

JETT AWARD APPLICATION

General Description of Program:

1. What is the official title of the program you are submitting?

“Survivor Course”

2. In which classification and category are you submitting this program? Include your chapter/state, your name, address, and telephone number.

Classification: State

Category: CLE Series of Related Topics
• Promotion of educational series

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3. Briefly describe your entry in 25 words or less, including its format, size, purpose, topic, and audience. For example, “a series of six 2-hour audio conferences for support staff to assist them in dealing more effectively with clients.”

An annual seminar offered to legal professionals presenting up-to-date information to work more efficiently in the office and with the courts.

4. Provide a summary of your submission that explains why, in your opinion, this program deserves to win the Founder’s Award. While the rest of your responses should be strictly factual, this description may be more promotional in nature. The purpose is to direct the judges’ attention to those aspects or elements of the program that, in your opinion, make the program exceptional.

This program deserves the Founder's Award because it encompasses ALL facets of the NALS Mission statement, Vision statement, and Code of Ethics & Professional Responsibility.

The seminar is held simultaneously in the two largest cities in Arizona, Phoenix and Tucson. The marketing is state-wide, and presentation topics always are chosen for timeliness and immediate implementation by the legal support professional. It is an annual educational opportunity for all skill levels, which incorporates insight and updates on day-to-day procedures in the legal system.

This program has met its original objective by becoming the cornerstone of hands-on education for the legal support professional, expanding the market for new members, and establishing a steady source of income for NALS of Arizona.

Judging Criteria Questions:

Needs Assessment

- **How was the need for the program identified (surveys, requests, please quantify)?**

It is a constant challenge to stay familiar with the changes in the law and court systems. One solution is to offer a forum that assists legal professionals to help them stay on top of these changes so they can work more efficiently. The title of the seminar ‘Survivor Course’ is right on point because it presents information that is critical to get the job done. In addition, with the ever-changing advances in technology, it is imperative for legal professionals to be familiar with the different computer applications so they can perform well in this environment.

- **How does this program address this need?**

The Survivor Course gives law firms an opportunity to send their legal staff to this seminar to learn the most up-to-date methods and procedures when dealing with the courts. By having Court personnel make their presentations, we are assured of the most current procedures, advance notice of upcoming changes, and direct information to access court personnel for future assistance.

Planning and Design

- **List the program’s objectives**
 1. **To offer procedural information to attendees that will assist them in dealing with the courts, the ever-changing laws, and computer applications.**
 2. **To market NALS of Arizona as a viable source of legal education and opportunities.**
- **Describe the steps taken to design and develop the program (planning process, members involved, creativity)**

Assessing the need of the legal community and its professional staff is always the first part of the planning process. Due to the ever-changing laws, it is first a challenge to chose the subjects that are most timely. NALS of Arizona has many members who have their pulse on these changes and offer assistance and suggestions in this area. The education director of each local and state chapter work together to contact potential speakers who will offer information on the selected legal topics. The local and state chapter presidents are also involved with the selection of the

location, registration and selection of the lunch menu. The state marketing director becomes involved with the design and distribution of the seminar flyers to law firms throughout the state.

Logistics and Production

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

At each seminar location, the room was set up in a classroom style with the speakers utilizing a podium and either handouts or PowerPoint presentations.

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

The following table reflects the speakers (in a lecture format) who presented valuable education at each location (Tucson and Phoenix) from 2002 to the present:

2002 – Tucson	2002 – Phoenix
Rob Charles, Esq. Lewis and Roca LLP Wendy Graham Graham Communications Patricia Noland, Clerk of Court Pima County Superior Court Sarah Simmons, Esq. Brown & Bain PA (Keynote Speaker)	
2003 Tucson	2003 – Phoenix
Patricia Noland, Clerk of Court Pima County Superior Court Jeff Handler, Clerk of Court Arizona Court of Appeals Susan Mizner Chandler Tullar Udall & Redhair Ronald S. MacMillan Track Down, Inc.	Michael Jeanes, Clerk of Court Maricopa County Superior Court Lori Landis, Operations Manager U.S. District Court Linda Polcha, PLS Fennemore Craig - Litigation Overview Mike Temple, Chief Deputy Clerk U.S. Bankruptcy Court

	2004 – Phoenix
	<p>Mary Van Loan, Asst. Dir. Bus. Services Arizona Secretary of State</p> <p>Cathy Lucero, Administrative Manager Maricopa County Recorder’s Office</p> <p>Mary Benchimol, Manager District Training Program U.S. District Court of Arizona</p> <p>Nicole Overholt, Software Programmer U.S. District Court of Arizona</p> <p>Teresa Perry, Account Executive LexisNexis</p>
2005 – Tucson	2005 – Phoenix
<p>Walter F. “Skip” Woods, Esq. Drive By of Changes Under Bankruptcy Reform Act</p> <p>Linda Mattern, PLS, CLAS Getting Yourself Out of Debt</p> <p>Jim Marten, Secretary of State’s Office Doing Business with the Secretary of State</p> <p>Chris Roads, Esq. Dealing with Details at the Recorder’s Office Pima County Recorder’s Office</p> <p>Ron Ezell, ACPSI HELP, LLC H.E.L.P. Is Here!</p>	<p>The Honorable Penny Willrich (retired) Phoenix International Law School Writing & Grammar Rules – How to File Briefs a Judge Will Read</p> <p>Michael Jeanes, Clerk of Court Maricopa County Superior Court Working With the Clerk’s Office</p> <p>Helen Purcell, Recorder Maricopa County Recorder’s Office Working With the Recorder’s Office</p> <p>Larry Cohen, Esq. Ethics and Support Staff</p>

Budgeting and Finance

- **What is the annual income and expenses of your chapter/state?**

Attached is the Variance Report for the budget approved for the fiscal year beginning May 2005. Our projected income/expenses is \$10,650.

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

NALS of Arizona continues to offer this seminar as an opportunity to provide some up-to-date information to the legal community and it counts on the profits as a major portion of its annual income.

- Provide the project revenue and projected expense, as well as the actual revenue and expenses.

2002: Actual income/expense: \$5,487.10 (income) \$1,752.16 (expenses)
 Projected budget: \$5,000.00 (net income) \$2,000.00 (expenses)
 Net Profit: \$3,734.94 (for one seminar in Tucson)

2003: Actual income/expense: \$6,985.00 (income) \$2,476.39 (expenses)
 Projected budget: \$4,000.00 (net income) \$2,500.00 (expenses)
 Net Profit: \$4,508.61 (for two seminars – Tucson & Phoenix)

2004: Actual income/expense: \$3,512.50 (income) \$1,984.19 (expenses)
 Projected budget: \$4,000.00 (net income) \$2,400.00 (expenses)
 Net Profit: \$2,314.12 (for one seminar in Phoenix)

2005: Actual income/expense: \$ TBD (income) \$ TBD (expenses)
 Projected budget: \$5,000.00 (net income) \$2,500.00 (expenses)
 Net Profit: \$ TBD

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

Resources = time, talent and creativity of the members who work together to make this seminar successful. There are many hours devoted to this endeavor – selecting a location, making arrangements with speakers, contacting possible sponsors, designing flyers and registrations for the event, printing handouts and programs, and making the seminar worthwhile for the attendees. This seminar is possible only because of the coordinated efforts of the members on both the state and local levels – they must all work together to make it happen. An estimate of volunteer time is 100 hours in each city.

NALS of Arizona works very hard to keep expenses low and overhead to a minimum. Therefore, we seek sponsors to reduce the overall costs and find the least expensive ways to print programs, copy flyers, and distribute them in the most economical way. In recent years, it has been helpful to work with law firms and courier services who support NALS and offer financial assistance with the bulk mailings and deliveries. The association always presents gifts to the speakers for these seminars and an estimate of total costs would be \$250 for each seminar.

Marketing, Promoting, and Advertising

- Describe the promotion used for this program.

The Survivor Course was advertised and promoted by mailing or distributing flyers to law firms in Phoenix and Tucson. In 2002, it was also sponsored by the Pima County and Maricopa County Bar Associations, which helped distribute the flyers to the members of the bar. Each city hosting the seminar has been responsible for the marketing of the seminar, and each flyer was specific to that particular city's seminar. In 2005, the association is advertising both seminars in Phoenix and Tucson together and mailing the flyer to law firms through the entire state. With this new marketing concept underway, the association is hopeful to reach more people who may be interested in attending the seminar that suits their specific requirements.

- List and describe the specific promotional and advertising vehicles used. Evaluation

Mailing or distributing flyers to law firms in Phoenix and Tucson has been used most effectively. Attached as exhibits are copies of the flyers from 2002 to the present.

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

NALS of Arizona has successfully sponsored the Survivor Course for the last four years (either in Tucson, Phoenix or both cities). This success has strengthened our visibility and viability in offering meaningful education. It also has become a profit center for NALS of Arizona, which has enhanced the association's ability to offer additional incentives at state conferences for new members, first-time attendees, and keynote speakers. The profits have fortified the NALS of Arizona budget enabling the association to re-institute its scholarship program and to fund its president, president-elect, and director of membership to Tulsa for the Professional Development Conference.

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

First, the development of this seminar has allowed the members to work and grow together while offering the legal community an opportunity to receive current information directly from the courts and distinguished legal professionals. Speakers throughout the community have shared critical information to help everyone maximize their potential. Second, the legal community in Phoenix and Tucson are more aware of NALS and what it has to offer for everyone in the legal profession. The connection between the local chapters and the state chapter is an extra benefit that has created awareness throughout the state. NALS is definitely on the map in Arizona.

- **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.**

In pricing the seminar, be sure to include lunch in the price. Many firms, government agencies, and municipalities WILL pay the entire registration fee if lunch is included; however, they will NOT pay the optional expense of lunch.

This seminar is best scheduled on a Friday. Most non-NALS members will NOT give up their precious weekend to attend a Saturday seminar.

Also, the original seminar was a day and a half, i.e., all day Friday and Saturday morning. It is best to keep it one full day on Friday.