

**JETT AWARD APPLICATION  
FOR SAN ANTONIO LEGAL SECRETARIES ASSOCIATION  
ALS/PLS STUDY GROUP**

I. General Description of Your Program

A. The official title of the program, the classification and category for which the entry is being submitted (entries may be re-categorized at the discretion of the Awards committee), the state/chapter name, and your name, address, telephone number, and email address.

Title: Certification Study Group

Classification: Large Chapter

Category: Certification Program

Chapter Name: San Antonio Legal Secretaries Association

Submitted by: Cheryl A. Wenzel, PP, PLS  
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San Antonio, Texas 78205  
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B. A brief description of your program, including its format, size, purpose, topic, and audience.

The study group sessions include 14 two hour classes presented to support staff as an aid in their preparation for taking the NALS certification exams.

C. A brief summary of your program. The purpose is to direct the readers' attention to those aspects or elements of the program that make the program exceptional and that make the program applicable to other states or chapters.

The classes consist of a guest speaker (attorney or educator) who comes and talks about the topic(s) for that particular class. The instructors are given the materials that will be covered and some quizzes to go over in class. They are also told that this is a national exam - not just regional, so they will not gear their class towards our state. Most of the quizzes have been prepared by previous students who have already passed their certification exams and they also obtain CLE for preparing quizzes and/or mock exams. See sample Class Schedule attached as Exhibit "A."

## II. Judging Criteria

### A. Needs Assessment

1. How was the need for this program identified (surveys, requests, please quantify)?

The need for this program was identified through numerous requests from members of our local association.

2. How does this program address this need?

Throughout the years, the program has grown and non-members as well as members join the study group. Most non-members who have joined and passed their exams, also then become members of the local association. Also, the instructors we have had teach the study group are amazed at the amount of information that is required to study for the exams and have been greatly impressed and request to come back again and teach. Some of the instructors have even encouraged their staff to join the study group and the local association in order to broaden their minds.

### B. Planning and Design

1. List the program's objectives.

The objectives of this program are to promote certification of members and non-members.

2. Describe the steps taken to design and develop the program (planning process, members involved, creativity).

The program was developed by taking the sections of the exam and dividing them up into different classes. This process has evolved over many years and through the effort of many of the members of the organization. The schedule is then set for the session and potential instructors are then contacted. Once the instructors have agreed to teach, they are then sent a letter thanking them for agreeing to teach a class as well as a copy of the material needed to teach and some additional quizzes for them to cover in class. The quizzes are given to the students ahead of time so that they can prepare for the class.

C. Logistics and Production

1. How was the program delivered to the target audience (room, room set up, etc.)?

The room was volunteered by the law firm of Cox Smith Matthews Incorporated ("CSM") which is centrally located in downtown San Antonio. The building provides free parking for the students, administrators and instructors for the class. CSM also volunteers their conference rooms for the day of the exams. See attached registration form as Exhibit "B."

2. Provide details describing educational materials, methods, and resources. Include samples of printed materials used (lecture, small group discussion, handouts).

The NALS booklist is provided to the potential students for the study group. Attached is a copy of the list that we have provided to the students and arrangements were made with a local bookstore to stock the books that were needed so the students would have easy access to the materials. See attached Booklist as Exhibit "C."

The instructors are given copies of the materials and quizzes for their use in the class. The students are emailed the quizzes the week before class so that they will have them ready. The day after class, the answers are emailed to the students.

Students are encouraged to ask questions and participate in quiz review, so that they will become more familiar with the terminology and information.

D. Budgeting and Finance

1. What is the annual income and expenses of your chapter/state?

The annual income and expenses for the San Antonio Legal Secretaries Association is \$23,670.

2. Was this program funded in whole or in part by a Grant from the NALS Foundation?

The study group program was not funded by a Grant from the NALS Foundation. Although, last year we had applied for a NALS Grant to provide a lending library for the students of the study group and we were successful in obtaining that grant.

3. What were the program's broad financial objectives (profit, break-even, or subsidized service)? *Choose one and tell why.*

The program's broad financial objectives have been for profit. We charge a reasonable fee for members and non-members and look for a good location that will not charge a lot of money. We have been fortunate the past few years that CSM has provided us with a free location to hold the classes and exams. Many of the non-member students become members after passing their exams. This is a great opportunity for people to hear more about our organization and to see that part of what we are is an organization that is geared towards educating the legal community.

4. Provide both the projected revenue and expense, as well as the actual revenue and expense.

Projected Revenue	\$1,500.00
Projected Expense	\$ 200.00
Actual Revenue	\$ 535.00
Actual Expense	\$ 123.85

5. Provide your best estimate of association resources expended on this program. You might use, for example, total dollars and total volunteer time.

It is hard to describe the total association resources expended on this project. This project has evolved over time and even with that it takes the volunteers hours to prepare exams, quizzes, send out information to the instructors, sending thank you letters to instructors, sending welcome letters to students. Just for one volunteer to attend all the classes that are offered is more than 30 hours of volunteer time for one person. Never mind the proctors that give up their Saturday for the exams. Each subject covered probably requires a minimum of two hours to prepare exams and materials. The instructors give up their two hours of class time and numerous hours to prepare to teach the classes. We are very fortunate to have a great legal community in which to work, that are willing to give of their time to assist others in continuing their legal education.

## E. Marketing, Promoting, and Advertising

1. List and describe the specific marketing, promotional and advertising vehicles used.

We prepare a registration form and class schedule which is then placed on our website (see attached) It is also emailed to our membership and they are encouraged to place the information at their firms so that others can see the information. Also, from word of mouth the class seems to grow.

## F. Evaluation

1. To what extent did the program achieve stated objectives (quantify results such as 10 new members)?

In this last class that we had from June through September 2005, we had 12 students. Nine members of the class passed the exams that they were taking. That is a 75% pass rate. We also achieved three new members to our association through the study group.

2. What broader impact, if any, did this program have on the growth, image or performance of the state/chapter or its members?

The study group continues to be a strong asset for SALSA because it involves local attorneys as instructors, they get to see how dedicated the students are and what kind of material they are expected to be familiar with for the exams. The attorneys continue to be strong advocates for SALSA and their programs through the study group. The study group seems to educate attorneys as well as the students. Many of the attorneys have told us that the information we are required to know for the exams, is very similar or even worse than what they study for the bar exam.

3. Based on the outcome of this program, describe the most significant changes you might make the next time you offer it or a similar program.

The program continues to be successful each year and a very valued commodity of our organization. The only change we are considering for the winter session is to have the class on Saturdays instead so that we can reach a wider area around San Antonio. We have been contacted by people outside the San Antonio area that would like to drive in to take the study groups but having the classes after work in the evenings, makes it difficult for them to attend. We will also be offering our first Professional Paralegal study course in the winter session to assist in increasing our numbers of Professional Paralegal certifications in the area.

CLASS SCHEDULE  
 CERTIFICATION STUDY GROUP: JUNE 2005

LOCATION: COX SMITH MATTHEWS INCORPORATED  
 112 E. PECAN, STE. 1800, SAN ANTONIO, TX 78205  
 6:00 p.m. to 8:00 p.m.

Date	Topic	Teacher
June 20	Introduction & Judgment, Written Communications	Cheryl Wenzel, PLS
June 27	Estate Planning	Rosie Trujillo, PLS
July 11	Law Library, Citations, Legal Writing Business Organizations, Contracts	Patty Rouse, Esquire Katy David, Esquire
July 18	Bankruptcy	Tom Rice, Esquire
July 25	Family Law and Criminal Law	Tim Daniels, Esquire and Dianne D. Garcia, Esquire
<b>AUG. 1</b>	<b>Deadline to apply for September exam</b>	
Aug. 1	Written Communications	Carl Werner, Esquire
Aug. 8	Real Estate	Sara Dysart, Esquire
Aug 15	Ethics	Ed Lavin, Esquire
<b>Aug 18</b>	<b>Mid-term</b>	<b>Cert. Committee</b>
Aug 22	Computer Information Systems & Office Procedures	Deana Simon, Esquire
Aug 29	Written Communications	Rosie Trujillo, PLS
<b>Sept. 10</b>	<b>All day mock exam (8:00 a.m. to app. 5:00 p.m.)</b>	<b>Cert. Committee</b>
Sept. 12	Accounting; Courts and Jurisdictions	Douglas Kiel, Esquire
Sept. 19	Final review & dictation	Cert. Committee
<b>Sept. 24</b>	<b>Exam (8:00 a.m. to 5:00 p.m.)</b>	<b>Cert. Committee</b>
Sept. 26	Celebrate!	

# BECOME CERTIFIED NOW!

**The San Antonio Legal Secretaries Association\***  
**will be holding a Certification Study Group**  
**in preparation for the Accredited Legal Secretary (ALS) exam**  
**or the Certified Professional Legal Secretary (PLS) exam**

Attaining this goal indicates your commitment and aptitude for succeeding in the ever-changing legal environment. Personal motivation is necessary to attain such a goal. The knowledge gained in preparing for the examination hones your on-the-job skills, so your duties can be performed more efficiently.

**Class Dates:** Each Monday evening beginning June 20, 2005 through September 19, 2005.

**Time:** 6 p.m. to 8 p.m.

**Location:** Cox Smith Matthews, Incorporated  
112 E. Pecan, Ste. 1800, San Antonio, Texas 78205

**Cost:** First-time attendees: Non-refundable fee of \$50 for SALSA members/\$75 for non-members. Attendees for retakes: Non-refundable fee of \$30 for SALSA members/\$60 for non-members. NOTE: This price covers only study session from June to September and does not include cost of books, examination fee, or other resource materials.

**Exam date:** Both ALS and PLS exams are given on a national basis on Saturday, September 24, 2005. Examination testing site will be here in San Antonio.

**About the exam: ALS...*the basic certification for legal professionals***

- PART 1 Written Communication (1¼ hours)
- PART 2 Office Procedures and Legal Knowledge (1¼ hours)
- PART 3 Ethics, Human Relations, and Judgment (1½ hours)

**PLS...*the advanced certification for legal professionals***

- PART 1 Written Communication (1¼ hours)
- PART 2 Office Procedures and Technology (1¼ hours)
- PART 3 Ethics and Judgment (1½ hours)
- PART 4 Legal Knowledge and Skills (3 hours)

Experience Requirements: ALS exam: One year experience

PLS exam: Three years experience (or more)

Class size is limited. If you are interested in joining, please fill out the attached application and return it to **Cheryl A. Wenzel, PLS, c/o Cox Smith Matthews Incorporated, 112 E. Pecan, Suite 1800, San Antonio, Texas 78205** as soon as possible. Registration fee may be paid the first day of class.

If you have any questions, please email Cheryl Wenzel at [cwenzel@coxsmith.com](mailto:cwenzel@coxsmith.com) or call 554-5359.

*\*The San Antonio Legal Secretaries Association is a member of the tri-level association of Texas Association of Legal Professionals and NALS...the association for legal professionals.*

**All books available at L&M Bookstore, 1716 N. Main, San Antonio, TX 78212**

**Telephone: 222-1323 Fax: 222-1580**

Book prices are designated by [ ]; prices quoted as of May 2005

## **BOOKLIST**

### **TEXTBOOKS FOR ALS EXAM:**

Sabin, William A., *Gregg Reference Manual*, 10<sup>th</sup> Edition, Glencoe McGraw-Hill,  
(ISBN 0072936533) [\$44.75]

NALS, Inc., *Basic Manual for the Lawyer's Assistant*, 7<sup>th</sup> Edition, West Group, 2001  
(West Material Order #40062464) [\$49.25]

### **TEXTBOOKS FOR PLS EXAM:**

Sabin, William A., *Gregg Reference Manual*, 10<sup>th</sup> Edition, Glencoe McGraw-Hill,  
(ISBN 0072936533) [\$44.75]

NALS, Inc., *Basic Manual for the Lawyer's Assistant*, 7<sup>th</sup> Edition, West Group,  
(West Material Order #40062464) [\$49.25]

NALS, Inc., *Advanced Manual for the Lawyer's Assistant*, 7<sup>th</sup> Edition, West Group,  
West Material Order #40181191 [\$65.75]

Rotunda, Ronald D., *Professional Responsibility*, 7<sup>th</sup> Edition, West Group,  
(ISBN 0314154450) [\$25.25] (Title: Rotunda's Blackletter Professional Responsibility)

The Harvard Law Review Association, *The Bluebook: A Uniform System of Citation*, 17<sup>th</sup> Edition,  
Cambridge, 2000. [\$18.95]