



**LSI**  
*Educating California's  
Legal Support Professionals*

OFFICERS AND CHAIRMEN WORKSHOPS

MAY 2018 ANNUAL CONFERENCE

**LEGAL PROFESSIONAL TRAINING/SEMINAR**

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LSI Legal Professional Training/Seminar Chair

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### LEGAL PROFESSIONAL TRAINING / SEMINAR CHAIRMAN

Congratulations on being appointed as Legal Professional Training/Seminar Chairman of your local association! As Legal Professional Training Chairmen, we are supposed to provide education that will enhance a legal secretary's knowledge and experience so they can do their job efficiently. The variety of educational training programs can encompass anything from beginning secretarial programs to advanced training, and can be a single class or multi-session classes. LSI has a publication to help you by offering detailed instructions that provide step-by-step instructions as well as sample forms and flyers. LSI's publication "Guidelines for Preparation of a Legal Educational Program" is available to download from LSI's website for free. The information provided in the guidelines is updated regularly so if you have an older version you might consider downloading the latest version.

LSI Law Office Procedures Manual (LOPM) and LSI Legal Professional's Handbook (LPH) are excellent reference sources for presenting training courses. It is possible to present a training session entirely from information found in those publications. Many associations rely on those publications to create training materials on a variety of legal topics ranging from civil litigation, criminal, probate, corporations, and family law to name just a few. You might also consider a seminar on office related topics that are not specifically related to chapters found in the LOPM and the LPH, but perhaps have to do with advancing computer program skills or proper legal office etiquette.

LSI is a registered MCLE provider and by following the guidelines provided by the California State Bar ([www.calbar.ca.gov](http://www.calbar.ca.gov)) you may be able to provide MCLE credit for your classes. Additionally, there is a very detailed section in the "Guidelines for Preparation of a Legal Educational Program" that will assist you in providing MCLE credit to attorneys and paralegals which in turn will make your training sessions more desirable for a wider range of professionals. In the recent past it has come to LSI's attention that some programs recently presented as eligible for MCLE credit do not meet the state bar requirements. For instance, if your program is geared toward legal computer programs or are related more toward office procedures they may not meet MCLE requirements. If you are in doubt, contact the State Bar for clarification or LSI's Legal Secretarial Training Chairman. To avoid embarrassment, make sure that the programs you are considering are MCLE eligible before you advertise that they are.

As the Legal Professional Training Chairman of your association you will receive a directive from LSI's Legal Professional Training/Seminar Chairman each quarter. This directive will have a few questions that are designed to get feedback from the local association Legal Professional Training officers. Generally, the chairman is interested in receiving answers regarding what classes and seminars are being offered by the local associations, and in what, if any, way the LSI Legal Professional Training Chair can assist you. Also, the directives are a way for the local association officers to see what other associations are doing and in what way others can be of assistance to you as this information is shared with all the local associations at conference in the report made available to all chairmen and officers. Please remember that it takes longer for the chairman to prepare the directive than the few minutes necessary for you to complete your directive and return it to the Legal Professional Training/Seminar Chairman. It is greatly appreciated when you answer your directives.

Some local associations successfully hold the same classes year after year, some associations provide different classes each time, and other associations join together to provide training. Every association needs to do what works best for their members and their community.

I have provided a simple guideline to assist with the planning of a legal education program from the initial scheduling through the end. If your association does not have an educational program in place I hope this helps to inspire you to start one.

## THE BASICS

### 1. Select a topic.

Ask your members for suggestions; distribute a survey to your members to find out what is of interest to them. One successful suggestion is to present a beginning legal secretarial course; however, there are many other possibilities. Here is a short list of suggested topics:

Appellate Procedure	Landlord/Tenant
Bankruptcy	Office Automation
Calendaring	Partnership Law
CCLS Workshop	Preparation for Trial
Changes in the law	Proper Grammar
Corporations	(using the Gregg Reference Manual)
Criminal	Probate
Discovery & Research Ethics	Time management
Federal Litigation	Unlawful Detainer
Filing a Lawsuit	Wrongful Termination
Labor Law	Yearly court update /clerks night

All of these topics and more can be tailored for beginning to advance students depending on the knowledge of your speaker.

Draft an outline of points to be covered. This provides a starting point for your speaker and makes creating material easier. You can use the Law Office Procedures Manual (LOPM) and/or the Legal Professional's Handbook (LPH) to help create an outline on a particular subject and provide ideas for handouts. An outline also helps determine if your topic is better suited for a one- or multi-night class.

### 2. Choose a speaker.

You should choose a speaker who has knowledge of the topic. This could be a member of your association who specializes in the topic, an attorney, or a clerk of the court. Association members can ask the attorneys that they work for if they would be willing to be a speaker. There are probably members of your association who are very capable of presenting educational programs so don't forget to ask association members. Don't forget to get a brief bio from your speaker to introduce them to the class.

### 3. Time and place.

Choose a location. Consider local law offices that have conference rooms, libraries, bar association office, community centers, and community colleges for free or low cost locations. If you have budgeted to pay for a room, don't forget to look into restaurants or hotels with private meeting rooms. Your location should be easy to locate and convenient to transportation or parking.

You will also need to consider the length of your class when deciding on a date and time. If your class is short, consider a lunch time brown bag affair or for a longer class consider an evening session. If your program is going to be all day or held over several days remember that you need to consider to proximity to restaurants, providing lunch or stating brown bag on the flyer.

### 4. Attendance fee.

Remember to include any cost for meeting rooms, equipment rental, printing, and any coffee break and/or luncheon in calculating the cost for your educational program. To help offset some of the costs of presenting your program don't forget to ask for donations. You can ask attorneys, local bar associations, attorney services and vendors to help defray costs, and don't forget to ask your association members for donations as well. In addition to monetary contributions, donations could include making copies of flyers and handouts or providing food and drinks for coffee breaks, etc. If your association is doing this as a fundraiser you will need to add in an additional monetary value to your fee.

### 5. Announcements and Promotion.

Publicity is essential for maximum attendance and a successful program. It is recommended that you begin promoting your class two to three months before your education program. If your association has a website and social media platform, the information should be placed there as soon as it is finalized. Copies of the flyer should be placed in your monthly bulletin and sent to your local bar association for publication in their bulletin and ask your local courier to distribute them as well. Don't forget to provide your program information to the LSI Executive Advisor for inclusion in the calendar of upcoming events.

When preparing your flyer, make sure that the information is simple to understand, clear and complete. Your flyer should include who, what, when, where, why and how. List the date, time, location, fees, topic and name of the speaker(s) on your flyer, and don't forget to include the name of your association as sponsor.

Mention of MCLE and CCLS credit could draw additional members and attorneys to your educational program. Do not forget to mention on your flyer if MCLE or CCLC credit is available. If MCLE credit will be offered, the promotional flyer must state that the activity is approved for MCLE credit or that a request for approval is pending; specify the amount of credit offered and whether any of the credit can be claimed for legal ethics, elimination of bias, or the

prevention, detection, and treatment of substance abuse or mental illness that impairs professional competence.

6. Finalize materials.

Communicate with your speaker regarding any materials and handouts far enough in advance so you have time to finalize the handouts and have enough copies for attendees. Remember, if you have advertised MCLE or CCLS credit, handouts are required. If you are providing MCLE credit make sure you review the "Guidelines for Preparation of Legal Educational Program" or visit the State Bar website at [www.calbar.ca.gov](http://www.calbar.ca.gov) for the most current information and requirements.

7. Evaluation Sheet and Certificate of Completion.

Provide evaluation forms to your attendees and remind them before and after completion of the program to fill out the forms and return them. The evaluation forms should ask the attendee's opinion on the overall program, the speaker and the handouts. Additionally, the forms can ask where improvements can be made and what other topics they would like to see presented in the future. Evaluation forms enhance the professionalism of your educational program.

Have a Certificate of Completion available for all registrants upon completion of the program. This will not only give registrants something official to show their employer, but will enhance the professionalism of your program. If MCLE credits are being offered, the Certificate of Attendance must be handed out. Check the State Bar website or LSI's "Guidelines for Preparation of Legal Educational Program" for instructions. Be cognizant that the certificates will have the name of your association and will represent that your association has been involved in the presentation of an educational program.

Being Legal Professional Training & Seminar Chairman will be what you make of it. Enjoy your term as chairman and help to provide the education that your members want. Remember that your association will attract new members based on the programs that they provide to the public so make sure you get the information about educational programs out there. Remember LSI's tag line, "Educating California's Legal Support Professionals" and have a successful year.