

# **CALIFORNIA ASSOCIATION OF LEGAL DOCUMENT ASSISTANTS**

## **Board Meeting Zoom Board Meeting August 20, 2020**

### **Officers Present:**

Carol Ludlow – President  
Debbie Hollis – Secretary  
Sofia Sanchez – Treasurer

### **Officers Absent:**

Ian Duncan – Vice President

### **Directors Present:**

Rob Van Steen – Events Chair  
Loretta Szudy – Professional Standards Chair  
Catherine Herzog – Education Chair  
Michael Mendenhall – Publication Chair  
Elizabeth Olivera – Membership  
Jeri Blatt – Public Relations Chair

### **Directors Absent:**

Lisa Castillo – Chapter Liaison  
Jim Wilroy – Legislative Chair

### **Guests:**

Tracey Booth – Administrator

The meeting was called to order at 7:07 pm by President Carol Ludlow.

The minutes from the June 18, 2020 meeting and the July 2, 2020 meeting will be reviewed and voted on at the next meeting. The Treasurer's report will also be heard at the next meeting.

### **1. Update on Conference:**

Rob stated that he would like to have a committee that will start planning a “social” online platform for the conference. Socializing and networking has always been an important part of past conferences. Tracey will send links for “Socio” and there will be a night set to go over this.

Carol stated that Rob will decide who will be on his committee. The committee members will be Catherine, Jeri, Tracey, Rob, Sofia and Carol.

All attendees will be given access to all classes offered because the conference will be recorded. Because of the way the conference will be held this year, Tracey stated that she doesn't believe there is a need for an “early bird” pricing.

Rob reported that the Dept. of Justice fined the California Escrow group that he belongs to, for selling raffle tickets on line. Elizabeth suggested putting raffle tickets into the “swag bags” and provide those for all attendees. She suggested adding \$10 to the price of the conference to cover the tickets and the raffle prizes. She further suggested that we only offer 2 prizes this year and make both “big” prizes.

Rob and Carol would like for Elizabeth to talk about the working group during the conference. She will be one of the main speakers. It was also suggested that there be ads for the CALDA Academy.

Rob wants the conference to be 1 weekend, 3 days (Friday, Saturday and Sunday) between 2 and 4 hours each day. It was suggested that pre-recorded classes are more “polished”. If we decide to do that, we would have the speakers available for questions, after the class is over.

Scholarships will be offered and Debra will be in charge of posting information about them. She will form a committee to review applicants and determine winners.

## **2. Update on working group**

Elizabeth reported that one goal of the working group is to come up with recommendations regarding 1) Can paraprofessionals give advice; 2) Can they go to Court with clients; 3) what bonding should be required. She reported that the BAR is “hung up” on allowing paraprofessionals to offer representation or advice to client. Jeri asked who would be considered a “paraprofessional” and Elizabeth responded that the role has not yet been created. She said that we will be able to choose to become a paraprofessional and that there will be additional educational requirements.

She further stated that the BAR does not want to eliminate LDAs because they do recognize that LDAs offer something different to clients.

They brought in professionals from Washington and Arizona to speak to the working group. Elizabeth stated that all calls, videos of the meetings can be viewed on the BAR website. Carol asked Elizabeth to provide the Board by email, a summary/update of the meetings she attends regarding this issue.

## **3. Update on You Tube video**

Tracey stated that she had edited the script. She showed the video to the Board. We were impressed with what has been done so far. Tracey stated that Maggie’s husband, Steve professionally does voices for commercials and would be available to do the voice for our video. We agreed to ask him to do the voice in this video because having a professional would make the video more professional.

Once the video is completed and approved, it was suggested that we have the membership share the video on their websites.

The meeting ended at 7:50 pm

Respectfully submitted by:

Debra Hollis