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**Spotlight: Legal Secretaries****Filling the shoes of Della Street** Legal secretaries remain vital asset to attorneys

By JAN SONES

San Diego Legal Secretaries Association

Della Street has retired. The legal secretaries she trained are now retiring.

Where are their replacements? How will they learn all there is to know about being a legal secretary? What is required of an individual to become a legal secretary?

There are various answers to these questions. First and foremost, this often overlooked profession requires highly skilled, detailed-oriented, organized individuals with a keen work ethic. The legal secretary supports the attorneys for whom she works by communicating with the clients (if that is the boss' preference), courts and other counsel to calendar meetings, hearings and other dates; producing documents as format- and letter-perfect as possible; keeping files in an organized manner; and keeping the attorneys up to date regarding their client matters.

She must be dedicated to her profession, her attorneys and her firm. A positive attitude, pleasant disposition and sense of humor will go a long way in sustaining a legal career.

Because typing is now taught at the middle school level, most high school graduates are already quite comfortable at a computer.

Today's attorneys generally draft their own pleadings rather than write them out longhand or dictate.

However, they are not familiar with the procedures for filing and/or serving documents. They may not know how to format pleadings or letters. They don't have time to be concerned with the protocol for getting their work out the door.

Their responsibility is to produce the work product for the client that hired them. It is the secretary's job to see that it is done properly.

So how does one learn that? Typing and shorthand classes do not provide sufficient training for the legal industry today. Occasionally, a law firm will hire a secretary and train her in the nuances of the legal profession. While this one-on-one training is valuable, it is often limited by

the trainer's knowledge or the area of practice for that particular law firm.

City College offers a two-semester, online course in Legal Office Procedures. The course is sponsored by the San Diego Legal Secretaries Association (SDLSA) and taught by an SDLSA member, Brenda Lewis. It is based upon the "Law Office Procedures Manual," written by **Legal Secretaries Inc.** (LSI). While "Law Office Procedures Manual" provides an excellent basis for understanding the secretary's role in the law office and how a case travels through the court system, LSI's other publication, a two-volume set called the "Legal Professional's Handbook" provides in-depth information regarding how and why certain documents are filed. It also includes samples of all the documents discussed.

Anyone interested in becoming a California Certified Legal Secretary (CCLS) may self-study (or form or join a study group) and take the test given twice a year by LSI. For further information, visit [www.sdlsa.org](http://www.sdlsa.org) and/or [www.lsi.org](http://www.lsi.org), or contact SDLSA's local CCLS Chair, Ann Posthill, at [aposthill@stutzartiano.com](mailto:aposthill@stutzartiano.com).

The program certifies those passing the eight-hour exam as having attained the requisite knowledge in such areas as legal terminology, performance skills, reasoning and ethics, California legal procedures, law office administration, communications and bookkeeping.

Those earning the degree must recertify every three years with proof of having attended for a minimum of 15 hours of mandatory continuing legal education (MCLE).

For legal secretaries in need of an overview of civil procedures, or those who have moved to southern California from elsewhere, perhaps a two-day class would be more appropriate.

**Alexander's Legal Seminars and Publications** ([www.AlexandersLegal.com](http://www.AlexandersLegal.com)) offers a two-day class (12 hours of instruction) on civil procedures every other month in San Diego, and periodically in Orange and Los Angeles counties. In

addition, this company coordinates seminars on a variety of legal topics for the legal community and is State Bar approved to provide MCLE credit for attorneys, paralegals and California Certified Legal Secretaries.

The Association of Legal Administrators (ALA) is currently putting together a class to help train individuals who wish to become legal secretaries. We should be hearing more about that program in the near future.

It is rumored to be a class based on the "Law Office Procedures Manual," but taught in smaller groups in an office setting, on an abbreviated schedule.

The San Diego Unified School District Office of College, Career and Technical Education is working with high school students in helping them decide their future careers.

One way of showing them what a job would be like is to shadow someone at work. SDLSA is working with this program by providing names of volunteer legal secretaries whose firm administrators have agreed to let a student shadow a legal secretary for half a day. This may, in turn, lead students to seek further education to pursue a career as a legal secretary. If you and/or your firm are interested, contact Shawn T. Loescher at (858) 496-1851 or [sloescher@sandi.net](mailto:sloescher@sandi.net).

In addition to the organized classes mentioned above, be sure to check out programs offered monthly by the San Diego Legal Secretaries Association ([www.sdlsa.org](http://www.sdlsa.org)), the San Diego Paralegal Association ([www.sdparalegals.org](http://www.sdparalegals.org)) and the San Diego County Bar Association ([www.sdcba.org](http://www.sdcba.org)).

The bottom line is that if you are interested in a challenging career that keeps you on your toes, and want to further your education (and thus your employability) as a legal secretary, the opportunities to do so are available. Do you want to be the next Della Street?

*Sones is president of the San Diego Legal Secretaries Association.*

**Source Code: 20080423crd**

By ABIGAIL PARENTE

Exclusively Legal

It is refreshing to see the legal secretary profession getting the attention it deserves.

One fact that does not go unnoticed at **Exclusively Legal** is the value that a legal secretary brings to the success of a law firm.

Over the 20 years we have been in business, we have received countless calls from attorneys and HR administrators searching for top-notch legal secretaries.

We pride ourselves in matching these professionals with our clients who want people able to carry the heavy workload inherent in this position.

One does not have to look far to see that the legal community needs more legal secretaries to bring their particular skills to firms' legal teams.

Because of the immense amount of responsibility a legal secretary holds, this position has become a vital commodity in the legal profession.

Some of the skills and responsibilities of the exceptional legal secretary are evidenced in the actual quotes below. (Specific names have been changed for confidentiality). The following comment is typical of those made by supervising attorneys in regard to their legal secretaries: "Michael was a tremendous legal secretary. He helped run my practice and kept me organized. He was efficient, very smart and calm under pressure."

Another client assesses her legal secretary as follows: "Mary drafted routine correspondence, managed attorney calendars, set meetings with clients, made travel plans, performed word processing, and was exceptional with PowerPoint presentations. Her overall performance was 'fantastic.'"

She went on to say that Mary always went the extra mile to ensure that work was completed. She was most personable and extremely flexible. Mary played a critical part in keeping five attorneys organized. Her greatest strength was her professionalism, which "exudes out of all of her work product."

Another attorney had these

words of praise for his legal secretary: "Ann does everything for me. I request a lot of processing documents, revisions to documents and complex travel arrangements. Ann excels at using her outstanding organizational skills in all she does. She is a solution-oriented person who repeatedly brings new and innovative approaches to her assigned projects."

Perhaps the most outstanding example of the value of a legal secretary occurs when we receive a frantic call from a firm that needs an experienced legal secretary to start immediately on a temporary basis.

Whether it is helping prepare a firm for trial, getting a firm up to date on its filing or preparing redlined documents, supplying a qualified person is essential to enabling an office to run more smoothly.

Many of our clients have shared positive and genuine praise for the invaluable help they received from a legal secretary. Recently, a law firm office manager described the key role a legal secretary played when she assisted the firm for several weeks: "She was a lifesaver and has worked out excellently. We can enjoy our week-end because we were able to meet our deadlines."

In the area of direct-hire, our team recently placed a tenured intellectual property legal secretary with an international law firm. The administrator later remarked that all three of the firm's offices were delighted with her work. "The East Coast loves her, Bay Area loves her and San Diego loves her. She can never leave."

Based on our interviews of

legal secretaries over the years, it becomes clear that this is a fulfilling career for many individuals. One such person with more than 20 years in the San Diego legal community stated, "I love what I do. I enjoy the interaction with our clients and being responsive to their needs. I have a great relationship with all of my attorneys and I enjoy contributing to their success."

A unique pattern that has emerged within the legal secretary profession is the frequent occurrence of an associate or partner transferring his or her legal secretary when a job change occurs.

These attorneys recognize that their assistant is a team member whom they rely on heavily and who is critical to a thriving practice; they therefore insist on bringing their legal secretary with them when they relocate. Many legal secretaries we have encountered over the years have stayed with the same attorney for more than 10 years, exemplifying the unique relationship between these two professionals.

We hope educational and legal institutions will continue to highlight this rewarding career opportunity. It is a job that brings satisfaction to the legal secretary and appreciation from those who benefit from their expertise and knowledge base.

*Parente is beginning her fifth year as senior recruiter. She holds a Paralegal Certificate from the University of San Diego as well as a Master of Arts degree in leadership studies*

**Source Code: 20080423cra**

**Correction**

In the special reports San Diego Paralegals 2008, published Feb. 27, and Spotlight: San Diego Paralegals, published April 2, Kendra Bogle was mistakenly listed as a paralegal employee of DLA Piper. Bogle was nominated by her former employer, Centara Legal Group, and is presently working as a temporary legal secretary through Exclusively Legal at DLA. *The Daily Transcript* regrets the error.

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**About San Diego Legal Secretaries Association**

San Diego Legal Secretaries Association is a nonprofit, mutual benefit corporation, to which membership is open to persons employed as legal support staff in the offices of attorneys who practice law in California.

Also eligible for membership are attorneys, persons employed in the courts, and persons employed in other offices or institutions directly engaged in any work of a legal nature in San Diego County.

Our objectives and purposes are to join together for the further education of legal secretaries and to cooperate with attorneys, judges and bar associations in stimulating a high order of professional standards and ethics among those performing secretarial and other duties in law offices.

We encourage friendship, cooperation and an exchange of ideas among members. All SDLSA members are affiliated with Legal Secretaries Inc., a statewide organization.

SDLSA offers the following benefits and programs, in addition to many others:

- Subscription to *The Legal Secretary*, a quarterly magazine published by LSI;
- Subscription to "LegalLines," a monthly bulletin published by SDLSA;

- Monthly membership meetings with featured guest speakers;
- Legal education classes, both beginning and advanced on legal procedures;
- Credit union membership, insurance plans (dental and medical), Costco membership, Hertz benefits, Wells Fargo; and,
- California Certified Legal Secretary program (CCLS).

Applicants must have been continuously employed in San Diego for a period of at least six months or elsewhere for a continuous period of at least 12 months. Associate and student memberships are available for those not meeting active membership requirements. Annual dues for active membership are \$50, for membership from May 1, 2007 to April 30, 2008. Student and Associate memberships are \$15. Pursuant to Standing Rule No. 5, a collection fee of \$15, plus bank charges, shall be assessed for each returned check.

For more detailed information regarding eligibility for membership, contact Marianne Boyles at (619) 236-1551 or [boyles@higglaw.com](mailto:boyles@higglaw.com). If you are interested in applying for membership at this time, mail the form with your dues to: Ann Posthill, SDLSA Treasurer, P.O. Box 127073, San Diego, CA 92112-7073.

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**Our best wishes  
for continued success.**

McDermott Will & Emery warmly congratulates Carrie Hines on her nomination to *The Daily Transcript's* Outstanding Legal Secretaries 2008.

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