



JETT AWARD APPLICATION

Philadelphia Legal Secretaries Association ("PLSA") Philadelphia, Pennsylvania

I. GENERAL DESCRIPTION OF PROGRAM

A. **Official Title** **SECRETARIAL BOOT CAMP**

Classification Large Chapter

Category CLE One-Time Program

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B. **Brief Description of Program**

This one-day program was developed to provide advantageous training in various areas of the legal profession that would benefit all levels of support personnel including staff that may not be receiving adequate training due to limited training resources from their employers (particularly mid-to small-size law firms).

C. **Brief Summary of Program**

Secretarial Boot Camp ("SBC") was visualized as a one-day seminar held on a Saturday from 8 a.m. to 5 p.m., providing 6.5 hours of continuing legal education credits ("CLE") in the format of military style basic training. The selected topics focused on building valuable skills that legal professionals already possess and developing a strong knowledge base in the legal industry at an affordable price. As legal professionals, we felt the following topics would best enhance each attendee's daily career challenges: Business and Office Etiquette; Law Office Ethics-The Basics; Working with Multiple Attorneys and Difficult People; Do You Write Right? Grammar, Spelling and Proofreading; and Microsoft Word-Styles & Advanced Features.

We meticulously selected qualified facilitators that would attract attendees who would be interested in improving their skills and to impress upon them that this seminar is a professionally academic approach to strengthen their career. A folder containing the program booklet, handouts, writing tools and membership information was presented to each attendee. At the end of the seminar, a review was conducted by playing a game – "Boot Camp Jeopardy" (Exhibit H), which is similar to Legal Jeopardy. The questions and answers were chosen by the facilitators from their session.

II. JUDGING CRITERIA

A. Needs Assessment

1. How was the need for this program identified?

Recognizing that PLSA had not offered the Basic Legal Training Course (“BLTC”) or any study group for certification in over three years, it was evident that we needed to gradually market the opportunities NALS and PLSA had to offer in education, certification and membership.

2. How does this program address this need?

This program was the initial step for members and non-members to realize how exciting and painless it is to receive certification and continuing education through a professional organization; to stay abreast of their specialized skills; and to convey this additional knowledge to their workplace; and, at an affordable cost.

B. Planning and Design

1. The Program’s objectives for the chapter project:

- to educate and certify our legal staff through NALS and PLSA by offering college acceptable CLE programs;
- to market the career enhancement opportunities PLSA and NALS have to offer; and
- to increase membership.

2. Describe the steps taken to design and develop the program:

PLSA planned the program, as a full-day Saturday seminar from 0800-1700 hours (*military hours*). The theme “Secretarial Boot Camp” – Are you ready to be all you can be?” was based on military concept, using Military dialect, to make the program more appealing. The board met and decided on a date and venue (the *barracks*) that would hold at least 40-45 people (*cadets*). We decided to hold five one-hour sessions (*drills*) with 15 minute breaks in between leaving time at the end of the program for review and questions. Once the topics were selected, the schedule was drafted to decide on which sessions would best be suited for the morning sessions and which one would best be suited for the afternoon sessions to hold our cadets attention. For each topic, we specifically wanted our faculty (*Drill Instructors*) to be professionally specialized in each area. Therefore, we contacted attorneys, law office administrators, office systems analysts, and training and consulting companies.

Due to a full day of sessions (*rigorous exercises*), we provided continental breakfast and a buffet lunch (*chow*) which were served in the conference room (*mess hall*). Before the cadets could graduate, we decided to end the program with

some fun by developing the jeopardy game (*Boot Camp Jeopardy*) based on questions and answers, given by the Drill Instructors, for review.

Registration cost for the seminar included all rigorous exercises, chow, graduation ceremony with proper saluting of the *Drill Sergeant*, a personalized Certificate of Completion (Exhibit F) and dog tags (Exhibit E). Recruitment fee (to *enlist*) for this full day of drills was \$35 for members and \$40 for non-members. Forty (40) people enlisted, thirty-seven (37) actually attended the program. Each Drill Instructor was given a Certificate of Appreciation (Exhibit G) with an Army green thermal lunch box filled with rations and a bandana. All PLSA members in attendance wore camouflage tee shirts for easy recognition by non-members. Everyone was given a name tag.

C. Logistics and Production

1. How was the program delivered to the target audience?

SBC was conveyed to the cadets by each Drill Instructor's presentation. It was hosted at the Law Firm of Pepper Hamilton LLP (a central location downtown) in its Philadelphia Conference Center. The room was arranged in classroom style with seating facing the podium and screen. IT personnel were available for technology support, as each Drill Instructor utilized PowerPoint slides and colorful handouts for a more visual learning experience.

2. Provide details describing educational materials, methods and resources.

At the registration table (*enlisting station*), each cadet received a folder (with pockets to store their handout materials) which included the program booklet (Exhibit D), a PLSA ink pen, a writing pad, an informational brochure about PLSA, program evaluation forms and membership material with an application. The Drill Instructors provided and presented educational materials for their exercise in color and some were velobound.

D. Budgeting and Finance

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

Annual income of the Philadelphia Chapter for 2008-2009 was approximately \$17,797 and expenses were \$14,281.

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

A \$300 Grant from the NALS Foundation was awarded to PLSA as partial funding for this program.

3. **What were the program's broad financial objectives?**

The overall financial objective was to break even in exchange for new members, recognition and to impact upon them that our association can provide a full day of legal education (at an affordable cost) and certification for legal staff.

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

Projected Revenue:	\$2,500
Projected Expenses:	\$2,500
Actual Revenue:	\$1,680 (includes \$300 Foundation Grant)
Actual Expenses:	\$885

5. **Provide your best estimate of association resources expended on this program.**

Total dollars expended included the purchase of certificates, speaker gifts, game items, and breakfast, lunch and afternoon snacks. The volunteer time was not tracked, however, at three board meetings time was allotted for updates and discussion, most of the planning and developing was done via electronic email. Time was also spent in preparing the program materials and packets, representing approximately two (2) hours. Our Drill Instructors volunteered their services; copying of program and conference room space were donated and hosted by local law firms and two members donated the dog tags and tee shirts. After our expenses, we actually profited from this program.

E. **Marketing, Promotion, and Advertising**

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

- Publicly announcing the upcoming Program at each PLSA's monthly Educational Dinner Meetings, Lunch-n-Learn Programs and special events; (Exhibit A)
- A flyer was designed using military photos incorporating the program topics with the photos to captivate our audience; (Exhibit B)
- The flyer was electronically emailed to all chapter members, non-members, law firms, companies and corporations in and throughout the city of Philadelphia;
- The flyer was posted on PLSA's web-site and in PLSA's local publication-the *Bulletin*, which is published quarterly; and
- A special ad was submitted and advertised in *The Legal Intelligencer*, Philadelphia's local legal newspaper. (Exhibit C)

F. Evaluation

1. To what extent did the program achieve stated objectives?

This program met all of PLSA's expectations. SBC proved to be an affordable legal education program provided for legal staff who was looking to enhance their skills. This program generated new members and an interest in the Association, membership and the Basic Legal Training Course ("BLTC"). The program's objectives were achieved through the support, commitment and attendance of our members and outside legal staff.

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

The chapter gained recognition as a professional organization that offers skilled training and certification. People attending the program were impressed with the quality of the education presented and asked if the program would be repeated and, if not, what other educational training programs were offered. This program was mentioned in Tulsa and other state/local chapters are presenting this same program in their chapters and a portion of this program was utilized in the president's track in Tulsa, March 2009.

3. Based on the outcome of this program, describe the most significant changes that might be made the next time a similar program is offered.

According to the evaluation forms we received from the attendees, the materials presented were informative and impressive but most importantly, helpful; the aspect in which the facilitators presented was professional and presented with clarity. It was expressed that the sessions could have been longer because it was too much material for the facilitators to cover in one hour, therefore, instead of five topics we would consider having four. This is basically the only change deemed significant. This program was one of the best programs we have presented; it generated new members, an interest in the Association and drew attention to the training, education and certification programs NALS and PLSA have to offer. Also, as a result of presenting this program, we received five (5) non-members who would like to study for the BLTC.