



ACCESS

A Publication of the
California Association of Legal Document Assistants
www.calda.org



February, 2005

PRESIDENT'S MESSAGE

Greetings to all CALDA Members

As all who attended, the 2004 annual conference was a tremendous success. Asilomar has been a delightful location for the past two years, offering the peace and tranquility of both the ocean and the forest - where the raccoons and deer come so close you can almost touch them, and the surrounding natural beauty takes your breath away. There were many new faces this year, and I personally enjoyed the added touch of the bonfire one evening that enabled each of us to chat and sing songs around the blazing fire under the starry night sky.

The 2004-2005 Board of Directors has some new faces this year and as your newly elected President with some very BIG shoes to fill, I am personally excited about the diversity of talents represented in your newly elected board. Now, some of you may not have realized it, but CALDA actually has two boards, making us quite unique and special as compared to other organizations. "Two boards?" you might ask with surprise. Yes, two boards. We all know about the elected Board of Directors, but there is another "board" as well, even more important than the "Board of Directors" and that is the "Board of Members"...and it's comprised of each and every one of YOU! This means that, just like the elected Board of Directors, each member not only plays an important role in the organization as a whole, but also has an "obligation" (yes, I said the "O" word) to do so.

You may not be aware of it, but in reality the Board of Directors is merely a defined, mirror representation of the "Board of Members" as I call it. Neither part can work without the rest. What does this mean? Your board cannot function without the help, input and support of the membership body as a whole. It is for this reason that I personally seek your consideration as to what part you will play in the continued growth of our organization over the next year. None of us can do it alone and as such, one of my personal goals is to have more one-on-one contact with each of you during my term -- to listen to your issues, concerns, ideas, hopes and goals for CALDA. Each of you has something uniquely special to offer CALDA and we **NEED YOU!**

As many of you probably know, before I accepted the nomination for President, it was with the understanding that I had already planned to be out of the country for an extended vacation which would take me to South America for 2 1/2 months and so I have left things in the competent hands of our Vice President, Tamara Parker, during my absence. Nevertheless, as I write this sitting on a veranda overlooking the City of Quito in Equator, my thoughts since being elected have been turned to what some of my personal goals will be for the coming year. I must admit, there are many, but I will try to focus on a few in the forefront.

First, with the recent conference so fresh in my mind, I would like to see an expansion of classes and speakers offered so that both the "old timers" and the "new bees" will be offered an experience they won't want to miss. This would include offering parallel classes specially geared to our long time LDAs that may encompass "non-legal" but highly informative and valuable topics specific to our profession.

Second, many members have expressed concern over those "illegitimate" document assistants. It may be time to re-address these statute violators and CALDA's role regarding this issue.

Third, I hope this next year we can make strides to expand CALDA's name, influence and role with the various State and County agencies, and to bring greater public awareness regarding LDAs in general. Part of this would be to strive to make CALDA similar to the "Good Housekeeping" seal, raising public confidence in dealing with CALDA members.

This list could go on and certainly will no doubt, but unless we can capitalize on the energy and efforts of each individual member, this list will merely remain on paper. None of us are super heroes, but collectively we can be!

So, get out your pen and paper and make your notes because the next time your telephone rings, it may be to get your personal Member Board report!

Talk to you soon!
Sandy McCarthy



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ATTENTION
All Board Members

ALL MEMBERS: EACH YEAR YOU MUST SUBMIT A COPY OF LDA, UD OR IMMIGRATION REGISTRATION; OR A LETTER FROM YOU STATING UNDER PENALTY OF PERJURY THAT YOU AREN'T REQUIRED TO CONFORM TO STATE LAW. EVERYONE MUST COMPLETE ALL 4 PAGES OF APPLICATION

Special Offer

CALDA offers instant messages to all voting and non-voting members. If you want to be a part of the TALKLIST and have an E-mail address (or if your address has changed), please send it to
dpwade@lightspeed.net

**WHEN AN LDA ASKS
"WHY SHOULD I JOIN CALDA?"**

Tell them, the benefits are:

1. Increased professional knowledge and networking opportunities.
2. Awareness of events and developments pertaining to the LDA profession.
3. Subscription to the newsletter, *ACCESS*.
4. A voice in decisions affecting the profession at the local, state and national levels.
5. Discounts on educational seminars and workshops.
6. Setting a higher standard of professionalism.

**The ACCESS is a publication of the
California Association of Legal Document Assistants (CALDA)**

The opinions expressed in ACCESS are those of the writers and are not necessarily those of CALDA. All articles are based solely on materials submitted in writing. The act of submitting editorial contributions shall constitute an express warranty by the contributor that the material is original and in no way an infringement upon the rights of others. CALDA assumes no responsibility for verification of the information submitted.

NEWSLETTER GUIDELINES

Materials may be submitted as follows: E-Mail to: newsletter@calda.org

Computer System used PC only, Software used, MS Word or Word Perfect 12 or lower ONLY.

Do not indent or use all caps in headlines or text. Prefer alignment to be justified

Nominations & Elections

By Jeri Blatt

Seems like yesterday...how many times have we said that! The year 2004 is behind us and now we have an exciting new CALDA board and an exciting new year ahead of us. With your suggestions and support, we can make great strides this year. I know you've heard it many times, but it's true, YOU are this organization. If you care about the future of this organization, don't just gripe about it. You are free to go to board meetings, express your concerns and, by all means, join a committee. Your suggestions and concerns *are* noted, be certain of that!

As past president, I inherit the office of Nominations and Elections Chair, so think about next year. Think about running for an office next year.... now! Wouldn't it be great to have several people who ran for President, Vice President, Secretary, Treasurer, etc.? Sometimes it takes a year to gear up for such a major commitment, so now is not too soon to be thinking about it. Of course, we have to bear in mind the qualifications per the by-laws for some of these positions; however, the board will be looking into proposing some changes, *with your approval*, to make it easier for members to join as directors.

I look forward to dozens of members expressing an interest in a board position!

Also, the local chapters issue. Starting February 1, 2005 (let's get holidays behind us and a trip) I plan to pick up where I left off before I became President in 2004 and help get more chapters started. So, between now and then, start thinking about taking the lead (you all have leadership qualities) by getting a chapter started in your area. It's easier than you can possibly imagine, educational and fun (the key word)! It is a great way to meet LDAs in your area, keep up on the latest issues concerning our profession, discuss form changes, learn about new services to provide our customers, and an opportunity to invite members of the legal community to further educate us and vice versa. You also get one educational unit for every hour you attend. Our meetings in the Bay Area start at noon on the third Thursday of every month and last about an hour to an hour and a half. Very manageable - and as few as three can start a chapter. The fun is watching it grow. You can contact me at jeri@jblatt.com or call me at 650-574-2087, however, I will be calling some of you, so be on the alert!

Jeri Blatt
Nominations and Elections Chairperson



Professional Standards Committee

PLAN OF ACTION

1. Hold Professional Standards Committee Meetings

Since there appears to be a great deal of interest among CALDA members regarding Professional Standards, it seems appropriate to set up several committee meetings throughout the state to discuss CALDA's role relating to these important topics (unregistered LDAs; yellow page ads and phone company statements under Aparalegal@ headings; handling consumer complaints against CALDA members and non-CALDA members; collecting LDA information from County Clerks; communication with County District Attorney, Consumer Fraud Divisions, as well as the State Attorney General's Office; and other concerns). The purpose of these meetings is to gather ideas and make recommendations to the CALDA Board.

Schedule of Professional Standards Committee Meetings - MARK YOUR CALENDARS:

March 5, 2005 10 a.m. - 2:00 p.m. Laguna Niguel, CA
March 19, 2005 10 a.m. - 2:00 p.m. Douglas City, CA

If you are interested in attending any or all of these meetings, please RSVP by February 18, 2005. A confirmation letter with specific location and directions will be sent two weeks prior to each meeting. Lunch will be served at all meetings.

2. Gather Yellow Page Ads to Obtain Unregistered LDA Names

To obtain a list of names, I'm asking each of you to send me a copy of the Yellow Page ads from your area, especially under the Aparalegal@ heading. Additionally, please send copy of your Yellow Page ads listing unregistered LDAs. I will be sending them a copy of the law, as well as information about CALDA, with a copy to their County District Attorney's Office.

3. Communicate with local District Attorney - Consumer Fraud Divisions, to Enforce LDA Law

As members of CALDA, we all try so very hard to follow the rules. It is truly unfair that some people try to skirt the law. The LDA law regarding being registered and bonded has been in effect since 2000. This Chairman will send a letter to each county DA to enforce compliance with the LDA registration regulation.

4. Collect Current LDA Information from County Clerks

Each year this chairman requests current LDA information from each of the 58 county clerks throughout the state to keep track of registered LDAs.

5. Respond to All Consumer Complaints Against CALDA Members

6. Perform Other Duties as Requested by the CALDA Board

Marcia Burke

Professional Standards Chairman

39159 Paseo Padre Parkway, #110

Fremont, CA 94538

Phone: 510-791-2700; Fax: 510-791-2798



Education Chair Person Betty Cole

I have been a member of CALDA for three years and attended my first conference in November. I was so impressed with all the board members as well as the members, I accepted when the board asked me to take over the remaining year to be the education chair.

Our success in business depends on hard work and knowledge. However, I personally feel that education is not only an important part of any business; it is the foundation for success.

As your new education chair person, I have sent an e-mail out to all members to get an idea of what workshop or classes you would be interested in having in your area. I would encourage and appreciate all members' to respond; I also, need committee members to help me arrange these classes in your areas.

I am excited to be a board member, and look forward to working and talking with each of you. If you have any ideas please e-mail me or call. I am open to any new ideas that can keep CALDA members educated and informed.

Betty Cole

legalese49@sbcglobal.net

FLASH ---Professional Standards Committee Held First of Three Meetings!

On Saturday, February 18, 2005, the first of three committee meetings was held in Fremont, CA to brainstorm and come up with ideas regarding CALDA Professional Standards. What a great day! In attendance were Chairman, Marcia Burke (Fremont Divorce, Fremont), Kerry Suendermann (People's LDA, San Rafael), Jim Wood (Attorneys Trust, San Ramon), and intern and guest, Holly Sheen (Santa Rosa). Great suggestions and ideas were put on the table. We looked at the big, long-term, positive picture of CALDA's opportunity to build the second tier in the legal system. Jim Wood volunteered to review, compare and revise CALDA's Code of Ethics into a clean, clear, people-oriented document. Kerry Suendermann volunteered to provide written notes about her numerous ideas. Throughout the meeting we noticed how many ideas overflowed into other chairmanships – membership, technology, public relations, etc. So much energy flowed; we are all ready to meet again in Laguna Niguel on March 5, 2005; and then in Douglas City on March 19, 2005. If you are interested in joining the Professional Standards Committee, mark your calendar, make plans to attend – you are invited!

If you are interested in attending any or all of these meetings, please RSVP by February 18, 2005. A confirmation letter with specific location and directions will be sent two weeks prior to each meeting. Lunch will be served at all meetings.

Marcia Burke

Professional Standards Chairman

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Phone: 510-791-2700; Fax : 510-791-2798

From the Desk of Your Secretary

Carol Ludlow

Hello to All Calda Members

As your new Secretary I look forward to becoming more involved in Calda during the coming year. This is very exciting for me to be able to contribute to an association that has benefited me so much during the past few years.

Many of you know nothing about me so I would like to give you a little background history. I was born Liverpool, England, and for the majority of my 30 years in the US I have worked as a self-employed bookkeeper. I became an LDA in December 2002, and a UDA in December 2003, after graduating from De Anza College in December 2000, with an AA Degree in Paralegal Studies. You are probably wondering why it took me 2 years to register as an LDA. My paralegal education focused on working as a Paralegal for Attorneys and for those 2 years I did work on an independent basis for several Attorneys. I have to admit I had no idea just what was involved in being an LDA and it was actually through my membership in the Paralegal Association of Santa Clara County that I learned about CALDA. Until 2003 I operated my business out of my home but after attending the 2003 Conference I was inspired to take the plunge and rent a small office in Cupertino. This was a good move and my business is growing slowly but surely.

In 2003, my son passed the Bar after graduating from Santa Clara University, School Law. In addition to operating my business as an LDA, I continue to work independently for several attorneys - and I am proud to say - including my son.

Thank you all for your patience as I learn all the new tasks that are expected of me. I hope that you will all feel free to e-mail me with any questions or suggestions or to just introduce yourself and share your experiences of Calda with me.

Carol Ludlow
Legaldocs4u@Comcast.net





Technology from Your Technology Chairman Marcel Neumann

We have started collecting the information to make the following changes to our web site as requested by the members:

1. Add an Organizational Chart.
2. Add info on what each committee does, in detail, and what projects they are working on.
3. Add the names of the current committee members.
4. Add info on ways to get involved in committees.
5. Add what CALDA is promoting, so prospective members see why they should join CALDA.
6. Add step by step instructions on the order page or product page on how to get to the page where Brochures are (or other products) for down loading.
7. Add the History of CALDA.
8. Chris Donica reported on the 'Forums': The forums would be able to send emails to members who wanted them. The emails would have the bodies of the messages posted on the forums. This way, a member could get the messages by email without actually having to use the forums to read each message. This cool feature is called an "E-mail Digest". Each CALDA member who goes to the forums can select WHICH forum topics they want to receive by email. If they aren't interested in certain forum topics, they don't subscribe to those in the Digest (but they could read those topics by going to the forums themselves instead of relying on the digest). Then, the user also selects how often they want to receive the E-mail digest. Hourly, daily, weekly, etc. This gives each member the control to determine what they want to receive from the forums and how often they want to get an email digest with all the latest message posts.
9. All other ideas and suggestions are welcome. If you would like to work with in this committee, Please contact me at technology@calda.org

Marcel A. Neumann
Technology Chairman

CONFERENCE INFORMATION FROM YOUR Conference Chair Person Connette Blalock

My first newsletter! How exciting! I joined CALDA about 3 years ago; I post almost daily to the talklist (I love the informative but concise feedback we get from the members). At the 2004 conference I talked to many of you from Southern California who wanted a Chapter and now we have one. We meet by chartroom once a month (we are still trying to find a good day and time for it) and we will have 4 face-to-face meetings a year. We had our first meeting of the SOCAL Chapter of Calda On January 17, 2005! Only 3 attended out of 11 who were interested. Hope to have a bigger turnout February 21, 2005 our next meeting. I have read Roberts Rules of Parliamentary procedure and am ready to go!

My background starts out as office manager to the various State Attorney Generals in San Diego for 13 years. I was also the Supervising Receptionist of the Public Inquiry Unit of the State Attorney General's Office, where I learned that companies putting wood in our bread, and other interesting facts were poisoning us. I assisted the Deputy Attorney Generals in investigative work, posing as customers, clients and whatever else was needed at the time. Prior to that I was a police matron. For a short time I had a Private Investigator's license.

I am chairperson for the Conference in 2005 in Asilomar. Connie Crockett is my committee member for the Conference (could use a few more). She has one speaker lined up for the conference and I have an ex-trustee who has agreed to speak to us about red flags to watch for when doing Bks. Her speaker will be a new addition to the conference. I will let Connie Crockett tell you about her.

I am excited to be a board member, and anxious for the conference this year. I am hoping to have more speakers this year, which will speak for about 45 minutes to an hour each, so there will be more choices this year. If anyone has ideas for vendors or know someone who is just dying to sell their products, email me.

Connette Blalock



**INFORMATION FROM YOUR
Fund Raising Chair Person
Connie Crockett**

I'm your new fundraising chair and I thought you might want a little more information about who I am. I live in the Sierra Nevada Foothills in Grass Valley and commute 5 miles to my business in Nevada City, where I grew up. I received my paralegal certificate from Chico State in the mid 80's and worked with family law attorneys for 7 years prior to opening my store front in 1994. I was our county's small claims advisor for 8 years in the 90's and a member of Legal Secretaries Inc. for several years. I married Chris Crockett 7 years ago and we have operated my business together since marriage. Chris and I have 6 grandchildren, the oldest age 6. They all live nearby so our lives are filled with family and work.

One of my duties as your fundraising chair is to submit an article outlining my goals. Admittedly, I have no goals and minimal knowledge of what I'm doing, let alone what I hope to accomplish. Don't worry, I'm certain I can fulfill my duties. My real mission was to get involved.

Because I live in a smaller town, building and maintaining a good reputation in the legal community is vital. If you're doing a good job, word travels quickly. If you're doing a bad job, word travels quickly. I feel very fortunate to have created a well respected business. But, I can't rest on my sense of accomplishment alone. I've realized it's time for me to wake up and pay attention to things such as staying current with the LDA laws, continuing my education and getting involved in CALDA for this and networking. I am increasingly amazed by how quickly laws are here today and gone tomorrow in the blink of an uninformed eye. Our profession has taken on an integral role in the legal field and I have developed a personal stake in seeing to it that I am able to continue doing what I'm doing. I've simply realized I just can't do it alone anymore.

During her term as fundraising chair, Sandy McCarthy spearheaded a huge effort toward the further development of the brochures and questionnaires. This is a great tool and we need to continue its creation and maintenance. I'm going to take Sandy's goal and nurture that with the help of others willing to participate in the formation of a "Publications/Revisions Committee". If approved by the members at the October 2005 meeting, this new committee will continue the creation of the brochures and questionnaires and revise these publications as necessary. But, you don't have to wait for this committee to be formed to become a part of this new growth. You simply contact me, or the Education Chair, Betty Cole, and let her know you are interested in working on this project. As long as you are a voting member in good standing, you can belong to any committee you want! So if you are like me, feeling the need to get involved, but perhaps you are unwilling or unable to be a board member, contact the chair person of any of the standing committees that interest you. There are some great ideas the new members are bringing in and many more out there we need to hear.



Connie Crockett