

A First-Hand Look Back: SFPA's role in the 1990s

by Dora Lew Dye

Introduction and History

The San Francisco Paralegal Association (SFPA) celebrates its 45th anniversary this year and invited me to share some of its history. I am honored to contribute this article to the Association and its members. This article covers the events of the Association and the issues affecting paralegals when I served as president in 1993 and 1994.

Back then, SFPA was known as the San Francisco Association of Legal Assistants (SFALA). SFALA was founded in 1972. While I never met the first SFALA president, I did meet and work with the first Secretary and 1977 SFALA president, Nancy Siegel, and a founding Board member, Fran Newman. In fact, Fran was still managing the annual salary survey in 1993 and 1994.

SFALA had about 800 members at the time consisting of practicing paralegals, a handful of students, vendors, and paralegal schools.

SFALA's Officers

During my term, SFALA had a board consisting of a president, a policy vice president, an administration vice president, a secretary, a treasurer, five directors at large, and a parliamentarian. We also had an outside management company that answered calls made to SFALA, sent out literature to potential members, maintained our records, handled our finances, and worked closely with our administration VP. I was fortunate that during the whole time of my service, I only had two vacancies which were quickly filled.

Practice Sections

We had the following practice sections – Environmental, Bankruptcy, Systems and Technology, Corporate/Real Es-

tate, Estate Planning & Administration, Litigation, and Professional Development – each staffed by a chair and a Board liaison. The practice sections met regularly once a month usually in the law firm where the chair was employed and were free to members, but required a small fee from non-members.

We also had two members monitoring issues and legislation that affected freelance and public paralegals. Today, we still have freelance paralegals, and SFALA's movement in support of public paralegals and access to justice led to the birth of legal document assistants in California and to some extent, the limited licensed legal technicians in Washington.

Committees

In addition to practice sections, SFALA had committees, each staffed by a chair and a Board liaison. The Community Affairs/Pro Bono committee promoted SFALA in the community and secured pro bono opportunities for our members.

The Education Committee had a student representative from each local paralegal program and managed the Chantal Russell memorial scholarship awarded each year to a deserving paralegal student. Chantal served as SFALA president in 1986. She dedicated herself to the paralegal profession and to the education of future paralegals. After her premature death, the 1993 SFALA Board named a scholarship fund in her memory. In 1994 SFALA awarded two scholarships: one to a paralegal student who was attending the paralegal program at Sonoma State University and the other to a paralegal student attending the paralegal program at California State University, Hayward.

We had a Public Relations and Program committee to organize and run the events to celebrate California Paralegal Day and the annual conference.

(continued on page 3)

AT ISSUE

THE PUBLICATION OF THE SAN FRANCISCO ASSOCIATION OF LEGAL ASSISTANTS—CHARTER MEMBER OF THE NATIONAL FEDERATION OF PARALEGAL ASSOCIATIONS

SFALA ANNUAL MEETING REPORT

SFALA'S ANNUAL MEETING at the Parc Fifty-Five Hotel on November 4 was a great success. Over 100 paralegals from the San Francisco Bay Area attended. Speakers, awards and seminars and a raffle highlighted the half-day event.

President Dora Lew introduced the 1994 officers, directors, and the honored guests, including Ms. Nancy Siegel, co-founder of SFALA, CAPA and NFPA and past president of SFALA, Ms. Sylvia Chery, president-elect of the California Association of Independent Paralegals, Ms. Lee Callery, director of San Francisco State University's Paralegal Program and a member of SFALA's Advisory Board; and Mr. John Kelly, professor of law at Seneca College in Ontario, Canada. The Annual Meeting was called to order. The first order of business was 1994 reports from each of the Practice Sections and Committees.

Next, the Elections Committee (Lynn Yarrington and Jane Johnson) announced the nominees for 1995 officers and directors, took additional nominations from the floor and officially closed the nominations.

The Honorable Senator Quentin Kopp, the event's keynote speaker, spoke about the changes in the delivery of legal services and the unlawful detainer assistance act that he authored. The Senator welcomed input from SFALA members on these issues.

The Scholarship Committee (Mary McLaughlin, Anita Hong, Gerri Jose and Dora Lew) awarded the 1994 Chantal Russell Memorial Scholarship.

Chantal Russell, past president of SFALA, dedicated herself to the paralegal profession and to educating future paralegals. Because of these enduring qualities, the 1993 SFALA Board named the scholarship fund in her memory. Mrs. Gilberie Russell, Chantal's mother, recently donated \$250.00 to the Chantal Russell Memorial Scholarship. SFALA gratefully acknowledged Mrs. Russell for her generosity.

The 1994 winners of the Chantal Russell Memorial Scholarship are Ms. Patsy West and Ms. Judith Hollowell. Each was presented with a check in the amount of \$500.00.

Patsy is currently enrolled in Sonoma State University's Paralegal Program and has earned straight A's. According to one



President Dora Lew, Legislative Representative Cynthia Kopp and Senator Quentin Kopp



Allan Howard reports on the Bankruptcy Section

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In the Beginning: The Start of the SFPA

Editorial by Carla Berg-Nelson, SFPA Founding Member and First President, 1972-1976

What was it like to be a paralegal in San Francisco in 1972 to 1976? What got it rolling and how did it feel? For me, it was incredibly gratifying to hatch an idea and see it take shape. It was one of those rare lucky strokes when idea and opportunity intersect at the right time to form a tribe and bring it to life. Without that timing, without the allies forming a tribe, the whole idea might have lacked enough kindling.

The biggest driver initially was simple curiosity. The paralegal profession was so new as a niche of its own that everyone wanted to hear what others were doing. The notion that non-lawyers might actually be on staff doing lawyerly tasks, such as drafting pleadings or questioning witnesses, was still very novel in 1971 when I graduated from Berkeley.

Many forward-thinking law firms were interested in saving money and being able to serve more clients, but no one really had a playbook for how to move from idea to action. From workloads and workflows to billing and salaries to training, it was new to almost everyone and as a result, all were eager to share and learn as we tried out different approaches.

In litigation especially, it felt like being part of a team, hunting clues, assembling puzzles, building a case, sitting with the rest of the team at the attorney's table in court. But as satisfying as the work might be, we were missing a strong sense of what others were finding out from their own collaborating. So I was extra pleased when my firm introduced me to Nancy Siegel, a cordial peer at a similar downtown firm, and she quickly became a great friend and ally. And as soon as there were two of us, it didn't take long for the curiosity to compound and to propose that we contact other firms and hold a meeting. (What do you want from a gal who started at Berkeley in the 1960s, then did a stint as an intake worker at Legal Aid?!)

Everything that happened the next few years, from allied groups blooming up and down the state, to seats on national committees for the American Bar Association (ABA), to interest from think tanks in Washington, DC, seemed to unfold almost on its own and very rapidly.

What I remember most was learning a lot, having fun with it, and being very aware we were all pioneering.

I was asked about our first election in 1972 and how I came to be the first president. I don't recall much of a race, I think we were more of a slate who offered ourselves as a group, and the rest of the members agreed. Elections might have been every two years initially to give us more continuity during the startup years, but I honestly don't recall.

What I remember the most during this period was instant camaraderie when meeting each other. Forming the California Alliance of Paralegal Associations (CAPA) in California and NFPA as a national alliance. Sitting on Bar committees and being treated as a peer, with respect. Getting past some attorney resistance to having a San Francisco salary survey, typing out the first survey forms myself, and eagerly awaiting results. Successful trips to Sacramento to lobby and testify against premature regulation. Watching paralegal job responsibilities and remuneration grow over the years and feeling fortunate in a time when many career opportunities (especially for women) still seemed much more limited.

What eventually led me to other opportunities was I kept being drawn to places where I could be a catalyst for healthy change. Innovation and opinion-shaping remained my primary aims, but in different domains. I moved from winning lawsuits alongside attorneys, to winning elections as a campaign manager, to persuading policy makers and then becoming a policy maker myself, to persuading investors and winning customers for startups during the early days of computing. After almost two decades of probing and pitching on behalf of clients, it also felt natural to move on to providing my own perspectives under my own byline as an op-ed columnist for much of the 1990s. Today, semi-retired, I am still "activating activists," but now it is in support of healthcare reform and empowering patients (see <https://participatorymedicine.org>.)

Did I regret not going to law school, you ask? At the time, yes, a bit. In retrospect? Not in the least. In the same way I enjoyed moving from one lawsuit to the next back in the day, I have had a great time exploring a wide range of places that same set of skills can lead. 🏡



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At Issue is published on a quarterly basis. If you would like to contribute content for submission to our newsletter, please send your inquiry to info@sfpa.com

A First-Hand Look Back *(continued)*

Our Resumé Clearinghouse collected member resuméés and matched the resuméés with job openings submitted to the Association.

Our Survey committee administered and reported the results of the annual salary survey.

The Membership Benefits committee was always on the hunt for discounts and benefits for our members.

Service outside San Francisco

We had an East Bay committee that met in the East Bay and a Peninsula committee that met in Redwood City for our members who lived and worked there.

Our important National and State Affairs committee consisted of a legislative representative who monitored local, state, and federal legislation (both proposed and active) that affected paralegals. This committee also provided representation at the California Alliance of Paralegal Associations (CAPA) and the National Federation of Paralegal Associations (NFPA) conferences. It is interesting to note that SFALA was one of eight associations that came together to found the NFPA in 1974. SFALA was one of four associations that came together to found CAPA in 1976. You can say that San Francisco was the birthplace of the paralegal profession.

At Issue

At Issue came out monthly and was 16 pages long. We had a managing editor, an editorial advisor, several co-editors, a calendar editor, an art director, an advertising manager, and a contributing editor who wrote articles every now and then. I am sharing the cover page from Volume XXI, Number XII dated December 1994.

Withdrawal from CAPA

In 1994 CAPA defined a paralegal as a non-lawyer who worked under the supervision of an attorney and excluded those paralegals who served the public directly. In addition, CAPA established a voluntary certification program in cooperation with the National Association of Legal Assistants (NALA). SFALA continued to support the right to be a public paralegal and could not support CAPA's position.

A special election was called, and SFALA voted to withdraw from CAPA. The withdrawal made the cover of *Legal Assistant Today* (currently known as *Paralegal Today*) and featured Tita Brewster, then president of CAPA, and me, SFALA president, at odds on this withdrawal. Fortunately, time heals

all, and we can find common ground again. SFPA rejoined CAPA in 2006 but sadly withdrew from the NFPA in 2016.

NFPA's PACE exam

Speaking of the NFPA, in 1994 the NFPA voted to develop the Paralegal Advanced Competency Exam (PACE) to be a "standard used by state legislative bodies to gauge the competency level of experienced paralegals." I jumped on the bandwagon and traveled to NFPA headquarters in Kansas City to write test questions for the PACE exam.

What came next?

In January 1995 after serving two terms as president of the San Francisco Association of Legal Assistants, I passed the gavel to my successor — Rose Nygaard. I commented before stepping down on the challenges facing the paralegal profession at that time. In 1995 the economy was such that paralegal jobs became harder to find. Working paralegals were getting more work with less help and smaller salary increases. I also noted the resilience of paralegals who accepted these challenges and continued to expand their roles in the delivery of legal services to keep the paralegal profession alive.

Happy 45th anniversary to everyone at the SFPA! 🎉

Endnotes

1. <https://www.sfpa.com/Founders>
2. <https://www.sfpa.com/Past-Presidents>
3. <https://www.paralegals.org/i4a/pages/index.cfm?pageid=3280>
4. <https://www.caparalegal.org/capa-history/>
5. <https://www.paralegals.org/i4a/pages/index.cfm?pageid=3298>



Dora Lew Dye worked as a real estate/corporate paralegal for over 15 years at several large San Francisco law firms and real estate investment companies, managing multi-state, real estate closings. In addition to her paralegal career, Ms. Dye has been in paralegal education since 1990 and is currently the paralegal program coordinator and CurricUNET administrator at City College of San Francisco ("CCSF"). CCSF's paralegal program became ABA-approved in 2017.

Ms. Dye is the 1993 and 1994 president of the San Francisco Association of Legal Assistants. Ms. Dye has been an active member of American Association for Paralegal Education ("AAfPE") since 1994 and has served on several committees, contributed content to model syllabi, and reported on events in the Pacific Region. She is AAfPE's long-time Listserv Manager and served two terms on the AAfPE Board as Director of Associate Programs.

What's in a Name? Common Naming Rules for Business Formations & Qualifications

by Kacy Flowers, CLAS Information Services

When a formation or qualification document is submitted for filing, the filing office will perform a thorough review before accepting it into the state's records. One of the first things the state looks at is the business name listed on the document. The business name must strictly comply with all of the naming rules in that state or the filing will be rejected.

Every state has its own specific requirements for what constitutes an acceptable name, but there are common criteria that most (if not all) states check for when evaluating a business name. To help guard against costly rejections, it is important to have a general understanding of common naming rules as you prepare and submit documents for your clients.

Language to Indicate Business Structure

Nearly every state requires that an entity's name include an ending word or phrase to indicate its business structure. For example, a corporation would need to end their name with Corporation, Incorporated or an approved abbreviation such as Corp. or Inc. If a name is otherwise acceptable but fails to include proper notation as to its business structure, the filing officer will refuse to file the document.

Use of Restricted Words Without Approval

In addition to words that a business entity must include in its name, states also have rules regarding words that a business cannot include. These are restricted words that can only be used with authorization from a certain government or regulatory agency.

Unsurprisingly, many states restrict the use of words such as "banking," "credit union," "insurance" and "trust." Some restricted words are less obvious, though. For example New Hampshire restricts the use of "farmers' market" and both Missouri and Virginia have restrictions on the use of "redevelopment."

False Implication of Government Affiliation


It is also common for states to have rules that prohibit a business from selecting a name that implies a false government affiliation. In these cases, a state would have to carefully consider a proposed name like "The United States Cattle Company," for example, to ensure that the public would not assume the entity has a connection to or endorsement from the U.S. government.

Use of Obscene or Indecent Language

Also, several states including Oregon, Georgia and New York have adopted rules prohibiting the use of words that they have deemed to be obscene or indecent.

Similarity to Existing Entities

In addition to checking the acceptability of a name, the state will also check its availability. A business name must be unique, or what is referred to as "distinguishable on the record." When a document is submitted, the filing office will check the proposed business name against their database of existing entities in that state. If the name is too similar to that of an existing entity, the state will not accept the document for filing.

To avoid rejection of a critical formation or qualification document due to naming concerns, work with your service provider to perform a name availability check and reservation prior to submitting your client's document for filing. 

CLAS Information Services can help! Trust CLAS with even your most complex business filing projects. Our highly trained staff of corporate experts can reserve your preferred business name for your exclusive use and will perform a thorough review of your document prior to submission to help guard against rejection. To learn more about our comprehensive suite of corporate services, call CLAS at 800.952.5696 or connect@clasinfo.com

SFPA's Featured Paralegal



Cindy June Melendres is a volunteer with SFPA's Pro Bono Committee and has been a great advocate during the Pro Bono meetings by voicing her opinions and raising SFPA awareness about current and potential pro bono opportunities in the Bay Area. Cindy received her ABA Paralegal Certificate through Saint Mary's College of Moraga and a Bachelor of Arts in Legal Studies and her 2nd ABA Paralegal Certificate, with honors, at John F. Kennedy University.

To gain volunteer experience, Cindy agreed to "shadow" Denise Bashline, a more experienced SFPA Pro Bono member, with the Elder Care pro bono opportunity. Cindy has 35 years of civil servant experience, 25 of which is adjudication experience working in the Department of Homeland Security, U.S. Coast Guard. Cindy is a member of the Alameda County Bar Association (ACBA), and her goal is to volunteer at the ACBA's Family Law Clinic once she receives her family law "advanced" paralegal certificate.

Cindy is also a volunteer Faith Formation Teacher for 3 and 4th graders at Christ of Light Cathedral, a yoga enthusiast, and is learning to master the acoustic guitar. Cindy lives in the East Bay hills with her hubby, Sol. They have five lovely children - Angelina, Richard, Julie, Todd and Rick and, most importantly, they have 12 very lovely grandchildren who they enjoy spending quality time with.

RECAP: SFPA 45th Annual Meeting

by Dede De'Toles-Dugan

The San Francisco Paralegal Association hosted its 45th Annual Meeting on October 13th at the Bar Association of San Francisco themed, "The Changing Role of the Paralegal in a Changing World, Part 2." The event offered 5.0 hours of mandatory continued legal education (MCLE) presented by five very engaging presenters.

The keynote speaker Dora J. L. Dye, Paralegal/Legal Studies Program Coordinator at City College of San Francisco (CCSF) and 1993 and 1994 president of the San Francisco Association of Legal Assistants (now known as the San Francisco Paralegal Association), addressed several topics. The first was the changing role of the paralegal in a changing world in which Dora shared her observations of what it was like in 1986 when she began her paralegal career and what it is like now. Dora then addressed the American Bar Association (ABA) approval process for a paralegal program and how the Paralegal/Legal Studies Program at CCSF earned ABA approval in August 2017. Dora went on to share that CCSF now offers an ABA-approved paralegal program tuition free to San Francisco residents. Dora's final topic was leadership and its impact and closed with the honoring of Mary McLaughlin, the 2005 and 2006 SFPA president, who served on Dora's board and who passed away recently. Mary held every officer position in the SFPA and continues to be the example for outstanding leadership.

Ahmad Zeki, J.D., Director of Business Development at Med Lien Solutions, LLC presented "Ethics: Lien Resolution & future Medicals – How to Deal with Them and Ensure Your Professional and Ethical Obligations." Med Lien Solutions offers services to injured plaintiffs and specializes in Medicare, Medicaid and ERISA liens. Ahmad provided an engaging presentation and Q&A session for audience participation. For more information about Med Lien Solutions, LLC and its services, visit <https://www.MyMedLien.com>.

Stuart (Stu) J. West, Managing Partner at West & Associates and Adjunct Professor of Intellectual and Property Law at California State University, East Bay (CSUEB), presented "Overview of Intellectual Property Law." Stu shared the importance of following procedures to finish to successfully obtain and enforce patents, trademarks, trade names, and the like. For additional information, visit the West & Association's website at <http://www.westpatentlaw.com/Swest.html>.


Administrative Law Judge Élan Consuella Lambert presented "Various Ways Paralegals Support and Adminis-

trative Law Judge," and there are numerous. Judge Lambert shared her personal experiences as an Employment Law ALJ and pro bono mentor and advocate. Judge Lambert uses paralegals to assist her with Veterans Affairs (VA), family law, unlawful detainers for low-income landlords, social security, equal employment opportunity commission (EEOC), and workers compensation. You can follow Judge Lambert on Twitter for legal updates and humorous anecdotes at Hon. ECL @Oaklandlawyer (<https://twitter.com/oaklandlawyer>).

Final speakers Bill Hirsch, Executive Director and Sara Malan, Managing Attorney at the AIDS Legal Referral Panel (ALRP) presented "An Overview of its Services and How It Utilizes Volunteers." They provided insight on the services offered to protect AIDS and HIV clients, specifically housing discrimination, and how paralegals provide assistance needed to carry out these efforts. For more information about ALRP's services visit <http://www.alrp.org/>.

This year's SFPA Student Essay Scholarship winner of \$1,000.00 is Sarah Wilson! Sarah is a student at CSUEB and she wrote an amazing essay on the theme "Americans with Disabilities Act: How can the 14th Amendment be used to ensure equal protection for those with disabilities?" Awards of Appreciation to three recipients for outstanding achievements and impacts on the association were presented to Elizabeth Olvera, SFPA President, 2016-2017; Janet Kelly, recently retired Executive Assistant of the Paralegal Department at CSUEB; and Dalia Liang Moore, Paralegal of the Year. The 2018 SFPA elected officers and members are Denise Bashline for President, Vincent Yasay for Vice President, Dalia Liang Moore for Treasurer, Albert Chen for Secretary, and Directors-At-Large Arni Alter, Felix Hernandez, Leticia Jimenez, Trinh Doan Johnson, Bernice Jaclyn Ledino, Olivia Lombard, Michael Schiraldi, and Gregory Johnson.

SFPA wishes to acknowledge our Sustaining Members who provide valued services year in and out in support of this association: First Legal Network; Litigation Services (LIT); City College of San Francisco; LexisNexis; and Alliant International University, as well as our newest member, RGL Forensics. Special thanks to Dean Anderson and Michelle Lynn Wylie of LexisNexis and Darr'ell Suha of Alliant for attending this year's 45th Annual Meeting!

Stay tuned for news about the upcoming social in November and other SFPA events and trainings! 

In Memoriam: Mary J. McLaughlin, RP® by Victoria (Vickie) M. Newman, RP



For many current SFPA members, you may not have had the pleasure of meeting Mary McLaughlin, RP® at

a SFPA meeting. For those of us who have been SFPA members for decades, Mary McLaughlin was someone you recognized at every Paralegal Day or Annual Meeting, greeting everyone with her infectious smile and twinkle in her eye. Many members may have avoided saying hello to her because of her ability to get you to agree to chair a committee or practice section or help with a pro bono project without even knowing it.


Mary was a long-standing SFPA member. She first joined what was then called the San Francisco Association of Legal Assistants (SFALA) board in 1994 or 1995, serving as a Director-at-Large.

Through the years, Mary was one of the few SFPA members to have served every position on SFPA's board, including president in 2005 and 2006. When Mary was termed out as president, she served as treasurer. She had to re-sign all of her SFPA activities when she was elected to the National Federation of Paralegal Association's (NFPA) board as Vice President and Director of Membership. This left a gaping hole in SFPA because Mary intimately knew all the ins and outs of SFPA: from serving as editor of the *At Issue* and stockpiling articles for future issues, to mentoring SFPA's student representatives on the board, to acting as liaison between practice sections and committee chairs to the board, finding the person to maintain and improve our website, to tracking membership. Mary never missed an opportunity to invite a new paralegal to join SFPA and kept SFPA business cards on her at all times, to hand out to attorneys, vendors and others in the legal community. She was SFPA's biggest cheerleader.

The paralegal profession fueled many of Mary's passion. Mary chaired the

Pro Bono Committee on the local level and frequently attended the Equal Access for Justice conferences, where she learned different ways for SFPA members to become more active in pro bono projects. Mary was the person who was responsible for encouraging members to bring items to be donated for Paralegal Day and Annual Meeting, such as teddy bears for the CHP and cell phones for domestic violence victims. She felt this was a way for all members to make a contribution towards a pro bono project. Mary served as SFPA's Primary both on the state and national level. She enjoyed mentoring up and coming paralegals and was a frequent speaker at the various paralegal programs in the Bay Area. Mary provided leadership training to SFPA board members, practice section chairs, committee chairs and any member who may be interested in serving on a committee.

Mary earned her paralegal certificate from St. Mary's, like many members: working during the day and going to school at night. The paralegal certificate meant that Mary could transfer out of her company's administrative department into their legal department. After retiring from the corporation, she went on to work for a small general practice firm in the East Bay.

Mary is survived by her son and brother. When she wasn't busy being a paralegal, Mary devoted her time to gardening, scrapbooking and her love for animals. Donations in Mary's name may be made to your local animal shelter or adopt an animal that needs a home. 

SFPA's Sustaining Members - Thank you for your support!



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About the San Francisco Paralegal Association

The San Francisco Paralegal Association is a nonprofit organization created to represent the paralegal profession as an independent, self-directed profession, to enable paralegals to enhance their professional development, and to support the expansion of the delivery of legal services in an economic and effective manner.

More information about our Board of Directors, bylaws, committees and practice sections can be found in the **About** section of the SFPA site.

Please visit our **Calendar** to find out about upcoming events.

If you're interested in joining the SFPA, information about how to do so can be found in the **Membership** section of the SFPA site.

To submit an article, please send requests to hgocchiogrosso@gmail.com.