



# Hearsay

*Through Example, We Lift Others*

## San Francisco Legal Professionals Association



PO Box 193054,  
San Francisco, California 94119-3054  
[www.SFLPA.org](http://www.SFLPA.org)



*By Jessica Landers, Editor*

Happy New Year one and all! I always like to ring in the new year by setting my intentions for the coming year, and by beginning as I mean to go on. You'll read about the resolutions and intentions of our various SFLPA members in this issue and hopefully find something that resonates with you.

Also in this issue, features on the realities of private investigation in California and Le Donne d'Italia invite us to learn more about the interworking of our community.

We at the *Hearsay* wish you all peace, safety and happiness in 2025!



### In This Issue...

Feature: Don't Be Like Mary: A Cautionary Tale

Feature: The Modern Day Private Investigator in California

What Have We Been Up To? Recent Events

# San Francisco Legal Professionals Association

## 2024-2025 Elected Officers



Frances Skaggs, CCLS  
President



Suddie Scott  
Vice President



Katia Tsvetkova  
Secretary



Sally Mendez  
Treasurer



Lorri Nicolini, CCLS  
Governor

## Appointed Officers, Chairs & Committee Members

Executive Advisor: May Sene - [executiveadvisor@sflpa.org](mailto:executiveadvisor@sflpa.org)

Parliamentarian: Sally Mendez - [sflegalsecretary@gmail.com](mailto:sflegalsecretary@gmail.com)

Career Promotion and Scholarship: Jameelah R. Hoskins - [careerscholarship@sflpa.org](mailto:careerscholarship@sflpa.org)

CCLS Program: Lorri Nicolini, CCLS - [ccls@sflpa.org](mailto:ccls@sflpa.org)

Education: Claudia Deza, Chair - [education@sflpa.org](mailto:education@sflpa.org)

Hearsay Committee: Jessica Landers, Chair, Francie Skaggs & Danya Gonzales - [editor@sflpa.org](mailto:editor@sflpa.org)

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Membership: Suddie Scott, Chair - [membership@sflpa.org](mailto:membership@sflpa.org)

Professional Liaison/Day-in-Court: OPEN - [dayincourt@sflpa.org](mailto:dayincourt@sflpa.org)

Programs: Mike Lewis - [program@sflpa.org](mailto:program@sflpa.org)

Ways & Means: Lillian Wong - [waysandmeans@sflpa.org](mailto:waysandmeans@sflpa.org)

Website: Kristen Craig-Reed, Chair - [website@sflpa.org](mailto:website@sflpa.org)

Employment: Kristen Craig-Reed, Chair - [employment@sflpa.org](mailto:employment@sflpa.org)

Social Media and DEI: OPEN

Open Positions:

Hearsay Graphics Designer, Day in Court, Social Media



Group Photo of SFLPA Members and Guests

# We Value our Members!

# HAPPY NEW YEAR

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# PRESIDENT'S MESSAGE

## FRANCIE SKAGGS, CCLS



### Through Example, We Lift Others

Happy New Year Members!

Welcome to 2025! I hope that all of you enjoyed your 2024 holiday season. To prepare for this issue of the Hearsay, we asked all attendees who RSVP'd to our December 10, 2024 holiday party to share either an upcoming goal or an inspirational quote for the new year. We received many motivational responses from members. You can find those goals and quotes on our New Year's Message Board on page 11. Our holiday party was full of enthusiasm, networking, and meeting new friends. It was a privilege to meet so many of our members, many old and many new, at the event. If you missed our holiday party, don't worry, we have so many more in-person events in the new year.

January is full of educational opportunities! Our January 28, 2025 Brown Bag will be "Your Home is Spying on You," with guest speaker Tom Plunkett, a professor at the University of San Diego and Managing Director of Digital Forensics at ArcherHall. Mr. Plunkett is a Certified Information Systems Security Professional (CISSP) and EnCase Certified Forensic Examiner (EnCE). Our monthly Brown Bags are virtual and free to members, which allows members and others to attend whether they are working from home or at the office. SFLPA wants to make these educational events accessible to all of you. I challenge each one of our members to attend at least one Brown Bag.

Our first in-person event will be our January Membership Meeting. I hope many of you join us on January 21, 2025, at O'Hagan & Meyer. You can enjoy dinner (which comes with your registration fee) while listening to guest speaker Walter Barrett, Magna Legal Services, who will discuss using AI to aid in summarizing deposition transcripts. Using AI to summarize transcripts, as well as to search for information, is becoming increasingly more popular in the legal field. There are some caveats in the use of AI, which is why this is a good opportunity for members to ask questions during the presentation.





# PRESIDENT'S MESSAGE CONT'D.



LPI also has many upcoming educational events as well. On January 7, 2025, LPI University has three online classes commencing: Beginning Legal Secretarial Training Online Course, Overview of California Discovery Online Class, and Trial Preparation Online Class. On that same day, LPI will also be offering a special FREE webinar, Legal Research 101: An Overview of Essential Techniques and Resources.

We cannot control the job market, but what we can control are our own development and skill level within the market. Being a member of SFLPA and LPI offers this opportunity with their educational webinars and courses that make us competitive in the job market, as well as a valuable and irreplaceable asset to our firms and employers. Investing in education is investing in our self-improvement.

SFLPA Programs Chair Mike Lewis was the inspirational speaker at LPI's November conference and shared a cautionary tale about "Mary," a secretary who worked for a high-ranking partner and felt protected and above her other colleagues, that she didn't keep up with her continuing education, assist in filings, or be a team player. One day, when Mary's high-ranking partner retired, Mary was in for a surprise. Read more about Mary in the "Cautionary Tale" by Mike Lewis and me starting on page 16.

I wish all of you a happy and prosperous 2025, and hope to see many of you at our upcoming events!

Your President,

Francie Skaggs, CCLS



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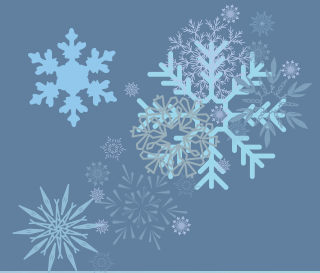
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# VICE PRESIDENT'S MESSAGE SUDDIE SCOTT



Dear Members and SFLPA Community:

San Francisco Legal Professionals Association has had a very good year with many members renewing their memberships, as well as new members joining SFLPA. I would like to welcome all the newly-initiated members into SFLPA. Legal Professionals, Inc. Career Promotions and Professional Liaison Leanne Ruesink has been very helpful to our local association by recruiting staff at various law firms to join SFLPA. Thank you, Leanne.

Our holiday party was held at the Patriot House, San Francisco on December 10, 2024. Our Programs Committee Chair Mike Lewis, as well as Ways & Means Chair Lillian Wong and I, hosted the event. There were 31 members and guests in attendance. We are happy to say that many of our local vendors and law firms donated to help support this event:

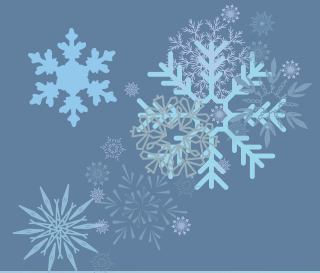
- Marlena Fejerang / Consillio
- Claudia Deza / Express Network
- Betty Hsu / Veritext
- Brandon Wai / Aptus
- Leanne Ruesnik and Ofelia Leming / First Legal
- Michael Taraban / Nationwide Legal
- Mike Lewis / O'Hagan Meyers
- Faye Lee Bresler, Esq. / Law Offices of Bresler & Lee

I was happy to see many of our members and their guests at the event. We had an opportunity drawing which included so many gifts that we asked those that did not receive a gift to please take one. We also had a couple of games that entertained our guests. It was a very successful holiday party, and I am looking forward to the next one.





# VICE PRESIDENT'S MESSAGE CONT'D.



We currently have 84 members and counting. We are looking forward to a great new year.

I would like to invite new members to attend our next Membership Meeting on January 21, 2025.

Thank you again for your support and membership with San Francisco Legal Professionals Association.

Suddie Scott  
Vice President



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# GOVERNOR'S REPORT

LORRI NICOLINI, CCLS



## LPI Second Quarterly Conference

The Second Quarterly Conference and Board of Governors Meeting was held November 15-17, 2024 at the Embassy Suites in Walnut Creek, California. It was co-hosted by Legal Professionals, Incorporated and Contra Costa County LPA. I attended as Governor, and Francie Skaggs, CCLS and Christine Flores, CBA attended in their capacities as part of the LPI Leadership Team. Larry McGrew attended in his capacity as LPI Treasurer, and Mike Lewis of SFLPA also attended, serving as the inspirational speaker for the Sunday session of the Board of Governors Meeting.

The theme of the Conference was “Don’t Stop Believing.” It began on Friday, November 15th with an informal welcome reception and a craft event and nacho bar hosted by Esquire Deposition Services. Participants had fun creating fall decorations out of empty wine bottles, strings of white lights, burlap cutouts, and multi-colored cloth leaves. Members of the Executive Committee displayed their creations on the podium throughout the conference.

The first session of the Board of Governors Meeting was held Saturday morning, November 16th. President Donna Day presided. There were 14 Governors present constituting a quorum. The Minutes of the August 2024 Board of Governors Meeting were distributed, but because they had not been previously distributed for review and comments, they were not approved at this conference and will be approved at a later date.

The LPI elected officers gave their reports. President Donna Day talked about LPI’s ongoing efforts to evaluate the viability of quarterly conferences since attendance has decreased overall and costs have increased. A committee has been formed to come up with recommendations for future conferences.

Vice President Bettina Jacobson reported on LPI membership. As of October 31, 2024, LPI has 851 members over all categories within the 23 active Associations, and 82 members-at-large (MALs), for a total of 933 members. For the same period in 2023, there were 945 total members of LPI. Bettina also reported that she and Donna Day participated in the recent California Association of Legal Document Assistants (CALDA) Conference in San Diego. They staffed a marketing table there and had a chance to network and get the word out about LPI and the many educational and professional development opportunities LPI offers. They hope to continue cross-participation between LPI and CALDA at future events and look forward to introducing LPI to other legal organizations.





# GOVERNOR'S REPORT

## CONT'D.



Treasurer Larry McGrew reported that LPI's taxes have been filed and are complete and up to date. LPI continues to have a healthy inflow of revenue from membership dues, classes, royalties from LPI publications, advertising in *The Legal Professional* magazine, and donations. As of this Conference, LPI's profit year-to-date is \$34,848.00. A motion was made for the Treasurer to pay LPI's bills for the quarter. The motion was carried unanimously.

Rod Cardinale, Jr., LPI Executive Advisor, spoke about the recently formed Nominations and Elections Committee which consists of Eliza Adams of San Diego LPA; Elise Dresser, LPI Parliamentarian; and Rod. Prior to January 15, 2025, the Committee will forward to the Associations the qualifications to run for the four offices that form the LPI Executive Committee (President, Vice President, Executive Secretary, and Treasurer). Elections will be held at the LPI Annual Conference in May 2025. Rod also has a goal of meeting with each Association individually either in person or via Zoom to get to know each Association and its needs in order for LPI to more fully support the Associations and their goals. Rod would like to have as many people involved in these meetings as possible and will be contacting each Association in the coming weeks.

Of note in some of the committee reports was the fact that The Rutter Group is considering making the *Legal Professionals Handbook* (LPH) available as an eBook. The *Legal Secretary Reference Guide, California Edition* (which will have a name change in January 2025 to the *Legal Professionals Reference Guide*) is now being sold on Amazon.com and has so far sold approximately \$1,000 worth of books. The Education Council is tracking how the members access LPI's *The Legal Professional* magazine when it is emailed out. They track how many people open the magazine and how many pages are clicked on, determining what topics are of the most interest to the membership, and how much of the magazine is read.

The CCLS (California Certified Legal Secretary) Committee reported that two more people passed the CCLS examination in September 2024: Michele Welch, from Sacramento LPA, and Shanshan (Susan) Mai, from San Mateo County LPA.

The Scholarship Committee is revising the Eula Mae Jett Scholarship application and deadlines to make it easier for people to apply and to receive scholarship monies in time to use for fall programs. A motion was made to have the various changes put into effect for the 2025-2026 LPI fiscal year (May 2025 through April 2026). The motion was carried unanimously.

All officer and committee reports are available in the Members Only section of the LPI website. I am also available to answer questions or find out more information for anyone who has additional questions.



# GOVERNOR'S REPORT



## CONT'D.

The Board of Governors Meeting was adjourned until Sunday, November 17th. A Roundtable Luncheon was held, and several educational classes were offered Saturday afternoon both in person and via Zoom. Various topics included Electronic Signatures, Trademark Law, Civility and Professionalism (taught by a Santa Clara Superior Court judge), and Legal Technology.

Several vendors displayed their offerings throughout the Conference. LPI gets a great deal of support from the vendors who support us through memberships, donations, sponsorships, and drawings. It was also a chance for Conference attendees to acquaint themselves with the many vendors who help us do our jobs so efficiently. LPI also had their usual raffle drawings made possible by donations from the various Associations. SFLPA contributed a \$50 Costco gift card for this purpose.

The Saturday evening reception and banquet continued the “Don’t Stop Believing” theme. A DJ played music throughout dinner, and the attendees spontaneously burst into song on several occasions and got up to dance between courses. It was a wonderful night of deepening connections with friends and colleagues old and new.

The Sunday morning session began with our own Mike Lewis serving as the inspirational speaker. Mike relayed interesting stories of legal professionals he has worked with, giving us both inspiring anecdotes and cautionary tales of how not to act in a professional setting.

The second session of the Board of Governors Meeting then convened. There were 13 Governors present, constituting a quorum. No motions were brought at that session. A bid was presented by Stanislaus County LPA to host the 2025-2026 fiscal year Second Quarterly Conference to be held in November 2025 in Modesto. There being no other bids for that Conference, the bid was accepted.

A drawing was held for scrip tickets to the 3rd Quarterly Conference to be held in February 2025 in Santa Cruz. The winning associations were Fresno County LPA, Santa Maria LPA, Orange County LPA, and Los Angeles LPA, with Long Beach LPA being drawn as an alternate.

It was a pleasure and a privilege to represent the San Francisco Legal Professionals Association at LPI’s 2nd Quarterly Conference as your Governor. Please feel free to contact me if you have any questions or comments about this Conference.

Lorri Nicolini, CCLS  
Governor

# New Year's Message Board

## To-Do

One of my New Year's resolutions is to attend more SFLPA events. The members are incredibly supportive, kind, and talented people. Truly a great group of people. It has been a treat to get to know the individual members. Thank you.  
~Melina Minas

The difference between genius and stupidity is that genius has its limits.  
~Albert Einstein

When I talk to managers, I get the feeling they're important. When I talk to leaders, I get the feeling I'm important.  
~Alexander Den Heijer

The greatest glory in living lies not in never failing, but in rising every time we fail.  
~Nelson Mandela

Never regret a day in your life. Good days give you happiness, bad days give you experience, worst days give you lessons, and the best days give you memories.  
~Anon

We must accept finite disappointment, but we must never lose infinite hope.  
~Martin Luther King

My New Year's resolution and inspirational quote is to be kind to everyone and remember to "Just Breathe!"  
~Donna Day

In any given moment we have two options: to step forward into growth or step back into safety.  
~Abraham Maslow

Don't cry because it's over, smile because it happened.  
-Dr. Seuss

It's A Small World  
Mother earth unites us in heart and mind  
And the love we give makes us humankind  
Through our vast wondrous land  
When we stand hand-in-hand  
It's a small world after all.  
~Robert Sherman, new verse to Disney's legendary theme song

A party without cake is just a meeting

When life gets you down, you know what you gotta do? Just keep swimming, swimming, swimming. ~Dory (from the movie "Finding Nemo")

Ripples  
When you create a difference in someone's life, you not only impact their life, you impact everyone influenced by them throughout their entire lifetime. No act is ever too small. One by one, that is how to make an ocean rise.  
~Danielle Doby

Enjoy Life...

It's a great life if you don't weaken!  
~Ernest Perry, grandfather of Christine Flores

Language is a living thing.

Management is about persuading people to do things they do not want to do, while leadership is about inspiring people to do things they never thought they could.  
~Steve Jobs

THE MOOD IS RIGHT. THE SPIRIT'S UP. WE'RE HERE TONIGHT. AND THAT'S ENOUGH. SIMPLY HAVING WONDERFUL CHRISTMAS TIME.  
~PAUL MCCARTNEY. "WONDERFUL CHRISTMAS TIME"

HAPPY NEW YEAR!

My New Year's resolution is simply to remember to write 2025, not 2024.  
~Danya Gonzales

When you use a bird to write with, it's called tweeting.  
~Maui, "Moana"

Beauty offers us an invitation to order, coherence and unity. When these needs are met, the soul feels at home in the world. ~John Donohue, "The Invisible Embrace"

i add VALUE  
Strive not to be a success, but rather to be of value. ~ Albert Einstein

I like choosing words to guide myself throughout the year and use as my reminder on what I want to focus on. The one that resonated with me the most was "growth" and it helped me be open to new opportunities and try new things. ~Julia Buteo

My goals for the New Year 2025 will be to focus on my own personal advancement. There are many things I cannot control, but self-improvement is something I can control. Therefore, I will work on my own self-improvement and learn new skills. ~Francie Skaggs

You never know how strong you are until being strong is your only choice.  
~Bob Marley

Seek to understand than to be understood.  
~Paul Wright

## RESOLUTIONS:

- eat this
- do more
- stop that



# MEMBERSHIP

Established in 1934, Legal Professionals Inc., also known as “LPI,” is a nonprofit, mutual benefit corporation organized for the purposes of providing educational, professional, and personal development programs to its members.

Membership is open to anyone within the legal profession. In addition to legal support professionals, the membership includes court clerks, court reporters, paralegals, legal assistants, legal administrators, banking/trust department personnel, legal support vendors, and attorneys.

Local associations, located throughout the state, offer monthly educational and professional programs. Many sponsor lunchtime learning, evening, and weekend long-term educational workshops.

### Advantages of LPI Membership:

- Continuing education and professional development
- Local association educational meetings
- Networking with other legal professionals
- *The Legal Secretary* magazine (published quarterly)
- Benefits available to members on an individual basis:
  - Discounts on LPI’s Rutter Group publications
  - Financial consulting
  - Disability income plan
  - Long-term care plan
  - Medical plan
  - Credit union memberships
  - Rental car discounts

### LPI Conferences:

Conferences are held May, August, November, and February at various locations throughout California. Continuing educational seminars and workshops are offered at each conference, conducted by respected attorneys, judges, and educators. Updated materials are provided for each workshop.

### Membership-At-Large:

There are over thirty associations within the State of California. Legal professionals may join LPI as a Member-at-Large if a local association is not within a reasonable distance. Members-at-Large are eligible for all of the benefits of membership, but joining LPI through a local association provides instant access to the benefits of the local association as well as LPI.

### LPI Publications:

*Legal Professional’s Handbook* – This best-selling, two-volume publication sets out procedures and forms in most areas of law in a clear, concise manner.

*Law Office Procedures Manual* – This publication, an excellent training tool, contains completed Judicial Council forms, procedural guidelines and a glossary formulated for legal procedure.

*Legal Secretary’s Reference Guide* – The essential, handy desk reference guide for busy legal professionals.

*The Legal Secretary* – This quarterly magazine, published by LPI and distributed to all members, contains educational and professional development articles from LPI officers, chairmen, members, and guests.

### LPI Programs:

California Certified Legal Secretary – Become more valuable in your office, maintain and increase your skills, gain more confidence, earn more respect, and achieve greater financial security by achieving certification through the CCLS program. Online study courses are offered.

Legal Specialization Sections – Further your legal education by joining one or all of the Legal Specialization Sections: Civil Litigation, Criminal/Family Law, Law Office Administration, Probate/Estate Planning, Federal Law, and Specialty Law. Classes are offered free to members at each LPI conference, as well as online. Members receive a statewide roster of counterparts and quarterly newsletters.

Legal Secretary Training – Online classes are offered, including Beginning Legal Secretary and Advanced Discovery. Classes are work-at-your-own-pace, and are designed for legal staff at all levels.

**For more information about membership or an association near you, contact LPI’s Corporate Office: Kim Oreno, [kim@legalprofessionalsinc.org](mailto:kim@legalprofessionalsinc.org); [www.legalprofessionalsinc.org](http://www.legalprofessionalsinc.org). Find us on Facebook, Instagram, LinkedIn & Twitter!**

Take a step in the right direction. Advance your legal career, improve your professional and personal skills.  
**BECOME A MEMBER OF LPI TODAY.**

# WHAT HAVE WE BEEN UP TO?

## RECENT EVENTS

### SFLPA October 2024 Membership Meeting at O'Hagen Meyer

On October 15, 2024, SFLPA had its second quarterly Membership Meeting with special guest speaker Aaron Hayes, Esq. of O'Hagen Meyer.

**Fall is Here!**  
San Francisco Legal Professionals Association  
**MEMBERSHIP MEETING**

**OCTOBER 15, 2024**  
5:30 pm to 8:00 pm  
O'HAGAN MEYER LLP  
ONE EMBARCADERO CTR, STE 2100  
SAN FRANCISCO, CA 94111

**The Life Cycle of an Employment Case: What Paralegals and Legal Secretaries Need to Know**

Special Guest Speaker:  
**Aaron Hayes, Esq.**

Aaron A. Hayes is Senior Counsel at O'Hagan Meyer LLP and represents clients in all areas of litigation defense including employment, directors & officers, personal injury and commercial litigation. Aaron has extensive experience defending employers against all types of employment claims, including wage and hour, discrimination, harassment and wrongful termination claims under both state and federal law. Aaron also brings to his practice prior experience as a claims attorney for a national insurer.

In Person (includes dinner):  
Members: \$30  
Nonmembers: \$35  
All virtual: \$15

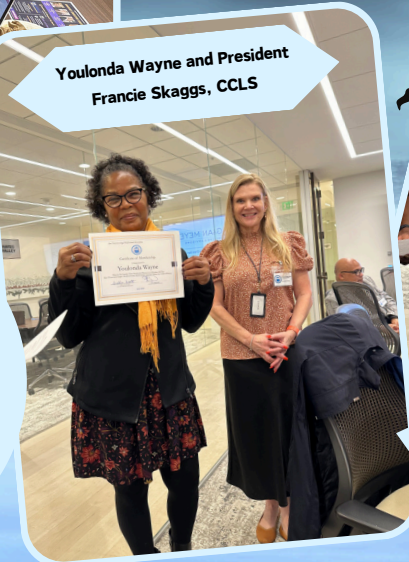
SCAN TO REGISTER

To Register, go to <https://www.sflpa.org/events-calendar/> or scan the QR Code  
DEADLINE TO REGISTER: OCTOBER 11, 2024

Below and right: Aaron Hayes, Esq. takes the attendees through the life cycle of an employment case, from the state agency through the court system, and the California laws that govern the process.



Left: Website Chair Kristen Craig-Reed monitors all the online questions in the presentation. Below: Welcome newly-installed members Youlonda Wayne and Shana O'Shea, who present their SFLPA certificates. Vice President Suddie Scott reads the SFLPA Code of Ethics to the new members, while President Francie Skaggs, CCLS presents them with the SFLPA pin, which represents the highest standards of conduct.





# WHAT HAVE WE BEEN UP TO?

## RECENT EVENTS



White Elephant Gift Exchange!



Julia Buteo and Claudia Deza

### SFLPA Holiday Party, December 10, 2024



Holiday cheers at the Patriot House! Starting at Left: Shana O'Shea, Donna Day, Katia Tsvetkova, Lorri Nicolini, CCLS, Francie Skaggs, CCLS, Claudia Deza, Lillian Wong, Julia Buteo, (front) Kristen Craig-Reed and Judy Nakaso.

What Did You Get?



LPI President Donna Day



Lorri Nicolini, CCLS



Judy Nakaso



Kristen Craig-Reed



Claudia Deza and Suddie Scott



Shana O'Shea



Jon Lucchese, JD



Mike Taraban



Jessica Landers and Katia Tsvetkova



Francie Skaggs, CCLS and Sandra Adly



Francie Skaggs, CCLS, Claudia Deza and Lillian Wong



Shana O'Shea, Francie Skaggs, CCLS, Lorri Nicolini, CCLS and Gloria Torres, ACP, CEDS

# WHAT HAVE WE BEEN UP TO?

## RECENT EVENTS

LPI 2nd Quarterly Conference, November 15-17, 2024

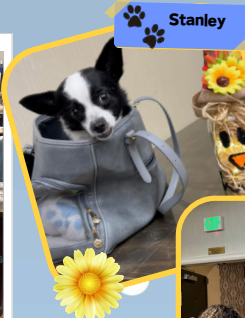
# Don't Stop Believing!



Leisel Hart (in red), of Stockton/San Joaquin LPA, enjoys making scarecrow lanterns with the Stanislas LPA gang Maureen Harry, Janice Williams, CCLS and Linda Brown.



Larry McGrew, Francie Skaggs, CCLS, Lorri Nicolini, CCLS, and Nicole of Fresno County (it was Nicole's first LPI Conference)!



Stanley



Scarecrow Lanterns



Jen Farnham

At the LPI Conferences, you can always count on a Friday Night Social. Jen Farnham, from Esquire Deposition Services, has hosted these events for many years. She plans fun projects that promote an entertaining team building event! Of course, Jen always has to bring her side kick, Stanley, and no one can get enough of Stanley!



Heather Novak, Reid Raukar, Carri Hughes, CCLS and Judie Martinez



LPI President Donna Day



Contra Costa LPA President Carri Hughes, CCLS addressing attendees



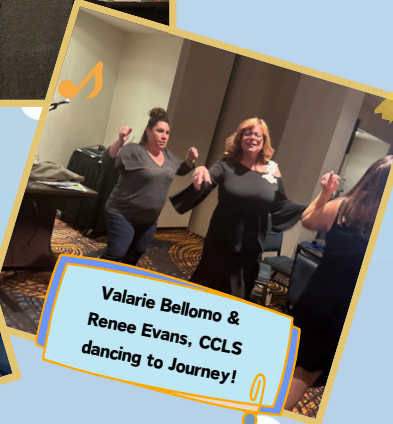
Bethany Ensz called a Lyft and look who showed up, Renee Evans, CCLS!



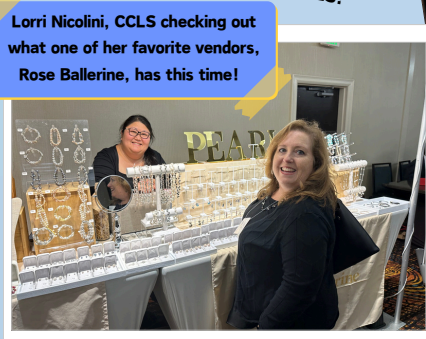
Larry McGrew making sure his lantern has enough stuffing!



Larry McGrew contemplates whether he likes this song.



Valerie Bellomo & Renee Evans, CCLS dancing to Journey!



Lorri Nicolini, CCLS checking out what one of her favorite vendors, Rose Ballerine, has this time!





# MARY - A CAUTIONARY TALE: THE IMPORTANCE OF CONTINUING EDUCATION IN LEGAL SUPPORT

A SPEECH BY MIKE LEWIS  
CHRONICLED BY FRANCIE SKAGGS, CCLS



At the recent LPI conference, an impactful moment unfolded during the Sunday brunch as LPI President Donna Day invited Mike Lewis, the Programs Chair for the San Francisco LPA, to serve as the Inspirational Speaker. Mike graced the podium, ready to share a story that reflects both the challenges and responsibilities faced by professionals in the legal support field. This tale, featuring a fictional character named “Mary,” serves as a reminder of the necessity for continuous skill development and education in our profession.

Mike Lewis began his speech by expressing gratitude to President Donna Day for her warm introduction. He introduced himself as the Operations Manager for Northern California at O'Hagan Meyer and shared his journey into the legal field, which began somewhat by accident.

In the late 1990s, Mike found himself at a crossroads, uncertain of his career path after graduating from college. He was working in the mail room of a law firm when an unexpected opportunity arose. The firm, in desperate need of legal secretaries, noticed Mike's aptitude as he operated machinery and typed impressively fast on a typewriter. Recognizing his potential, a colleague from the office called him over to explore the possibility of a new role.

While this initial story highlights Mike's serendipitous entry into the legal profession, he quickly shifted the focus to a cautionary tale about a former co-worker named Mary at a large litigation law firm. Mary was emblematic of a common challenge in the field: professionals who become complacent in their roles and neglect their ongoing education.

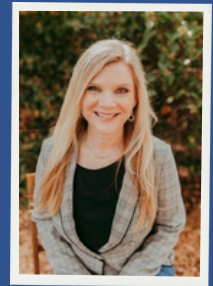


**Mike Lewis at the LPI Conference on Sunday, November 17, 2024.**





# MARY - A CAUTIONARY TALE: THE IMPORTANCE OF CONTINUING EDUCATION IN LEGAL SUPPORT



CONT'D

According to Mike, Mary was someone who had settled into a predictable routine, relying on her past experiences and the security of her position. Mike gave spirited examples of Mary's art in avoiding being a productive team member of the law firm:

*Court filings? That was below her!*

*Running TOCs/TOAs? That was for someone else to do!*

*Keeping updated with the latest court rules? She couldn't be bothered!*

*Working for the MP, she had the luxury to pass litigation tasks to others.*

*For years, she didn't bother staying current with her litigation skills.*

*Through the managing partner she worked for, she was powerful in the office...*

*UNTIL she wasn't!*

Many of us can relate to the frustration of working with such a team member. However, this lack of commitment to personal growth and skill enhancement ultimately rendered her vulnerable. Mike emphasized that while it's easy to become comfortable in a job, the legal landscape is constantly evolving. Without a proactive approach to learning and development, professionals risk falling behind.

Mike then revealed how Mary's fortune took a turn, and she would suffer the consequences of her complacency:

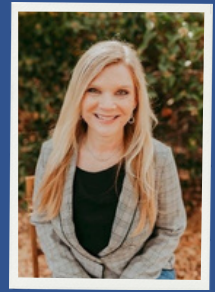
*Then one day the managing partner had a debilitating stroke. It caused him to abruptly retire early. A new managing partner was appointed, and he had his own secretary and did not need Mary. Mary had to go back to being a legal secretary for a busy litigation desk.*

*Needless to say – Mary was in trouble!*





# MARY - A CAUTIONARY TALE: THE IMPORTANCE OF CONTINUING EDUCATION IN LEGAL SUPPORT



CONT'D

Mike's narrative serves as a reminder that the legal support community thrives on continuous education as encapsulated in LPI's motto: "Educating California's Legal Support Professionals." This principle is not merely a slogan; it is a vital component of career longevity and success.

The cautionary tale of Mary illustrates the consequences faced by those who neglect their professional development. As the field progresses, those who prioritize self-improvement and seek ongoing education will be better equipped to handle changes and challenges, while those who do not may find themselves facing the repercussions of being left behind. Mike conveyed his own wisdom to the audience on how educational development can lift professionals out of challenges that arise in our precipitous field, "Your education can be a bridge over troubled waters."

Mike finished his speech leaving the audience with three of his favorite inspirational quotes about learning and education.

1. *The beautiful thing about learning is that no one can take it away from you.*  
— B.B. King
2. *Education is the passport to the future, for tomorrow belongs to those who prepare for it today.*  
— Malcolm X
3. *Education breeds confidence. Confidence breeds hope. Hope breeds peace.*  
— Confucius

In conclusion, Mike's stories—both personal and cautionary—drive home a powerful message: embrace learning and development throughout your career. The journey in the legal support profession is one of constant evolution; staying ahead requires dedication, initiative, and an unwavering commitment to growth. Let us all strive to avoid becoming like Mary and, instead, invest in our futures as informed, capable, and well-prepared legal support professionals.

**Your education can be  
a bridge over  
troubled waters.**

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# THE MODERN-DAY PRIVATE INVESTIGATOR IN CALIFORNIA: MYTHS VS. REALITY

BY LINDON LILLY



When you think of a private investigator (PI), your mind might drift to images of shadowy figures in trench coats following suspects through dark alleys or pulling off daring stunts like breaking into offices or chasing criminals in high-speed car pursuits. This portrayal, often seen in Hollywood films and TV shows, is far from the truth about what PIs do, especially in California. While the cinematic PI is thrilling to watch, the real profession of private investigation is grounded, professional, and (most importantly) regulated.

My journey as a private investigator has been nothing short of rewarding. Among the myriad of cases I have tackled, a few stand out for the profound impact they have had on my career. I have navigated the labyrinths of hundred-million-dollar corporate patent infringement battles and helped unravel high-stakes arbitration of terminations involving major national television news network personalities. I was a linchpin in a case involving Major League Baseball. However, the experience that resonates with me the most is my work alongside nonprofits dedicated to finding missing and exploited children. There is no greater fulfillment than the joy of reuniting these young lives with their families to bring hope and healing where it is most needed.

## The Hollywood Detective vs. the Real PI

Hollywood has long romanticized the image of the PI. From film noir classics to modern crime dramas, the PI is often portrayed as a solitary, hardboiled character operating outside the law to get results. But California laws place significant restrictions on what PIs can and cannot do. PIs are bound by strict privacy laws, including the California Consumer Privacy Act, which governs how personal data can be collected and used. Investigators cannot simply follow anyone they want or hack into computers to gather information. Surveillance, for instance, must be done within legal limits, respecting both the law and individual privacy rights. Breaking into someone's property, tapping phones, etc., are not only unethical, but also illegal, with serious consequences for anyone caught doing so.

*Feature Article*



# THE MODERN-DAY PRIVATE INVESTIGATOR IN CALIFORNIA: MYTHS VS. REALITY



CONT'D

## Strict Regulations and Licensing

California has some of the most stringent licensing requirements for PIs in the United States. To become a licensed PI, an individual must have at least three years (or 6,000 hours) of experience in investigative work, which could include working under another licensed investigator or in law enforcement. Alternatively, certain academic qualifications can reduce the experience requirement. Additionally, PIs must pass a state exam covering laws, regulations, and investigative techniques and undergo thorough background checks by both the California Department of Justice and the FBI.

The licensing process ensures that California PIs operate with professionalism and integrity. They must adhere to a strict code of ethics that includes honesty, respect for privacy, and no engagement in fraud or misrepresentation. In contrast to TV detectives who often bend or break the law, real PIs must maintain high ethical standards. Failing to do so can result in severe penalties, including the loss of license.

## Core Services of Modern PIs

Today's PIs in California are much more likely to conduct professional, data-driven investigations. These less dramatic (but essential) core services offered by most California PIs vary from (but are not limited to) background checks, asset searches, and surveillance to specialized litigation support services like accident scene canvassing, locating defendants or witnesses, and service of process. They often track down the one witness to help attorneys build stronger cases. Also in personal injury cases, it's quite common for investigators to serve as a valuable resource within a larger focus group even before attorneys take on the case.

## Technology's Role in Investigations

Gone are the days when PIs relied solely on traditional, time-consuming methods like tailing suspects or conducting interviews in person. Nowadays, they employ the latest technology, such as license plate recognition (LPR) software to track down subjects and Zoom meetings to conduct interviews.

*Feature Article*



# THE MODERN-DAY PRIVATE INVESTIGATOR IN CALIFORNIA: MYTHS VS. REALITY

CONT'D



This paradigm shift is a much more efficient use of time. Other advanced technologies modern PIs in California use to make investigations faster and more reliable include data tracking software, digital forensics, unmanned surveillance cameras, data mining, and AI-powered analysis tools. Monitoring social media has also become integral to private investigation, as many people unwittingly reveal valuable information on platforms like Facebook, Instagram, and LinkedIn. Indeed, modern technology assists PIs in collecting data through legal means that can be used to build solid cases.

## Collaborating with Law Firms and Corporations

Today's PIs frequently assist law firms, corporations, and insurance companies. In many instances, they help attorneys gather evidence for civil or criminal cases, whether they involve locating witnesses, gathering evidence of fraud, or conducting in-depth background checks and asset searches on individuals involved in a case.

The relationship between PIs and law firms is especially important in California where a significant amount of legal work involves pre-litigation investigations and personal injury cases. PIs may also work with insurance companies to investigate potential fraud, ensuring that claims are legitimate. Unlike the lone-wolf detectives depicted in movies, today's PIs often collaborate with other professionals, including lawyers, records specialists, forensic accountants, specialized tech experts, and of course, networks of other investigators to solve complex cases.

## Challenges Unique to California PIs

California presents unique challenges to PIs, mainly due to its strong privacy laws. The California Consumer Privacy Act, for example, imposes strict rules on how businesses can handle personal information, which can complicate investigations. PIs must navigate these laws carefully to avoid overstepping legal boundaries, including respecting people's right to privacy, while still conducting thorough investigations.

*Feature Article*



# THE MODERN-DAY PRIVATE INVESTIGATOR IN CALIFORNIA: MYTHS VS. REALITY



CONT'D

Additionally, California's size and cultural diversity means that PIs may need to handle a wide range of cases in rural settings or highly urbanized environments. The challenge lies in maintaining professionalism while adapting to the various types of cases that arise in such a dynamic state. Google Translator is handy for investigators who run into language barriers while in the field.

## The Human Side of PI Work

While TV PIs are often depicted as emotionally detached, real-world PIs must possess strong communication and interpersonal skills. They deal with sensitive cases such as infidelity, custody battles, and fraud, which require empathy and discretion. Emotional resilience is crucial, especially when dealing with clients who may be in stressful or traumatic situations. Real-life PIs often work in teams, collaborating with experts in different fields, unlike the solitary, antisocial detective portrayed by Hollywood. For example, when assisting with high-risk terminations, it is crucial for employers to prioritize the emotional well-being of the employee involved. In such situations, I often take on the role of the client's mediator to ensure that the employee is treated with dignity and respect. This approach helps to minimize the urge of the individual to act out, fostering a more positive and supportive environment, even in difficult circumstances.

## Conclusion

Modern-day PIs in California are a far cry from the characters on TV and film. While they may not engage in high-speed chases or risky break-ins, they are highly trained professionals bound by strict ethical and legal standards. Using advanced technology and working closely with law firms and corporations, California PIs provide reliable, lawful, and effective investigative services. California PIs also play a crucial role that is essential to the state's legal ecosystem. The next time you think of California private investigators, remember that the reality is far more complex and professional than the Hollywood version.

*Feature Article*



# THE MODERN-DAY PRIVATE INVESTIGATOR IN CALIFORNIA: MYTHS VS. REALITY



CONT'D

## Author:

Lindon Lilly is a distinguished member of the California Association of Legal Support Professionals (CALSPPro). He is currently a board member of the California Association of Licensed Investigators (CALI). Lilly has previously served two terms as Governor of CALI. By virtue of his stellar 20 years of service in law enforcement, the California Assembly recognized him for his dedicated work with victim rights groups. As the esteemed founder and president of Rhino Investigation and Process Serving, Lilly brings over 30 years of experience in the attorney support business. For questions about the article, the author can be emailed at [info@llegalassistance.com](mailto:info@llegalassistance.com).

*Feature Article*

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# SFLPA Out and About



(Left) Marisa Blackburn, Hearsay Editor Jessica Landers & Geetali Chitre visit the annual life-sized Gingerbread House at the Fairmont San Francisco.



A sunny Southern California Thanksgiving for the Craig-Reed family



(Right) VP Suddie Scott spends a holiday evening enjoying SF Symphony's "Colors of Christmas"

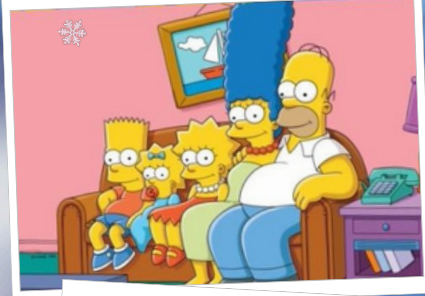


Lisa, Tony & hundreds of other Santa-ness fans brave the rain & flock to the streets of downtown San Francisco for the annual holiday SantaCon.



THE SIMPSONS

2024



For the past several years, Aileen Henderson (Veritext Legal Solutions) and her sisters have been making themed Halloween costumes BY HAND AND FROM SCRATCH for them and the kids in their very large family.





# SFLPA Out and About Cont'd.



*Apollo & Athena, Lillian Wong's new family members*

A frosty Thanksgiving in Colorado for President Francie Skaggs & family



A Christmas reunion for Danya Gonzales & long-time friends

*Keker, Van Ness & Peters members & guests party to the soulful Royal Jelly live band & other holiday entertainment at the Regency Ballroom, San Francisco.*



*Sapphire dressed in her new Christmas jammies*



Happy New Year



# SFLPA Out and About Cont'd.



”نحن لا ننتظر الأحداث، بل لصنعها.“  
 صاحب السمو الشيخ محمد بن راشد آل مكتوم.  
 "WE DO NOT WAIT FOR THINGS TO HAPPEN,  
 RATHER WE MAKE THEM HAPPEN"  
 HIS HIGHNESS SHEIKH MOHAMMAD BIN RASHID AL MACTOUM



Suddie Scott & granddaughter TaMika Scott visit Dubai; wearing traditional head & shoulder hijab worn in Dubai



Lillian Wong feeding the deer, Nara Park, Japan



Mike Lewis (Programs Chair) & other members of the O'Hagan Meyer law firm attend SFLPA's holiday party.



Kobe beef dinner, Kobe, central Japan



Thousand torii gates, Fushimi Inari Shrine, southern Kyoto, Japan



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# Le Donne d'Italia

## Promoting & Preserving Italian Culture

By Sandy Martino



Currently over 90 members strong, San Francisco's Le Donne d'Italia[1] (The Women of Italy) is a women's club focused on "promoting and preserving Italian culture while strengthening Italian female heritage through building friendships and community." Although many members have Italian heritage, it is not required for membership; you only need to be interested in Italian culture. (And you don't need to speak Italian.) We currently meet and hold our monthly activity nights at Italian Community Services (ICS) on the third Tuesday of each month.

Le Donne members participate in activities throughout the year that focus on the Italian history and culture of North Beach and California. These include the Italian Heritage Parade, where our past two entrees included live grape stomping to music with an Italian vineyard theme, and a tribute to San Francisco's Italian fisherman, in which we passed out a Cioppino recipe donated by the family of one of our members (and some of us dressed as fishermen or sea creatures). We have also presented Italian-themed activities for kids at the South San Francisco Festa, the North Beach Library, and Golden Gate Park. We also host the popular annual "Bubbly and Bingo," our major fundraising event.

Founded in 2010, Le Donne d'Italia is in the tradition of Italian social clubs and organizations in the Bay Area. Like them, we strive to serve our local community across the lifespan, intentionally sharing the highlights of the Italian and Italian American cultures. We fund four lunches yearly for Italian seniors at Italian Community Services (ICS), an organization founded as "the Italian Welfare Agency" to support Italians and Italian immigrants. ICS still supports the Italian community today.

We are keenly interested in sharing the history and contributions of Italians and Italian Americans in North Beach, San Francisco, and beyond. The "San Francisco Little Italy Honor Walk Inc." (SFLIHW), which Le Donne d'Italia co-founded in 2023, aims to celebrate, preserve, and enrich Italian American heritage and culture in San Francisco's Little Italy/North Beach and broader Bay Area communities. (Our co-founders include Italian Community Services, Italian Heritage Celebration, Inc., the Bay Area chapter of Italian

*Feature Article*

[1] Le Donne d'Italia, <http://www.ledonneditalia.com/>.



# Le Donne d'Italia Promoting & Preserving Italian Culture

Cont.



Scientists and Scholars in North America Foundation, the Museo Italo Americano, the San Francisco Italian Athletic Club, the Silicon Valley Italian Executive Council Foundation, and COM.IT.ES. SF. The project is generously promoted and supported by the Italian Consulate General.) The SFLIHW project immortalizes and honors Italian and Italian American figures while highlighting their efforts in community development.

The “honor walk” will eventually comprise a series of bronze plaques around North Beach commemorating the contributions of our community's important, although sometimes little-known, figures. Eventually, a free app will share more in-depth information about each honoree. Much of the research for the first thirteen honorees has been largely completed by members of Le Donne and other organizations.

The first two plaques, for former Mayor George Moscone<sup>[2]</sup> and Dr. Mariana Bertola<sup>[3]</sup>, were placed along Stockton Street, between Filbert and Union Streets, this year and were accompanied by events that told attendees more about these important Italian Americans and their contributions to San Francisco. The contributions of Mayor Moscone to San Francisco and beyond in social justice and civil progressivism are well-known. Dr. Bertola is an example of a lesser-known figure whose impact we wish to share and acknowledge. She was a pioneering physician, educator, and philanthropist. Born in 1865 to immigrant parents from Genoa, she became an obstetrician in 1899, when there were few women physicians. That didn't stop her from being acknowledged as one of the finest doctors in the city at the time, delivering over 3,000 babies during her career. When the earthquake and fire of 1906



Mayor George Moscone



Dr. Mariana Bertola

*Feature Article*

[2] George Moscone, [https://en.wikipedia.org/wiki/George\\_Moscone](https://en.wikipedia.org/wiki/George_Moscone).

[3] Mariana Bertola, [https://en.wikipedia.org/wiki/Mariana\\_Bertola](https://en.wikipedia.org/wiki/Mariana_Bertola).



# Le Donne d'Italia

## Promoting & Preserving Italian Culture



Cont.

struck, Dr. Bertola's home, like the homes of many, was destroyed. All she rescued from it was her bag of obstetric instruments, which she used to deliver the babies of women who went into premature labor due to the stress of the earthquake.

Dr. Bertola was also a tireless advocate for the Italian immigrant community, providing essential services and aiding their assimilation into American society. She led and supported numerous organizations dedicated to social causes, including the Native Daughters of the Golden West, the Vittoria Colonna Club, the Travelers' Aid Society, and the Women's Vigilant Committee. Her leadership skills and philanthropic endeavors were instrumental in establishing the Native Daughters of the Golden West Home and advancing women's and children's rights, healthcare, and immigrant assistance.

Our third plaque for Father Raffael Piperni[4] of Sts. Peter and Paul Catholic Church will be placed in early 2025. Father Piperni was an Italian priest who was instrumental in establishing the Salesian order in the United States and played a pivotal role in supporting the Italian immigrant community in San Francisco. He oversaw the building of the current Sts. Peter and Paul Church after the 1906 earthquake and fire. He was also a tireless advocate for the Italian community in San Francisco, providing English language classes and acculturation opportunities to help immigrants integrate into mainstream society. As immigrants from southern Italy poured in to help rebuild San Francisco after the earthquake, joining those from northern Italy who arrived years earlier, Father Piperni helped them assimilate.

In the book "Italy on the Pacific," Sebastian Fichera postulates that the concerted efforts of people like Dr. Mariana Bertola, Father Raffaele Piperni, and other social workers and organizations in San Francisco are why the mob never gained traction in this city as it did in Chicago and New York City. Italian newcomers in San Francisco had legal ways to get the help they needed from people who understood their language and culture and helped them make lives for themselves in this new land.

[4] Revered Father Raffaele M. Piperni, <https://www.casacalenda.ca/wp-content/uploads/2015/02/Father-Raffaele-M-PIPERNI.pdf>.

*Feature Article*





# Le Donne d'Italia

## Promoting & Preserving Italian Culture

Cont.



Go to the San Francisco Little Italy Honor Walk website[5] to see the complete list of the first thirteen honorees, or suggest Italians or Italian Americans who you feel should be honored. Our current list includes more social workers and philanthropists, scientists / inventors, a baseball great, sculptors and activists, a poet, a filmmaker and vintner, two visionary bankers, a founder of a prominent local Italian men's club who also designed the United Nations Charter, and even an impresario of the Italian theater back when that was an essential part of San Francisco's Little Italy – North Beach. What was the one thing they had in common? Their Italian heritage. Well, that, and the desire to make San Francisco, and sometimes the world, a better place.

[5] San Francisco Little Italy Honor Walk, <https://www.sflittleitaly.us/>.

## Le Donne d'Italia

*Feature Article*



Le Donne d'Italia officers and members with Italian Consul General Sergio Strozzi and Darleen Carpenter, Grand President of the Native Daughters of the Golden West (fourth from right), at the unveiling of the plaque for Dr. Mariana Bertola, former Native Daughters' Grand President, in North Beach.

(Left to right) Dawn Dunlap, past Grand President of the Native Daughters of the Golden West (NDGW); Jennifer Consalvi Hodges, board member of Le Donne d'Italia and SFLIHW and then SFLIHW President; Italian Consul General Sergio Strozzi; Darleen Carpenter, Grand President of the NDGW.

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**TOM PLUNKETT**

Tom Plunkett is Managing Director of Digital Forensics at ArcherHall. He is a Certified Information Systems Security Professional (CISSP) and EnCase Certified Forensic Examiner(EnCE) with over 20 years of experience in digital forensics, cybersecurity and counterintelligence. He holds a Master's in Information Systems and is an adjunct professor, teaching cybersecurity and digital forensics topics at the University of San Diego. He has led investigations involving data breaches, computer hacking, theft of intellectual property, and foreign intelligence operations. His clients have included all levels of government, law firms, casinos, medical device manufacturers, hospitals, technology companies and celebrities.



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\*Fees subject to change without notice.

Rev. April 2020



# Legal Procedure



## California Court Chatter

### Danya Gonzales, Legal Procedure Chair

#### **UNITED STATES FEDERAL COURT – MALICIOUS ELECTRONIC FILING NOTICES AND OTHER SCAMS TARGETING ATTORNEYS**

The federal courts are warning the public of new scams targeting attorneys across the country utilizing fraudulent electronic filing notifications and malicious phone calls and emails. Fake electronic filing notices are being sent to people who interact with the federal courts, instructing them to act by prompting them to malicious websites seeking to collect personal information and/or money, and even threatening fines and other penalties if recipients do not comply.

Federal courts will never use a phone call or email to request personal or financial information, or to threaten recipients who do not comply.

To avoid becoming a victim of these scams, refrain from disclosing any information. Be skeptical of any emails or calls that ask for financial or sensitive information, and never download attachments or click on links from unofficial or questionable sources. If you receive a suspicious email regarding a federal court case, contact the federal court in your jurisdiction before opening any attachments or links, or validate the case documentation directly through your local federal court's CM/ECF system.

To view the recent announcements related to these scams, visit the United States Courts website at: <https://www.uscourts.gov/about-federal-courts/federal-courts-public/federal-court-scams> and <https://www.uscourts.gov/news/2024/11/06/electronic-filing-scam-targets-attorneys>.

#### **UNITED STATES FEDERAL COURT – JUDGES ENGAGE WITH STUDENTS IN LIFE AND LAW CLASSROOM VISITS**

Federal judges, volunteer attorneys, and other court personnel across the country are engaging with students of all backgrounds to deepen their understanding of the court system, and teach students valuable legal and life skills through Candid Conversations, the judiciary's national program.



# Legal Procedure



## Court Chatter Cont'd.

This program centers on the opportunity for students to interact with judges and the legal community on meaningful discussions about Constitutional issues, civility, decision-making skills, and other topics of interest to young people, including careers in the courts.

Many schools across the country are required to teach students about Constitutional principles as a condition to receive federal funding. Schools can meet this requirement by joining with their nearest federal courthouses in a variety of ways, including an invitation for judges to make an in-person or virtual visit to their classrooms. Judges may involve attorneys and other court personnel to facilitate the program and participate in meaningful discourse with the students.

Candid Conversations is relevant throughout the year and even more so in September in observance of Constitution Day and Citizenship Day, a national ceremony to commemorate the anniversary of the signing of the Constitution in Philadelphia on September 17, 1787.

For additional information on the Candid Conversations program, visit the United States Courts website at <https://www.uscourts.gov/educational-resources/educational-activities/candid-conversations-exploring-students-questions>. Visit The White House's website for information on Constitution Day and Citizenship Day (Constitution Week) at <https://www.whitehouse.gov/briefing-room/presidential-actions/2024/09/16/a-proclamation-on-constitution-day-and-citizenship-day-and-constitution-week-2024/>.

### **UNITED STATES DISTRICT COURT, NORTHERN DISTRICT OF CALIFORNIA – NEW DOCUMENT-FREE METHOD FOR FILING NOTICES OF APPEARANCE, SUBSTITUTION AND WITHDRAWAL IN CIVIL CASES (IN EFFECT)**

Most notices of appearance, substitution and withdrawal no longer require the preparation of a separate document via the Court's ECF system. Instead, these notices should be filed using the ECF omnibus event titled "Notice of Appearance/Substitution/Withdrawal of Attorney."



# Legal Procedure



## Court Chatter Cont'd.

**Notice of Appearance:** Members of the Northern District California Bar can simply log in to ECF, enter the case number and party representation, and press “submit.” Thereafter, filing documents on behalf of their client may begin within minutes.

**Notice of Substitution:** Newly-appearing members of the same Bar may use the same ECF event and provide the name of the attorney leaving the case. The Court will update the change on the docket within one business day.

**Notice of Withdrawal or Change in Counsel:** The withdrawing attorney may use the same ECF event to be removed from the case and will no longer be associated with the case within one business day.

In some instances, a PDF filing is still required. A firm seeking to replace another firm should use a Motion to Substitute Firm, along with the form motion and proposed order. Also, a Motion to Withdraw as Attorney is required when an attorney seeking to withdraw is the sole remaining counsel for a party.

To view the Court’s announcement about these changes, visit the Court’s website at <https://www.cand.uscourts.gov/notices/new-document-free-method-for-filing-notices-of-appearance-substitution-and-withdrawal-in-civil-cases/>.

### **UNITED STATES DISTRICT COURT, NORTHERN DISTRICT OF CALIFORNIA – NEWLY REVISED VERSION OF CIVIL COVER SHEET (EFFECTIVE DECEMBER 2024)**

The Court’s Civil Cover Sheet (Form JS-CAND 44) has been revised and can be used immediately. It must be used as of January 6, 2025. This form is required for the use of the Clerk of Court for the purpose of initiating the civil docket sheet.

The revised form is available on the Court’s website at <https://www.cand.uscourts.gov/notices/new-revised-version-of-civil-cover-sheet-now-available/>.



# Legal Procedure



## Court Chatter Cont'd.

### **ALAMEDA COUNTY SUPERIOR COURT AND SANTA CLARA COUNTY SUPERIOR COURT – LAUNCH OF CARE PROGRAM (EFFECTIVE DECEMBER 2, 2024)**

The Alameda County and Santa Clara County Superior Courts officially launched the Community Assistance, Recovery, and Empowerment (CARE) program to address the interconnected crises of untreated mental health disorders, substance use, and homelessness.

The CARE Act (Senate Bill 1338) was established to ensure that Californians facing severe mental health challenges, such as schizophrenia and other psychotic disorders, receive access to necessary treatments they so desperately need. CARE is intended to be a less restrictive alternative to conservatorships or incarceration, and steps in not only to help those with severe untreated mental illnesses but also to assist local governments in their duty to provide behavioral health services. The CARE process operates through California's civil courts, enabling earlier intervention and offering much-needed support and accountability through community-based services.

Family members, first responders, mental health service providers, and others are authorized by statute to refer qualifying individuals to CARE Court. Through a carefully designed Care Plan, referred individuals will be connected with stabilization medications, treatment and recovery support, housing plans and social services. During the CARE Court process, lasting 12-24 months, individuals are supported by a clinical team, a public defender, and personal advocate to help them make self-directed decisions.

To view the Courts' press releases about the launch of CARE, visit the Courts' websites at <https://www.alameda.courts.ca.gov/news/alameda-county-prepares-launch-care-act-court> and <https://santaclara.courts.ca.gov/news/superior-court-california-county-santa-clara-launches-care-court>. For additional information on CARE, visit the National Alliance on Mental Illness's website at <https://namica.org/care/> and for legislative information on Senate Bill No. 1338 at [https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill\\_id=202120220SB1338](https://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=202120220SB1338).



# Legal Procedure



## Court Chatter Cont'd.

### **LOS ANGELES COUNTY SUPERIOR COURT – IMPLEMENTATION OF MODERNIZED COURTROOM TECHNOLOGY (IN EFFECT)**

The Superior Court has begun installing modern technology in select courtrooms throughout Los Angeles County, with an initial expansion to upgrade in over 50 courtrooms. Upgrades have been installed and are now operating in courthouses in Van Nuys East, Pasadena, Chatsworth, and Edmund D. Edelman's Children's Courthouse. Additional courtrooms will be upgraded through a phased rollout, with anticipated completion by the fall of 2026.

The upgrades will ensure that each courtroom is equipped with the latest technology to enhance the Court's ability to provide the highest quality remote and hybrid court appearances, permitting litigants and attorneys to choose the best option of appearing for hearings.

Attorneys and self-represented litigants will have access to 85-inch display screens, ultra-high-definition cameras for remote participants, monitors with touch and annotation capability, and microphone and speaker units with push-to-mute capabilities located on counsel tables. Attorneys and litigants may also share their content and screens from their external and mobile devices by connecting directly to the Court's HDMI cable.

To view the Court's press release on the courtroom technology roll out, visit the Court's website at [file:///C:/Users/dgonzales/Downloads/LOSANGELES142024115111517NTA24-11-05-2024-CourtroomTechnology%20\(1\).pdf](file:///C:/Users/dgonzales/Downloads/LOSANGELES142024115111517NTA24-11-05-2024-CourtroomTechnology%20(1).pdf).

### **SAN FRANCISCO COUNTY SUPERIOR COURT – CHANGES TO LAW AND MOTION AND DISCOVERY CALENDARS (EFFECTIVE DECEMBER 9, 2024)**

Effective December 9, 2024, Law and Motion matters calendared in Department 302 were split between Departments 301 (odd-numbered cases) and 302 (even-numbered cases).





# Legal Procedure



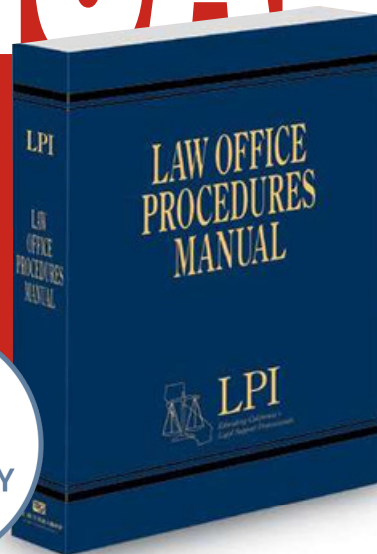
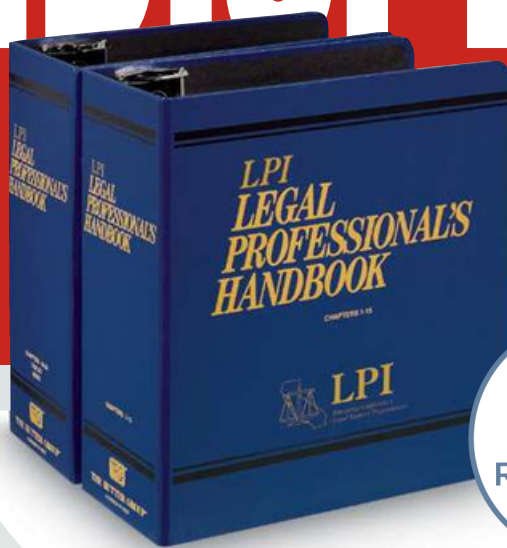
## Court Chatter Cont'd.

Discovery-calendared matters have been reassigned from Department 525 to Departments 301 (odd-numbered cases) and 302 (even-numbered cases).

To view the Court's Public Notice, visit the Court's website at [https://sf.courts.ca.gov/system/files/news/24law\\_and\\_motion\\_public\\_notice.pdf](https://sf.courts.ca.gov/system/files/news/24law_and_motion_public_notice.pdf).



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# Just a Few LPI Events



### Style Savvy: Mastering Word for a Flawless Table of Contents!

January 21, 2025  
12:00 P.M. - 1:00 P.M.

**Instructor:**  
June Hunter

Ready to transform your document into a polished masterpiece? Join us for 'Style Savvy,' where you'll unlock the magic of Microsoft Word's style system to create a stunning Table of Contents (TOC) with ease! This hands-on class will guide you through the essentials of using built-in styles, ensuring your headings and text not only look great but also function seamlessly.

In this dynamic session, you'll discover:  
The Power of Styles  
Accessing and Modifying Styles  
Applying Styles Effectively  
Numbering Magic

Whether you're new to Word or looking to refine your skills, this class will equip you with the tools to impress with your professional documents. Don't miss out on this opportunity to elevate your writing game and streamline your workflow!

**LPI Member - \$25**   **Non-LPI member - \$55**  
To Register, go to our website:  
<https://www.legalprofessionalsinc.org/events> or scan the QR code.

No cancellations or refunds are provided after the webinar; however, should a cancellation occur at least 48 hours before the live webinar, LPI will issue a full refund. For further information or group registrations email: [training@legalprofessionalsinc.org](mailto:training@legalprofessionalsinc.org).

**About the Trainer**  
June Hunter is a Technical Enablement Sr. Specialist at DISCO and teaches computer essentials at UC San Diego Extension in their ABA approved Paralegal Studies program. June Hunter is an affiliate of Legal Professionals, Incorporated, an approved provider, and certifies that this activity is approved for 1.0 hour of CCLS credit.

### CORPORATE TRANSPARENCY ACT

Presented by  
Tiana Garbett, Esq. and John Herbstritt, Esq.  
Sheppard, Mullin, Richter and Hampton LLP

**FREE for LPI Members**  
**\$55 for Non-LPI Members**  
• The price increases \$5 after 01.09.25  
• Registration closes 01.16.25

**January 23, 2025**  
**12 PM to 1 PM**

To Register, go to our website:  
<https://www.legalprofessionalsinc.org/events> or scan the QR code

THIS WEBINAR HAS BEEN APPROVED FOR CALIFORNIA MINIMUM CONTINUING LEGAL EDUCATION CREDIT IN THE AMOUNT OF 1.0 CREDIT HOUR.

### DEMURRERS: ANSWER, MOTION, OR BOTH?

In this presentation we will demystify demurrers, cover what the court says about their use in litigation practice, and when they are used most effectively.

**FEBRUARY 24, 2025, 12:00 PM to 1:00 PM**  
**LPI Member - \$25 / Non-LPI Member - \$55**

Presented by: Lynne Prescott, CCLS  
Lynne is LPI's Legal Education Instructor and LPI Past President from 2020-2022. She currently teaches LPI's Intermediate and Advanced Legal Professionals Training Courses, as well as beginning level classes in the Sacramento area. Lynne has been a legal professional for over 30 years, with broad and specialized experience in several practice areas.

To Register, go to our website:  
<https://www.legalprofessionalsinc.org/events> or scan the QR code.

THIS WEBINAR IS APPROVED FOR CALIFORNIA MINIMUM CONTINUING LEGAL EDUCATION (MCLE) CREDIT IN THE AMOUNT OF 1.0 CREDIT HOUR AND IS APPROVED FOR 1.0 HOUR OF CCLC CREDIT.

### Unlocking the Power of Word Styles

Streamline Your Workflow and Troubleshoot Formatting Issues

**FEBRUARY 25, 2025**  
**12:00 P.M. - 1:00 P.M.**

**Instructor:**  
June Hunter

Discover the time-saving potential of Word's Styles feature in this in-depth webinar. Designed for legal professionals and office users alike, this session will explore the full range of capabilities within Word, including built-in themes, how to identify, create, and modify styles, and troubleshooting common formatting issues. Learn how to apply consistent formatting across your documents, improve document navigation, and save valuable time by automating repetitive tasks. Whether you're preparing legal briefs, reports, or correspondence, this webinar will help you take full advantage of Word's powerful styling tools to enhance your productivity and ensure professional results every time.

**LPI MEMBER \$25**  
**NON-LPI MEMBER \$55**

To Register, go to our website:  
<https://www.legalprofessionalsinc.org/events> or scan the QR code.

**About the Instructor**  
June Hunter is a Technical Enablement Sr. Specialist at DISCO and teaches computer essentials at UC San Diego Extension in their ABA approved Paralegal Studies program. June Hunter is an affiliate of Legal Professionals, Incorporated, an approved provider, and certifies that this activity is approved for 1.0 hour of CCLC credit.

### Changes in the Law

Webinars Presented via Zoom!

- Civil** 9:00 a.m.  
Jeanine DeBacker  
McPharlin Spindles & Thomas LLP  
Attorneys at Law
- Federal** 10:00 a.m.  
Jeanine DeBacker  
McPharlin Spindles & Thomas LLP  
Attorneys at Law
- Probate** 11:00 a.m.  
Christina McGonigle  
McGonigle & Hunsaker, LLP
- Family** 12:30 p.m.  
Hazel Bradshaw  
Shannon, Kinney & Sullivan
- Criminal** 1:30 p.m.  
Jo-Anna Nieves  
The Nieves Law Firm

**Saturday, February 8, 2025**  
**Register TODAY!**

These webinars are approved for California Minimum Continuing Legal Education (MCLE) credit in the amount of 1.0 credit hour per seminar.

### Foreign Subpoenas

Presented by:  
Sigrid Propper and Maurice Archelle  
NATIONWIDE LEGAL

**March 13, 2025**  
**12 PM to 1 PM**

**FREE for LPI Members**  
**\$55 for Non-LPI Members**  
Registration closes 03.06.25

To Register, go to our website:  
<https://www.legalprofessionalsinc.org/events> or scan the QR code

THIS WEBINAR HAS BEEN APPROVED FOR CALIFORNIA MINIMUM CONTINUING LEGAL EDUCATION CREDIT IN THE AMOUNT OF 1.0 CREDIT HOUR AND 1.0 HOUR FOR CCLS.



## MCLE

Go to: <https://www.legalprofessionalsinc.org/events/> for more LPI events!

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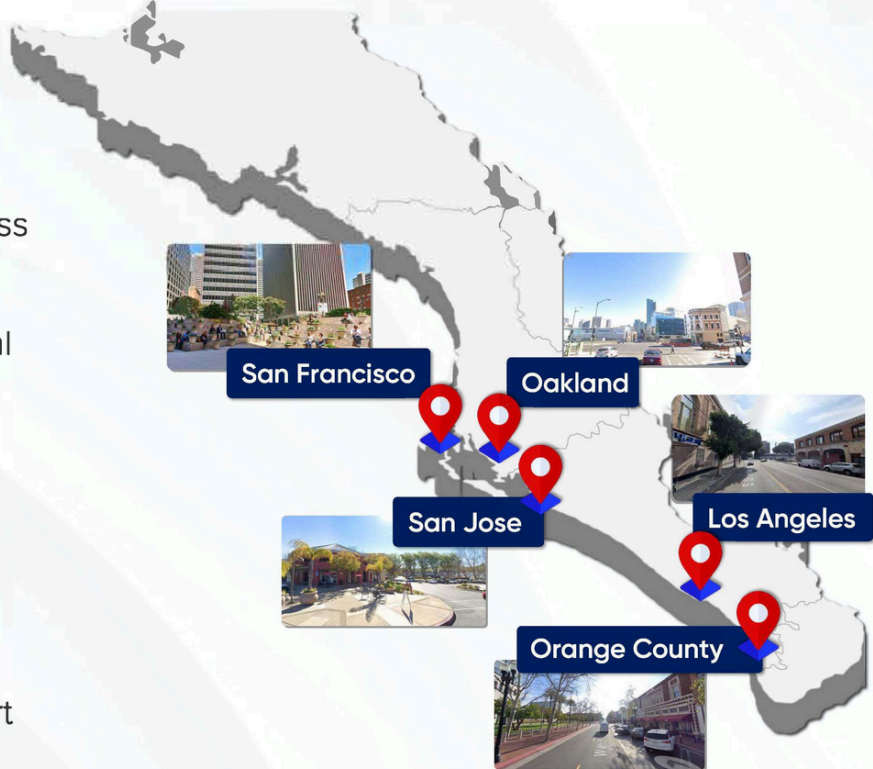
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San Francisco Legal Professionals is a mutual benefit corporation formed for the primary purpose to provide its members with educational, networking, and personal development opportunities through a range of services. We have three different membership categories:

### Active Membership

- You are currently employed by or have at least one-year experience, including temporary or freelance work, with a law firm, the legal department of a private company or government entity, a courthouse or other company that is legally entitled to provide legal advice and counseling to the public; employed by any business which provides legal support services
  - Have attended at least one SFLPA function.
- Submit with your application dues in the amount of \$80.00 for the first fiscal year of membership. \$70.00 for renewal.

### Associate Membership

- You are a student enrolled in a legal trade school or currently attend college and are enrolled in legal classes; are temporarily unemployed in the legal profession, or are actively seeking employment in the legal field.
  - Have attended at least one SFLPA function.
- Submit with your application dues in the amount of \$60.00 per fiscal year. \$50.00 for renewal.
  - Student Membership

### Membership Renewals

- If you are a current member and wish to renew your membership, you may renew online or download a form to mail your renewal.

If you are interested and would like to learn more about the services provided within the SFLPA, please visit our website at: [www.sflpa.org](http://www.sflpa.org). To apply for membership, click on the Membership Tab and fill out our online application form. Payments can be made via credit card online.

Our application forms are also available to download. Applications and payments can be received by mail. Address information as well as who to make checks payable to are also provided on the forms.

If you have questions and would like to speak to someone, please send an email to our Vice President/Membership Chair: Suddie Scott. Send your email to: [membership@sflpa.org](mailto:membership@sflpa.org).

# LPI BENEFITS

## LEGAL PROFESSIONALS INCORPORATED (LPI) - BENEFITS

*Note: This list is maintained for use by members of Legal Professionals, Inc. Agents for insurance and financial providers are available as resources when members inquire about benefits. Please use this as a starting point; ask for information, compare policy coverage and prices. For information, call these representatives directly. For questions and concerns regarding Member Benefits, please contact the LPI Vice President at [vicepresident@legalprofessionalsinc.org](mailto:vicepresident@legalprofessionalsinc.org).*

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Revised 04/2020



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# SFLPA & LPI EVENTS CALENDAR

## Educational & Networking Opportunities January

1/7 - 12:00 pm (LPI) Legal Research 101  
1/7 - 6:00 pm SFLPA Board Meeting  
1/7 - 6 weeks (LPI) Overview of Cal. Discovery  
1/7 - 8 weeks (LPI) Beginning Legal Secretary  
1/7 - 8 weeks (LPI) Trial Preparation  
1/8 - 12 weeks (LPI) Advanced Legal Professional  
1/11 - 10:00 am (LPI) Probate for Beginners  
1/14 - 12:00 pm (LPI) Ethics & Trust Accounting  
1/14 - 6 weeks (LPI) Advanced Discovery

1/14 - 8 weeks (LPI) Appellate Procedures  
1/21 - 12:00 pm (LPI) Mastering Word for a flawless TOC  
1/21 - 6:00 pm SFLPA Membership Meeting  
1/23 - 12:00 pm (LPI) Corporate Transparency Act  
1/28 - 12:00 pm (LPI) Creating TOA & Terms in Word  
1/28 - 12:30 pm SFLPA Brown Bag  
1/30 - 12:00 pm (LPI) MSJ New Rules

Don't forget the CCLS Online Class every Sunday at 7 pm!

## February

2/4 - 12:00 pm (LPI) Navigating Citation Styles  
2/4 - 6:00 pm SFLPA Board Meeting  
2/8 - 9:00 am (LPI) Day of Changes in Law  
2/11 - 12:00 pm (LPI) Mastering Advanced Citations  
2/12 - 12:00 pm (LPI) Ex Parte Appls. in Super. Ct.  
2/18 - 12:00 pm (LPI) Mastering Word  
2/21-23 - LPI Third Quarterly Conference

2/24 - 12:00 pm (LPI) Demurrers  
2/25 - 12:00 pm (LPI) Unlocking the Power of Word Styles  
2/25 - 12:30 pm SFLPA Brown Bag  
2/26 - 8:00 am (LPI) MSJ/Adjudication

Don't forget the CCLS Online Class every Sunday at 7 pm!

## March

3/1 - 9:00 am (LPI) Federal Court Practice, Part 1  
3/4 - 6:00 pm SFLPA Board Meeting  
3/6 - 12:00 pm (LPI) Your Value as a Legal Prof.  
3/8 - 9:00 a.m. (LPI) Federal Court Practice, Part 2  
3/13 - 12:00 pm (LPI) Foreign Subpoenas

3/18 - 6:00 pm SFLPA Membership Meeting/Election Night  
3/20 - 12:00 pm (LPI) Civ. Proc. for Discovery & Subpoenas  
3/25 - 12:30 pm SFLPA Brown Bag

Don't forget the CCLS Online Class every Sunday at 7 pm!

All SFLPA events are posted on our website. You will also find some of the flyers published in this issue. Please visit us at [www.sflpa.org](http://www.sflpa.org) and click on the Events tab.

We also encourage you to visit LPI's website at [www.legalprofessionalsinc.org](http://www.legalprofessionalsinc.org) to keep up with all the educational webinars, other local association events, and information on upcoming LPI Conferences.



# Change of Address

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New Office Telephone \_\_\_\_\_

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New Work E-Mail Address \_\_\_\_\_

New Employer Name \_\_\_\_\_

New Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

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| <input type="checkbox"/> Taxation           | <input type="checkbox"/> Other (Specify):      |

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E-mail: [sflegalsecretary@gmail.com](mailto:sflegalsecretary@gmail.com)





# San Francisco Legal Professionals Association



## Diversity, Equity + Inclusion Statement

Members of the San Francisco Legal Professionals Association shall respect everyone, and shall not discriminate against anyone on the basis of that person's actual or perceived race, ethnicity, age, gender, religion, sexual orientation, gender identity, gender expression, disability, body size, educational background, nationality, immigration status, economic status and/or other diverse backgrounds.

Members shall contribute to a safe, professional, and collegial environment in SFLPA and LPI. This includes all SFLPA and LPI events, and all situations in which a member interacts or communicates with another member, regardless of whether the interaction occurs at or outside SFLPA or LPI events.

Members understand that people may belong to different communities and backgrounds of which the member is not aware. Members will be mindful of their potential biases, and respectful as they interact with others.

Members understand that disclosure of a person's diverse background can lead to unintended negative consequences. Therefore, members shall exercise utmost discretion in respecting others' privacy when diversity-related information is disclosed to or obtained by a member.

Members are encouraged to examine and take advantage of the privileges they have to support others within our association, their own communities, and beyond.



The SFLPA Leadership Team and Friends



# Diversity, Equity & Inclusion Calendars

By Odaya Buta-Scott, DEI Chair

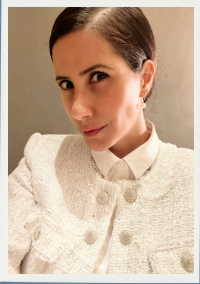


Dear Members,

We are very excited to share with you our SFLPA Diversity, Equity and Inclusion (DEI) calendars. We made every effort to include many of the important dates, awareness days, and months of all groups. If we missed any important dates, please reach out to us. Please let us know what we missed, so we can make sure we include it in the future. Please email us at: [editor@sflpa.org](mailto:editor@sflpa.org). Thank you and Happy Celebrating!



<h1>January 2025</h1> <div style="display: flex; justify-content: space-between; align-items: center;"> </div>						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			Happy New Year 2025	2	3	4
5	6  Dia De Los Reyes Magos	7	8	9	10	 HUMAN TRAFFICKING ... Awareness Day ...
12	13	14  HAPPY MAKAR SANKRANTI	15	16	17	18
19	20  MARTIN LUTHER KING DAY	21	22	23	24	25
26	27  HOLOCAUST REMEMBRANCE DAY	28  DATA PRIVACY DAY	29  2025 CHINESE NEW YEAR	30	31	



# Diversity, Equity & Inclusion Calendars

(Cont.)



# February 2025

February is **HEART HEALTH** month **BLACK HISTORY** MONTH **DEI CALENDAR**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
9	5	<b>WORLD CANCER DAY</b> FEBRUARY 4 <sup>th</sup>	5	6	7	8
16	<b>HAPPY PRESIDENTS DAY</b>	11	<b>TU BISHVAT</b>	15	<b>Happy Valentine's Day</b>	<b>NIRVANA DAY</b>
25	24	<b>Maha Shivratri</b>	26	27	<b>Ramadan</b>	

# March 2025

**GREEK AMERICAN HERITAGE MONTH** MARCH **MARCH IS IRISH AMERICAN HERITAGE MONTH** **WOMEN'S HISTORY MONTH** **DEI CALENDAR**

**MARCH IS NATIONAL DISABILITY AWARENESS MONTH** **GENDER EQUALITY MONTH**

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	<b>WORLD WILDLIFE DAY</b>	4	5	6	<b>EMPLOYEE APPRECIATION DAY</b>	<b>INTERNATIONAL WOMEN'S DAY</b>
9	10	11	12	<b>Happy Purim</b>	<b>Happy Holi</b>	15
16	<b>ST. PATRICK'S DAY</b>	18	19	<b>Spring Equinox</b> <b>PERSIAN NEW YEAR</b>	<b>Down Syndrome Day</b>	22
25	24	25	26	27	28	<b>Eid al-Fitr</b>
50	51	<b>TRANS GENDER DAY OF VISIBILITY</b>				



# Diversity, Equity & Inclusion Calendars

(Cont.)



# April 2025



## DEI CALENDAR

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				5	4	5
6	7		9	10		
		15	16	17		19
	21		25	24	25	26
27	28	29	50			



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# Message From The Editor

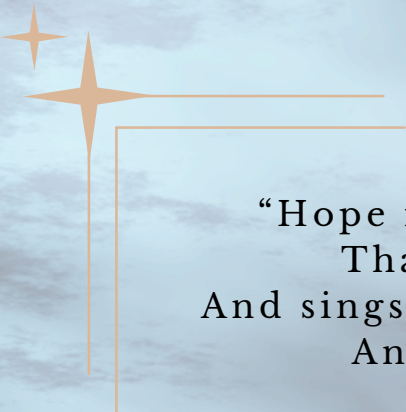
**Jessica Landers**



Well, that's another year in the books. Thanks for joining us to close out 2024 and usher in 2025.

One of my takeaways from this issue is the throughline of the importance of new lessons and experiences. All of us in the legal field need to keep track of the ever-changing environment, whether that's through modern investigation techniques, like we learned from Lindon Lilly, keeping up with our continuing education, recounted by Mike Lewis and Francie Skaggs, CCLS, or reviewing all the new rules and laws coming into play this year, collected by Danya Gonzales.

As I look into the new year, I want to take with me that thirst for knowledge and also apply it to my community. How can we use the tools we gain in this profession to make life better for our friends, families and neighbors? Here's to a year of making meaningful connections and holding onto hope.



“Hope is the thing with feathers  
That perches in the soul  
And sings the tune without the words  
And never stops at all.”

— Emily Dickinson



# LPI Code of Ethics

*Members of LPI adhere to the LPI Code of Ethics which is dedicated to an LPI Past President, Joan M. Moore, PLS, CCLS, and reads as follows:*

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