and prosperous! Finally, I will leave you with one of my favorite quotes: Dream big, stay positive, work hard, and enjoy the journey (Urijah Faber).



CALSPRO COMMITTEES

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California Association of Legal Support Professionals Notice of Annual Business Meeting And Bylaw Amendment Proposals

September 9, 2021

In accordance with the California Association of Legal Support Professional's Bylaws, Article VII – Meetings, Section 9, notice is hereby given of the Annual Meeting of the membership which shall take place on **Saturday, October 9, 2021 from 8:30 a.m. – 9:30 a.m.** The meeting will be held in conjunction with the 53rd Conference at the Omni Rancho Las Palmas in Rancho Mirage, CA. For further conference details, please visit the CALSPro website at https://calspro.org/events/annual-conference/.

In accordance with the California Association of Legal Support Professional's Bylaws, Article XII — Amendments, Section 1, the following proposed bylaw amendment is being placed in writing and included in this notice of the Annual Meeting. The Bylaws may be repealed or amended or any Bylaws may be adopted at the Annual Meeting by a vote of two-thirds of the voting members present and voting at the Annual Meeting.

California Association of Legal Support Professionals Proposed Bylaw Amendment: For Presentation to the membership on October 9, 2021:

Strikethrough denotes deletions and <u>italicize with underline</u> denotes insertions. All proposed amendments are also highlighted.

PROPOSAL #1 of 1:

ARTICLE VI – MANAGEMENT, OFFICERS, BOARD OF DIRECTORS

Section 3. Board of Directors. The Board of Directors of this Association shall consist of eleven (11) seven (7) Directors which includes ten (10) six (6) members elected by the membership and the Immediate Past President. The Immediate Past President shall serve a one-year term of the Board of Directors. If there is no Immediate Past President, the membership shall elect eleven (11) seven (7) members at the Annual Meeting.

Current CALSPro Vendors



















CALSPro 2020-2021 Officers

PRESIDENT

Ken Hastings 951/296-2669 – ph 951/296-2770 – fax president@calspro.org

VICE PRESIDENT

Kristian Pujol 415/475-6424 – ph vicepresident@calspro.org

SECRETARY/TREASURER Andrew Gowing

secretary@calspro.org

IMMED. PAST PRESIDENT Robert Porambo

619/549-4853 – ph rporambo@knoxservices.com

2020-2021 Board of Directors

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Connie Bettencourt

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Tom Bowman

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