



ROD CARDINALE JR.

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21st Century And LSI

ROD CARDINALE JR. — SUBMITTED BY SANTA CLARA COUNTY LPA

Can LSI succeed in its current structure in the 21st Century? My simple answer is, no! I am relatively new to LSI and to date have been to six conferences. I thoroughly enjoyed myself at every conference, and in fact have caught the "conference fever." However, I am beginning to see a trend. I have attended the Presidents' luncheons and heard the struggles presidents from other associations are having. On the upside, many associations are experiencing successes. At each conference, LSI President Brooke Mansfield-Atherton, CCLS, encourages each of us to step up and help by providing our experiences and suggestions in an attempt to get back on track and increase membership. I took President Brooke's recent President's report to heart. I have been a legal professional for three years now and so far, I love it! I love being a part of LSI. As a member of LSI, I have made so many new friends and have many memories of the conferences, meetings and social events sponsored by LSI and its local associations. However, I have some major concerns about the future of our corporation that I would like to share with everyone.

TEAMWORK

Any team is only as strong as its weakest link. You can consider LSI as a 41-team league, and many of our associations (teams) are not doing so well. In fact, many are floundering. When local associations need help, LSI steps in and assists in any way they can through the Officer Visitation Program. But it appears that there are currently no solutions for LSI to help the local associations when they are in dire straits financially. They need LSI's help. I feel that getting members to attend at least one conference will be all it takes for them to gain interest in LSI. If each association would bring a new member, or a member that has never attended conference, to conference, I am positive they will catch the "fever," take

it back to their local association, share their experiences and thus light a fire and begin to rebuild interest in their local associations. In the case of Santa Clara County LPA, sending a new member to the 2010 Annual Conference made a huge impact on that member. So much so the member came back to the local association armed with excitement and enthusiasm, which snowballed. The association was finally able to balance their budget and increase membership from approximately 40 members to almost 70 members in just one year, hosted monthly educational seminars and general meetings, and has hosted many successful fundraisers. While it took a team to accomplish these successes, it took only one person fully energized from attending one conference to encourage the other members to get more involved. If Santa Clara County LPA can do it, so can your association. Every association should be represented at every conference.

Perhaps LSI should consider creating a "conference fund" whereby \$5 of the \$20 from the per-capita tax paid by associations would be earmarked for the purposes of aiding local associations in need. The funds could be used to assist in keeping the associations active or possibly used to send those that have never attended a conference. Because LSI is a non-profit organization, the funds should be made available to all local associations. Sort of like revenue sharing - much in the way the NFL has done. Doing so allows all associations the possibility to be represented at every conference. I propose that the associations that need "seed" money could receive an interest-free loan from LSI, much like the subsidy account used to assist associations who need "seed" money to start the process of hosting a conference. LSI must offer this opportunity to every association in order to protect its non-profit status. The associations that have the funds in their budget would likely not need to take advantage of this opportunity, but we have to at least

ensure it is offered to every association. This would allow the struggling associations to have the funds to put the plans into action to promote their local association as well as the means to send members to conference. As a state-wide organization, we need to work together to help each other out in times of need. I think LSI should provide an association-wide structure for running the associations. Give the associations a model of how to maintain an association - something they can work with. Does something like this already exist? I'm not sure, but LSI needs to provide associations with the tools that will teach them how to prosper.

EDUCATION

At the August Conference, I discovered that only about 20 percent of the applicants for the most recent CCLS exam passed. To me, that is unacceptable. If our tag line is "LSI - Educating California's Legal Professionals" and we have only a 20 percent passing rate for the CCLS exam, then are we failing as educators? Times have changed since the CCLS program was started, and I think it is time to update the CCLS program. The CCLS program is well known throughout LSI; unfortunately it is an unknown program to most law firms. The CCLS program is promoted throughout LSI, - We need to market outside LSI and focus our efforts on the California legal community. It's time to brand and market the CCLS program, but first we should consider whether the name should be changed to California Certified Legal Professional ("CCLP").

Since the term "legal secretary" seems to be going by the wayside, is the interest going forward in becoming a CCLS also fading? If we change our name from Legal Secretaries, Incorporated to more of an all-encompassing term such as Legal Professionals, Incorporated, then it makes sense to change the CCLS program to CCLP. Changing the name of the program would allow us to market to all legal professionals and not just limit us to legal secretaries. This would expand the desire to want to attain the status of a CCLP. Of course, we would still need to market the program and this can be done by educating the law firms in your area, through local bar associations, and of course the State Bar of California. We should focus our promotion of this unique certification to include what the exam can accomplish for the legal professional. By changing the name and doing a mass marketing of the program, attorneys will want to better educate their legal support staff and encourage them to take the exam. The idea would be to promote and grow the program to the point that every law firm in California would recognize the term "CCLP" and appreciate the work and knowledge it takes to attain this status.

NAME CHANGE/MARKETING

In my opinion, the first thing LSI needs to do is change our name. We need to "re-brand" LSI to stay current with today's legal

community. I believe the term "secretary" is becoming extinct. As Legal Secretaries, Incorporated, we continue to market to a class of professionals that are rapidly decreasing in numbers. The whole structure of the law firm has changed so much over the last 25 years and the new legal secretaries today would rather be called legal professionals.

Is it a coincidence that the LSI membership totals have declined almost every year since 1991? I don't think so. A review of our membership list from the LSI Treasurer's 2011 Annual Report shows that over the last 20 years LSI's membership has declined 19 out of 20 years, from a high of 3,915 in 1991 down to 1,250 today. Something is clearly not working.

In 2006, the Board of Governors voted not to change our name, but to add a tag line - "LSI - Educating California's Legal Professionals." Has that tag line helped to gain members? It doesn't appear that it has. The primary reason the name change was voted down was the concern of the amount it would cost to put the name change into play. The Board of Governors thought five years ago that the name change may be necessary, but apparently money upheld the decision. While I respect the rich history of LSI, I think it is definitely time to change the name. With the onset of the use of e-mail and electronic documents, the cost to change our name would in all likelihood be less costly than initially thought. While it is important to have a financial safety net, I believe that we have the funds to change our name. After all, it takes money to make money. Since 2006 approximately half of the local associations have changed their names from Legal Secretaries Association to Legal Professionals Association. Some members feel that because they didn't see much of a rise in membership when their local association became a Legal Professional Association, that LSI should not consider changing its name. Is this a reason not to consider a change? While I agree that changing the name of some associations has not generated the increase in membership there is a reason behind that, and that reason is marketing and branding. For example, if I change my name to Joe and don't tell anybody that I've changed my name to Joe, people will continue to call me Rod.

LSI on the state level, the local level, and the CCLS Certifying Board, need to do much better marketing of our organization. Not just within our membership, but to the legal community - today's legal professionals. There are many ways this can be done. For example, Santa Clara County LPA (SCCoLPA) began marketing to all legal professionals and now has paralegal students joining because they found out about the association through their school. Flyers have been sent to every law firm in Santa Clara County announcing that SCCoLPA offers MCLE credits, at a reasonable price, for all legal professionals, including attorneys. Attorneys and paralegals who attend our seminars are offered a one-year free membership to our local asso-

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ciation which gives us the permission to email to them information about upcoming events in the hope that they will want to become more involved. They attend, enjoy the classes and then go back to their offices and share their experiences with their peers. It is free advertising - and word of mouth is the best form of advertising. SCCoLPA now has attorneys and paralegals as members. We changed our name from "SCCLSA" to "SCCoLPA", marketed ourselves to all legal professionals in our area, and have seen our membership numbers rise approximately 40 percent in the past year. Little by little, we are growing and more importantly, the legal community is learning about us. It is amazing to hear how many people who attend our seminars say they have been legal professionals in Santa Clara County for years, but yet never knew we existed.

CONCLUSION

In conclusion, if we don't change our name to include ALL legal professionals, how can we expect an increase in membership? Once we change the name, we can work together to assist the

smaller associations become more active. We can update our teaching materials and create models and outlines for every association to use for the purposes of presenting educational classes. We can establish a marketing plan targeted towards the up and coming legal professionals. We can change the CCLS program to the CCLP program and aggressively market its relevance to ALL legal professionals.

The legal secretary's job description, with all the new technology in today's world, is simply not the same as it was 20 years ago, and it is evidenced by the decrease in membership in LSI over the last 20 years. It is apparent that the new generation of legal assistants does not want to be considered a legal secretary, and according to research, a large percentage of existing legal secretaries are trying to change their titles to legal professionals. If the majority of the legal community wants to be referred to as legal professionals, what do you think we should call our corporation? The answer is simple: "Legal Professionals Incorporated." **LS**