LEGAL TECH: TIMELINE 3D

PARALEGAL OF THE YEAR WINNER: Christina Sanders (CCPA)

2 RULES OF THUMB FOR EMPLOYEE LEAVE REQUESTS

THE LONG & WINDING ROAD: A HISTORY OF B&P §6450
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2016 COMMUNICATIONS COMMITTEE CHAIRS

RECAP EDITOR
Sara M. Lutz, CP
caparecap@caparalegal.org

WEB DIRECTOR
Makala Reha, ACP
website@caparalegal.org

CONFERENCE CHAIR
Connie Johnson
conferenceinfo@caparalegal.org

LIAISONS TO THE CA STATE BAR
State Bar
Nancy Woods
Law Practice Management & Technology Section
Makala Reha, ACP

BOARD ADVISORS EMERITUS
Hazel Lange, CLA
hlange@attglobal.net
Jon Montgomery, CLA
jonmontgomery@paulhastings.com
Trudy McQuiddy, CP
boardadvisor@caparalegal.org
“The power of imagination makes us infinite.” –John Muir

In the 1970’s a group of paralegals imagined the possibilities for the paralegal profession, and CA-P A was born. In the 1980’s another group of paralegals bound together to champion a law to elevate our profession, Business & Professions Code Section 6450, et seq. And, now, during our 40th anniversary year, Team CAPA continues to imagine the possibilities for our field.

We are diligently monitoring the LLLT and access to justice discussion with the State Bar of California. Team ICAP hosted our annual education conference on Saturday, June 25, at the Riverside Convention Center with resounding success. Our national association representatives, Allen Mihecoby, CAS, RP of NFPA and Jill Francisco, ACP of NALA joined us in celebrating our 40th anniversary. Past Presidents Jon Montgomery, Michele T. Pfeiffer, ACP, and Trudy McQuiddy, CP also attended our celebratory luncheon. And Christina Sanders of CCPA was recognized as our Paralegal of the Year. As well, we continue to host our monthly Growing Our Association Leaders (GOAL) Leadership Academy webinars as a benefit for CAPA members.

We imagine the possibilities. We think outside of the box. We share resources and inspire one another. We are committed to leaving a lasting legacy, developing dynamic leaders and to continually improve our profession.

What is the legacy that you wish to leave behind? How are you contributing to your local associations and community? Are you serving as a mentor for the next generation of paralegals to follow you? Do you participate in your association’s pro bono activities? Are you speaking to paralegal students to provide invaluable guidance as they embark upon their new careers?

As infamous American cultural anthropologist, Margaret Mead, said, “Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it’s the only thing that ever has.”

Be the change! And also be sure to check our website regularly and connect to us on our social media outlets for GOAL Leadership Academy details and other updates.

Warmly,

Kristine M. Custodio
Kristine M. Custodio, ACP
President

TREASURER’S REPORT: September 2016

By Bernice Meisner, CAPA Treasurer

CAPA currently has $12,122.91 in its checking account and $14,922.47 in its savings account for a total $27,045.38 all held at Bank of America. The Executive Committee and Conference Committee are currently reviewing all budgetary items, expenditures, and income to ensure all monies are accounted for. The Audit Committee has reconciled their audit of the 2015 financial records of CAPA, and will providing a report on the audit.
SVPA - Sacramento Valley Paralegal Association

SVPA has been busy busy in 2016! Our monthly MCLE luncheons have seen a jump in attendance with such popular topics as June’s Wine, Beer & Spirits (and Cannabis?), Law, Effective Communication in the Legal Profession (July), and Program & Debt collection Defense, Bankruptcy Clinic, and an Employment Law Clinic (August). Two of these events were free to SVPA members compliments of our fabulous sustaining members and the efforts of our Board.

SVPA is currently preparing for our upcoming Annual MCLE Seminar. As in years past, the event will be held at the UC Davis Extension center in Sacramento. This year’s focus will be ethics and participants can acquire four (4) ethics credits in just one day! As a bonus our Education Board has managed some awesome raffles prizes. The cost is a mere $125 to SVPA members, $150 non-members and Attorneys and $85 students.

The Annual MCLE Seminar is also our kick off for our “Three for Free”. Any new individual member and/or sustaining member who joins SVPA in October will receive their applicable benefits for the rest of 2016 and the entire 2017 year.

SVPA’s Annual “Pay it Forward” Student Event will be Saturday, Nov. 12, 2016, 9:00 a.m. – 1:30 p.m. The keynote speaker is Cami Mclaren of McClaren Coaching and the topic is Time Management. There will be Three (3) breakout sessions on “Resume Building”, “Interviewing Tips and Techniques and Stuffing Agency Resources. Three SVPA scholarships will be awarded to the recipients at this event. This event has shown to be extremely beneficial to those breaking into the paralegal profession.

SVPA’s recently formed “Pro-Bono” & “Volunteer Committee” is off to a good start with efforts to further contribute to the Sacramento area community. We are currently in discussions with several potential business entities in hopes of developing a relationship where SVPA members are able to assist them with providing legal aid and for those least able to obtain it through conventional means.

SVPA’s Paralegal Student Shadowing Program (PASS) continues to be a very popular. “Shadowing” a working paralegal allows a student to gain an inside perspective and make valuable connections. SVPA continues to expand the list of participating law firms in order to meet the demand for this high demand opportunity available only to SVPA Student Members.

For more information contact sacvalleypa@gmail.com.
IN THE neighborhood...

SDPA - San Diego Paralegal Association

San Diego has been full speed ahead and continues to entertain and surprise its members with on-point and leading-edge CLE and events.

On Thursday, June 23rd, SDPA hosted it’s June Paralegal Night event - one of the biggest and most anticipated San Diego paralegals look forward to. Our theme was Alice in Wonderland and was held at La Valencia Hotel in La Jolla, CA with its checkered black and white tiled floors and majestic gardens overlooking the ocean. Keynote Speaker Anne M. Rios, Esq. of Think Dignity, delivered a wonderfully crafted and highly motivating speech that touched on many well deserved accomplishments throughout her truly inspiring career. Guests mingled and networked with each other and vendors while enjoying SDPA's signature drink “Down the Rabbit Hole,” a refreshing watermelon based cocktail. SDPA offered professional face painting as well as a photo booth with props for Guest’s enjoyment. The room was full of colorful characters, including white rabbits, mad hatters, and a majestic Queen of Hearts.

SDPA is pleased to announce its 2016-2017 Charity of Choice is Voices for Children. The SDPA Board of Directors and the Pro Bono Committee are proud to facilitate this partnership between our organizations.

SDPA continues to give back to the community through its ProBono efforts led by SDPA superstar director Nikki Rettelle who contributes countless hours for several worthy causes. Center for Community Solutions San Diego, a former charity of choice of SDPA invited Nikki to march with them in the Pride Parade, and she served a 4-hour shift volunteering at their first Pride booth ever. Next up is the Wine Women and Wealth Expo, Think Dignity Legal Referral and Advocacy Clinic, and partnering with Couture for a Cause, a local legal fashion show and silent auction event where 100% of the proceeds fund Voices for Children and StarPal.

We are gearing up for the holidays including our annual Friendsgiving on November 2nd, and Holiday party set for December 8th at the Dana Hotel.

For more information contact www.sdparalegals.org
IN THE neighborhood...

The Fresno Paralegal Association (“FPA”) is continuing to offer continuing education to its members. On June 15, 2016, we held “I Object” presented by Nancy Woods. Practical information was provided, including proper objections to discovery requests. On August 17, 2016, Trenton Walton from US Legal presented “Social Media & Mobile Data Discovery”. This class was very informative in today’s social media society.

In October FPA will be joining Fresno City College Paralegal students in hosting E-filing presented by Eddings Attorney Services. FPA will be also holding continuing education with LITILI and US Legal in November 2015. FPA is currently working on scheduling CLE for 2017.

For more information contact http://www.fresnoparalegal.org/

SFPA - San Francisco Paralegal Association

Paralegal Day 2016 was held on Saturday, June 11 at the Bar Association of San Francisco. Attendees were able to attain five MCLE credit hours over the course of the event, which followed the theme, “A Day in the Life of a Paralegal.” Terry Symens-Bucher, Esq. presented “How the Law Changes with Social Realities,” which provided insight into how social and technological changes have shaped the practice of family law in California. Geoffrey Steele, Esq., a partner at the Law Offices of Nevin, Ramos and & Steele, emphasized the importance of paralegals proactively engaging with their supervising attorneys in order to maximize their paralegal potential in his presentation, “How Attorneys Can Best Utilize Paralegals in the Practice Area.” Mona FosterWhite, Esq. gave the presentation “Trust and Estate Planning,” a thorough introduction to both the fundamentals and the practical considerations necessary to orient paralegals previously unfamiliar with this field of practice. Mark Susnow, author of “The Power of Change,” spoke from his experience as a California attorney and as a life-coach to examine how paralegals can prevent the stress and anxiety of their profession from compromising their emotional and intellectual integrity. Lastly, SFPA President Elizabeth Olvera presented “Important Considerations in Being a Freelance Paralegal.” Drawing off of her personal experience as a freelance paralegal and licensed document preparer, the presentation provided a thorough examination of both practical and personal considerations for those contemplating the idea of putting up “a shingle of one’s own.”

SFPA’s Summer Social was celebrated on Wednesday, August 17 at Pacific Coast Brewery in downtown Oakland. Attendees enjoyed a fine selection of tasty brews and the folk-guitar styling’s of Graham Patzner while mingling, networking, mentoring, sharing…and planning and plotting future association events.

On Tuesday, September 13 at 12:00 pm, SFPA’s Trusts and Estates Practice Section will host the event “A View from the Probate Examiner’s Desk.” Susan Hilton, Assistant Director of Probate at San Francisco County Superior Court will provide her unique “probate examiner’s-desk” perspective at San Francisco State University. This event will provide attendees with one California MCLE credit hour, and will be free for all SFPA members, as well as SFSU Paralegal Students. Registration for non-members will be $25.00, payable at the door. Please visit the SFPA website at http://www.sfpa.com/calendar to register.

SFPA’s 2016 Annual Meeting has been announced for Friday, October 14, 2016. It is scheduled to take place from 8:30 a.m. – 4:00 p.m. at the Bar Association of San Francisco, located at 301 Battery Street. Please visit the SFPA website at http://www.sfpa.com/calendar for additional information on presentation topics, speakers, and how to register for the event. See you there!
Since the CAPA Conference, PASCCO has been busy! We prepared for and participated in the NALA Conference in Las Vegas July 13-15, 2016. As one of the affiliated associations in the hosting Region IX, PASCCO sent representatives to the welcome reception on July 12 and hosted an affiliate table on the last day of the conference. PASCCO displayed a PowerPoint presentation of its history and recent events.

On August 18, 2016 PASCCO hosted its first ever Town Hall style meeting followed by an ice cream social at a local park. The turnout was smaller than we had hoped for, but the few members that did attend contributed some valuable suggestions to increase interest and membership numbers. We discussed our affiliations with CAPA and NALA and answered questions from the members. Prior to the meeting, PASCCO sent a blast with a message from the President and questions directed at the membership designed to solicit input into how we can recruit new board members and maintain PASCCO as a viable association. We are encouraged that a couple of the attendees at this event will step up and serve on our board next year.

Following the town hall meeting, the board held our annual retreat on August 20, 2016 using the input provided at the town hall meeting to facilitate the succession planning for the 2017 board and beyond. We hope the time we’ve invested will help the future boards succeed.

PASCCO’s Marketing Committee implemented a new sustaining member/sponsorship program which is being tested as we solicit sponsorship for our signature event—the 38th Annual Educational Seminar scheduled for October 15, 2016. It seems to be very successful so far and as of mid-August we have eleven (11) legal service companies that will support our seminar at one of the sponsorship levels, as an exhibitor, or as a sustaining member. This year our theme is “Silicon Valley & Beyond: Technology’s Fusion with the Global Law Practice.” We are offering two MCLE tracks (litigation and corporate law) and one Professional Development track. We have negotiated a discounted rate for a limited amount of rooms via courtesy block of rooms at a local hotel for anybody wishing to travel the day before and stay the night. If the interest exceeds the number of rooms we have on the block, we can increase the number of rooms. We have distributed this information to our fellow CAPA association members and hope many will take advantage of CAPA reciprocity and join us in Mountain View for this event!

We are pleased to report that the Santa Clara County Bar Association (SCCBA) has accepted PASCCO’s request to participate in and publicize for its members the internship service putting SCCBA members in touch with our student members who are seeking internship positions to meet graduation requirements. We are piloting the program this year as part of our goal to keep PASCCO’s name recognition with the SCCBA following last year’s historic joint MCLE event with the SCCBA and to continue fostering a positive relationship with the SCCBA.

September’s MCLE will be held at West Valley College on September 15 and presented by Attorney Robert Bohn, Jr., Bohn & Fletcher, LLP on preparing and taking a premises liability case to trial. The Trusts & Estate Section is planning its MCLE luncheon for November 9, 2016. Our annual meeting & MCLE presentation will be held on November 17, 2016 at De Anza College and be given by John W. Prokey, Esq., Ramsbacher Prokey Leonard LLP. On December 15, PASCCO hosts another social/networking opportunity, an awards ceremony and installation of its 2017 board. An Ethics MCLE presentation on Ethics in Social Media by DTI’s Ross Mecham, Esq. will follow those formalities and close out 2016.

For more information contact http://www.pascco.org/
In the neighborhood...

CCPA - Central Coast Paralegal Association

The Central Coast Paralegal Association put on two continuing legal education presentations this summer presented by two former paralegals who are now attorneys. In July, local attorney Jane Heath presented a program entitled, “The Many Hats of a Paralegal.” Ms. Heath discussed how a paralegal can make herself indispensable in the 21st Century law firm, with the primary take-aways of the program as follows:

- Be willing to wear many hats
- Be aware of where you fit into the lawyer’s bottom line
- Stay current with trends and resources
- If it isn’t a good fit; don’t force it
- get what you need, then move on (but remember your resume is a window)
- Communicate — what you need and what you offer

Ms. Heath also handed out a copy of “8 Signs an Employee is Exceptional (Which Never Appear on Performance Evaluations),” written by Jeff Haden and published by Inc.com on July 18, 2016. According to Mr. Haden, the eight signs that an employee is truly exceptional are that:

1. The employee thinks well beyond job descriptions and can identify problems, think fast and adapt quickly to shifting priorities, doing what it takes to get things done;
2. The employee is quirky and a bit unusual, but in a good way that makes work more interesting, flavorful and fun, with these characteristics lending to an ability to “stretch boundaries and challenge the status quo” to come up with great ideas;
3. The employee knows when to rein in their individuality and knows when to conform with the team when necessary;
4. The employee praises others in public and recognizes the contributions of others, in small or large group settings where the impacts of such words of recognition are amplified;
5. The employee disagrees in private — bringing up a sensitive issue before or after a meeting so as not to potentially start a controversy;
6. The employee asks questions or raises important issues when others hesitate and will speak up in meetings, having an “innate feel for the issues and concerns of those around them”;
7. The employee likes to prove other people wrong and is self-motivated with a personal, deeper drive to do more than just a good job;
8. The employee is constantly exploring, reinventing processes or tweaking them, not because it is expected or required, but because she is rarely satisfied and knows that can be done better.

In August, the Honorable Dodie A. Harman gave an informative presentation on judicial ethics. Judge Harmon highlighted that the central principle of judicial ethics is to “ensure the integrity and honesty of the process of judicial decision making and of judicial decisions.”

The most common ethical issues for judges include: disclosure and disqualification; political activity; ex parte communications; attorney misconduct; judicial misconduct and supervising judges; self-represented litigants; demeanor; community outreach; and no fundraising. A video presentation of vignettes demonstrating ethical situations was shown, followed by discussion.

The presentation was well attended and received. Judge Harman is a real inspiration to paralegals, especially those who aspire to be attorneys or judges, as she began her legal career working as a paralegal while she attended law school in Riverside, California and she demonstrates superlative integrity.

Looking forward, the CCPA is gearing up to host the CA-PA Board of Directors Meeting set for November 12 and 13, 2016, at the Cambria Pines Lodge (www.cambriapineslodge.com) in beautiful Cambria, California. The CCPA has secured excellent lodging rates for the week before and after the meeting, so if you are interested in learning more about how CAPA works, come visit us at our board meeting and enjoy a fabulous coastal destination with some fantastic lodging at great rates and maybe a tour of the world-renowned Hearst Castle. Contact your local association primary representative to learn more about the CAPA’s November board meeting and the fantastic lodging rates offered at Cambria Pines Lodge.

For more information contact http://www.ccpaslo.com/
ICAP - Inland Counties Association of Paralegals

ICAP’s August general membership meeting features Attorney Robert Lynch presenting a 1 hour MCLE on Pitfalls in Discovery and How to Avoid Them. This presentation was hosted by Esquire Deposition Solutions at their Riverside office. Jamee Rashi of Esquire was her usual amazing hostess and not only provided us with an amazing dinner, but treated us to some Esquire goodies as well. This is an amazing office and we will be visiting Esquire Deposition Solutions again in the near future!

Our September meeting will take place at the Riverside County Bar Association on September 21, and will spotlight Attorney Norman DeGrave with his MCLE presentation on Critical Steps for Trial Preparation. Anyone and everyone involved in litigation should attend this presentation! We will have lots of yummy food from my favorite local Italian restaurant and, as always, several drawings following the presentation.

On October 19, we will be featuring Kelly Bennett of Bennett and Bennett on “Becoming Your Firm’s Most Valuable Legal Professional”. I expect a huge crowd at this event so you want to get your RSVP in early!

On October 25 we will also be co-hosting an event with the Riverside Legal Secretaries Association on Riverside Superior Court Updates. Kim Pegis, the Division Manager of the Riverside Historic Courthouse and Sylvia Chernick, the Assistant Deputy Executive Officer for the Desert Region will be getting us up to date on the many changes to the Riverside courts, including policies, procedures, and who to go to when help is needed.

We are still looking for an awesome November presenter for our membership meeting. Our November meeting is near and dear to our hearts as all proceeds from that meeting are donated to the Moreno Valley Salvation Army to assist with their Thanksgiving dinner program for the less fortunate in Riverside. This is a very worthy cause and we have been able to provide funds for this program for the last five years.

Finally, our holiday party planning is already in full swing with Board Member Dana Fischel setting us up at a new location, the Café Sevilla in Riverside. This year’s event will take place on December 3, 2016 and is our second members only event of the year. The turnout for this event is always large and a good time is had by all who attend! As we do every year, we will be donating a portion of the proceeds from our holiday party to a local charity.

We are starting on setting up MCLEs for the 2017 calendar year and will be working with the University of California, Riverside, to set up a paralegal career workshop in the coming months. For more information contact icaponline.org.
LAPA - Los Angeles Paralegal Association

The Los Angeles Paralegal Association is getting ready to host its 40th Annual Conference, A World of Possibilities, on October 22, 2016, at the Hilton Los Angeles Universal City. As always, LAPA’s October Conference is an all-day event, which will feature an opportunity for legal professionals to earn four hours of MCLE credit with 2 hours of ethics. There will be over 14 MCLE sessions, including eDiscovery, Litigation, Family Law, Personal Injury, Probate Law, Contract Writing, Corporate Compliance, and Intellectual Property Law. Attendees can also take sessions in legal research or legal writing and attend a Professional Development Session to learn more about the CP and ACP certifications. This year’s conference promises to be very special as we are moving to a new venue and celebrating forty years’ of providing outstanding conferences for the Los Angeles and California paralegal and legal professional communities. As a member of a CAPA affiliated association, you can attend at the membership rates. Registration is open at LAPA’s website, www.lapa.org.

The summer was a busy one for LAPA:
In July LAPA’s Pro Bono & Community Services Committee was honored to receive the NALA 2016 Affiliates Award and LAPA was furthered honored to receive NALA’s Making a Difference Award for the third year running. In keeping with our commitment to promoting pro bono work and putting paralegals and charity organizations together, LAPA held its 10th Annual Pro Bono Fair at National University on August 27th. The event was attended by over 100 paralegals, students, and attorneys and representatives from several organizations. It offered attendees not only networking opportunities but a chance to learn about the needs and opportunities to give back that pro bono work can offer.

LAPA also presented two substantive legal seminars during the summer. On July 21, 2016, the Westside Section presented a Probate Law seminar with Rich Martin speaking on new estate issues surrounding digital assets and online communications. LAPA’s Immigration Law Section presented Your Client Wants to Marry a Foreign National presented by Nikki Jacobson, Esq., at National University on August 18, 2016.

Upcoming, LAPA is expecting an even busier fall:
The Family Law and South Bay sections of LAPA will be presenting on a dinner seminar on September 28, 2016, on Family Law and Finances at the offices of Waddell & Reed in Torrance, California.

Of course, our October Conference mentioned above will be held on October 22, 2016.

November through December LAPA will be offering its semi-annual CP Review Courses at National University. This 4 week course, with sessions Thursdays and Saturdays offers examinees an opportunity to take the entire series or individual sessions. It runs from November 3 to December 3.

LAPA will begin planning for 2017 in earnest with its November 15, 2016, LAPA Fall Mixer and Planning Meeting on November 15, 2016, at the Los Angeles Athletic Club, Downtown Los Angeles. This event sold out last year and it’s sure to be a great chance to network and start thinking about 2017.

We will close out 2016 with our Holiday Benefit Gala which is currently in the planning stages but looks to be a festive event.

For information on any of these events, please visit LAPA.org or contact LAPA’s representatives to CAPA at LAPA1@caparalegal.org or LAPA2@caparalegal.org.

CAPA Mission - Strength through statewide alliance -
providing a voice of leadership in promoting education, voluntary certification and advancement of the paralegal profession.
28th Annual Educational Conference, June 25, 2016

Hosted by Inland Counties Association of Paralegals (ICAP)
By Sara M. Lutz, CP (San Diego Paralegal Association)

What an amazing event. 2016 marked CAPA’s 40th Anniversary, and the 28th Annual Conference. The CAPA Board and Conference Committee put on an amazing event. Thank you to Conference Chair, Connie Johnson of ICAP, and the entire conference committee. The Conference was held at the Riverside Convention Center in downtown Riverside, which is very picturesque. The day started out with a warm welcome by CAPA’s President Kristine Custodio, ACP, and a Keynote address by Heather Rosing, Esq. on The Unauthorized Practice of Law. Heather is an excellent speaker and filled the room with her captivating words. The morning keynote was the most highly talked about presentation of the day.

CAPA pulled out all the stops this year, offering over 20 CLE sessions throughout the course of the day. Some of these sessions included The Commission on Judicial Performance: Protecting the Public from Judicial Misconduct, How to Conduct an Online CA Legislative Intent Search, the ever so popular LLLT, Finding Assets and Finding People: Tips, Tricks and Insight from a Private Investigator (which was standing room only), The Expert Witness – Ethics, Preparation and Challenges, The Other Bar, Ethical Issues that Arise in Preservation and Collection, Can Lawyers Lie in Negotiation?, Benefit Corporations, Business Compliance & Governance Essentials, PTSD and Offenders, LLC Law Today, The Workers Compensation Case, and many more. The speakers were top notch and all of the attendees left feeling educated, inspired, and MCLE compliant.

In addition, CAPA offered a mobile Conference App through Whova. The App was very interactive, and proved to be a neat networking tool. Many new connections were made, pictures shared, and real-time comments and conversations sent. The App also offered the agenda for the day, a list of all attendees, vendors, and sponsors, a link to download the syllabus, and an interactive logistical map of the venue. Welcome to the future of conference going.

Throughout the day, attendees had plenty of opportunity to visit and mingle with Exhibitors – and this year there were over 20 (check out page 30 of this RECAP to see a list). This year also brought in affiliate tables including AAFPE, CAS (CCP), ICAP, LAPA, NALA, NFPA, and the UCR Extension Program. As you might imagine, there was lots of swag, demonstrations, information, and goodies to eat throughout the day. This is by far one of the most anticipated parts of the Conference, and the networking is exceptional and fun.

The lunch hour brought another great keynote speaker, current California State Bar President, David Pasternak, Esq. who spoke on the Revisions to the California Rules of Court. Following his educational presentation, CAPA presented its Paralegal of the Year Award. Each of the 12 Associations that make up CAPA nominate one paralegal whom they believe is deserving of this award. San Diego nominated Lauren Doucette, CP for her dedication and excellence in the para-
legal community. The winner for 2016 was Central Coast Paralegal Association’s Christina Sanders, congratulations! (Read more about the POY winners and nominees on page 25 of this edition of RECAP).

At the conclusion of the conference CAPA had an Evening Reception celebrating 40 years including a highly anticipated Opportunity Drawing of several high value prizes. This always brings in a large crowd and is loved by all. I am sad to say, I did not win anything this year, but there’s always next year. An optional Pub Crawl was offered this year by ICAP and CAPA to wind down the busy day. The Pub Crawl was attended by 30 conference goers who had a great time out on the town. Check out photos on the Whova App of our shenanigans.

On Sunday, the CAPA Board met for an all-day meeting and recap of the Conference. This was the second in-person board meeting for 2016, so you can imagine how much work is completed in such a short amount of in-person time. A massive amount of work went into this Conference and I’m happy to say it was a success. I hope that those of you who did not make this event can attend next year’s conference in Visalia, CA. Be on the lookout for more information from CAPA! 😊

(Continued from page 11)
On September 13, 2000, the phone call I had been waiting on for years came through while I was sitting at my desk at work. The voice of Carolyn Yellis, President of CAPA, was on the other end. “The Governor just signed our bill.” I put my face in my hands and started to cry. It had finally happened. After more than a decade of effort, CAPA had done the impossible – we had a formal definition of “paralegal” destined for the California Code.

I’ve been asked to write a brief history of how all this came about. I joined the CAPA board in 1989, first as a representative for the San Joaquin Association of Legal Assistants (now Fresno Paralegal Association) and then in 1997 as the representative for the Central Coast Paralegal Association, following a move to Los Osos. I was elected president of CAPA for 2002, finished my term at the end of 2003, and stayed on for another year as Board Advisor. I had firsthand experience with the process throughout my time on the Board.

1989

This was the year that CAPA adopted the following definition of “paralegal”:

A paralegal, also known as a legal assistant, is a person who performs legal services traditionally, but not exclusively, performed by a lawyer. A paralegal is qualified to perform such legal services through formal education, training and/or experience in substantive and procedural law. Paralegals are retained or employed by law firms, corporations, governmental agencies and other entities. Paralegals may also be authorized by administrative, statutory or court authority to perform legal services.

Now look again carefully at that definition. Do you notice anything different from the current definition? Do you see anything in there about our work requiring attorney supervision? And the last sentence about us being allowed to perform legal services — for whom, you might wonder?

It is important that you understand the politics of the time within CAPA. Some of the member associations comprising CAPA were led by what was known then as “independent paralegals,” people who were providing legal advice directly to the public. That resulted in confusion, suspicion and actual harsh judgment within the legal community. When you told a lawyer you were a paralegal, you were eyed with suspicion at first. Are you a real paralegal, they would ask? (meaning do you work with attorney supervision) or are you one of those independent paralegals? (i.e., practicing law without a license and stealing business from attorneys). We “traditional” paralegals were often defending ourselves, responding with “NO, we’re not one of THOSE paralegals.” It became clear that we had to undertake the tremendous task of educating attorneys on who and what we were and what we do (a task that continues on today).

(Continued on page 14)
You also have to keep in mind that at this time, there were absolutely no standards for paralegal education. There were voluntary standards, such as those promulgated by the American Bar Association (ABA) and the American Association for Paralegal Education (AAfPE), but there were also schools out there that promised a paralegal education in only three weekends for $5,000! So again, those of us who had completed a legitimate course of study had to explain to a skeptical judge or attorney, “I went to a REAL school!” The profession was not seen as legitimate by a large segment of the legal community, and in some ways rightfully so.

During this period there were many strong voices for independent paralegals on the CAPA board that were able to block efforts to push the profession away from the unauthorized practice of law to a more conservative approach of expanding the profession, but with attorney supervision.

1990

The first big step came in 1990, in the second term of President Kathleen Keefe, from the San Francisco Association of Legal Assistants (currently San Francisco Paralegal Association). At the time, the ABA was looking at the possibility of licensing laypeople to perform certain types of legal tasks (similar to what is being considered right now, in California for limited licensure – déjà vu all over again). The ABA had put together a Commission on Legal Technicians to do research and conduct hearings on this, and the Commission was considering calling these people “independent paralegals.” CAPA took a huge step forward, preparing a position paper to the Commission opposing the title. Following that line of thinking, we argued, paralegals who work under attorney supervision would become, by default, “dependent paralegals.” By the 1990s, the term “paralegal” had some recognition amongst the public, and the independent paralegals did not want to start over with a new title, Legal Technician. The struggle escalated.

1992

A big turning point came in 1992, during the presidency of Fran Turner of the Marin County Association of Legal Assistants. Very quietly, very simply, the CAPA Board decided that CAPA would represent only traditional paralegals, and that it would be proactive in pursuing the interests and goals of traditional paralegals. This decision, along with the later pursuit of a California voluntary certification program for traditional paralegals, ultimately resulted in the withdrawal from CAPA of the San Francisco Association of Legal Assistants in 1994. It was a very painful, divisive time, but we knew our only chance of advancing the profession was to stand firm in our efforts to legitimize it in the eyes of the very conservative legal community and the California State Bar (State Bar).

1994

During the presidency of Tita Brewster, from Paralegal Association of Santa Clara County, after a great deal of discussion, CAPA decided that rather than fight with legal technicians about the paralegal title, it would be easier just to define ourselves in some way, either in the California Code or via a Supreme Court definition, which had been done in some states. CAPA approved the hiring of a lobbyist, Tony Nevarez, to represent CAPA’s proposed legislation defining “paralegal” in the Probate Code. It was felt that we should

(Continued from page 13)

3 Jim Petruelli is now a Superior Court Judge in Fresno County and Linda Hurst is a Superior Court Judge in San Luis Obispo County. CAPA has good friends in high places!
start small and take on only one legal practice to start. Ne-
vearez eventually resigned because of a perceived conflict of
interest. CAPA’s proposed legislation was hit by unex-
pected opposition from organizations opposed to the status
quo of a monopoly of the delivery of legal services by attor-
nies. One powerful opponent was AARP, whose members
apparently utilized the services of independent paralegals.
CAPA ultimately withdrew its proposed legislation. The
timing was clearly not right.

1995

CAPA representative Cynthia Jankowski, from Orange
County Paralegal Association approached State Senator Joe
Dunn to help lay groundwork for another try at a legislative
approach. Mr. Dunn was very sympathetic to our cause,
but warned us we would need the State Bar behind us be-
fore we could get anywhere with the Legislature. This was
going to be a difficult hurdle.

1996

Through its close and friendly association with the Law
Practice Management Section ((present day Law Practice
Management and Technology Section, LPMT), CAPA was
introduced to James Michael Petrucelli, a Fresno-based
family law attorney who was very connected with the Con-
ference of Delegates, an activist arm of the State Bar. The
Conference of Delegates could take up and adopt resolu-
tions to support particular legislation and Mr. Petrucelli
thought that might be a good route for CAPA’s proposed
legislation, given the advice of Senator Dunn. On February
2, CAPA submitted a proposed resolution for the recovery
of paralegal fees and a definition of “paralegal,” but by
March the opposition became so fierce, Mr. Petrucelli re-
commended withdrawing the proposal.

1997

With the help of Mr. Petrucelli and San Luis Obispo attor-
ney Linda Hurst, the Law Practice Management & Technol-
ygy Section and the Fresno County Bar sponsored CAPA’s
paralegal definition on the floor of the State Bar Conference
of Delegates in Long Beach. Although CAPA’s Legislative
Committee lobbied hard and met with many of the delega-
tions present to win their support, various special interest
groups kept whittling away the language to almost nothing.
One of the ultimate absurdities we had to endure was a
speech on the floor of the Conference of Delegates by an
attorney opposed to our definition. He argued that he want-
ed the freedom “to hire a bricklayer to be my paralegal if I
want to.” The proposal was eventually defeated in a very
disappointing vote.

Later that year, President Jon Montgomery, from Orange
County Paralegal Association, sent a letter to Ronald M.
George, Chief Justice of the California Supreme Court, re-
questing support for a paralegal definition from the judici-
ary. Chief Justice George responded that the court was the wrong venue for CAPA’s request.

1998

Just when things were looking most grim and those of us who had been in the trenches for almost a decade were becoming discouraged, an amazing and unexpected turn of events took place. In late 1997, then Governor Pete Wilson vetoed the annual funding bill for the State Bar, virtually shutting down operations. With the State Bar in disarray, AB 1418, which created the profession of Legal Document Assistant (LDA), was introduced in January 1998. CAPA President Jon Montgomery worked hard with the LDA leadership on their legislation, and CAPA agreed not to oppose it as long as the LDAs stayed away from the terms “paralegal” or “legal assistant.” AB 1418 sailed through the Legislature, and was signed into law by Governor Wilson in September. Why was this critical, you may ask? Now that there was an alternative to the perceived attorney monopoly on the delivery of legal services, opposition to CAPA’s definition by organizations like AARP dissolved, opening the door for another try. In June of this year 500 of the State Bar’s 700 employees were laid off, rendering the State Bar irrelevant as an opponent. We knew it was now or never.

1999

CAPA Vice President of Policy, Carolyn Yellis from Orange County Paralegal Association, made the acquaintance of Assemblywoman Marilyn Brewer, a Republican based in Newport Beach. CAPA’s Legislative Committee began meeting with Ms. Brewer to draft proposed language for a bill, AB 1761, that was eventually introduced by Ms. Brewer on January 18, 2000. The battle had begun.

2000

AB 1761 had support from both sides of the aisle. Co-authors included Rod Pacheco (R) from Riverside, Abel Maldonado (R) from San Luis Obispo, Jim Cunneen (R) from San Jose and Senator Jackie Spier (D) from San Mateo. The bill was placed on a fast track to get it through the process before the State Bar could be resurrected and oppose our efforts.

On March 28, CAPA President Carolyn Yellis and attorney Elaine Alston testified in support of AB 1761 before the Assembly Judiciary Committee. Legislative Committee member Hazel Lange, from Paralegal Association of Santa Clara County and other members of CAPA appeared and expressed their support. NFPA Vice President of Policy & Issues Mary Kay Rivera, Sacramento Association of Legal Assistants (currently Sacramento Valley Paralegal Association) President Connie Miksits and members of the San Francisco Paralegal Association came to express their opposition to the bill. It may be hard to grasp, sixteen years later, how divided the paralegal committee was over this issue.

On June 13 we faced our next big hurdle, the Senate Judiciary Committee. A heavy letter-writing campaign by CAPA member associations preceded the hearing and paralegals from Orange County, Ventura, Los Angeles, Inland Counties, Santa Clara, San Luis Obispo (including yours truly) and Santa Barbara turned out in support. The Senate Judiciary Committee asked the bill’s proponents to agree to remove language that was a sticking point for them – the language that disallowed disbarred or suspended attorneys from taking the title “paralegal.” That was key language for us – we did NOT want disgraced attorneys becoming paralegals. However, Adam Schiff, Chair of the Senate Judiciary Committee (and now a U.S. Congressman) was firm. The Committee wanted attorneys to be able to work in the legal field in some way while they rehabilitated, and allowing those attorneys to be paralegals supervised by another attorney seemed the perfect solution. In an attempt to provide balance, Mr. Schiff added the ethics MCLE requirement that is currently present in B&P 6450. It was a deal breaker – accept this or no definition. We unhappily relented. The bill passed the Senate Judiciary Committee unanimously.

The final vote on the Senate floor was 67 to 8. We had won. On September 13, 2000, Governor Gray Davis approved AB 1671 into law as Business & Professions Code section 6450, which went into effect on January 1, 2001. Our long, long road was finally at an end.

The definition has achieved many of the goals we had set. Fly-by-night weekend paralegal schools disappeared quickly, as their students would not qualify under the new law. “Independent paralegals” began taking advantage of the opportunities provided by the Legal Document Assistant legislation and stopped using our title. Attorneys have

(Continued from page 15)

(Continued on page 17)
more respect now for a paralegal’s education and the fact that continuing education is required. With the definition as a springboard, new paralegal leaders must take it and use it to pave new ways for paralegals to expand the profession.

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Stacey Hunt, CLA, CAS is a graduate of the Fresno City College paralegal program and works in the Asset Management Department at SESLOC Federal Credit Union. She is the co-author of three books for paralegals, including her most recent, Evidence Management for the Paralegal (Cengage, 2008). Ms. Hunt currently teaches Civil Litigation and Procedure, Business Organizations and Ethics in the paralegal program at Cuesta College. She also teaches Evidence, Discovery & Trial Preparation, Business Organizations and Torts & Contracts online for the paralegal studies program at Fresno City College. She is a past-president of the California Alliance of Paralegal Associations and the Central Coast Paralegal Association. She is a co-founder and CEO of Ecologistics, Inc., which is holding the first Deep Ecology Collaboratory this year in San Luis Obispo. She is currently Vice-President of the Foundation for San Luis Obispo County Public Libraries.

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CAPA has compiled an informational guidebook for a quick and easy reference on the utilization of paralegals. Available to you for $15! Special discounts on Amazon.

The following are highlights from the guidebook:

- Definitions pertaining to the paralegal profession
- Duties, responsibilities, and skills for specific practice areas
- Flow chart for attorney/paralegal team
- Ethics guidelines
- CAPA Member Associations

Excerpts:

For more information, or to purchase the Guidebook, visit our website at [http://www.caparalegal.org/index.php/capa-guidebook/](http://www.caparalegal.org/index.php/capa-guidebook/)
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Embassy Room

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WWW.CCPASLO.COM

Fresno Paralegal Association (FPA)  
P.O. Box 28515  
Fresno, CA 93729  
WWW.FRESNOPARALEGAL.ORG

Inland Counties Association of Paralegals (ICAP)  
Post Office Box 143  
Riverside, CA 92502-0143  
WWW.ICAPONLINE.ORG/

Kern County Paralegal Association (KCPA)  
P.O. Box 2673  
Bakersfield, California 93303  
WWW.KCPAONLINE.ORG

Los Angeles Paralegal Association (LAPA)  
P.O. Box 71078  
Los Angeles, CA 90071  
WWW.LAPA.ORG

Paralegal Association of Santa Clara County (PASCCO)  
1275 Franklin Mall, PMB 192  
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WWW.PASCCO.ORG

Redwood Empire Association of Paralegals (REAP)  
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Whenever our team goes to mediation, I like to prepare a timeline of events as an overview for this third party person who may not be able to grasp all of the significant events from just the mediation briefs. I have played around with a variety of timeline presentation options, but recently was turned onto Timeline 3D by an iAttorney webinar, hosted by Veritex. Timeline 3D is a beautiful presentation application that allows you to display the most critical events with graphics and a detailed summary in a chronological manner. My attorneys are big on utilizing their iPads, thus this application works perfectly for them, but it may not work for other firms that are more laptop oriented (or are still in the stone ages with paper).

To create a new timeline, begin by:

1. Click the + button in the lower left hand side of the application’s home screen and select Create Timeline. It will ask you to name your timeline. I usually put our case name in this field box.

2. From there, you are able to add your critical events utilizing a similar + button in the lower left side of the new timeline screen.

3. When adding a new event, it asks you to name the event, give it a start date, and has an option to input notes and/or a photo of the event. These last two functions are great for legal use. For the media, I actually import the evidentiary foundation for the timeline event, such as the deposition exhibit, produced document, investigative photos, or deposition testimony. The notes category allows for your team to expand into the relevance of the timeline issue, such as:

   Timeline Event Title: “Plaintiff requests a medical accommodation”

   Timeline Event Notes: “Plaintiff requested a standing desk from HR representative, Rachel Zane, after his shift ended claiming his back started to cramp at his current desk configuration. Zane asked Plaintiff to get a doctor’s note attesting to the same accommodation in order to process the request.”

   Timeline Event Media: Insert JPEG of Plaintiff’s deposition testimony to this fact, highlighting page and line of the testimony that states the above fact.

4. Upon entering all relevant events, press the play button for the final 3D view of your timeline. The application will process your tiles into 3D textures and it takes a minute, so be patient. The end result is a beautiful 3D timeline that has a few different views. You can look at your timeline from a birds eye view, in that it is zoomed out for the entire 2D timeline view. You can also move into the 3D view by tapping on any of the event tiles; this will zoom into the event tile and show the media, notes, date, etc. You can move to the next tile by either tapping on the tile, or pressing the arrow button on the bottom toolbar right or left. To zoom onto the actual media or document, double tap on the media and it will open the document in its own window for previewing.

A few things to note, when importing media as the visual aspect of your events, the accepted file format is a picture file (jpeg, jpg, tiff). I had to open my documents in PDF and then convert to jpeg within Acrobat in order to make this happen. You are also able to change the final look of the visual timeline through a variety of color schemes using the “Configure” option at the top left toolbar.

The timeline is also easily exportable; the formats in which you are able to share the timeline outside of the application are PDF, slideshow, printing, publishing to the web, and exporting as a zipped document. This is great for use at trial when you wish to utilize the timeline in your opening or with witnesses. You are able to export the timeline to PDF and include it as an exhibit in your trial binders for production to opposing counsel in order to gain the rights to use it visually on the big screen without issues.
Another thing to consider is the format in which you are going to present it in. As we present it to a single person, such as a mediator, our team either loads the presentation on their iPads and hands the device over to the mediation for viewing, or we can transmit the timeline onto a larger device for multiple viewers. You can accomplish this a few ways: air drop, apple TV, or an HDMI cable with a Digital A/V Adapter to connect your iPad to the mediator’s TV.

Timeline 3D only works with Macs and iOS devices, thus a Windows desktop option is not available. If you have Macs at your office (as a few of our opposing counsels do), you are able to work with this function at your desk on a desktop computer, instead of just through the iPad application. Unfortunately, if your office does not do iPads or Macs, this timeline application is not for you. There is a lot of timeline creation software out there so if you have a favorite, please feel free to write to me. I would love to learn about what works for other firms in displaying their fact patterns visually.

If you have questions regarding how to integrate this software into your firm’s litigation strategy, please feel free to contact me at ldoucette@klinedinstlaw.com.

Timeline 3D is an application created by BEEDOS, available in the iTunes app store for $9.99.

ABOUT THE AUTHOR:
Lauren Doucette, CP is an eDiscovery Strategy Coordinator at Klinedinst PC in San Diego, CA. Ms. Doucette serves on the board of directors of the San Diego Chapter of Women in eDiscovery and the San Diego Paralegal Association, and is actively involved in education and programming of events within the legal community. She earned her ABA Approved Paralegal Certificate through the University of San Diego in 2012 and passed the nationally administered exam to become a Certified Paralegal in 2016. For her undergraduate degree, she received her Bachelor of Arts in Environmental Studies from the University of California, Santa Cruz. She also updates “Open Source Guide to ESI,” a blog dedicated to eDiscovery during preservation, collection, and production of data.

Ms. Doucette was the recipient of the 2016 San Diego Paralegal of the Year award through the San Diego Paralegal Association.
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**FEBRUARY 11-12, 2017**
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Location TBD

**JUNE 24-25, 2017**
hosted by Sequoia Paralegal Association, Fresno Paralegal Association, and Kern County Paralegal Association

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**NOVEMBER 4-5, 2017**
hosted by San Diego Paralegal Association

Location TBD

ATTENTION: NEW CAPA BYLAWS

As many of you may know, CAPA has revised their bylaws to make them complaint with the California Corporations Code. CAPA has spent the last two years dedicating their time to bring them up to code. Very soon your CAPA representative will be providing you with CAPA’s proposed changes to it’s bylaws for your vote. This will be a vote by each member association’s membership. When bylaws are changed, revised, etc. to enact them, a vote by each member association’s membership is required. CAPA is very excited to have these finalized and looks forward to the voting process. Each association will receive a copy of the Restated Bylaws of CALIFORNIA ALLIANCE OF PARALEGAL ASSOCIATIONS and a ballot. Then the voting period will start - and each voting member will be able to vote yes or no. One of the biggest changes is the director representative structure. i.e under the new bylaws, each CAPA rep will be a director, entitled to one vote. In November, the CAPA board will meet and determine the outcome of the vote of the bylaws.

CAPA AFFILIATE ASSOCIATIONS

[Images of various affiliate association logos]
There are so many federal and California laws giving employees the right to take time off work that it’s not surprising to find more than one law governing a particular employee’s leave or absence. But there are two rules of thumb that help employers navigate this often complicated area.

First, gather and review the universe of laws that might apply. Before denying an employee’s leave request because he or she doesn’t meet the eligibility requirements of a particular statute, an employer should carefully consider all laws that might provide the employee a right to leave under the circumstances.

For each law, the employer needs to determine the following:

- whether it’s covered by the law (e.g., some leave statutes only cover employers with a certain number of employees),
- whether the employee meets the eligibility requirements,
- the employer’s obligations (e.g., notice, reinstatement),
- the employee’s leave entitlement, and any other terms, limitations, and restrictions.

And if more than one leave law applies, the employer has to understand the ways in which the laws interact to properly calculate and track the employee’s leave (e.g., running leave entitlements concurrently or consecutively). For example, the Equal Employment Opportunity Commission discusses the interaction between the Family Medical Leave Act and the Americans with Disabilities Act in its Enforcement Guidance: Reasonable Accommodation and Undue Hardship Under the Americans With Disabilities Act (Oct. 17, 2002).

Second, apply whatever gives the employee the greatest benefit. In determining the amount of leave that an employee may take and the benefits and protections associated with that leave, an employer must provide an employee with the most generous leave entitlement, benefits, and protections provided by any of the laws applicable to the leave. See e.g., 29 CFR §825.701(a) (“Nothing in FMLA supersedes any provision of State or local law that provides greater family or medical leave rights than those provided by FMLA”).

If a collective bargaining agreement or an employer’s policy provides greater leave entitlements or benefits than those under applicable leave laws, the employer has to comply with the more generous provisions. For example, California’s paid sick leave law “does not lessen the obligation of an employer to comply with a contract, collective bargaining agreement, employment benefit plan, or other agreement providing more generous sick days.” Lab C §249(c). See also 29 CFR §825.700(a) (“An employer must observe any employment benefit program or plan that provides greater family or medical leave rights to employees than the rights established by the FMLA”).

This sounds straightforward, but it can get tricky when the employer must comply with one law or policy in calculating the leave entitlement, another for determining the other leave benefits, and another for specifying the terms and conditions of the leave.

Get help with this type of tricky situation as well as all other aspects of navigating employee leave laws in CEB’s award-winning book Employee Leave Laws: Compliance and Litigation.

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SFPA

44th ANNUAL MEETING 2016

Please join us for San Francisco Paralegal Association's Annual Meeting 2016!

The program will include:

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Details on the agenda and speakers to follow. Visit www.sfpa.com for more info.

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Christina Sanders
CCPA

Christina has been employed as a dedicated paralegal professional for more than 15 years in San Luis Obispo and, throughout her career, has been very interested and involved in the advancement of the paralegal profession in California through the California Alliance of Paralegal Associations (CAPA). Christina is a native of San Luis Obispo County who attended local schools and earned an Associate of Arts degree at Cuesta Community College in San Luis Obispo. In 1998, she began attending the accredited paralegal studies program at California Polytechnic University, San Luis Obispo while working fulltime as a legal secretary at a local law firm. She earned a certificate of completion in Paralegal Studies in 2000. That same year she joined the Central Coast Paralegal Association (CCPA) and became a member of CAPA.

Throughout the past sixteen years, Christina has consistently volunteered her services to both CCPA and CAPA in various leadership positions and has been an officer on the CCPA Board of Directors for most of those years. She first served as CCPA's Secondary Representative to CAPA after being elected in 2000 and then as the Primary Representative to CAPA for two subsequent years. In 2015, she again served as Secondary Representative to CAPA and currently sits on the 2016 CCPA Board as Treasurer and Primary Representative to CAPA. Christina has also served CCPA for at least three years as the NewsBrief Editor, two years as President in 2007-2008, two years as Program Director in 2011-2012, and as Website Coordinator in 2012. Additionally, Christina has served on various committees and worked at special events for CCPA, CAPA and the local Bar Association.

Christina has also served on the Advisory Committee for Cuesta Community College's Paralegal Studies Program which includes both an AA degree curriculum and a Certificate of Achievement curriculum. Christina was able to make important contributions as an invited member of the Advisory Committee and, when the Paralegal Studies Program was close to being on the budgetary "chopping block", she wrote a persuasive letter to the College's administrators urging them to continue their support of the program. They did, and the Cuesta College Paralegal Studies Program has continued to thrive, with many of its former students now working as paralegals within the local community.

As a CAPA Representative, Christina regularly writes detailed and informative articles for CAPA's RECAP and CCPA's NewsBrief, updating our members about the current objectives and activities of both organizations so that the members remain informed about the direction CAPA and its member associations are taking and what is being done to achieve those goals. Christina’s experience as a paralegal includes working in San Luis Obispo for the small law firm of Fitzpatrick & Barbieri for her first four years as a paralegal, after which she spent nine years employed at the mid-size law firm of Andre, Morris & Butterly from 2004-2013. In 2013, she seized an opportunity to begin working on estate tax returns with the senior partners at Sinsheimer, Juhnke, Mcivor & Stroh. Throughout her paralegal career, Christina has developed expertise in estate planning, probate and trust administration, as well as knowledge and skills in the areas of corporate formation and real estate transactions. She has also been a Notary Public for many years.

Due to her ongoing commitment to continuing education to develop her skills and knowledge, as well as her excellent work ethic, Christina is an invaluable asset to the attorneys and clients for whom she works on a daily basis. She is also well-respected by her paralegal peers in the community and, due to her upbeat and fun-loving personality, has cultivated many friends in the profession with whom she socializes regularly.
Trudy is a litigation paralegal with 22 years’ experience. She holds a B.A. from Sonoma State University where she also graduated from the paralegal program.

Trudy joined REAP (then Redwood Empire Legal Assistants or RELA) as a student and volunteered to serve as newsletter editor. In 2005 she rejoined the RELA board, holding the position of secretary. In 2008, she became REAP’s representative to the California Alliance of Paralegal Associations (CAPA). In 2011, Trudy was elected Treasurer of CAPA and in 2013, she was elected President of CAPA. She served two terms as CAPA President, and presently serves as CAPA’s Board Advisor.

In 2011, she assisted with the Certified Paralegal Workshop hosted by REAP, presenting a session on Judgment & Analysis. As a result of this presentation, she decided to pursue obtaining her Certified Paralegal designation from the National Association of Legal Assistants, and successfully completed the two-day examination in 2011.

Since then, Trudy has taught sessions on Judgment & Analysis and Civil Litigation as part of Certified Paralegal Workshops for REAP, CAPA and the Paralegal Association of Santa Clara County. With her supervising attorney, Bonnie Freeman, Trudy presented a program to REAP members on “100 Days Before Trial.” In addition, she has presented on topics related to non-profit boards, including “Board or Bored? How to Build a Better Board” at the 2011 CAPA Leadership Conference held in Santa Rosa, “Cultivating Leaders of Tomorrow” as part of a panel discussion at the 2013 CAPA Leadership Conference in Bakersfield, and a program on growing association boards through engaging members and succession planning as part of CAPA’s “Team Talk Tuesday” program. Trudy has also worked with attorney Bill Adams, Grace De La Torre, CP, and Deborah Cain, CP, to prepare and present REAP’s fun-tastic annual ethics programs, “Ethics Jeopardy” and “Family Feud.”

As a senior paralegal with Senneff Freeman & Bluestone, LLP, in Santa Rosa, Trudy specializes in civil litigation. She also has extensive experience in general business transactions, corporate formations and compliance, real property transactions, estate planning, trust administration and probate.

Actively involved in the community, Trudy is a past board member of Schools Plus, an organization dedicated to raising funds for sports, music and art programs in Santa Rosa City Schools, and the Santa Rosa Youth Soccer League, both as a board member and as a youth soccer coach and referee.

(Continued on page 27)
Dawn’s legal career began in 1989 as a law office receptionist, as a legal secretary from 1990 through 1998, and thereafter transitioning into her current paralegal position where she is the firm-wide senior paralegal and paralegal manager at Lobb & Cliff, LLP. Dawn is very excited to be a paralegal and is devoted to her legal career, certification, education, and expanding into paralegal management. In striving to maintain excellence in the paralegal field, Dawn obtained her Certified Paralegal credential through the National Association of Legal Assistants (NALA) in May of 2006. In September of 2006, Dawn obtained her Advanced Certified Paralegal credential in Discovery. In January of 2007, Dawn obtained her Advanced Certified Paralegal credential in Trial Practice. In August of 2012, Dawn obtained her Advanced Certified Paralegal credential in Business Organizations.

As an Advanced Certified Paralegal, Dawn taught the CLA Review Course in Legal Ethics for ICAP in June 2007. Dawn also serves on the Paralegal Advisory Committee at University of California Riverside Extension (UCRX) (2007-present). In July of 2012, Dawn was employed by UCRX as the Paralegal Program Liaison and the Paralegal Internship Coordinator/Instructor. Dawn also sits on the Commission for Advanced California Paralegal Specialization (CACPS) as a Board Member (9/11/2012-present). CACPS’s mission is to provide a voluntary, uniform professional credential for those demonstrating an advanced knowledge of California law and procedures and to enhance the quality of services available from California paralegals and legal assistants to the legal community, and to the public which is served.

In December of 2007, Dawn was chosen as one of ParalegalGateway.com’s 2008 Paralegal Superstars (one of twelve paralegals nationwide that lead the field and contributed above and beyond in the profession and/or in their community).

On July 30, 2008, Dawn was honored with the 2008 Affiliates Award by NALA for outstanding contribution and dedication to the advancement of the legal assistant profession through volunteer service to NALA affiliated associations. In 2008, Dawn was also the recipient of the IPMA 2008 Therese A. Cannon Educational Scholarship.

On July 12, 2013 and July 23, 2015, Dawn was honored with the 2013 Affiliates Award by NALA for outstanding contribution and dedication to the advancement of the legal assistant profession through volunteer service to NALA affiliated associations.

Dawn has been a member of ICAP since 1998 and has served on the Board of Directors since 2000. In the past, she has served as ICAP’s President (2007-2008), Vice-President (2005-2006), Parliamentarian (2009 to present), NALA Liaison (2007-present), CLA Review Chair, RCBA Liaison, Elections Chairperson, 2012-2015 Educational Conference Chairperson, and Newsletter Editor (2007-present). Dawn has also served on NALA’s Early Bird Reception Committee for the 2009 NALA Convention in San Diego. Dawn is the Secondary Representative to the California Alliance of Paralegal Associations (CAPA) and is a member of the International Paralegal Management Association (IPMA). She is a member of the National Association of Legal Assistants (NALA), National Notary Association (NNA), Riverside Legal Professional Association (RLPA) and its affiliate Legal Secretaries, Incorporated (LSI).

Dawn puts her whole heart and soul into her work as a paralegal and into her dedication to the Inland Counties Association of Paralegals (ICAP).

(Continued on page 28)
Janie has had a long and distinguished paralegal career in the Tulare County community. Her general focus has been in the probate arena; but she has always remained willing and capable of working in all areas of the law in an efficient and effective manner, assisting all her co-workers and attorneys on her team.

Janie has also been an indispensable member of Sequoia Paralegal Association from its inception. She works tirelessly as the SPA Treasurer to insure that the records are meticulously maintained and a report can be provided upon request at any given moment. In addition to her duties as the SPA Treasurer, she also volunteers her time and efforts for other SPA functions and will provide her assistance wherever it may be needed. It goes without saying that anytime she is asked to complete a task, she is quick to respond and provides her attention to detail to the task so that it is done in a timely fashion. She is quick to offer her assistance when necessary. It is a relief to the SPA Board knowing that she is on top of the job. She is dependable and has been instrumental in the growth of the SPA membership. Each new Board requires new opinions and leadership, Janie has been able to adapt to those changes and has been able to assist to allow a smooth transition.

Janie is confident in her abilities as a paralegal. She is also willing and open to helping new paralegals, as well as paralegals that are established. Each of us know that we always need to ask questions of our fellow associates. Janie avails herself to everyone and enthusiastically provides her expertise to those that require assistance and training.

Janie is a well-rounded member of the Tulare County Legal Community. Her legal background and understanding of the law make her the go to person if you have questions, for training new paralegals and providing important knowledge to students or individuals who may be thinking of joining the legal profession.

Janie has also committed herself to the paralegal association and though she has full-time responsibilities, she makes the time necessary to provide to the Sequoia Paralegal Association. She works tirelessly for her legal community and organization. If you were to ask anyone in the community, you would be told that Janie is one of the hardest workers. She does not often put herself in the forefront and usually prefers to be behind the scenes.

Theresa has been, and still is, an extremely active, present and committed as a member of SFPA’s Pro Bono Committee. She also recently volunteered to take on the role as main Chair of SFPA’s Pro Bono Steering Committee to replace Rolayn Tauben who retired and formerly stepped down from the position in Jan. 2016. Theresa goes out of her way to seek volunteer opportunities for SFPA members. One example is the Glide Project which took at least 2-3 years for Theresa to communicate with contacts and ensure that the pro bono opportunities “fit” for SFPA paralegals and student members, and now this opportunity has finally come to fruition and recently became “activated” for pro bono service.

Theresa works full time as a paralegal, yet still finds time to mentor and provide valid information and her personal experiences about the paralegal profession to other paralegals (including me) and student paralegals.
Lauren is Secretary of SDPA and a Director of Women in eDiscovery San Diego Chapter. She earned her Certified Paralegal designation in 2016, and has made extraordinary and invaluable contributions to both her law firm and to the paralegal profession.

Lauren’s attorney, Michael Weinstein, Esq., Shareholder and Principal Attorney at Ferris & Britton, APC, states “In my 33+ years of practice I have never come across an individual—paralegal or attorney—with her energy or professionalism. Her “can do” attitude and commitment to the team inspires others. She inspired me to see the value that a paralegal professional can contribute to a law firm—so much so that I approached her in late 2014 about implementing an individualized, written Professional Development plan for all paralegals (we had done so previously only for attorneys) and we put those plans into place.

Lauren strives every day to learn and improve and to help others do so as well. Her work product is outstanding. She thinks outside the box and contributes valuable ideas that we incorporate into case strategy. I remind myself often how fortunate I am to work with Lauren.”

Lauren is a superstar bringing extraordinary value to her team. Lauren is a team player in words and actions and brings passion and energy to the team. Lauren is a lifetime learner—taking every opportunity to: improve both the scope and quality of her skills and competencies; learn from other resources, share what she has learned; and teach other team members where she has superior skills and competence. Lauren has, and continues to develop expertise with eDiscovery and litigation technology. “Lauren has made me and all the lawyers in the firm better lawyers.” Michael Weinstein, Esq.

She has displayed commitment to providing services to professional organizations - local, state, and national. She teaches, tutors, and mentors paralegal students and other working paralegals; written articles for legal publications, dedicated her time speaking at seminars on substantive legal topics, issues concerning the paralegal profession, or on leadership. She volunteers and provides pro bono services within and outside the legal profession.

Here is what she’s done in the last 16 months:
- Revitalized and co-launched SDPA’s Mentorship Program and organized the first Mentorship Mixer. The program has already paired more than 35 individuals based on practice area interest.
- Co-launched WiE SD chapter’s Facebook Page and established a mentorship program in which mentors and mentees are matched up through an applications process she created using Google forms.
- Launched her own eDiscovery blog. Written articles for publications, which have also been posted on her blog, concerning topics such as: What is metadata?; Bates/control numbers; Using Acrobat in discovery; Tracking custodians with Excel, and more.
- Attended: ESI Forum monthly meetings; Digital Forensics 101 course; Digital Forensics for Attorneys course (4 hrs); SQL database seminar (all day), and Excel Intermediate seminar, among others.
- Volunteering for the YMCA at Becky’s House 3hrs/month.
- The last two years she organized her firm’s participation in the MS Walk, raising money to fight multiple sclerosis.

CAPA MEMBER ASSOCIATIONS:

Start thinking about who you want to nominate for paralegal of the year in 2017! Nominates will be due in April/May 2017. For more information please contact president@caparalegal.org
PASCCO 38th Annual Educational Seminar

SILICON VALLEY & BEYOND: TECHNOLOGY’S FUSION WITH THE GLOBAL LAW PRACTICE

KEYNOTE: LAW IN SOCIETY IN THE INTERNET ERA — Ronald Bell, Esq.
ETHICS IN THE AGE OF TECHNOLOGY — Hon. Kevin Murphy (Ret.)

CORPORATE TRACK
- Expanding Internationally – Approach and Key Considerations to Global Entity Formations and Corporate Maintenance — Daniel K Robyn, Esq.

LITIGATION TRACK
- Medical Negligence 101 — Bradley Corsiglia, Esq.
- How to Litigate Real Estate Disputes — Daniel Ballesteros, Esq.
- Patent Law in the Supreme Court — Matthew Poppe, Esq.

PROFESSIONAL DEVELOPMENT TRACK
- WebTMS Trademark Management & Docketing System — Michael Ullman
- Trial Director: The Art of Presenting Your Case at Trial — Caitlin Stevens and Kyle Frankeny, Paralegal
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- E-discovery (Introduction)

Afternoon Break-out Sessions:___________________________________
- Contract Law - E-Discovery (Advanced) - Personal Injury
- Legal Writing - Intellectual Property Law - Probate Law
- Professional Development (CLA/ACP (NO MCLE)

Return this completed Registration Form and payment, which can be made by check or money order payable to "LAPA" or by credit card. Mail to: LAPA, 2016 October Conference, P.O. Box 71708, Los Angeles, California 90071

Questions? Call 866.626.5626. LAPA or email LAPA October Conference Chair Terry L. Wright, ACP at terry.wright@dignityhealth.org or LAPA Administrative Manager Tracey Booth at admin@lapa.org

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In a never-ending search to provide the greatest benefits, CAPA’s Board of Directors is pleased to announce the opportunity to purchase a variety of insurance products including health, dental, vision, auto, home and more for CAPA members! This is a fantastic benefit and let me tell you why…

I. PUBLICATIONS

1. CAPA’S RECAP is a quarterly newsletter. RECAP provides comprehensive informative legal news of interest to paralegals. RECAP has practical articles of interest to paralegals and their career. As a member of CAPA you receive an electronic copy at no charge.

2. NEWSLETTERS – CAPA Affiliates each exchange their monthly or bi-monthly newsletters. As a member of CAPA you are able to access each association’s newsletter.

3. PARALEGAL TODAY MAGAZINE - CAPA provides a discounted rate of $2 for members when purchasing the magazine Paralegal Today. Your subscription to Paralegal Today includes both the print edition and the online edition. Use Promo Code (this can be obtained from your CAPA representative at your local level). To obtain your member discount visit: www.paralegaltoday.com or call toll free: 1-877-202-5196.

4. THE CALIFORNIA PARALEGAL by William P. Statsky and Sharon Sandburg - CAPA members can save 25% on this resource guide. This reference book provides an introduction to the career, Code of Professional Responsibility, unauthorized practice of law, employment rights of paralegals, among other topics of interest to paralegals. CAPA members can order by calling 1-800-347-7707 and reference promo code (this can be obtained from your CAPA representative at your local level)

5. CAPA’S GUIDEBOOK ON THE UTILIZATION OF PARALEGALS is a guidebook to provide members with updates on pending legislation and new cases regarding paralegal fees, usage of paralegals, general job descriptions in various practice areas and more. The guidebook is currently available to members for $10 plus postage. If you would like to obtain a copy, please contact your CAPA Representatives or Vice President of Administration.

6. CAPA’S RESOURCE MANUAL is updated yearly and is a comprehensive listing of known legal service vendors and other useful legal contacts located throughout California www.ceb.com/capa. The source code is (this can be obtained from your CAPA representative at your local level).

8. AMAZON - CAPA benefits each time its members orders on Amazon. All you need to do is go to the CAPA website, click on Resources Bookstore and it will direct you to Amazon.com. CAPA receives a percentage for each purchase and the proceeds help maintain and run the organization.

II. INSURANCE

1. UNITED INSURANCE PARTNERS - Available through United Insurance Partners, CAPA members have access to purchase numerous types of Insurance including Medical, Dental, Vision, Home, Auto and more, available through United Insurance Partners. To learn more about this member benefit, go to www.go2uip.com and you will find an array of insurance products available for you to purchase through such companies as Blue Cross, Aetna, Cigna, Mercury, Travelers, Safeco and many other insurance companies. Or simply access the UIP link on CAPA’s website or call 1-800-707-2360.

2. AFLAC - offers a menu of CASH BENEFITS to CAPA members, regardless of any other core Insurance benefits you may also have in place! These Cash benefits can help you and your family recover various out of pocket expenses you incur on an ongoing basis, such as co-payments, deductibles, mortgage and car payments and other routine bills like groceries and gas!! Aflac also pays big cash for routine physicals, mammograms, pap smears, dental cleanings and eye exams! Your family members can also be covered under Aflac’s supplemental policies! To get more information on this Association Member Benefit, please contact our Aflac Representatives: Annie Christian - anncan@usaflac.com T: (714)297-2155, and Bill Newberry - wmaflac@aol.com T: (714) 803-3444.

III. DISCOUNTED RATES ON SERVICES

1. SPREEBIRD FORMERLY KNOWN AS SCREAMIN DAILY DEALS – Click on the SpreeBird widget to sign-up and then when you reach the Community Partner, select nonprofit and “California Alliance of Paralegals” from the drop-down menu for daily emails that provide deep discounts of 50 to 90% from businesses in your area.

2. FLOWERS - CAPA offers a 15% discount on 1-800-flowers.com. Use Promo Code: CAPA

3. WORKING ADVANTAGE provides CAPA members with reduced rates for movies, sporting, concerts, restaurants, theme park admissions, Verizon Wireless, computers, flowers, gifts, on-line shopping at numerous websites and much more: Go to: www.workingadvantage.com
IV. ADDITIONAL CAPA BENEFITS

1. OBTAIN AFFILIATE RATES, As a member of CAPA you receive reciprocal member rates when you attend events, seminars or conferences put on by any CAPA Affiliate Associations.

2. LEGISLATION UPDATE, CAPA’s Legislation Committee reviews and reports on pending legislation of interest to paralegals and disseminates and shares reports and information with each affiliate association.

3. STATE BAR LEVEL REPRESENTATIVES, CAPA provides representatives at the State Bar level. CAPA members sit as board members for sections of the State Bar of California. These members are promoting the paralegal profession to attorneys and other legal professionals. The members also provide seminars on the value and utilization of paralegals, fee recovery, as well as other topics.

4. ANNUAL CALIFORNIA STATE BAR CONFERENCE, This conference is covered by CAPA representatives who act as a liaison between the State Bar and CAPA and are there to represent our profession. They respond to inquiries from attorneys and other legal professionals, providing attorneys with information on Business & Professions code, and the usage and profitability of paralegals.

5. INFORMATION POWERHOUSE THROUGH THE ALLIANCE, As a member of CAPA you have connections with other affiliates throughout California which provides a sharing of information on how they run and improve their organizations. There is an exchange of information on how to put on successful seminars, increase membership, help out your community, provide seminars and advice to association members, vendor referrals, local court information, filing questions, exchange of resources and information, and much more. To learn more, please contact your local association’s representatives or contact the CAPA board.

6. CAPA EVENT DISCOUNTS, CAPA members receive discounted rates to attend CAPA’s Educational Conference and the Bi-Annual Leadership Conference. The conferences provide attendees with quality educational courses given by leaders in their field. The conferences also are a way to provide quality education to smaller associations. Attending the conferences provides leadership mentoring, education and the necessary skills to guide your members’ paralegal careers and help build your own local association.

(Continued from page 35)