

The Legal Pad

2009-10, Issue 3

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On the Move!

ALA Worldwide - 30 Countries, 100 Chapters, 10,000 Members

by Judy Anderson

Steven Wingart, CLM, Executive Director of Marshall Gerstein & Borun, LLP, in Chicago, IL, and member of ALA's Board of Directors, serving Regions 4 & 6 as At-Large Director, visited Tulsa recently and brought news to Tulsa Chapter members about the development of the Association's rebranding initiative. He also spoke of the Board's Plan of Work for the coming year as well as about the Certified Legal Manager (CLM)SM program and process.



Steven Wingart

Steve addressed the question of why ALA moved ahead with rebranding in 2008 when the economy was "tanking." "By moving forward, we differentiated our Association from others." He shared the history of the process as having begun in 2006 with the *Mignerone Committee* which spearheaded an Association name change feasibility study. The *Nigon Committee* followed in 2007 with deeper digging as to the Association's need for image refreshment and renewal. Based on results of a significant member survey, it was deemed conclusive that some 82% of members surveyed preferred the name *Association of Legal Administrators* over any other; but it was also evident that there was a need to reposition the organization. In 2008 BrandSavvy, Inc. was hired for consultation and professional services to guide us through a comprehensive image study and rebranding effort.

Members present at Tulsa Chapter's September meeting viewed the DVD which had unveiled ALA's new logo to attendees at the national conference in New Orleans in May 2009. Supported by customized lyrics to the tune of *Taking Care of Business*, the logo development was graphically and energetically displayed! However, as Steve cautioned, it is not just about the logo/brand. It is about who we are. The tag line (shown at the bottom of this page) supports the logo which capitalizes on the intersection of arcs from two circles. One circle represents ALA's global outreach; the second its unparalleled member support services. Where the circles come together is our *connection*.

Your Connection is about the "you" in Your. "It's all about the members."

Knowledge is understanding the issues and gathering information into a package to present to members. "It includes education where we present the knowledge to members." And it is an ever-evolving concept, never stagnant.

Resources are the tangible benefits: publications, LMRC, Help Desk, and on and on.

See 'Wingart Speaks' at pg 5

Your connection
to knowledge, resources and networking



Leaders working....

Member Retreat & Mini CLI

...and...
...not so much

"you bend it ..how?!"

Calendar of Events

September 16		ALA Webinar - <i>Strengthen Your Bottom Line With a Well-Built Budget</i>
September 26	8:00-12:00	CCW Habitat for Humanity
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October 1-3		Region 4 Conference, San Antonio, TX http://www.alanet.org/meetingsevents/conf/2009reg4/hotelinfo.asp
October 1		Regional Nominating Committee Meeting
October 5-9		ALA - Professional Legal Management Week SM (PLMW) http://www.plmw.org/
October 14	11:30-1:00	Chapter Board Meeting
October 15	11:30-1:00	Chapter Meeting, <i>Risk Management</i> , Kelley Heide Martin, <i>Claim Counsel at Travelers Insurance Company</i>
October 16-18		ALA - Official Community Challenge Weekend
October 21		ALA Webinar - <i>Stepping Out of the Rubble: Developing a Disaster Recovery Plan That Works</i>
October 21-22		ALA - Intellectual Property Retreat, Savannah, GA
<hr/>		
November 11	11:30-1:00	Chapter Board Meeting
November 11		ALA Webinar - <i>Control Stress Before It Controls You</i>
November 19	11:30-1:00	Chapter Meeting, Topic TBA
November 21		ALA - Association Nominating Committee Meeting
<hr/>		
December 9		Chapter Board Meeting
December 12		ALA - FALA Board of Trustees Meeting, Seattle, WA
December 17		Chapter Meeting, <i>Christmas 'Wrappin'</i>

A Look Ahead

February 5-6		ALA - Regional Team Orientation, Deerfield, IL
February 18-20		ALA - Law Firm Financial Management Conference, Carefree, AZ
May 2		ALA - Certified Legal Manager (CLM) SM Exam, Boston, MA
May 3-6		ALA - Annual Educational Conference & Exposition, Boston, MA
June 14-16		Essential Competencies of Legal Administrators, Denver, CO
June 25-27		Chapter Leadership Institute, Caesars Palace, Las Vegas, NV

The Insider: Charlene Reid



Charlene Reid

MEMBER: CHARLENE REID

FIRM: Best & Sharp

Career

My interest in the legal field started when I was a kid watching old Perry Mason re-runs and police dramas. The lawyers always seemed so astute and resourceful and somehow always saved the day. When I married right out of high school, I promised my dad I would go to college. But I needed a job and I figured in a few years, maybe with a legal assistant degree, I could find something better working in a law firm, going to court and being right in the middle of interesting whodunits! There was a legal assistant program at TJC and I promptly enrolled. I graduated in 1986 and obtained a CLA designation. My first job as a legal assistant was at a plaintiff firm, Howard & Widdows. There I got to do many things that lawyers did - research, writing motions and briefs, interviewing clients and witnesses, and I loved it. The only thing I didn't do much of was trial work.

Finally, when a friend left her job at Best & Sharp, she put in a good word for me and I landed a position there. Best & Sharp did lots of trial work, mainly in the area of medical malpractice defense. Instead of working on three trials like I had during my entire eight-year tenure at Howard & Widdows, I was now working on about three trials a year! The cases were always interesting and complex. Over the years I followed cases from start to finish and attended many trials.

In early 2006 the partners approached me, advising that Susan Lyons, the legal administrator of the firm, would be retiring. They asked if I might be interested in her position. It sounded interesting and certainly different, but I had no experience. Nevertheless, I was ready to do something challenging so I accepted. Susan helped train me until the end of 2006 when she retired.

While Susan was a great help to me, there was no way that she could have prepared me for all of the issues I have faced in an area that is constantly changing. Thankfully I joined the Tulsa ALA Chapter and its members have been so helpful. My first year was very difficult (as everything was a crisis) but now I feel that I have finally settled into the job. The one thing I really love about it is the diversity of activity. I have been able to work on a variety of types of projects and assist the firm in



moving into the twenty-first century. It has given me great satisfaction to help motivate employees and aid them in reaching their potential.

Family

I have three boys, Josh (25), Alex (15) and Kyle (11). A few years following a divorce, in 2003 I married a wonderful man, Brad Smith. His adoption of my youngest son was finalized this year.

I don't know that we have a "favorite" vacation spot because we try to go a different place every year. The one destination we always try to get to is South Padre Island in July. All of my mother's family lives in south Texas so the kids have cousins to keep them occupied and I have relatives to catch up with. Lots of times we rent a condo and all hang out on the beach together. It is definitely a good time.

The Real Charlene

In 2001, after meeting Brad, I did a tandem parachute jump. Brad is an avid skydiver and when I started dating him I wanted to know **why anyone would feel the urge to jump out of an airplane** so I tried it. It was a huge adrenaline rush and not nearly as scary as I thought it would be, but I have yet to go for jump number two. A few months after my jump, my photo appeared in an issue of *Parachutist* magazine. This is a big deal because most jumpers, like Brad, have been jumping for years and haven't made it to the magazine. Brad later told me that he begged the magazine staff to run my photo in a feature to help win some brownie points with me. I hate to say that it worked!

Other than that, there isn't much about me that people don't know. I do like to run which I began about five years ago for fitness. It allows me to think and regroup on those days when everything seems to be going haywire. Sometimes it will just be enough to get me out of a crummy mood.

I'm enjoying my position as Secretary on the Tulsa ALA Board this year and I'm learning a lot about how the organization works. Some things that the long-time members take for granted are new to me, so it is all very interesting. The Tulsa Chapter has been so great to provide friendship and advice and to let me know that, on the bad days, I am not alone!



2009 Tulsa Legal Expo



Sincere thanks to our **ALA Tulsa Business Partners** who generously sponsored our 2009 Expo in March, and who continue to participate with us in other ways. As it is appropriate for your firm or organization, please consider doing business with these companies. *A Hollywood red carpet salute to these business partners!*

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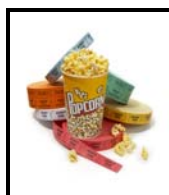
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**Platinum Chapter Award
 for Value to Members**



**Green Country's Network
 of Law Office Managers**

Wingart Speaks, Cont'd from pg 1

Networking in some ways is the most important benefit of the Association -- networking with each other as administrators but also networking with ALA's headquarters staff and networking with the available information.

BrandSavvy delivered on the brand promise; but there is still work to do. In fact, Steve invited Tulsa members to view the Board's Plan of Work entitled, "The Horizon and Beyond 2009, Defining and Fulfilling the Brand Promise of Being *Your Connection to Knowledge, Resources and Networking*," now available on ALA's website at http://www.alanet.org/members/strategic_planning.aspx (which requires member login). Steve expanded the formal Plan document by sharing these thoughts:

- Education and the delivery of knowledge (#2 of the Plan) is the core of ALA's primary mission and there remains a requirement for the Association to be responsive, and nimble in changing, to meet the needs of the time;
- The CLMSM program speaks to the concept of life-long learning whether you complete the requisite study with an eye to sitting for the exam to attain the CLM designation or, rather, to improve your awareness and knowledge for your daily responsibilities;
- ALA strives to assist members in developing strategic alliances with other members, with colleagues involved in career expansion, with business partners who offer expertise, and others bringing value and support to our profession;
- ALA emphasizes business and personal ethics; and, in fact, the Board will be reviewing our current *Code of Professional Ethics* with an eye toward revision and refreshment to maintain relevance in our changing work environment;
- The Board and HQ Staff consistently consider the need and method for delivery and communication of information and knowledge without leading members to information overload. It's a delicate balance.

The Future Is Bright! "This is an important time in the Association's history and it's exciting to be part of it."

Steve's visit was enlightening and helpful and brought refreshment to our group. It's time for renewal! It's time to move! In fact, ALA is ON THE MOVE!!

**Your connection
to knowledge, resources and networking**



ALA Executive Director John Michalik to Retire

Signaling the end of his 15-year tenure as ALA's chief executive officer, and a 35-year career in association management, John Michalik will retire in late January 2010. In his letter advising the Board of his decision, Michalik observed that: "There is no good time to leave – and certainly there is no good time to end an infinitely happy relationship such as I have and have had with the Association of Legal Administrators. However, it is and always has been inevitable that no matter how mutually pleasant and productive, it had to end sometime. Going on forever has not been one of our available alternatives."



ALA President Susan French Koran noted that, "Though John Michalik's inevitable retirement has been foreseen by the Board of Directors for some time, it is nonetheless a sad reality for us to accept his resignation. Much of the Association's success

over the past fifteen years is attributable to the quality of John's leadership and management. His strategic vision and fiscal guidance has taken the Association of Legal Administrators to a new level. He has played a key role in the development and projection of the image of ALA members, the role of the legal management profession, and the value and meaning of the Association's brand. The positive impact of John's commitment to and passion for ALA will be felt for many years to come."

"The Association's members have a great deal of gratitude for what John Michalik has done for us," Koran said, "and one of the best ways in which that gratitude can be expressed is to continue the legacy he has built. With that in mind, the Search Committee and Board of Directors welcome the opportunity to select the Association's next Executive Director, who will help forge a new path and continue the success of ALA."

Rebranding With A Bucket List

by Judy Anderson

The focus since May on ALA's re-branding and all the hype about this opportunity to refresh, renew and step out has inspired me to look around my own world. In doing that, somehow I was reminded of *The Bucket List*, a poignant comedy-drama directed by Rob Reiner, starring Morgan Freeman and Jack Nicholson about two unlikely friends identifying things they wanted to do before dying from their terminal cancers and then setting out to actually do those things. If you have seen the movie, you will recall that the men's personalities were quite different from each other; nonetheless, they each had trips to take, adventures to seek after and relationships to mend.

Though Freeman and Nicholson's lists involved personal issues for the most part, it struck me that developing a professional Bucket List could be an uplifting and beneficial thing for me. So last week as I looked around my firm at the files to be closed, staff training needed, project stacks on desks and dishes in the sink (yes, those too), I consciously thought "It's just another day" .. a day today like the day yesterday and probably like the day tomorrow will be. But *must* it be the same tomorrow? What might I do today to improve things for tomorrow? In fact, before I leave my current position, due to a change in health or simply a season of life, what can I, what *should* I, accomplish or put in place, in fact, to leave my position better than I found it?

The role of legal administrator is one of a professional, a mentor, a teacher, coach, manager, a leader. Clearly, a segment of that overall role is to guide the firm/department (i.e., the firm) *today* through a successful day with support desks filled with qualified staff, supplies in the cabinet to meet the needs of each lawyer's practice, equipment on hand and functioning to support document creation, scanning, faxing, printing, all manner of communications, and all the rest. I have rediscovered through all this that I don't want to leave my job with some of the things in my office in their current status.

And so, may I invite your similar consideration. What things in your office should be completed or put into motion before you are *finished* there?

- Are processes in place for the critical functions of legal services and support, as well as administration of the office? Are those processes documented; is staff trained to follow them?
- Is staff in each position trained to the level of today's needs and mentored to have developed within themselves their own personal bent toward daily improvement and life-long learning?
- Are there at least two people trained for each position or task to accommodate unexpected absences or job terminations?
- Is there regular retraining of all staff regarding not only the Oklahoma Rules of Professional Conduct for lawyers but also the parallel ALA Code of Professional Ethics for legal administrators (found on page 4 of *The Legal Pad* November/December 2008 at [http://www.alatulsa.org/wp-content/](http://www.alatulsa.org/wp-content/uploads/2008/12/2008-special-edition.pdf)

[uploads/2008/12/2008-special-edition.pdf](http://www.alatulsa.org/wp-content/uploads/2008/12/2008-special-edition.pdf)).

- Is your file closing, storage and destruction policy in place and has implementation of the process been kept current?
- Is your disaster preparedness and recovery policy in place and current; do your lawyers and staff even know of its existence and do they know what their role is if it must be activated?
- Are administrative functions fully documented and covered by "how to" lists/manuals in your own office?
- Are your staff benefit plans documented and serviced by credible third-party administrators/servicers; or, if administered in house, is there a plan for coverage of those tasks in case of your absence?
- Are the simple things completed in your own office – all filing done with file drawers labeled as to content (i.e., could the partners/shareholders in your firm *find* anything in your office if they even knew for what they were looking)?
- Have you identified what institutional knowledge you have that no one else has and determined how to document it or pass it on?
- Is there someone on your staff whom you have identified or begun training to replace you when you leave? Have you, in fact, developed an attitude of daily working toward replacing yourself?



I believe part of our professional responsibility as legal administrators, by whatever name we might be called, is to tend to the items listed here (no doubt among many more) as well as to maintain an orderly, organized and current work station of our own rather than risk throwing the firm's ownership and executives into chaos in the event of our planned or unexpected departure. Although it has been said that the administrator's job is one that goes unnoticed unless a task is found undone, the choice to hold the position is ours. Making the choice to accept the position brings with it an obligation to fulfill the role with integrity and honor and with the distinction of suitably supporting the firm's legal practice in whatever manner is needed by the individual firm. To function in a climate of disarray falls short of the level of ethical professionalism for which we should strive.

Being among the chosen legal administrators to whom this writing seems directed, I recognize the sound theory of the article to this point. I also recognize what feels like the impossible reality of getting all these things done *while* surviving each day's firestorms. Let me say that my personal call to arms...a call to *rebranding* my own career...summons me to think afresh of workable methods of aligning the tasks to be done, of delegating (not dumping) those

See 'Bucket' at page 7

Bucket, cont'd from pg 6

things which can be handled by another and then, perhaps most importantly, of listing those things which need/require attention but which never make it to the top of the heap and presenting that list to my managing partner/executive committee. It seems to me that it falls on the negative side of ethical behavior for me (a) to be aware of administrative tasks needing attention, (b) not to have, or be able to create, time to give attention to the need and (c) not to disclose to the owner(s) the absence of coverage. IF the reaction of the partners/shareholders turns out to be inattention, at least I can rest easy knowing the information has been shared with the stakeholder(s) of the firm.

Perhaps, however, positive self-encouragement to look anew at what is not being done which should be, what *is* being done that doesn't need to be, and considering a new and different approach for the tasks at hand could lead me to a different outcome. Remember the definition of insanity: "continuing to do the same thing you've been doing and expecting a different outcome." Translation: if I merely consider tomorrow to be a continuation or copy of today, then it probably will be. However, if I can don my rose-colored glasses as if I am walking into my office for the first time, I may see new and different approaches for aligning my *Bucket List* items to some reasonable configuration.

This rebranding could be fun; it could be fruitful; it could be rewarding; and it could be healthy.

Speaking of health (now I'm meddling), what about your *personal* Bucket List? With all of this fresh thinking now abounding around you, there could be a big-time pay back for allowing your personal life some restoration. When was the last time your mate or other most significant person heard your expression of how thankful you are for him/her being in your life? When was the last time you looked around and gave thanks for oh, my...for all those people and things and abilities in your life and on and on? When was the last time you spent time scheduling *first* the time you would spend with your mate, your special person, your children/grandchildren, your church or synagogue, yourself in the coming week?! And *really* what about your *Bucket List*? What things are there that you've never had, or taken, time to do? If finances prohibit, find a book or a movie to represent the trip or activity. If it's a phone call, make it. If it's a letter, write it. If it's an apology, give it. If it's forgiveness, extend it.

I am convinced that ALA's rebranding will be good for the Association. It's new, it's fresh and it has taken us, as the body of members, another step "out there" in our professional world. It has extended *our* Association from being not only *The Source of Legal Management Information and Knowledge*. It has clarified that ALA is also *Your Connection to Knowledge, Resources and Networking*.

My personal Bucket List includes **speaking your mind and share your heart**. Thanks for enabling me to check that one off. What's your goal for rebranding-- what's on your own *Bucket List*?



ALA TULSA

Green Country's Network
of Law Firm Managers

THE LEGAL PAD

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ALA MISSION STATEMENT

The mission of the Association of Legal Administrators is to promote and enhance the competence and professionalism of all members of the legal management team; improve the quality of management in law firms and other legal service organizations; and represent professional legal management and managers to the legal community and to the community at large.

ALA also provides the *Legal Management Resource Center* (LMRC), <http://thesource.alanet.org>, an online resource answering legal management questions.

To learn more about ALA, visit www.alanet.org.

P.S. - The President Says...

Football has begun once again! I am quite the football fan. I must admit, I grew to love it even more when one of my sons started playing the game in 3rd grade. He played with many of the same kids from the 5th grade all the way through his senior year in high school. Early on, his team could dominate other teams with only a few really good players. As the kids began to grow and mature, it took more and more good players playing as part of a "team" to dominate other teams. Football is a game of individuals who excel in sports. However, without each individual playing as a team member, performing his assigned duty to the best of his ability and to the benefit of the team, the team will never be great.

Generally, we work in law firms comprised of highly intelligent and successful individuals, not only our lawyers, but our support personnel. I challenge you to coach your firm to work as a team, understanding that everyone, no matter how insignificant they perceive themselves to



*Jim Hoffmeister
President*

be, is vitally important to the success of your firm.

The Tulsa Chapter ALA fall season is very busy once again. We enjoyed a successful Member Retreat at Post Oak Lodge. Seventeen members enjoyed the Friday night event in August featuring Kristine Sexter and Barry Friedman. The late September Community Challenge project, chaired by Julee Thomas, involved investing physical equity with Habitat for Humanity, just as we did last year. We have several members attending the ALA Region 4 conference in San Antonio on October 2-3. Mark your calendars for October 22 for the Business Partner Appreciation Reception. We hope you will join us to thank these important business partners for helping ALA Tulsa become a 2009 ALA Platinum Level Chapter.



*Kristine Sexter
with President Hoffmeister*

