



THE ADVANCE SHEET SCCoLPA's News & Events May 2017

Dear SCCoLPA Members:

Greetings! I believe it's finally time to say goodbye to April showers and welcome to May flowers - I hope you have all been enjoying the lovely weather we've been experiencing in the South Bay lately!

It has been a privilege and honor to serve as your President over the past year. We are now starting our new fiscal year, and, as you read this issue of The Advance Sheet, your Executive Board and Chairmen are already busy at work planning events for this next fiscal year. We're looking forward to turning plans into action, and we have some great things in store for you in 2017-2018.

In this issue of The Advance Sheet, we have a lot of information to share, along with some important dates for your calendar:

- * **May 18-21, 2017:** LSI's 83rd Annual Conference, to be held at the Doubletree Hotel in Modesto, CA. Registration forms can be found in this newsletter.
- * **June 17, 2017:** SCCoLPA's annual summer BBQ, to be held once again at LSI Treasurer and SCCoLPA Executive Advisor Rod Cardinale's house. In appreciation of your support, the BBQ is FREE for all members. Join us for a fun afternoon which includes a delicious BBQ, silent auction, and dessert contest!
- * **July 20, 2017:** SCCoLPA's first annual Bunco Night! Come one, come all, and join in on a fun, easy-to-play dice game, to be held at McManis Faulkner in San Jose. Appetizers and "mocktails" will be served. Prizes will be awarded to winners *and* losers!

Additional information on all these events can be found in this newsletter.

Calling all volunteers! As you all know, SCCoLPA has the honor of hosting LSI's 2nd Quarterly Conference in November 2018. The conference will be held at the Silver

Legacy Resort in Reno, NV the weekend of November 9-11, 2018 and we're so excited to start planning! That being said, we have formed a Conference Committee to get the ball rolling, and we need YOUR help! If you are interested in volunteering on the Conference Committee, step on up! Please contact me at endresser@gmail.com for more information.

Membership in SCCoLPA continues to grow every year, and 2017-2018 will be no exception. SCCoLPA is currently the third largest association in the state, and we hope to keep attracting new members from the local legal community, be they students, legal secretaries, legal assistants, paralegals, attorneys, and legal support professionals. We need your help, so encourage your co-workers, peers, friends, bosses, and vendors to join our association!

Our association is a collegial one, filled with members who actively volunteer to help us continually improve the quality of our educational programs and fundraising events. Your Executive Board listens to your needs and we are committed to create program content that will help you become successful in your career. I'm proud to say that our members excel in connecting with and helping each other, be it through networking, reaching out to those who cannot attend our monthly meetings, and most importantly, mentoring and support.

Our mission this year is to continue to encourage members to step outside their box and try something new. I encourage each and every one of you to contact a board member and see how you can become involved in this great association.

As a reminder, "The Advance Sheet" will be distributed monthly in an online format right here via Constant Contact. Please feel free to share the newsletter with your co-workers, colleagues, and employers, and encourage them to join our association! Please also remember to "like" our Facebook page (<https://www.facebook.com/SCCoLPA>) to view all upcoming events, as well as to see what we've been up to lately.

Thank you again for the privilege of letting me lead this amazing association again this year. My best wishes to all of you this year, and thank you for your continued membership, participation, and support. I hope to meet many new members as we move forward together as the best association in the state. There has never been a better time to be a member of Santa Clara County Legal Professionals Association!

With very best wishes,

Elise Dresser, CCLS
President

Upcoming Monthly Meetings

Monthly Membership Meeting May 9, 2017



SCCoLPA invites you to its **May 9, 2017** monthly membership meeting and is pleased to present "Taking a Murder Case to Trial," presented by Attorney Kevin R. Nowack. Join us as Mr. Nowack, a noted criminal defense attorney in the Bay Area, will be our guest speaker. Mr. Nowack has handled death penalty cases and gang-related cases, among others, and will present information regarding trial preparation and other matters related to criminal defense trials.

IMPORTANT NOTICE: Our May membership meeting will be held at **Gordon Biersch, 33 E. San Fernando Street, San Jose, CA 95113**. There is validated parking across the street at the Pavilion Garage. \$6 flat rate parking in the garage after 6:00 p.m.

Register and pay via PayPal at www.sccolpa.org, or RSVP via email at reservations.sccolpa@gmail.com. Cash or checks accepted at the door. **No refunds will be issued if your reservation is canceled within 24 hours of the event.** A \$3 convenience fee will be added for PayPal/credit card payments.



"Taking a Murder Case to Trial"
Guest Speaker:
Kevin R. Nowack, Esq.

Join us for an enlightening program presented by Attorney Kevin Nowack, a noted criminal defense attorney who has handled death penalty cases and gang-related cases. Mr. Nowack will present information regarding trial preparation and other matters related to criminal defense trials.

Register and pay via PayPal at www.sccolpa.org, or RSVP via email at reservations.sccolpa@gmail.com. NOTE: Please pay SCCoLPA membership in the title of your email. Your credit card will be charged for "SCCoLPA" - cash or checks accepted at the door.

No refunds if reservation is canceled within 24 hours of the event. \$3 convenience fee added for PayPal/credit card payments.


Tuesday, May 9, 2017

TIME
 Social Hour: 6:00 p.m.
 Dinner/Program: 6:30 p.m.

Flames Eatery & Bar
 88 S. Fourth Street, San Jose, CA 95113
 408-971-1802 - validated parking at the 4th Street parking garage

COST
 \$35.00 (dinner, dessert & CCLS credit)
 \$20.00 (CCLS credit, no dinner)
 Free (no dinner or CCLS credit)

UPCOMING EVENTS
 April 9, 2017 SCCoLPA's Annual Luncheon of Officers & Directors (2-day brunch at Flames)
 April 26, 2017 SCCoLPA Quarterly Workshop - "100 Days Before Trial"
 May 18-21, 2017 LPA's 80th Annual Conference - Modesto, CA



Santa Clara County Legal Professionals Association
June 2017 Dinner Meeting

"Unlawful Detainer Laws - What Everyone Needs to Know"
Guest Speaker:
Todd B. Rothbard, Esq.

What is an unlawful detainer action? Join us as Attorney Todd Rothbard explains the process of preparing and serving pre-eviction notices, three-day notices, the differences between commercial and residential actions, and when and how the notices should be served.

Register and pay via PayPal at www.sccolpa.org, or RSVP via email at reservations.sccolpa@gmail.com. NOTE: Please pay SCCoLPA membership in the title of your email. Your credit card will be charged for "SCCoLPA" - cash or checks accepted at the door.

No refunds if reservation is canceled within 24 hours of the event. \$3 convenience fee added for PayPal/credit card payments.

Tuesday, June 13, 2017

TIME
 Social Hour: 6:00 p.m.
 Dinner/Program: 6:30 p.m.

Flames Eatery & Bar
 88 S. Fourth Street, San Jose, CA 95113
 408-971-1802 - validated parking at the 4th Street parking garage

COST
 \$35.00 (dinner, dessert & CCLS credit)
 \$20.00 (CCLS credit, no dinner)
 Free (no dinner or CCLS credit)

UPCOMING EVENTS
 June 13, 2017 7th Annual Meet Pay (see B&B) - 100% NEW ALL SCCoLPA MEMBERS!
 July 11, 2017 Dinner Meeting - "Renting a Job - From Resumes to Interviews"
 August 1, 2017 San Jose Chapter - "The Identity is Indeed a Complex Subject"

Monthly Membership Meeting June 13, 2017

SCCoLPA invites you to its June 13, 2017 monthly membership meeting and is pleased to present "Unlawful Detainer Laws - What Everyone Needs to Know," presented by Attorney Todd B. Rothbard. Join us as Mr. Rothbard will discuss unlawful detainer procedures, the process of preparing and serving pre-eviction notices, three-day notices, and when and how notices should be served.

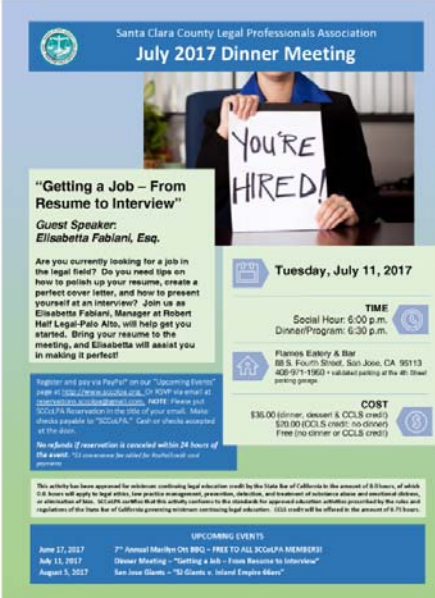
Register and pay via PayPal at www.sccolpa.org, or RSVP via email at reservations.sccolpa@gmail.com. Cash or checks accepted at the door. **No refunds will be issued if your reservation is**

canceled within 24 hours of the event. A \$3 convenience fee will be added for PayPal/credit card payments.

Monthly Membership Meeting July 11, 2017

Are you currently looking for a job in the legal field? Do you need a helping hand polishing up your resume? If you need tips on how to freshen up your resume, create a perfect cover letter, and how to present yourself at an interview, join us at our July 11, 2017 membership meeting. We are pleased to present Elisabetta Fabiani, Esq., Manager at Robert Half Legal in Palo Alto as our guest speaker for July. Bring your resume to the meeting and Ms. Fabiani will assist you to make it perfect before you send it to prospective employers!

Register and pay via PayPal at www.sccolpa.org, or RSVP via email at reservations.sccolpa@gmail.com. Cash or checks accepted at the door. **No refunds will be issued if your reservation is canceled within 24 hours of the event.** A \$3 convenience fee will be added for PayPal/credit card payments.



Santa Clara County Legal Professionals Association
July 2017 Dinner Meeting

"Getting a Job - From Resume to Interview"
Guest Speaker: *Elisabetta Fabiani, Esq.*

Are you currently looking for a job in the legal field? Do you need tips on how to polish up your resume, create a perfect cover letter, and how to present yourself at an interview? Join us as Elisabetta Fabiani, Manager at Robert Half Legal-Palo Alto, will help get you started. Bring your resume to the meeting, and Elisabetta will assist you in making it perfect!

Register and pay via PayPal on our "Upcoming Events" page at www.sccolpa.org, or RSVP via email at reservations.sccolpa@gmail.com. **NOTE:** Please put "SCCoLPA" in the title of your email. **Reservations are accepted on a first-come, first-served basis.** Cash or checks accepted at the door. **No refunds if reservation is canceled within 24 hours of the event.** **NO cancellations for the first 24 hours of the event.**

TIME
Social Hour: 5:00 p.m.
Dinner/Program: 6:30 p.m.

PLACE
Flames Eatery & Bar
88 S. Fourth Street, San Jose, CA 95113
(408) 977-1950 • validated parking at the 4th Street parking garage

COST
\$35.00 (member & CCLS credit)
\$75.00 (CCLS credit: no dinner)
Free (no dinner or CCLS credit)

UPCOMING EVENTS
June 17, 2017 77th Annual Meeting On BQ - FREE TO ALL SCCoLPA MEMBERS!
July 11, 2017 Dinner Meeting - "Getting a Job - From Resume to Interview"
August 1, 2017 San Jose Events - "90 Days to a Better Employer Brand"

April 2017 Highlights



April Monthly Membership Meeting April 9, 2017

Santa Clara County Legal Professionals Association held its 77th Annual Meeting & Installation of Officers on Sunday, April 9, 2017 at Flames Eatery in San Jose. Members enjoyed a delicious brunch and great company as the Officers of SCCoLPA's Executive

Committee were installed for the 2017-2018 fiscal year. We were honored to have LSI Executive Secretary Lynne Prescott, CCLS as our Installing Officer, and SCCoLPA Past

President Patty Russell as Installing Marshal. Many thanks to Lynne and Patty for joining us!

Presenting the Executive Committee for Santa Clara County Legal Professionals Association for 2017-2018:

President	Elise Dresser, CCLS
Vice President of Membership	Shannon Quigley
Vice President of Marketing	Sheryl Boardman
Executive Secretary	M'Liss Bounds
Treasurer	April Ignaitis, CCLS
Governor	Linda Neuman

Appointed Officers:

Executive Advisor	Rod Cardinale, Jr.
Parliamentarian	Elena Schneider, CCLS
CEC Coordinator	Vivian Shreve, CCLS

Committee Chairs:

Advertising	Christina Hall, CCLS
Annual BBQ Chair	Rod Cardinale, Jr
Chapter Achievement	Linda Neuman
Day-in-Court	Irma MacKay
Continuing Education	Vivian Shreve, CCLS
Crab Feed Chair	Rod Cardinale, Jr.
Employment & Professional Liaison	Elena Schneider, CCLS
Historian	Elena Schneider, CCLS
Inter-Association	Rod Cardinale, Jr.
Legal Procedures	Lori Lovelace-Jones, CCLS
Marketing	Sheryl Boardman
MCLE Coordinator	Linda Neuman
Membership	Shannon Quigley
Programs	Irma MacKay
Reservations	M'Liss Bounds
Scholarship	Linda Neuman
Social Media	Mark Dresser
Ways & Means	April Ignaitis, CCLS
Website Coordinator	Mark Dresser
Assistant Website Coordinator	Rod Cardinale, Jr.

SCCoLPA also acknowledged Patty Russell for teaching this year's 8-week Beginning Civil Litigation training classes. 22 students attended this class, which was so well-received that we are thinking about presenting an intermediate civil litigation class in the near future.

Historian Elena Schneider, CCLS presented President Elise with a beautiful scrapbook containing photographs and memories of SCCoLPA's events over the past year. Elena's scrapbook will be entered in LSI's Annual Scrapbook Contest at this year's annual conference, and we all know that she will win! As you know, the Historian is responsible for keeping a visual record of our association's events, which means Elena took pictures at all our monthly meetings, workshops, and fundraising events. The lovely scrapbook is a reflection of all the hard work that Elena put into creating it!

The tradition of the Annual President's Award started in 2010 when Rod Cardinale was President of SCCoLPA. The annual award was presented to a deserving member who, during the course of the year, and in the President's opinion, made a significant contribution to the association and epitomized the spirit of volunteerism, hospitality, and dedication to the association. In 2014, the membership voted to rename the award to the "Rod Cardinale, Jr. President's Award." This year, President Elise presented the 2016-2017 Rod Cardinale, Jr. President's Award to Vice President of Marketing, Sheryl Boardman. Sheryl stepped outside the box this year to run for the office of Vice President of Marketing, and she also generously hosted the Board's monthly board meetings at her office. Whenever an "SOS" went out, Sheryl was always available to help out. And speaking of stepping outside the box and keeping with last year's theme of trying something new, Sheryl wrote her very first article for this month's issue of *The Legal Secretary* magazine. Keep an eye out for it and enjoy Sheryl's article!



Installing Officer Lynne Prescott, CCLS; Elise Dresser, CCLS; Shannon Quigley; Sheryl Boardman; M'Liss Bounds; April Ignaitis, CCLS; Linda Neuman; Installing Marshal Patty Russell



SCCoLPA's Executive Committee and Chairmen: Elise Dresser, CCLS; Rod Cardinale, Jr.; Elena Schneider, CCLS; Vivian Shreve, CCLS; Irma MacKay; Sheryl Boardman; Shannon Quigley; Lori Lovelace-Jones, CCLS; Linda Neuman, M'Liss Bounds; April Ignaitis, CCLS; Mark Dresser



Lovely "Hospitality" centerpieces courtesy of our very own Governor, Linda Neuman!



SCCoLPA's intrepid photographer, Historian Elena Schneider, CCLS, who is everywhere with her camera, all the time!



Congratulations to Sheryl Boardman, recipient of the Rod Cardinale, Jr. President's Award!



Thank you to LSI Executive Secretary and Installation Officer, Lynne Prescott, CCLS!

"100 Days Before Trial" Quarterly Workshop April 20, 2017

SCCoLPA Members Sheryl Boardman, Rod Cardinale, Jr., Elise Dresser, CCLS, Linda Neuman, and Elena Schneider, CCLS participated in the 8th Annual Legal Trivia Throwdown, held on Saturday, March 25, 2017 at Nixon Peabody in San Francisco. Seven local associations participated in the event, which was hosted by last year's champs, San Francisco LPA. Many thanks to Larry McGrew, President of SFLPA, who masterfully emcee'd the throwdown. It was a close game of legal trivia Jeopardy, but in the end, congratulations go to Mt. Diablo LPA, who had the only correct answer in Final Jeopardy! We had a great time, and hope that more of you will join us next year for the 9th annual throwdown!

SCCoLPA's CEC Coordinator Vivian Shreve, welcoming attendees and introducing our "100 Days Before Trial" workshop



Susan Kalra presenting a great interactive and informative program.



Susan Kalra and Vivian Shreve, CCLS

San Francisco Legal Professionals Association 80th Anniversary & Installation of Officers April 22, 2017

Congratulations to San Francisco Legal Professionals Association, who celebrated its 80th Anniversary and Installation of Officers on April 22, 2017 at the Irish Cultural Center in San Francisco. We thoroughly enjoyed ourselves as SFLPA's members were the perfect hosts, as the room was awash in silver and gold, and we were treated to a delicious dinner buffet and a beautiful tribute to the past, present, and future of the association. Congratulations to Larry McGrew, President of SFLPA, and the dedicated officers who were installed that evening. We wish you all the best this year and always!



*Tony Page, LSI President Jennifer Page, CCLS, Shannon Quigley, Elise Dresser, CCLS,
Rod Cardinale, Jr., Elena Schneider, CCLS*



Shannon Quigley and Elena Schneider, CCLS



LSI Treasurer Rod Cardinale, Jr., SFLPA President Larry McGrew



Rod Cardinale, Jr., Linda Neuman, Shannon Quigley



Norbert was here!



Congratulations SFLPA!



LSI Treasurer Rod Cardinale, Jr. performing his duties as Installing Marshal for the Installation of Officers



Congratulations to the newly installed SFLPA Officers Larry McGrew, Christine Flores, Sheryl Warr, Francie Skaggs



Shannon Quigley, Elena Schneider, CCLS, Diane Mecca, Tanya Tate



LSI VIP table included LSI President Jennifer Page, CCLS, Tony Page, Yvonne Waldron-Robinson, CCLS, Mary Beaudrow, CCLS, Rod Cardinale, Jr. Sally Mendez-Aravallo, Kristi Edwards, CCLS

San Mateo County Legal Professionals Association Annual Installation of Officers April 25, 2017

SCCoLPA members attended San Mateo Legal Professionals Association's Annual Installation of Officers on April 25, 2017, at the historic Van's Restaurant in Belmont. With a beautiful sunset in the background, we dined on a delicious dinner and enjoyed great company. Congratulations to incoming President Tanya Tate, who gave an inspiring speech to the members of SMCLPA, and to the rest of the board. We wish you all the best this upcoming year!



Norbert tagged along with SCCoLPA for the evening

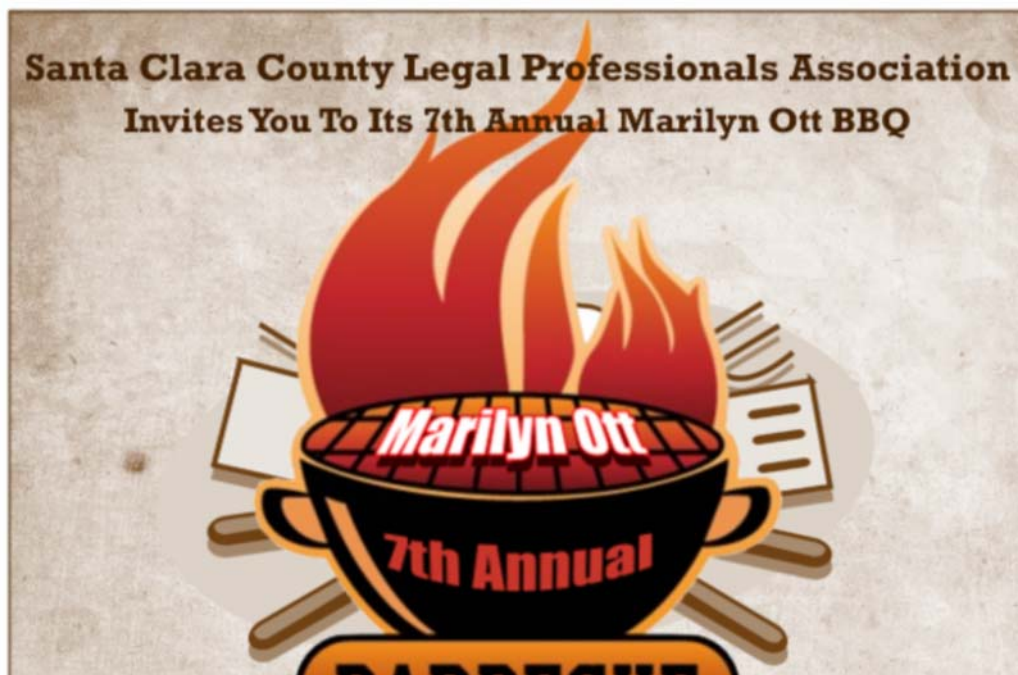


SCCoLPA members attending SMCLPA's Installation: Elena Schneider, CCLS, Shannon Quigley, Rod Cardinale, Jr., Elise Dresser, CCLS, Linda Neuman, and Sheryl Boardman



Congratulations to the newly-installed officers: April Vanderbilt, Pauline Balestrino, Kim Ratto, Cynthia Woodman, Tanya Tate

UPCOMING EVENTS





Join Us For Our First Bunco Fundraiser! July 20, 2017



Have you ever played Bunco? Ever wondered what Bunco is? It's an easy, fun, social dice game played with three dice in groups of four consisting of two teams. There are six rounds, progressing in order from one to six, where the number of the round serves as the target for that round's rolls. Within a round, players alternate turns rolling three dice, aiming to obtain the target number. Players gain one point for each die

matching the target. If the player gets three-of-a-kind of the target number (a Bunco), they get 21 points. The round stops when a player at a head table obtains 21 points. After each round the winning team moves to the next table and change partners. Following three games (18 total rounds), cash prizes will be awarded to the person with the most Bunco's, the most Wins, and the most Loses.

Please join us on Thursday, July 20, 2017 for our first Bunco fundraiser. It will be held at McManis Faulkner, 50 West San Fernando St., 10th Floor, San Jose starting at 6:30 p.m. There will be cash prizes, appetizers, mocktails, and door prizes, all for \$20.00!

Please come and join the fun. Everyone is welcome, members and non-members included. You do not need to be a member of our association or affiliated with the legal

community. A flyer will be circulated shortly with registration information. If you have any questions please feel free to contact Sheryl Boardman at Sheryl.boardman@compexlegal.com.

SCCoLPA's Annual Summer Baseball Game
August 5, 2017
San Jose Giants v. Inland Empire 66ers

Join us for a great day of fun in the sun!



 **Santa Clara County Legal Professionals Association**
invites you to

The San Jose Giants v. Inland Empire 66ers
Municipal Stadium, 588 East Alma Ave. San Jose, CA 95112

Saturday, August 5, 2017
Game Time: 6:00 p.m.
Tickets: \$50 Adults / \$30 Children

Be part of the action as we watch the San Jose Giants from the private field level VIP Party Deck! Your ticket package includes one game ticket, a delicious BBQ meal, and two alcoholic beverages per guest as well as a personal Beverage and Food Attendant. You will have the opportunity to win Lucky Prizes throughout the game with your very own scorecard and bingo card! Learn about the history of the team with one of the handful of programs included.

Make reservations and payment at
www.sccolpa.org
or contact Reservations Chair M'Liss Bounds,
reservations.sccolpa@gmail.com
Please contact Rod Cardinale, Jr. at
rodcardinalejr@sbcglobal.net if you have any
questions about the game/ticket purchase.

Please RSVP by July 27, 2017

WELCOME TO OUR NEW MEMBERS!

SCCoLPA extends a warm welcome to the following new members this month:

Kimberly Chu
Brian Ward

We hope to see you at our upcoming meetings, workshops, fundraising and networking events!

Member in the Spotlight **May 2017**

Sheryl Boardman

~by Shannon Quigley, Vice President of Membership~

Our May Spotlight Member is not only the latest recipient of the Rod Cardinale, Jr. President's Award, she is currently our Vice President of Marketing, and one of our very own vendors who works for Compex. That would be none other Sheryl Boardman!

Before joining Compex, one of the largest litigation and discovery support services in the nation, Sheryl was a workers' compensation claims adjuster. Prior to that, she worked at four different insurance companies. Unfortunately, they all ended up going out of business, but right before the last layoff, Sheryl was approached by a nurse case management company asking her if she would be interested in joining their company doing sales. Sheryl decided to make the decision to step out of her comfort zone and try something different. She was nervous about leaving a company with an extremely busy desk to give sales a chance. Even though she would have to find her own work and meet new people, she had nothing to lose since her job was ending. She started her journey at Concentra but left after four years to join Compex. Fast forward 11 years and this girl has not looked back.



Sheryl was convinced she could use her knowledge of workers' compensation in another field and when she joined Compex, she found that she was exposed to both workers' compensation and liability firms. She found it interesting learning the differences between the two systems. She used her desire to provide for her family and giving it her all to whatever she does to keep her motivated.

Sheryl's favorite part about her job is the flexibility it provides her, which allowed her to

attend her children's sports practices/events and whatever else was needed when they were little. Working at home allowed her the freedom to take care of her family and after they went to bed, she could go back to her computer and finish her work. Today, Sheryl is typically in the office one or two days a week with the rest of her time spent meeting clients, educating new clients about the website and services provided visiting existing clients to make sure their services were still meeting their expectations.

Sheryl was invited, or rather convinced, to join our association by one of her most favorite clients...our very own President Elise Dresser, CCLS. Elise encouraged Sheryl to ask Compex to be one of the sponsors for an annual conference. She also encouraged Sheryl to attend the dinner meetings. Even though Sheryl joined only knowing Elise, she soon found that she was making some very good friends and was picking up additional business along the way. With that said, I encourage you to reach out to Sheryl the next time you are in the market for legal support services.

Santa Clara County Legal Professional Association is also very proud that Sheryl stepped out of her comfort zone, once again, by penning her first article for LSI's magazine "The Legal Secretary." Please look for her article in the May magazine. When you get a chance, please give her a big "thumbs up" on a job well done.

Congratulations, Sheryl, for being chosen as our May Spotlight Member!

Governor's Corner

~by Linda Neuman, SCCoLPA Governor~

What Does That Acronym Mean?

At a General Membership Meeting or a LSI Conference do you find yourself confused by the acronyms flying around?? Do you want to know what they stand for but feel apprehensive asking the question, "what does that mean?"

Well here are some of the acronyms I know I have used while giving a verbal or written report:

LPA - Legal Professionals Association

LSA - Legal Secretaries Association

LSI - Legal Secretaries, Incorporated

LOPM - Law Office Procedures Manual (LSI publication which is a concise training tool for new legal staff and a procedural handbook for the California Courts and most areas of law. Includes examples and instruction for completion of legal forms. It is also used



in studying for the CCLS exam.)

LPH - Legal Professional's Handbook (LSI publication which is a procedural handbook for California Courts with 24 chapters giving deadlines and instructions and is also used in studying for the CCLS exam.)

LSRG - Legal Secretary's Reference Guide (LSI publication which is a legal procedures guide designed to assist local associations in conducting training classes.)

LSS - Legal Specialization Sections (a committee consisting of leaders for six sections Criminal/Family Law, Federal Law, Law Office Administration, Litigation, Probate and Estate Planning and Transaction Law, who conduct seminars, workshops, and roundtable discussions at LSI Conferences.)

CCLS - California Certified Legal Secretary (involves passing an 8-hour exam spanning 7 legal procedural sections for state certification.)

PLS - Professional Legal Secretary (involves passing a one-day exam spanning four legal procedural sections.)

PRC - Publications Revisions Committee (a committee consisting of an Editor-in-Chief, two Editors and six Assistant Editors responsible for revising and updating the above listed LSI publications.)

CEC - Continuing Education Council (A chairmanship on both the State and Local level responsible for presenting legal educational programs.)

MCLE /CLE - Minimum Continuing Legal Education/Continuing Legal Education (an educational requirement for Attorneys, Certified Paralegals and California Certified Legal Secretary (CCLS) to remain current regarding the law, and obligations and standards of the legal profession.)

I hope this has cleared up any confusion you may have had with acronyms that fly around at meetings or conferences. Members who have been exposed to these acronyms for many years (which I am one), sometimes forget that not all members know the lingo.

Until next time . . .

Linda Neuman, proud Governor of SCCoLPA



NAME (ON BADGE): _____
MAILING ADDRESS: _____

Cruisin' to Conference: Graffiti Style
STANISLAUS COUNTY LEGAL PROFESSIONALS
ASSOCIATION
MAY 18-21, 2017
LSI ANNUAL CONFERENCE
DOUBLE TREE HOTEL - MODESTO, CALIFORNIA
CONFERENCE REGISTRATION FORM



CONFERENCE REGISTRATION FORM

NAME (ON BADGE): _____

MAILING ADDRESS: _____

CITY/STATE/ZIP: _____

HOME PHONE: _____ WORK PHONE: _____

E-MAIL ADDRESS: _____

LOCAL ASSOCIATION: _____ LSA/LPA (FULL NAME) _____

PLEASE CHECK IF APPLICABLE AND INCLUDE TITLE: ☐ STATE OFFICER ☐ STATE CHAIRMAN

PLEASE CHECK IF YOU ARE: ☐ GOVERNOR ☐ CCLS ☐ PLS

SCRIP (INCLUDES REGISTRATION, WELCOME RECEPTION, BANQUET AND BRUNCH)

POSTMARKED ON OR BEFORE APRIL 30, 2017 \$125.00 \$ _____

POSTMARKED MAY 1, 2017 OR LATER \$135.00 \$ _____

INDIVIDUAL TICKETS

REGISTRATION BY APRIL 30, 2017 @ \$25.00 \$ _____

REGISTRATION MAY 1, 2017 OR LATER @ \$35.00 \$ _____

WELCOME RECEPTION (FRIDAY) @ \$30.00 \$ _____

LUNCHEONS VEGETARIAN

GOVERNOR'S (FRIDAY) @ \$25.00 \$ _____

PRESIDENT'S (FRIDAY) @ \$25.00 \$ _____

MEMBERSHIP (FRIDAY) @ \$25.00 \$ _____

CCLS (SATURDAY) @ \$25.00 \$ _____

SATURDAY NIGHT BANQUET

CHICKEN BEER \$45.00 \$ _____

FISH \$ _____

SUNDAY BRUNCH @ \$30.00 \$ _____

TOTAL AMOUNT ENCLOSED \$ _____

SPECIAL DIETARY NEEDS: _____

PLEASE MAKE CHECKS PAYABLE TO: **MAY 2017 CONFERENCE FUND**

MAIL TO: JANICE WILLIAMS, 3212 PROVINCE TOWNE CT., MODESTO, CA 95355



FOR GENERAL INFORMATION CONTACT:
REGISTRATION CHAIR - JANICE WILLIAMS - (209) 499-8911
JANICEWILLIAMS@PCADOPTIONS.ORG

NO REFUNDS AFTER MAY 10, 2017



Cruisin' to Conference Graffiti Style
STANISLAUS COUNTY LEGAL PROFESSIONALS
ASSOCIATION
MAY 18-21, 2017
LSI ANNUAL QUARTERLY CONFERENCE
DOUBLE TREE HOTEL - MODESTO, CALIFORNIA
HOTEL REGISTRATION FORM



NAME: _____

MAILING ADDRESS: _____

CITY/STATE/ZIP: _____

HOME PHONE: _____ WORK PHONE: _____

E-MAIL ADDRESS: _____

LOCAL ASSOCIATION: _____ LSA/LPA (FULL NAME) _____

ARRIVAL DATE: _____ DEPARTURE DATE: _____

ACCOMMODATIONS: (PLUS APPLICABLE TAXES AND FEES)

- ☐ SINGLE/DOUBLE - \$109.00
- ☐ TRIPLE - \$109.00

COMPLIMENTARY SELF PARKING
VALET PARKING IS \$12.00 PER DAY



REGISTRATION CHAIR - JANICE WILLIAMS - (209) 499-8911
JANICEWILLIAMS@FCADOPTIONS.ORG

CONFERENCE CHAIR - DIANE M. MECCA, CP, CBA - (209) 918-0796
DIANEMECCA@HOTMAIL.COM

NO REFUNDS AFTER MAY 10, 2017

Order in the Court

~By Elena K. Schneider, CCLS, SCCoLPA Parliamentarian ~

To What Does "Advice and Consent" Refer?

To prevent the abuse of power by one of the three branches of government, checks and balances have been built into the Constitution. "Advice and consent" is one of them. It's the most important means by which the Senate checks the power of the president, who according to Article II, Section 2 of the Constitution, "shall have power, by and with the advice and consent of the Senate, to make treaties...appoint ambassadors, other public ministers and consuls, judges of the Supreme Court, and all other officers of the United States...". The Senate must approve presidential appointments by a majority vote; treaties by two-thirds vote. Despite the more stringent requirements of the latter, the form are more difficult for the president to win. Since the constitution was ratified, one-quarter of all presidential nominations to the Supreme Court have been rejected or not confirmed by the Senate. Advice and consent battles have spilled over into other presidential appointments, too.

Education is the Key

**Superior Court of California
County of Santa Clara**

191 North First Street
San Jose, California 95113
(408) 882-2700

Chambers of
HON. PATRICIA M. LUCAS, Presiding Judge



February 28, 2017

Santa Clara County Bar Association
31 North 2nd Street, Suite 400
San Jose, CA 95113

Dear Members of the Santa Clara County Bar Association:

As you know, staffing shortages continue to cause significant backlogs in all divisions of the Santa Clara Superior Court.

Because of the constitutional and statutory timelines under which other divisions work, the Court's civil division is presently most severely impacted. There, the vacancy rate is so high and backlogs are so deep that our staff needs uninterrupted time to address the unprocessed work.

To do so, beginning Friday, May 5, 2017, the office and telephone hours at the Superior Court Civil Clerk's Office each Friday will be 8:30 a.m. – 12:00 p.m.

Thank you for your continued support.

Yours truly,

A handwritten signature in blue ink, appearing to read "Patricia M. Lucas".

Patricia M. Lucas
Presiding Judge

CCLS Quiz

~By Vivian Shreve, CCLS, SCCoLPA CEC Chair~

Are you interested in attaining your California Certified Legal Secretary certification? Certification is achieved by passing a comprehensive full-day examination. Candidates are tested in California legal procedures, legal terminology, performance skills, reasoning and ethics, law office administration, ability to communicate effectively, and legal computations. A minimum of two years' experience is required. Continuing legal education requirements must be met for recertification.

Each month we will present a mini "mock" quiz to give you a sense of what the exam covers. The exam is administered twice a year, in March and September and is given in various locations throughout the state. If you are interested in applying to sit for the next exam, which is scheduled to take place on September 16, 2017, please fill out an exam application, which can be found on SCCoLPA's website, or LSI's website at www.lsi.org.

CCLS Quiz - Ethics

1. A couple of years ago, I was involved in a very interested murder case that got a lot of publicity. I was contacted by an author who will be writing a book about the crime and the trial, and he wanted to interview me. Since we no longer represent the client, is it okay to grant an interview with the author?

Always____
Never____
Sometimes_____

2. Is it okay to send copies of financial documents from our files to our client's accountants?

Always____
Never____
Sometimes_____

3. Is information given to the attorney by the client still considered confidential and privileged if I attend the meeting?

Always____
Never____
Sometimes_____

4. Do I need a license to work as a paralegal?

Yes____
No____

5. If I am not an attorney, I cannot be disbarred. What are the negative consequences to unethical paralegal behavior? (List 3)

6. Can I give legal advice on my blog as long as I identify myself as a paralegal?

Yes____
No____

7. Is it possible for an attorney to represent two clients with adverse interests?

Yes____
No____

8. Do all retainers our law firm receives need to go into a trust account?

Yes ____

No ____

9. The attorneys I work for would like to establish a profit-sharing plan. Can I participate or is that considered fee sharing?

Yes ____

No ____

10. Is it okay for me to receive a commission equal to 10% of the fees our law firm collects for each client I refer to our firm?

11. If I witness an accident, can I suggest to the accident victims that they contact the personal injury attorneys I work for?

12. Is it okay to send a letter to the families of plane crash victims to offer them the assistance of our law firm?

ANSWER KEY

1. NEVER. The rules of confidentiality outlast the attorney's representation of the client. The attorney or paralegal may NEVER divulge confidential client information, even after the client's death. (Pocket Guide to Legal Ethics, Chapter 5)

2. SOMETIMES. Depends on the working relationship between the attorney, client, and the accountant. If they are working on an ongoing transaction, such as the purchase of a business, it would be understood that the attorney and accountant would share information. If, however, it is an unfamiliar accountant calling to request financial information concerning one of your clients, you should obtain the client's permission first. (Pocket Guide to Legal Ethics, Chapter 5)

3. ALWAYS. In some circumstances, the attorney-client privilege may be waived if the client divulges otherwise confidential information in the presence of a third party, there is generally no waiver of the privilege when information is shared in the presence of a paralegal or another agent of the attorney. (Pocket Guide to Legal Ethics, Chapter 5)

4. NO. Although some states set forth minimum qualifications for individuals who use the title paralegal, no state currently requires a license to work as a paralegal. (Pocket Guide to Legal Ethics, Chapter 1)

5.

A. Loss of respect among colleagues

B. Loss of employment

C. Supervising attorneys may be subject to discipline by the state bar and court that has licensed them;

D. Possible discipline by a paralegal association

E. Civil lawsuits

F. Criminal prosecution

(Pocket Guide to Legal Ethics, Chapter 1)

6. NO. In general, the giving of legal advice by anyone other than a licensed attorney is considered to be the unauthorized practice of law. You could probably share information with other paralegals, such as where to file real estate documents in your

county, but to advise others how to proceed in a legal matter would be the unauthorized practice of law. (Pocket Guide to Legal Ethics, Chapter 4)

7. YES. It is possible as long as the representation is not prohibited by law and the attorney believes that he or she will be able to provide competent and diligent representation to each client. If that is the case, the attorney can represent both parties if the representation does not involve one client suing the other one, and if both clients give informed written consent. (Pocket Guide to Legal Ethics, Chapter 6)

8. GENERAL retainers do not need to be deposited into trust accounts. General retainers are considered earned when received. All SPECIAL retainers, however, need to be deposited into client trust accounts, with amounts withdrawn and paid to the law firm as earned. (Pocket Guide to Legal Ethics, Chapter 7)

9. YES. Profit sharing and 401(k) plans are not considered to be fee splitting under most circumstances. (Pocket Guide to Legal Ethics, Chapter 7)

10. NO. To receive a commission on any referral or on any files on which you work would be considered to be fee splitting with the attorney. Fee splitting is impermissible under the rules of ethics of every state. (Pocket Guide to Legal Ethics, Chapter 7)

11. NO. In-person solicitations are generally prohibited because it is felt that such a solicitation puts too much pressure on individual who are already in a stressful situation. Unless the accident is a family member or close personal friend, such a solicitation would probably not be permitted. (Pocket Guide to Legal Ethics, Chapter 8)

12. YES. It is probably permissible as long as all the rules in your state concerning solicitation by mail are followed. Unlike in-person solicitation, solicitation letters are generally permitted because they are thought to put less pressure on the potential client. Most states have placed certain restrictions on solicitation letters. For example, there may be restrictions on the time period during which such letters may be sent and what the content of those letters may be. (Pocket Guide to Legal Ethics, Chapter 8)

Coming Soon!

You asked for quality educational classes, such as Microsoft Office, Adobe Acrobat, Calendaring, 100 Days Before Trial, Basic Legal Secretary Skills, E-filing, Discovery, and more. Look no further - keep your eyes peeled for updates on our website, our Facebook page, and our regular email blasts as we announce more educational workshops to be presented in the next several months.

Coming up: Attend our "eDiscovery" workshop on





August 24, 2017. A four-member panel of experts will discuss topics such as the processing of e-discovery, document review and productions, collection of forensic data, cybersecurity matters and data privacy, and database hosting. 90 minutes of MCLE credit will be provided.

Future educational workshops will include workplace/employee relations investigations, employee rights, probate, navigating court websites and local rules, e-filing in Santa Clara County, and discovery.

Membership in SCCoLPA - Spread The Word!

Attention all members - it's time to renew your membership with Santa Clara County Legal Professionals Association! Please take a moment and renew online at www.sccolpa.org or fill out the membership/renewal form and mail it to us with your membership dues. You can also pay online via PayPal/credit card. A \$3 processing fee will be charged for online payments.

The renewal period is from May 1, 2017 to May 31, 2017. Don't wait too long! After you renew your membership, you will receive a new password for the "Members Only" section of the website, and in that section you can review the association's monthly financial reports, minutes of membership meetings, rosters, and conference reports. Please encourage your co-workers, colleagues, and friends to join SCCoLPA!



SANTA CLARA COUNTY LEGAL PROFESSIONALS ASSOCIATION

2017-2018 MEMBERSHIP/RENEWAL APPLICATION

Please make checks payable to: SCCOLPA
Send to: SCCoLPA Treasurer
P.O. Box 90509
San Jose, CA 95109-3627

Member's Name _____ Residence Address _____ Residence City and Zip Code _____ Residence Telephone Number _____ Residence Fax Number _____ E-Mail Address (Home) _____ PREFERRED E-MAIL: (Check One) Residence: _____ Business: _____ Birthdate: _____ Month/ Day	*Title: [Examples at bottom of page] _____ Business Name _____ Business Address _____ Business City/State/Zip Code _____ Business Telephone Number/Business Fax Number _____ E-Mail Address (Work) _____ Field of Law _____ Year I became a member of SCCoLPA: _____ How many years with SCCoLPA? _____
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If accepted as a member, I agree to be bound by the bylaws and standing rules of Legal Secretaries, Incorporated, and/or the local association, whichever are applicable to which I hereby apply for membership, including the following Code of Ethics:

"It shall be the duty of each member of Legal Secretaries, Incorporated and/or Santa Clara County Legal Professionals Association, to observe all laws, rules, and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence, and diplomacy, in accordance with the highest standards of professional conduct. (Dedicated to the memory of Joan M. Moore, PLS, CCLS, LSI President 1980-1982)"

Applicant's Signature: _____	Date: _____
Sponsor: _____	Application Approved: _____

*Title: [Your Title/Certification in the Legal Field - EXAMPLES: CCLS California Certified Legal Secretary; PLS Professional Legal Secretary; CLA Certified Legal Assistant; (Or) Paralegal; Legal Assistant; History Public; Office Manager; etc.]

Application/Renewal Form 2017-2018

MEMBERSHIP DUES¹

PLEASE CHECK THE APPROPRIATE BOX(ES) BELOW

- ☐ ACTIVE MEMBER (\$55.00 - New Member)
- ☐ ACTIVE MEMBER (\$45.00 - Renewing Member)
- ☐ ASSOCIATE/STUDENT MEMBER (\$35.00 - New Member) (Students, please attach proof of enrollment to this application)
- ☐ ASSOCIATE/STUDENT MEMBER (\$25.00 - Renewing Member) (Students, please attach proof of enrollment to this application)

☐ ASSOCIATE/STUDENT MEMBER (\$35.00 - New Member) *(Students, please attach proof of enrollment to this application)*
☐ ASSOCIATE/STUDENT MEMBER (\$25.00 - Renewing Member) *(Students, please attach proof of enrollment to this application)*
☐ RETIRED MEMBER: ☐ A (\$20.00) ☐ B (\$0.00)
☐ DISABLED MEMBER: ☐ A (\$20.00) ☐ B (\$0.00)
☐ LIFE MEMBER *(If a life member desires to retain active membership status, full payment of dues is required)*

MEMBERSHIP CATEGORIES

Active Member:	Dues for an Active Member of this Association shall be \$25.00 per year, plus \$20.00 per capita tax to LSI for total of \$45.00, following payment the first year of \$55.00 which includes a one-time only \$10.00 initiation fee.
Associate Member:	<p>Candidates with less than one year in a law-related environment, or enrolled in an academic program involved in legal studies and not employed in the legal field.</p> <p>Dues for an Associate Member of this Association shall be \$25.00 per year, following payment the first year of \$35.00 which includes a one-time only \$10.00 initiation fee.</p> <p>Associate Membership as defined in the By-laws shall include any student enrolled in a certified educational program recognized by this Association.</p>
Retired Member:	<p>Age 62, retired from employment, wishing to retain active status:</p> <p>A. Less than 10 years in SCCoLPA, payment of \$20.00 LSI per capita taxes. B. More than 10 years in SCCoLPA, no payment.</p>
Disabled Member:	<p>Must present certification of permanent disability and request to retain active status:</p> <p>A. Less than 10 years in SCCoLPA, payment of \$20.00 LSI per capita taxes. B. More than 10 years in SCCoLPA, no payment.</p>
Life Member:	Granted upon vote of the members to any member who has performed outstanding services to the Association. If a life member desires to retain active membership status, full payment of dues is required.
Delinquent Dues:	<p>When dues are not paid to the Association within thirty (30) days after the due date, such dues shall become delinquent, and such member shall without notice be suspended and shall lose all rights and privileges as a member of this Association.</p> <p>Such suspended member may be reinstated during the current fiscal year upon payment of the current annual dues, plus a reinstatement fee of \$5.00.</p>

² A \$3.00 processing fee will be applied to all online payments (PayPal) to cover fees. Renew online at www.sccolpa.org.

Application/Renewal Form 2017-2018

Help Wanted - Current Employment Opportunities

Did you know that you can view current job opportunities and openings in the local legal community on our website?

Our Employment Chair, Elena Schneider, CCLS, has been busy this month collecting and posting new job openings for positions such as legal assistants, legal secretaries, administrative assistants, and more, for many of the top firms in Santa Clara County. Go to our website (www.sccolpa.org) and check it out!



Volunteers Needed!

The Bay Area Legal Forum is comprised of members from the local Bay Area associations, and presents educational workshops throughout the year, including the always-popular "Changes in the Law" full-day workshop each January. If you are interested in volunteering on the Bay Area Legal Forum as a representative from SCCoLPA, please contact President Elise Dresser, CCLS, at endresser@gmail.com.

Happy Birthday to Our Members!

Happy Birthday to the following SCCoLPA members:

Rebecca Flores - May 2
Monica Sjoblom-Tyler - May 6
Brooke Mansfield - May 7
Sheryl Boardman - May 13
Adrienne Desmond - May 13
Gwen Freeman - May 14
Elise Dresser - May 23
Luanna Pignati - May 28





PARALEGAL ASSOCIATION OF SANTA CLARA COUNTY

TO ALL ATTORNEYS, PARALEGALS & OTHER LEGAL PROFESSIONALS:

TOPIC:	Trial Preparation – Tips & Tricks		<i>*1 hr. MCLE Credit approved</i>
SPEAKER:	Ilya D. Frangos of Galine, Frye & Fitting		
DATE:	May 18, 2017	TIME:	6:00 pm – 8:00 pm
		Sponsored by Quest Discovery	
			
LOCATION:	Hilton Garden Inn Mountain View 840 E El Camino Real, Mountain View, CA 94040		
Register online:	https://www.eventbrite.com/e/trial-prep-tips-and-tricks-tickets-33785527422		
PASCCO Member: \$35.00		PASCCO Student Member: \$33.00	Non-Member: \$45.00

SUMMARY: This presentation was designed to give legal professionals practical advice for preparing to take a civil case to trial by considering what to select as your trial exhibits and ensuring they support your case theory, what to consider in preparing motions in limine and trial notebooks, as well as understanding the difference in preparing for a bench trial and a jury trial.

- OBJECTIVES:**
1. Learn what to consider in selecting trial exhibits to support the theory of your case
 2. Learn what to consider in preparing motions in limine and trial notebooks
 3. Learn the differences between preparing for a bench trial and jury trial

Mr. Ilya Frangos is a Partner with Galine, Frye & Fitting and has served as lead counsel litigating cases in both state and federal court. Ilya aggressively pursues fair compensation for his clients and has successfully obtained millions of dollars in verdicts, judgments, and awards in cases involving complex issues of liability and damages. Ilya regularly represents clients in matters involving serious and catastrophic injuries from automobile, industrial, or premises liability cases, professional malpractice (including dental and medical malpractice), bad faith insurance, and business litigation. Ilya's work ethic and reputation have also been recognized in the legal community. He currently serves as the President of the San Mateo County Trial Lawyers' Association, is a member of the At Large Board of Governors for the Consumer Attorneys of California, serves as co-founder/Treasurer for the Veteran Lawyers of San Mateo County, and is a member of the Hellenic Law Society. Every year since 2013 through 2016, Ilya has been nominated by his colleagues as a Northern California Super Lawyers Rising Star. Ilya received his Juris Doctorate Degree from UC Hastings College of the Law with an emphasis in Criminal Law and received his Bachelor's Degree from UC Berkeley in Rhetoric. Prior to joining the Law Office of Galine, Frye & Fitting as an attorney, Ilya worked with the District Attorneys' office in San Mateo and San Francisco appearing frequently in court to prosecute criminals, and practiced general civil litigation in the areas of real estate, contract disputes, and personal injury. When Ilya is not representing his clients, he is involved in the local community working as a mentor for Woodside High School students in their Business Academy Mentoring program and routinely lecturing at local colleges in the areas of Business Law, Torts, and Legal Writing and Research. He also enjoys spending time with family and friends, playing and watching basketball, swimming, and listening to and playing music.

*PASCCO is a California State Bar Association approved MCLE provider
CLAE credit is approved by the National Association of Legal Assistants ("NALA")*



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Any Questions for Your Executive Committee? Contact Us!

We always want to hear from you! If you have any ideas or suggestions as to how we can make our association the best in the state, please reach out to a member of the Executive Committee. The board meets on the first Tuesday of every month, and anyone is welcome to attend. Your Executive Officers for 2017-2018 are:

President
 Vice President - Membership
 Vice President - Marketing
 Executive Secretary
 Treasurer
 Governor

Elise Dresser, CCLS
 Shannon Quigley
 Sheryl Boardman
 M'Liss Bounds
 April Ignaitis, CCLS
 Linda Neuman

Executive Advisor
Parliamentarian
CEC Coordinator

Rod Cardinale, Jr.
Elena Schneider, CCLS
Vivian Shreve, CCLS



Code of Ethics

It shall be the duty of each member of Legal Secretaries, Incorporated, to observe all laws, rules, and regulations now or hereafter in effect relating to confidentiality and privileged communication, acting with loyalty, integrity, competence and diplomacy, in accordance with the highest standards of professional conduct.

Dedicated to LSI Past President Joan M. Moore, PLS, CCLS

See what's happening on our social sites:



Santa Clara County Legal Professionals Association, P.O. Box 90509, San Jose, CA 95109

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