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Volume 37, Number 1 | January 2024

Bench/Bar Issue



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CONTRA COSTA LAWYER

Volume 38, Number 1 – January 2024

The official publication of the Contra Costa County Bar Association



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On the Cover

CCCBA Board President David Pearson invites you and the legal community to celebrate the CCCBA's 90th Anniversary, to be held at the Blackhawk Museum on Saturday, April 13, 2024. This black tie gala will be a look back at the past accomplishments of the CCCBA and a peek into the inspiring plans for the future. Mark your calendar and be sure to join us!

Cover photo and page 8 by Jim Fidelibus, James Brian Studios, Walnut Creek.

Superior Court of Contra Costa County

2024 JUDICIAL ASSIGNMENTS

Edward G. Weil

Presiding Judge

Christopher Bowen

Assistant Presiding Judge

MARTINEZ

Criminal

Supervising Judge: David Goldstein

- ♦ Hon. Charles (Ben) Burch
- ♦ Hon. John Kennedy
- ♦ Hon. Christopher Bowen (effective 1/29/24)
- ♦ Hon. Rebecca Hardie
- ♦ Hon. Terri Mockler
- ♦ Hon. Mary Ann O'Malley
- ♦ Hon. Julia Campins (Mental Health)
- ♦ Hon. Patricia Scanlon (Arraignments, 995s, Probation/Parole)

Civil

Supervising Judge: Danielle Douglas

- ♦ Hon. Charles (Steve) Treat (Complex)
- ♦ Hon. Terri Mockler
- ♦ Hon. John Devine
- ♦ Comm. Yamamoto

Family Law

Supervising Judge: Benjamin Reyes

- ♦ Hon. Leonard Marquez
- ♦ Hon. Palvir Shoker
- ♦ Hon. Ayana Young
- ♦ Hon. Kirk Athanasiou (50%)
- ♦ Hon. Wendy Coats (DVRO Calendar)
- ♦ Comm. Quam

Misdemeanor Depts.

- ♦ Hon. Joni Hiramoto (Trials & Motions)
- ♦ Hon. Kirk Athanasiou (50%)
- ♦ Hon. Frank Riebli (50%)

Probate

Supervising Judge: Virginia George

- ♦ Hon. Susanne Fenstermacher (50%) (through 2/9/24)
- ♦ Hon. Shara Beltramo (50%) (beginning 2/5/24)
- ♦ Hon. Frank Riebli (LPS; 50%)

PITTSBURG

Supervising Judge: John Cope
(Supervising/Felonies)

- ♦ Hon. Brian Haynes
- ♦ Hon. Glenn Kim
- ♦ Hon. Shara Beltramo (through 2/2/24)
- ♦ Comm. Lifter

RICHMOND

Supervising Judge: Jennifer Lee
(Supervising/Felonies) (effective 1/29/24)

- ♦ Hon. Gina Dashman
- ♦ Hon. Peter Chang
- ♦ Comm. Verriere - Afternoon

Juvenile

Supervising Judge: Barbara Hinton

- ♦ Hon. Colleen Gleason
- ♦ Hon. Wade Rhyne
- ♦ Hon. Susanne Fenstermacher (50%) (through 2/9/24)
- ♦ Hon. Shara Beltramo (50%) (beginning 2/5/24)
- ♦ Comm. Verriere (Morning Traffic Calendar)

Introducing: Contra Costa Justice for All



By Jody Iorns,
Guest Co-Editor



“Empowering Justice for All”

Our mission is to provide access to high-quality legal services and programs that support underserved individuals and communities, ensuring that justice is a fundamental right, not a privilege. Through advocacy, education, and community engagement, we strive to bridge the justice gap, protect civil liberties, and promote equality under the law.

In July of 2023, the CCCBA Board of Directors approved the creation of a “501 C 3 arm” for our organization. The effort was led by Ray Robinson, a board member and Chair of the CCCBA Pro Bono Committee. Upon approval, Contra Costa Justice for All was born!

Noted above is the mission statement for this new “sister-charity” for CCCBA. As is inferred by the name “sister-charity,” Justice for All is a related but completely separate organization. The inaugural Board of Directors is made up of dedicated members of our community: President, Craig Nevin; Vice-President, Ray Robinson; Treasurer, Matt Toth; and Secretary, Mike Kasin. Barbara Suskind, who passed

away in November of 2023, had long believed that an organization of this nature was essential for the Contra Costa County Bar Association, served as the original secretary of the founding board. The other board members are: Michelle Ferber; Judge Rick Flier (Ret.); Magdalena Kochanski; Beth Mora; Dora Ritzer, LMFT; and Gary Sanders.

An important role for Justice for All is to continue the established CCCBA tradition of supporting and working closely with our community legal-aid partners. The Bar Fund event, which has raised over \$894,000 since 2009, is being transitioned to a gala event in 2024 with the proceeds going to support Justice for All. Justice for All will continue to ensure that the Contra Costa legal community has the opportunity and means to provide essential, unrestricted funds for Justice for All and all community partners to ensure we collectively fulfill our shared missions of promoting equality under the law.

While supporting Justice for All, the main purpose of the inaugural Gala is to celebrate the CCCBA’s 90th Anniversary! The Contra Costa County Legal Community is a singularly special and unique community.

I can think of no better opportunity to both celebrate our collective success while raising funds for this new exciting organization. Though none of us will be around to see it, I envision an incredible celebration in another 90 years for both CCCBA and Justice for All.

Finally, the Justice for All Board of Directors has been hard at work pulling the paperwork together and developing the foundation from which Justice for All will help create greater access to justice and meaningful representation for those who may not otherwise be able to so afford. We are currently holding a logo competition (details below) and welcome applicants to serve on the Board or supporting committees. Please contact me to learn more if you are interested in being part of this exciting new organization.

Justice for All Logo Competition, deadline February 2, 2024. See the details on page 7..

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Contra Costa Justice for All is searching for an Official Logo

The competition is open to everyone and the winning design will be used as the official logo of CCJFA. The winner will receive two tickets to CCBA's 90th Anniversary Gala Celebration on April 13, 2024 at the Blackhawk Museum in Danville and be recognized at the Gala when the logo is revealed.

Calling all Artists! We need your help in the development and creation of a logo for Contra Costa Justice for All (CC Justice for All), the new 501C3 sister organization to the Contra Costa County Bar Association. The mission for CC Justice for All is:

"Empowering Justice for All"

Our mission is to provide access to high-quality legal services and programs that support underserved individuals and communities, ensuring that justice is a fundamental right, not a privilege. Through advocacy, education, and community engagement, we strive to bridge the justice gap, protect civil liberties, and promote equality under the law.

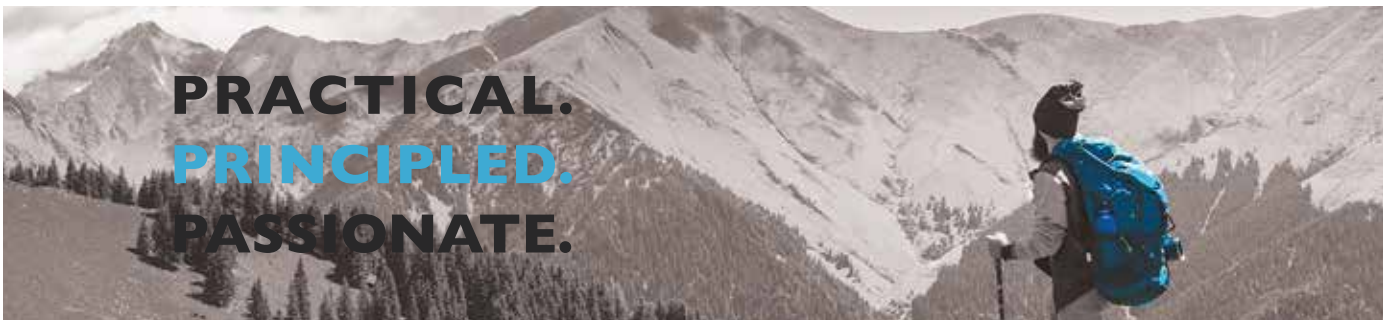
For the official rules and full submission guidelines, be sure to download the official logo competition rules at <https://www.cccbba.org/flyer/2023/ccjfa-logo-comp-with-rules.pdf>

All entries are due by February 2, 2024 and should be emailed to: jjorns@cccba.org or sent by mail to: CC Justice for All, 2300 Clayton Road, Ste. 520, Concord, CA 94520

Judging and Selection

CC Justice for All will appoint a panel of judges to review all submissions and select the winning logos.

Judging will be based on creativity, originality, adherence to CC Justice for All's values, brand identity and overall visual appeal.



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- Fiduciary Representation
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Renaissance Man

An Interview with David Pearson
CCCBA Board President 2024



by Jody Iorns,
CCCBA Executive Director

David Pearson is a man of many interests, hobbies, and passions - one of those is the passion for law. Having been a practicing attorney for 33 years, he brings extensive experience, understanding and practicality to each case with an intention to find the appropriate solution for his client and often the opposing parties. Another passion is our bar association. As you can see, he has graced two covers of our Contra Costa Lawyer and remains highly committed to the growth and effectiveness of the bar association. I have had the honor of working with David in his role as Incoming President for the past year and I can count on very direct, thoughtful and considered advice - with a healthy dash of humor, as you will see below. Here is a brief 'interview' with David.

Tell us about you and your family

I have a wife of 32 years - Rita, who is retired and rehabilitating from her 4th kidney transplant. We have one daughter and two grand dogs who live in San Diego. Our daughter is engaged and her fiancée serves in the US Navy. Our house is owned by two 75 pound dogs who let us live in it as long as we provide plenty of snacks, walks and comfortable furniture. We are repaid in mounds of dog hair.

Outside of your legal work, what are your hobbies/activities?

Take care of the wife and dogs. I occasionally do trail races (my longest race was 100k) and am usually found at the gym at 5 am. For many years my wife, daughter and I have also attended the Highland Games in Pleasanton, which is where we got our current two dogs.

(Don't drink whiskey when there are puppies available for adoption.) We first attended games in Fresno when we lived in Fresno. Once we moved back to the Bay Area we attended the Pleasanton Games and I joined Clan MacPherson as I knew my father had ancestors from all over the British Isles including Ireland, Scotland, and Wales. After a few years I decided to pick up a kilt and accessories to wear to the games. I first wore the kilt (the formal MacPherson dress tartan) outside of the games about 20 years ago at SF's Black and White Ball which is how I ended up with the Prince Charlie jacket. My wife just shakes her head when I wear the outfit as she does with most of my activities.

Why did you decide to become a lawyer?

I was in college at University of Nevada, Reno and my father was in night school at McGeorge. I attended a few classes with him and it seemed easy (boy was I wrong). I figured a business degree from UNR wasn't worth much and a law degree seemed interesting and useful.

How did you get involved with the CCCBA?

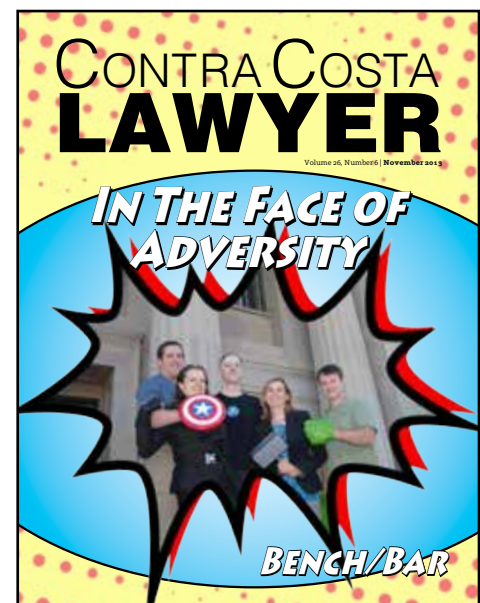
When I moved back to the Bay Area in 2000 from Fresno, I immediately joined the CCCBA to meet local attorneys and build a network. I had been in Fresno since graduating from Hastings in 1991. Lisa Reep talked me into taking over the Solo Section in 2001 or so and the rest is history.

What have you done during your time on the Board of Directors?

Lots of board meetings and committee meetings. The best part of serving on the board has been the social gatherings once COVID lifted



David's first Contra Costa Lawyer magazine cover was the July 2012 issue on Technology and Law Practice Management issue.



His second cover was the Bench/Bar issue in November 2013 that pictured David, Dawn Ceizler, Hon. Christopher Bowen, Marie Quashnock and Philip Simpkins.

Continued on page 10 ►

Renaissance Man

Continued from page 9

and participating in many of the recent judicial inductions. It has been amazing to see our bench grow and add a significant amount of diversity.

Looking forward to 2024 – what are your goals for CCCBA during your presidency?

My goal is to leave the CCCBA in at least as good a shape as I received it from David Erb. I would like to see more social gatherings and more of the weekend outings that have become so popular. While fewer attorneys seem to want to show up in person for MCLE events, the Bar's social events have been very popular.



The poster for the Bay Area Women Lawyers' Retreat features a pink background with stylized illustrations of women's faces in various colors (orange, yellow, purple) on the sides. At the top center is a scale of justice icon. The main text is in a serif font. Below the title, the dates and location are listed. Two circular portraits of women are shown, each with a caption below it. At the bottom, the price per person, reservation information, and sponsorship opportunities are listed.

BAY AREA WOMEN LAWYERS' RETREAT

Friday March 1, 2024 - Sunday March 3, 2024
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Justice
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The banner for ADR Services, Inc. has a black background. On the left is the company logo, which includes a gold gavel icon and the text "ADR SERVICES, INC." in gold. To the right of the logo, the words "Proudly Features" are written in a large, bold, gold serif font. Below this, there are ten individual portraits of professionals, arranged in two rows of five. Each portrait is in a white-bordered frame with a grey background. Below each portrait is a caption in white text. At the bottom of the banner, a line of gold text provides contact information.

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Robert P. Hamilton, Esq.

Hon. Leslie G. Landau (Ret.)

Claudia Hagadus Long, Esq.

Comm. Glenn P. Olean (Ret.)

Hon. Anita Santos (Ret.)

Hon. Winifred Y. Smith (Ret.)

For information and scheduling, please contact Joanna Barron at Joanna@adrservices.com (415) 772-0900

Welcome to the Bench



Judge Peter Chang

was appointed to serve as a judge in the Contra Costa County Superior Court by Governor Gavin Newsom in June 2023. Prior to his appointment, he served as a Deputy Attorney General at the California Attorney General's Office for ten years where he practiced constitutional law and consumer protection law. He also taught legal research and writing as an adjunct professor at UC Law San Francisco (formerly UC Hastings) for four years. Before joining state service, he was in private practice at Black, Chang & Hamill LLP, which he co-founded, Kirkland & Ellis LLP, Wilson Sonsini Goodrich & Rosati PC, and Fulbright & Jaworski LLP. He earned his Juris Doctor degree from the Georgetown University Law Center and Bachelor of Science degree from the University of Texas at Austin. Among his proudest professional achievements is his extensive pro bono work on behalf of indigent individuals while he was in private practice.

Commissioner Andrew R. Verriere

was appointed as Court Commissioner May 1, 2023. Before joining the bench, Commissioner Verriere was a partner with Hartog, Baer, Zabronsky & Verriere APC in Orinda, where his practice focused on trust and estate litigation, contested conservatorships, and financial elder abuse litigation. Before that, Commissioner Verriere was a partner with Morrill Law Firm in Walnut Creek, and worked at Barr & Barr Attorneys in Danville, Jones Day, and Seyfarth Shaw. During law school, Commissioner Verriere was an extern to Judge Richard Clifton of the United States Court of Appeals for the Ninth Circuit in Honolulu.



Commissioner Verriere is a fellow of the American College of Trust and Estate Counsel (ACTEC), and was a member of the California Lawyers Association Trusts and Estates Executive Committee (TEXCOM), the Board of Directors of the Contra Costa County Bar Association, the Contra Costa County Bar Association Committee on Judicial Bias, and the Boards of Directors of the Contra Costa County Bar Association Litigation Section and Elder Law Section. Commissioner Verriere also served as a Planning Commissioner for the Town of Danville.

Commissioner Verriere received his J.D. from UC Berkeley School of Law and his B.A. from UC San Diego. He is currently assigned to the Walnut Creek and Richmond branch courts presiding over traffic, small claims, unlawful detainers, civil harassment, domestic violence restraining orders, and misdemeanor arraignments.

2024 DEI Events Sponsorship Bundle

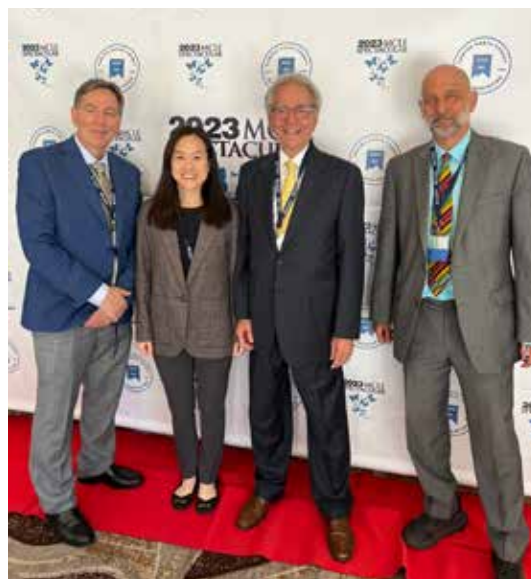
Did you know that you can be a sponsor of six different events from the CCCBA Diversity Equity and Inclusion Committee scheduled throughout 2024? The first DEI event is the CCCBA Installation & Awards Luncheon on January 19.

Sponsors receive tickets to the events, recognition in event promotional materials, the CCCBA weekly eblast, CCCBA's social media campaigns and more!

For further information, please contact Anne Wolf at awolf@cccba.org. You may also sponsor individual DEI events! Contact Anne to find out more!

2023 MCLE Spectacular

Refreshed & Reimagined at the Concord Hilton



The theme on November 3 was all about super heroes! The day started off with Justice Peter Siggins (Ret.), top left, speaking about ethics and the Supreme Court.

Scott Lantry, Scott Isherwood and Mike Beuselinck are ready to enjoy lunch!

We appreciate our sponsors! Pictured middle left is the team from California Bank of Commerce.

Luncheon Keynote speaker, Justice Tani Cantil-Sakauye (Ret.) who spoke about the California Supreme Court and Joanna Barron of ADR Services, Inc.

Natasha Chee shows off the signature mocktail of the 2024 MCLE Spectacular.

Gary Watt, Rosanna Gan, Justice Mark Simons (Ret.) and Don Willenburg.

Welcome to the Board of Directors



Ray Robinson,
Esq.

While new to the practice of law as an attorney, Ray Robinson is no stranger to the legal profession. With a passion for helping people, Ray began his legal journey over 30 years ago as a trial/litigation paralegal. Often encouraged by others to become a lawyer, he didn't do so until just two years ago! And what an amazing two years it has been. Ray jumped in wholeheartedly with the Contra Costa County Bar Association getting involved in many sections and committees. He was the inaugural winner of the Justice James J. Marchino Distinguished Service Award in 2021. Fast forward to 2023, in addition to serving on the CCCBA Board of Directors, Ray is the Chair of the CCCBA Pro Bono Committee, Treasurer of the CCCBA Barristers Committee, and various other CCCBA sections. In his spare time, he served as Guest Editor of the CC Lawyer for the July 2023 edition on pro bono service and was the driving force in the creation, development and implementation of the CCCBA's new sister-charity, Contra Costa Justice for All. In recognition of his outstanding contributions in such a short time, Ray was awarded the CCCBA Board of Directors 2023 Star Award for extraordinary service to the organization.

Punita
Bhasin,
Esq.



Punita Bhasin, JD (Magna Cum Laude), is a multidisciplinary professional with a Ph.D. in Biophysics and a Juris Doctor degree from John F. Kennedy University, School of Law. She founded her legal practice in 2020, focusing on intellectual property and transactional law to serve innovators, start-ups, and small companies. Guided by her father's wisdom that positions of privilege should be used to help those in need, she exemplifies a commitment to community service by extending her expertise to assist victims of domestic abuse through partnerships with non-profit organizations. She is one of CCCBA's inaugural Pro Bono Honor Roll Recipients for 2021. In addition to her legal pursuits, Punita Bhasin is an active board member for the small/solo firm section of the CCCBA. In her free time, she prioritizes family moments, especially with her children, indulging in the joys of cooking and planning trips. Her dedication to community service extends to her role as a board member providing legal services to underserved communities.

For a list of CCCBA Board members, turn to page 3.

Interested in Joining the CCCBA Board?

Serving on the CCCBA Board of Directors can be a highly meaningful experience for any member. It offers a unique opportunity to actively contribute to the legal profession and make a positive impact on the legal community. Being part of the board provides a platform to engage with fellow legal professionals, exchange knowledge and ideas and shape the direction of the association. Board members have the chance to advocate for important legal issues, develop and implement policies

and promote access to justice. Additionally, serving on the board can enhance one's leadership skills, expand professional networks and foster personal growth. It is a role of responsibility and influence that allows members to leave a lasting legacy in the legal field while actively contributing to the betterment of the profession as a whole.

The board meets on the first Wednesday of most months, except August and December. Terms are three years in length with the oppor-

tunity to run for a second term. The Executive Committee track can expand a term an additional five years.

Nominations for 2025 open May 1st. Interested candidates will be asked to submit a statement of interest, resume, and 3 or 4 references. Learn more about the roles and responsibilities of CCCBA board members at <https://www.cccba.org/flyer/2023/board-member-roles.pdf>. or contact Jody Iorns, CCCBA Executive Director.

JAMS WELCOMES

Paul E. Garrison, Esq.

Clients say Paul is a
**“very skilled mediator
who really listened to
each party’s concerns”**
and that he resolved
a contentious case
**“with persistence and
patience and gave me a
perspective that I didn’t
have about the situation.”**



Mr. Garrison has more than three decades of legal and managerial experience, including 18 years as a senior executive and attorney for large companies. Since 2008, he has focused primarily on ADR, helping parties negotiate multi-million-dollar settlements in complex disputes. He is available as a mediator, arbitrator and neutral evaluator in **business/commercial, employment and estate/probate/trust** matters. Visit jamsadr.com/garrison or scan the QR code to learn more.



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In Memoriam

The CCCBA honors the following members we lost in the past year

Loren Blum, 1938-2023

Laura Ramsey, 1981-2023

Robert A. Buchman, 1939-2023

Robert Bruce Stirling, 1943-2023

John Coker, 1938 - 2023

Barbara Suskind, 1941-2023

Cyril Epstein 1936-2023

Ralph Zappala, 1954 - 2023

George Hardisty, 1927-2023

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An Update on **E-Filing** in Contra Costa Superior Court

by the Contra Costa
Lawyer Editorial Board

This article was written from an interview with Andrew Adams, Court Operations Manager Civil and Small Claims and Antwana Fortenberry, Court Operations Manager, Family Law.

Andrew has been with the courts for 17 years. He has worked in Criminal, Juvenile, Civil, Probate and Appeals. Antwana has been with the court for 29 years. She has worked in Traffic, Criminal, Civil, Family Law, Small Claims, Jury and Court Records.

Overview

One year after E-Filing was launched, we at the Contra Costa Lawyer wanted to ask, how is it going? Where are we in the implementation?

E-Filing is going pretty smoothly. We have learned a lot. And there have been growing pains for sure.

The E-Filing rules have been amended five times so that we can provide updated rules! As we learn, we make changes. For example, ex parte requests generally are not allowed to be E-Filed. Now, ex parte requests that do not need hearing, such as a request for publication, are allowed to be E-Filed.

Before E-Filing, there was a six-month backlog in Limited Civil. Now it's less than two months.

We realize that mistakes happen, but this has been a big upgrade in technology for the court.

What are the Benefits of E-Filing?

It is trackable. Clerks are able to see where a case is in the process. They can see if it was incorrectly rejected and can use that as a training experience. Previously, if the clerk rejected

something, it was returned. Now, if you call us, we can look at the document together and try to figure the issue out.

- All documents are viewable by clerks from their desktops. No more searching for files or going into the court to find documents.
- It allows clerks to fix common problems.
- It is used by judges to better prepare for their calendars. They can more easily gather all relevant documents to that hearing.
- It helps with maintaining a clean record for cases on appeal.
- It is more flexible than the old ICMS system. The old CMS system had a lot of macro processes that, if entered incorrectly, could not be removed.

- It gives the court advanced data analytics that identifies workers who are most efficient, so we can learn from these workers and increase the efficiency of the whole team.

- It allows access to the attorneys to case files.

How many filing clerks in Civil, Probate, and Family Law does the court employ?

Andrew supervises seven clerks in Unlimited Civil, six in Limited Civil, two in Probate, three in small claims/unlawful detainers and three lead clerks. Antwana supervises 15 clerks in Family Law, 7 in Legal Processing, 6 in Legal Tech and 2 in Calendar. The court originally thought that E-Filing would reduce the need for clerks, but that is definitely not the case because filings have substantially increased. The court is trying to add more positions as budgets allow.

Innovative Things Contra Costa Superior Court is Doing with E-Filing

- **Daily Triage:** Every morning, clerks are scanning filings to find cases with deadlines in next two weeks. We first started filing cases on a first come, first served basis. But that didn't work. This is why adding the "Next Hearing Date" to your filings is so helpful (see below.)

- **Consistently assigning filing clerks to Civil and Probate departments** so they become familiar with the history of cases and unique characteristics for the judge and that kind of law. (Depending on workload, clerks are able to help out in different departments as they are needed.)

- **Allowing certain non-parties to add themselves to a case.** Special types of professionals such as Referees, Special Masters, Parenting Coordinators, and Experts may

E-File or they may continue filing at the window.

Things to Remember

- E-Filing is open to attorneys 24 hours a day, seven days a week. Clerks are only on the job eight hours during business days. They find themselves always trying to manage workloads.

- CC Superior Court has seen a drastic increase in the number of filings here. This may be due to the fact that Contra Costa Courts are now more accessible - attorneys were previously required to pay a courier to file in-person and appear in-person. E-Filing and remote appearances have reduced the cost of filing itself and also eliminates travel time and attorneys' hourly fees. We have seen a particularly significant increase in Personal Injury cases and Minor's Compromise petitions.

- The clerks are working hard to find solutions. They look carefully for critical deadlines (Answers, Defaults, Unlawful Detainer cases in Unlimited Civil) and spend time every day doing the triage. Having attorneys file at the window does not help fix the backlog because if the clerks stop to handle matters at the window, then it takes away time for E-Filing. (They don't hear compliments often and really appreciate them when you take the time.)

- If a filing has not completed and it is a time-sensitive matter, please call the Clerk's Office and let us know the envelope number so we can look into it. Given resources available, please use your best discretion in labeling something as an emergency.

- If your document has a statute of limitations or deadline and it was rejected, you have one day to cure the problem. (CCP 1010.6)

The Clerk's Office can fix a lot of things but, there are some they absolutely cannot fix. The only option is to reject the filing. For example:



- Party has a fee waiver and that payment type is not selected
- Filings submitted into the subordinate case on consolidated actions
- Large exhibits broken up and submitted without cover pages (see tip below re: Motions in Limine)
- Multiple documents uploaded as one PDF
- Amended filings are submitted but not identified as amended
- Subsequent pleadings are submitted as a new filing

What Happens When a Stipulation or an Order after Hearing is Filed?

Family Law: When it is received via E-Filing, the filing clerk directs it to the Department in an E-Filing queue. Once it is approved by the judicial officer, it is sent back to the Clerk's Office for filing. You will receive a filing update in your envelope.

Civil and Probate: On a rolling basis, the departments are receiving training on how to receive the documents in the same fashion as noted above in Family Law. For now, the filing clerks are printing the documents submitted for approval and routing them to the relevant department.

If it is a pleading that has a statutory deadline attached, such as a requirement to hold a document for 25 days, then the document is routed by the Clerk's Office to the Department. After the requisite time has passed,

Continued on page 18 ►

Update on E-Filing

Continued from page 17

the department clerk presents it to the judicial officer for signature and returns it to the Clerk's Office.

Please check Odyssey because the clerks try to input notes of the progress so that they can be seen by the public.

Simple Things Attorneys Can Do to Speed Up the Process

- Include the Next Hearing Date in the beginning of the filing description and then finish the title of the document (Example: "Next HRG 2/5/24 Petitioner's Responsive Declaration" Do not put this in the comments column. Clerks cannot see that from the overview screen.

- The document description should match the document title. This is especially important for preserving your appellate record, because the files sent to the appellate court are identified by the document description NOT the caption on the pleading! Furthermore, if the names are not accurate, the clerks must take time to rename each document.

- Pick the correct security level for each document.

- For large filings such as Motions in Limine which may include a large number of files, use cover pages and include the document title and items enclosed, for example, the title should be something like, "Exhibits A-K in support of motion," next filing "Exhibits L-M in support of motion." Add a cover page for each batch of pages for a large file that has been broken up. Without one there is no way to tie the subsequent batches to the original exhibit batch.

- Use the "Comments to Court" box for special notes for the Clerk's Office. Include things like timeline restrictions. – This is especially helpful for specific timeframes required by statute that the clerks office might not see regularly.

- Send courtesy copies to the judge with a label including the E-Filing envelope number so that the Department knows that an E-Filing is pending.

- To the extent you can, please do not categorize something as Miscellaneous.

Prefer to Learn by Watching a Video?

There are two on the CCCBA's E-Filing Basics web page. <https://www.cccba.org/member-center/cccsuperior-court/efiling-basics/>

Need Help with Odyssey? Use the source the Clerk's Office uses, Odyssey's Knowledge Base. This is posted on the Civil E-Filing Services page of the court's website on the right, "E-Filing User Questions." Or visit <https://odysseyfileandservecloud.zendesk.com/hc/en-us>

Still stumped?

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Samuel L. Welles, focuses on the areas of Probate and Trust Litigation. He is a member of the State Bar of California and the United States District Court for the Northern District of California.

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Pilot Programs for CCCBA Membership Drive this Year

By Jody Iorns

“We empower attorneys to build thriving practices and professional networks and connect the community to valuable legal resources and assistance.”

Many of you have seen that statement on our website but you may not recognize it as part of the CCCBA Mission Statement. With that goal in mind, the CCCBA Board of Directors and staff are continually evaluating the programs and opportunities we have for our members. How can we build our community? What can we provide to encourage membership while also ensuring value?

In an effort to answer those questions, we are launching four “Pilot Programs” for 2024.

Paralegal/Legal Assistant Membership: We recognize that many of our members are struggling to find, hire and retain good legal support. Also, support organizations have dwindled in numbers in our area leaving a gap for networking, MCLE and support for paralegals specifically. As such, we are offering reduced membership rate to \$100 (formerly \$170) and, if we get enough members, creating a new Paralegal Section. Our vision is that with this focus, CCCBA can ensure that the essential workforce for our attorney members has the support, information, education and networking that is essential to firm health and business growth. We encourage all of our members who represent their firms to consider signing up your paralegals and legal assistants for this great new endeavor!

Conflict Program & Family Law Minors Counsel Panel Members:

In recognition of the outstanding and essential work that the members of the CP and Minors Counsel Panel members do, too often without commensurate compensation, CCCBA is including these folks in the Public Attorney Support level. As Judge Virginia George said of Minors Counsel, and I believe can be applied to all of these panel members, serving as a Minors Counsel is like “Pro Bono work with a tip.” We recognize the financial sacrifice that this type of work requires and want to support these folks by offering a reduced membership fee.

LRIS Panelists – Our Lawyer Referral and Information Service program is in DIRE need of panelists. Our LRIS program is one of the best in the nation and that is due to the ability to effectively screen and connect potential clients with attorneys. While we have a stellar group of panelists, calls to our lines have increased and we need YOU to help us make those connections – especially in the areas of: Consumer, Tenant (especially Evictions), Moderate Means Family Law, Elder Financial Abuse, and Debt Collection. As an incentive, if you join the panel as a NEW member, the annual LRIS Panel membership fee of \$100 will be waived for 2024. If you are an existing LRIS member and you

refer an attorney who then becomes a panelist, your membership will be refunded. Thank you in advance for helping us grow this already excellent program!

JusticeDirect – We are pleased to introduce a new collaboration with JusticeDirect. JusticeDirect is an online platform that provides simple, quick and effective small claims help. As we know, in the state of California, folks involved with Small Claims matters cannot be represented by an attorney. Further, few attorneys actively provide advice and guidance in this area. Contra Costa County Superior Court has an excellent Small Claims Advisor, but with the growing number of cases and inquiries, being able to provide another resource is ideal for our community. A potential litigant is guided through an intuitive and simple ‘wizard’ to help them craft either a demand or settlement letter – all at no cost. Plus, users can file a small claims case and can even create a full trial presentation to present a more complete case to the judge. JusticeDirect is not a law firm and does not provide legal advice. Users are educated on legal information for their dispute type and decide what steps are right for them. Learn more about JusticeDirect at <https://justicedirect.com/>



Judges in the Classroom

by Honorable Leonard Marquez



As a Judge of the Contra Costa County Superior Court and recent past Chair of the Judicial Outreach Committee of the statewide California Judges Association (CJA), I have been involved with a program called “Judges in the Classroom.” I write to share a bit about this amazing program with CCCBA members and the larger East Bay legal community.

Judges in the Classroom is a state-wide program that provides a platform for teachers to connect with judges in order to organize classroom presentations by judges to students about the judiciary, the work of the courts, and the law more generally.

The program was developed by the California Chief Justice’s Power of Democracy Steering Committee and has a strong track record in a number of counties such as San Diego.

The program was expanded during the pandemic era through the use of remote video technology and has been a good example of how to effectively transition judicial outreach programs to a remote platform and bring them to a broader audience. For example, the San Diego County Superior Court had, from Spring of 2020 into the Summer of 2020 alone, utilized this program to deliver presentations to 580+ students by more than a dozen judges in their county.

The Judicial Council, in the past couple of years since, has ramped up efforts to roll out the program to other counties throughout the state. Starting last year, I volunteered to serve as the local coordinator for the program in Contra Costa County. Last year, judges from our county completed more than a half dozen presentations and this school year (2023-2024), we are on track to well exceed that. Judges have given presentations to hundreds of students in our local schools over the past two years, including John Swett Elementary in Martinez, and Del Rey Elementary in Orinda. This year we had our first teacher match at a west county school as well, Michelle Obama School in Richmond.

Knowledge of our legal system and its functioning is at the heart of a strong and well-functioning democracy. The Judges in the Classroom program gives our youth an opportunity to understand and appreciate how and why the legal system, as an institution, functions to resolve conflict in a reasoned way. Consider the words of United States Supreme Court Justice Felix Frankfurter who served on the High high Court court from just before World War II until the 1960s:

"Fragile as reason is and limited as law is as the institutionalized medium of reason, that's all we have standing between us and the tyranny of mere will and the cruelty of unbridled, undisciplined feeling."

--Felix Frankfurter,
"Felix Frankfurter Reminisces"
(Anchor Doubleday 1962).

Learning about and even experiencing the process—through mock trial proceedings and the like—brings home this message in a real-world, impactful way.

The Judges in the Classroom program is one small way that the Court and its judicial officers can help outreach to the community, especially our

young people, and educate them on the vital institutions of our American democracy and their role in it as citizens.

For more information about Judges in the Classroom, please visit the program's website at www.judgesin-theclassroom.org. There you can find

a further description of the program and an online sign-up form that teachers can fill out to be matched for presentations. Also, there are program curriculum materials accessible online through the program website. CCCBA members can help by sharing this program information with any teachers they may know.

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Tuesday, January 30
Thursday, February 14

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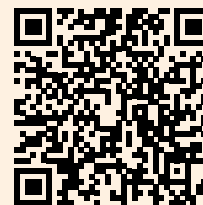
FINALS:

Tuesday, February 13

Volunteer Scorers are needed especially during the preliminary trials.

Each shift runs 2 1/2 to 3 hours.

Learn more about the Mock Trial Program here:



2024 Section Leaders

We are proud to introduce and thank these new and returning section leaders for 2023. CCCBA's sections are truly the life blood of our organization. For up to date details on section leadership, events and programs, visit each section's page on the CCCBA website.

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If you are a member of the CCCBA Elder Law Section and are interested in partnering with the CCCBA as the Elder Law Section Leader, please contact Anne Wolf at awolf@cccba.org



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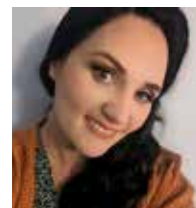
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Discount: 10% discount for Social Media Marketing and/or Print and Mail Services when you identify yourself as a member of the CCCBA.

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Discount: CCCBA members receive up to 10% off rental car rates. Use Corporate Discount Program ID# 2133824 when making your reservations. You can use this number when reserving online, over the phone, through a travel agent, or walk-up reservations.



**Contra Costa County
Bar Association**

Let's Build Your Practice Together

**CCCBA LAWYER
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We Take the Calls, You Get the Clients

Each year we receive over 9,000 calls through our Lawyer Referral & Information line from potential clients seeking referral to an attorney. Registered attorneys receive referrals for panels they choose, including:

- Mediation/Arbitration
- Family Law
- Tenant Law
- Estate Planning
- Civil Litigation
- Personal Injury
- Elder Law
- and many more

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A Special Note to Senior/Retired Attorneys and Retired Judges

Your help is needed on CCCBA's Lawyer Referral & Information Service (LRIS). We are looking for members who can spare 3 or 4 hours per month to match potential clients with attorneys for 30-minute consultations.

Contact CCCBA LRIS Director Barbara Arsedo for more information at barsedo@cccba.org or 925-370-2544.

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We gratefully acknowledge our

2023-24 SUSTAINING LAW FIRMS

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Miller Starr Regalia

FIRMS WITH 20-29 ATTORNEYS:

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Littler Mendelson, P.C.

FIRMS WITH 11-19 ATTORNEYS:

Brothers Smith, LLP

Clapp Moroney Vucinich Beeman Scheley

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Gagen, McCoy, McMahon, Koss, Markowitz & Fanucci

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Kilpatrick Townsend & Stockton

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Whiting, Ross, Abel & Campbell, LLP

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Casper, Meadows, Schwartz & Cook

Craddick, Candland & Conti

Donahue Fitzgerald, LLP

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Ferber Law, APC

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Hartog Baer Zabronsky, APC

Horner Law Group, P.C.

Law Offices of Joseph H. Wolch

Livingston Law Firm, P.C.

Morrill Law

Patton Sullivan Brodehl LLP

Talbot Law Group, PC

Temmerman Cilley & Kohlman LLP

CALENDAR

UPCOMING EVENTS | OVERVIEW

The Contra Costa County Bar Association certifies that the MCLE activities listed on page 32 have been approved for the specific MCLE credit indicated, by the State Bar of California, Provider #393.

January 10 | Senior Section

Senior Section General Meeting (In Person)

Join the Senior Section for a general meeting to brainstorm future MCLE programs and social events.

Noon – 1:30 pm | Online on Zoom

January 11 | Barristers Section

Barristers Annual Afterglow Party (In Person)

5:30 pm – 8:30 pm | Tellus Coffee, 1410 N. Main St., Walnut Creek | Free for Barristers Section member and Judges, \$20 CCCBA members, \$35 nonmembers

January 19 | CCCBA

2024 Officer Installation & Awards Luncheon (In Person)

Speakers: Hon. Ed Weil | David Pearson
Superior Court Presiding Judge Edward Weil will give a State of the Judiciary address before swearing in the 2024 CCCBA Board of Directors and Section Leaders.

We will also be presenting the 7th Annual CCCBA Diversity Award to qualifying law firms and new awards from the CCCBA Port Chicago Taskforce. Don't miss this very special annual CCCBA event!

11:45 am - 1:15 pm | Contra Costa Country Club, 801 Golf Club Rd., Pleasant Hill | \$60 Judges and members of the Barristers Section, \$40 Law Students, \$55 Legal Support, \$65 CCCBA members, \$75 nonmembers

January 25 | Estate Planning & Probate Section

2024 Annual Probate Luncheon (Hybrid)

In Person 11:30 am - 1:15 pm, Virtual
Noon – 1:15 pm | 1 hour Estate Planning & Probate Specialization MCLE credit | Contra Costa Country Club, 801 Golf Club Road, Pleasant Hill | \$75 members of the Estate Planning & Probate Section, \$50 Judges, \$60 Legal Support, \$70 Barristers, \$85 CCCBA members, \$100 nonmembers

January 27 | Wellness Committee

Annual CCCBA January Walk at the Lafayette Reservoir (In Person)

Kids, friends and dogs welcome!
9:30 am - 11:30 am | Lafayette Reservoir,
3849 Mt. Diablo Blvd. Lafayette

February 6 | Education Committee

Depositions 2024 - Learning by Doing (Hybrid) Six Sessions

5:30 pm - 7:30 pm | 2 hours General MCLE credit per session | Specific details and faculty TBA. More information on page 33.

February TBD | DEI Committee

CCCBA's 7th Annual Lunar New Year Celebration Dinner (In Person)

5:30 pm - 7:30 pm | Location and details
TBA

Sponsored by: Jim Y. Yu

February 23 | Barristers Section

Bridging the Gap 2023

(In Person)

For new lawyers, young lawyers and those new to the county

9:30 am - 5:00 pm | 4 hours General MCLE credit | DA Community Room, 900 Ward St., (Entrance is on Court Street) Martinez | Free for CCCBA New Admittees (first year of practice only, never practiced before)

Sponsored by: Daily Journal

February 27 | Estate Planning & Probate Section

You Can Lead a Horse's Head to Water, But You Can't Make It Accept Your Settlement Offer: Settlements In Probate Code Matters (Webinar)

Noon – 1:30 pm | 1.5 hours General MCLE credit | Online on Zoom | Details TBA

February 29 | Women's Section

SAVE THE DATE - Women's Section SOCIAL HOUR

5:30 pm - 7:30 pm | Location and details
TBA

For more information on these programs, please contact Anne Wolf,

CCCBA Education & Events Director at awolf@cccba.org or (925) 370-2540 or check the calendar www.cccba.org/attorney-events

Depositions 2024 - Learning by Doing

This multi-part series will allow you to practice taking depositions, with feedback from seasoned veterans. The series will cover everything from mastering the admonitions, to advanced matters, such as taking the depositions of the expert witness. Often, a deposition can make or break a case, help you prevail on or overcome a summary judgment motion, and/or leverage a favorable settlement. So ask yourself, why not be better at this important discovery proceeding?

This practicum will feature lectures followed by the opportunity for you to conduct actual mock depositions in the presence of very experienced attorneys. You will be provided feedback tailored specifically to your questioning and approach.

Registrations will be limited to ensure individualized attention.

- Lectures via Zoom
- **Learning by Doing** portions held in Concord
- 5:30 pm - 7:30 pm
- 2 hours General MCLE credit per session
- Further details TBA at www.cccba.org/attorney-events

1 February 6

2 February 27

3 March 19

4 April 16

5 May 8

6 May 28

The Contra Costa County Bar Association certifies that this activity has been approved for 2 hours of General MCLE credit per session by the State Bar of California, Provider #393.

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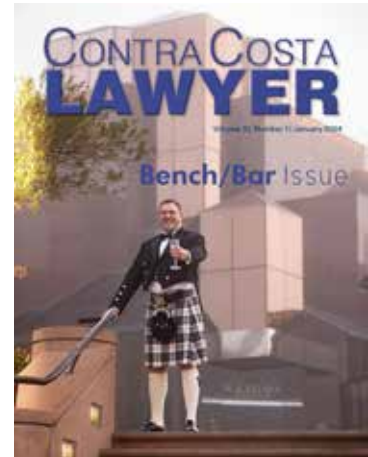
Interested? Call Stan Pedder or MacKenzie Bush at (925) 283-6816.

Advertising Space Available

Did you know that you can run classified ads in Contra Costa Lawyer and also on the CCCBA website? Classified ads run on the CCCBA website for 30 days. Members pay just \$75 per month for online classified ads that can include photos or graphics. For information, please contact Carole Lucido, CCCBA Communications Director at (925) 370-2542 or clucido@cccba.org.

Advertising Opportunities

Contra Costa Lawyer Magazine - Print and Online



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The Contra Costa Lawyer is the official publication of the Contra Costa County Bar Association. It is published every other month for an audience of more than 1,500 attorneys, judges and court officials, law libraries and public officials involved with the administration of justice in Contra Costa County and has a readership of approximately 4,500 online.

Both the print and online editions of Contra Costa Lawyer have won awards of excellence from the National Association of Bar Executives.

Cost effective display and classified advertising opportunities are available in the print magazine. Online ads are available on the CCCBA's website: www.cccba.org.

View and download the complete media kit at www.cccba.org/flyer/2024/ccba-adkit-2024.pdf

Contact CCCBA Communications Director Carole Lucido if you have questions, clucido@cccba.org or (925) 370-2542.



**Contra Costa County
Bar Association**

ANNUAL OFFICER INSTALLATION & AWARDS LUNCHEON

State of the Judiciary Address
by Presiding Judge Edward Weil

Passing the Gavel

Outgoing CCCBA Board President David Erb welcomes Incoming Board President David Pearson

Oath of Office

and Installation of CCCBA Board Officers & Section Leaders

7th Annual CCCBA Diversity Awards
Presented to Qualifying Law Firms

The Port Chicago Hero Awards
presented by the CCCBA Port Chicago Task Force

**Friday,
January 19, 2024
11:45 am - 1:15 pm**
In Person

**Contra Costa
Country Club**
801 Golf Club Road
Pleasant Hill

\$60 Judges & Barristers
\$40 Law Students
\$55 Legal Support
\$65 CCCBA Members
\$75 Nonmembers

REGISTER TODAY!

www.cccba.org/attorney-events/

Questions?
contact Anne Wolf at
(925) 370-2540,
awolf@cccba.org
or visit www.cccba.org.



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