

IN REVIEW...

- 1 **South Bay Section Review:**
Rhonda Reid Speaks on Legal Technology
- 1 **President's Message:**
Time Flies When You're Having Fun!
- 3 **Letter From the Editor:**
Forgive Me for Being Old School!
- 4 **Spotlight on Paralegals:**
Lee Paige Reflects on a Long and Varied Career in the Public and Private Sectors
- 6 **LAPA's October Conference Speaker Preview:**
Melvin E. Irvin, CP
- 7 **LAPA Board Member Q&A:**
Catherine Durgin, CLAS
- 8 **Peanut Gallery:**
Job Search Reality Check
- 9 **Spotlight on Paralegals 2:**
William Mandel
- 11 **South Bay Section Review 2:**
How to Find Undisclosed Assets in Tax Returns
- 12 **California Corporate Procedure Alert**

Also in This Issue:

Calendar of Events	3
LAPA Career Center Info.	9
LAPA Lifetime Achievement Award	13
LAPA 32nd Annual October Conference	19
CLA Review Course	20
New & Renewing Members	22
Board of Directors Listing	23

SOUTH BAY SECTION REVIEW

Rhonda Reid Speaks on Legal Technology

by Judy Lynn Shields – LAPA Member

On June 11, 2008 about 30 LAPA members gathered at the Del Amo Room, next to Coco's Restaurant in Torrance, California, to hear Rhonda L. Reid speak on the impact of technology in the practice of law. After dinner, Andrea Mitchell, the Co-chair of the South Bay section introduced Rhonda to the members present that evening. Rhonda is a long time member of LAPA, currently serving as the "Board Advisor Emeritus."

Until recently, Rhonda worked as a Senior Litigation Paralegal for the Allen Matkins law firm in downtown Los Angeles. On June 9, 2008, she began working for Encore Legal Solutions as a Trial Consultant. It was a natural transition for Rhonda to begin work at Encore Legal Solutions as she always had an interest in how technology could make data management and trial presentations easier. During the years Rhonda spent working at Allen Matkins, her expertise was frequently called upon during trials to bring her

continued on page 5

PRESIDENT'S MESSAGE



Time Flies When You're Having Fun!

by Jane M. Gately – LAPA President

I cannot believe that we are over halfway through the year already. It seems like yesterday that I had my first LAPA board retreat as the new President in January, and here we are, the LAPA board, finishing up our second retreat this past month. A lot has happened these past seven months.

Most of our continuing education sections have put together some fantastic seminars so far this year and there are many more seminars to come! Not only are the existing sections busy, but we also have two new sections this year that have been hard at work planning upcoming seminars: The Bankruptcy Section, co-chaired by James Bartlett and Myrtle John, completed their second seminar on July 23rd entitled: "Protecting Distressed Families in Bankruptcy." and the brand new San Fernando Valley Section, co-chaired by Sarah Thrift and Amy Bernardino, with their first seminar scheduled for

continued on page 13

laptop and run the presentation while the attorneys voiced the legal argument and questioned witnesses.

On one occasion she even traveled to Guam to work on a trial. The trial in Guam moved along much quicker when the parties stipulated to have Rhonda run the presentation for both the Plaintiffs and the Defendants. Despite the proximity of the ocean, and clear sparkling water, Rhonda was too busy to enjoy the beach during her time spent in Guam.

Rhonda currently lives in Redondo Beach with her husband, and rides her bike whenever she has free time. She also volunteers her time helping disabled people.

Appropriately, a presentation on legal technology was given to the LAPA members present on June 11th with PowerPoint graphics linked to a laptop computer and projector.

Rhonda began her presentation by emphasizing, "It's not what you know, but where you go to get the information." Various products have emerged over the years in response to judges requiring counsel to manage the voluminous amounts of email and other papers relied upon as evidence in trials. The Federal Courts already have technology rules and the state courts are creating technology rules. Clients now tend to be tech savvy and expect their attorneys to be tech savvy as well.

Studies have shown that people need to hear information 9 times before it is permanently retained. "At least in trial you can say it and show it two ways." Deposition excerpts can be incorporated into PowerPoint, and can then be used to impeach a witness who is lying during the trial. Scanning trial documents into Concordance allows for a search of these documents by key word.

After reviewing the presentation by Rhonda and researching vendors on the Internet, three central themes emerged:

THEME ONE: Legal Technology Software is used for Data Management.

Data management programs include: Concordance, offered by Lexis-Nexis; CT Summation, available through www.summation.com; kCura, available

through www.ckura.com; CaseMap, offered by Case Soft, at www.casesoft.com; and Synthetix, offered by Syngence, LLC, at www.syngence.com.

Data management is critical in multi-party lawsuits, with what can literally be boxes of documents. Documents can be scanned with a bar code already affixed, making for an even quicker search. In response to a question from the audience with regards to "Mac" compatibility, Rhonda replied that she did not know how many of these programs are Mac compatible, but she then concluded, "Probably not."

THEME TWO: Legal Technology Software is used for Real Time Transcript and Evidence Management.

Live Note is an example of Real Time Transcript and Evidence Management software. Live Note is available through www.livenote.com. Live Note allows for full text searches, hyper linking of documents, reports based on key words, issues, annotations, and exhibit lists that automatically update over time. Cases can

continued on page 10

On The Move....

KATHLEEN ROSENSTOCK, ACP, has recently accepted the position of Litigation Paralegal with the Los Angeles office of Fox Rothschild LLP, working primarily in the Labor and Employment Department. Congratulations, Kathleen!

CARL ALVARADO, a paralegal with The Hecker Law Group since relocating from New Orleans (right after Katrina) recently accepted an Intellectual Property Paralegal Manager position with the firm of Lee, Hong, Degerman, Kang & Schmadeka in downtown Los Angeles. Way to go, Carl!

CHERYL WINSTON, a litigation paralegal with Sheppard Mullin in downtown Los Angeles, recently moved to Gibbs, Giden, Locher, Turner & Senet in Century City. Cheryl's new position uses her technology skills in preparing complex commercial and construction litigation matters for trial. Congratulations, Cheryl!

be shared over a network to facilitate multiple team members working simultaneously. Using the Serial Realtime Transcript Text feature, the court reporter can provide a serial real time feed to individuals using laptops connected with a serial cable. The LiveNote Stream function allows off site participants to receive real time transcript text, or communicate directly with the court reporter. Audio and video can also be streamed to off site users, so they can view the deposition, as it takes place, from a different location.

The final theme of the presentation was:

THEME THREE: Legal Technology Software is used for Trial Presentation.

Rhonda spent most of her time discussing this issue. PowerPoint, available from www.microsoft.com, is by far the most commonly used software for presenting opening statements and closing arguments. PowerPoint is considered part of the Microsoft Office Standard Edition group of programs. Data, put into PowerPoint, can be displayed in charts with bullet points and photos. The presentation can also be downloaded to "Notes," so that someone can write his or her own notes as they listen to the presentation. PowerPoint is easy enough to use so that attorneys in small offices often run the presentation themselves rather than having a paralegal billed out to do this, or an even more expensive trial consultant billed out.

Other examples of trial presentation software includes: Visionary 7.2, Standard edition, offered by Visionary Legal Technologies at www.visionarylegal.com; TrialDirector, offered by inData at www.indatacorp.com; Sanction 2.9, offered by Official Verdict Systems, at www.sanction.com. The Standard edition of Visionary 7.2 is actually available to download for

free. Visionary 7.2 is a database that can handle over One million documents per case, with 250 user definable fields. Other Visionary programs available for sale are Visionary 7.2 Pro, Auto-Syncer, V-Print CR, V-Print Enterprise, Visionary Scan, V-Print CR Pro, and V-Print Shuttle.

Trial presentation software enables the jury to see a document circled with relevant sections. The relevant sections can be circled live during the presentations. Trial presentation software is useful for assembling time lines, and jury instructions. Video taped deposition excerpts can be played at relevant times during the trial. Rhonda emphasized that video excerpts from a deposition helps to convey attitude, appearance, voice inflections, facial expressions, the speed of answering, and the overall confidence of the witness.

Common mistakes when producing trial presentations are unprepared witnesses, the wrong colors, or difficult to read font size, and simply too much technology. Neutral colors are preferred, unless you intentionally want to use red for the "bad guys." Overuse of technology can distract the jury.

Another common mistake is the failure of not having a back up plan. Malfunctions can happen. Rhonda said she would typically have a second laptop available with the complete presentation loaded on it. Alternative ways of backing up information can include the use of external hard drives, flash drives, and the old fashioned "Elmo." The Elmo is similar to the overhead projector used by many elementary school teachers, with the exception that you do not have to convert everything to transparencies. Plain paper can be viewed on the Elmo. Elmos may be simple to operate, but they are

continued on page 14

SPOTLIGHT ON PARALEGALS 2 - continued from page 9

One more interesting tidbit about Bill is that he will be traveling to Africa in July for two weeks to help local villagers work on projects, as well as squeezing in some vacation time by going on a safari in Tanzania. One of the programs sponsoring this trip is called Roots & Shoots, which is a program of the Jane Goodall Institute. Through Bill's involvement with

primates and Roots & Shoots, he has had the privilege and pleasure of actually working with Jane Goodall!

Now you can see why Bill Mandel is in our spotlight – he is not only an outstanding paralegal, but has a very interesting life outside of the office working with animals. Keep up the good work Bill and thank you for taking the time to share your experiences with me. It was a great pleasure! 🐼

attest to the fact, that you are acting under the authority and supervision of that attorney, whose electronic certificate you've been given permission to use. Its right about at this stage that my head starts to hurt...but I move on, since all I really want to do is respond to an Office Action by way of the most simplest and easiest means available in our modern day workplace.

Our typical Office Action response is first drafted as an MS Word document, another "Modern Day" application which mystifies me even still, and is then handed to the Attorney for signature and verification, where it is then scanned and downloaded in PDF format for electronic submittal. Adobe Acrobat...you gotta love it!!! O.K., so now I've scanned my MS Word doc in PDF format, sent it to my desk top work station, downloaded it to my desktop and now, I'm ready to rock n' roll...only to discover that, what ever you decide to title your PDF doc can't have any spaces or hash marks as this only confuses the PTO website you are trying to log on to. Slowly but surely,

my physical well being progresses from someone with a mere head ache, to that of a sniveling and trembling glob of human clay in the flesh.

I go back to my original document, correct the title of the document, this time with no spaces or hash marks or anything that the USPTO might construe as "confusing" and then attempt to download the whole entire process of signed paperwork all over again. It goes through...sort of...as this electronic version of modern day technology then takes me through a myriad of steps which at some point and time are suppose to confirm payment for submittal of this response. I go from sniveling and trembling, to outright bawling as I can't get the @\$%^&*(! system to verify what the fee payment amount is, or should be. To make matters worse, my computer crashes and locks up, so now I have to go back to square one and start the downloading process of one stinking, lousy Office Action response...all over again. I started this electronic submittal at 10:00

continued on page 17

SOUTH BAY SECTION REVIEW - continued from page 10

not cheap. They typically cost about \$3,500.00. When all else fails, the old fashioned hard copies are a reliable back up.

Rhonda emphasized the importance of being informed on the local rules involving these types of visual presentations during trial. Sometimes courts will require cables to be taped down to the floor.

Rhonda concluded her presentation by informing the members of the Legal Tech convention occurring on June 26 and June 27, 2008 in downtown Los Angeles at the Convention Center. She said this

convention is sponsored annually by a company named ALM, and is offered in New York as well as in Los Angeles.

At the conclusion of the presentation, Andrea Mitchell thanked Rhonda for her time, and encouraged the members to stay and meet individually with Rhonda for further questions to be answered.

Judy Lynn Shields is a contract paralegal with Advanced Paralegal Services in the South Bay area. She can be reached via email at jshields90501@yahoo.com

PEANUT GALLERY - continued from page 8

is by far your most important task in seeking a new position. Would your reason(s) lead someone to think negatively and assume there is more to your story? Will they think you are hiding something? You must have a solid and cohesive summary of why it's time to move. Over the years I have seen candidates stop and really challenge themselves

with the question "Why am I looking?" only to determine they are better off staying. Believe me - if you like your firm/company, the people you work with, and your job duties, why would you leave? You might be surprised to find out how many other paralegals would LOVE to have your job! 🏠