

The Legal Pad

2010-11, Issue 2

July - August, 2010

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Yes, Administrators, There Is Life After Legal Administration!

by Susan Lyons, former ALA Tulsa member

When I was first planning to retire to Costa Rica, I couldn't imagine that there would be any bumps in the road - that life would be wonderful and like being on vacation all the time. And mostly it was. The interesting thing for me was that I was a little lost and I didn't expect to be. So much of my life had been centered around work - most of my waking hours, activities involving people at the office, friends who were administrators, ALA activities, and even things like planning, shopping, meals and laundry around and for my work. My husband, Tom, said he was going to be really interested to see what type of person I would be when I retired!

Eventually, you really do most of the things you thought you'd do when you retire - I read a book or two a week. I sewed (embroidered T-shirts for our B&B). I gardened (on a much bigger scale than I had before - my goal the first two years was to start at least 30 new plants a day during the rainy season!) I did some concrete work (for those of you who are familiar with my backyard in Tulsa, I now have sand delivered by the truckload and 3-4 bags of Portland cement at a time instead of 3-4 bags of ready mix.)

The Bed & Breakfast project has been fun and challenging. Even the government in Costa Rica runs at a much



slower pace. It can take months instead of weeks to get a building permit. You make plans to meet someone for a delivery and they may not show up for two or three days, and they may not even call. One of the sayings here is "Pura Vida" which literally means "pure life," but it is used as a greeting, for wishing someone well, as a goodbye - and just an everyday saying. It signifies the slower pace of life and means not to worry about things, not to get excited or "bent out of shape." For the type of person who enjoys legal administration, those sorts of things ... the slower pace and *laissez faire* mentalities ... are generally a challenge in and of themselves.

See Vista Val Verde, page 6

Your connection
to knowledge, resources and networking

August 20-21
ALA Tulsa Member Retreat
Post Oak Lodge

Chapter Events

October 1-2
Region 4 Conference
Las Colinas Resort, Dallas

Calendar of Events

July 07 11:30-1:00 *Suicide Awareness*
 July 14 11:30-1:00 ALA Tulsa Board Meeting
 July 15 11:30-1:00 **ALA Tulsa Chapter Meeting**
Jeff Magee, Performance Execution: Interviewing, Hiring & Retaining in the Current Environment
 July 21 *ALA Webinar* *Legal Risks to Assessing Candidates by Social Networking Sites*

August 11 11:30-1:00 ALA Tulsa Board Meeting
August 18 ALA Webinar Profitability Enhancement
 August 19 11:30-1:00 **ALA Tulsa Chapter Meeting**
ABCs of Risk Management, Jim Beavers & Terry Cupp, The Arrow Group, intro by Kay Ameen, Summit Financial Group
 August 20-21 **ALA Tulsa Member Retreat, Post Oak Lodge**

September 8 11:30-1:00 ALA Tulsa Board Meeting
September 15 ALA Webinar Electronic Records Management: How to Manage your ESI in the 21st Century
 September 16 11:30-1:00 **ALA Tulsa Chapter Meeting**
Specific Business Management Topic TBA
 September 21 ALA Tulsa Business Partner Appreciation Reception
September 23-25 ALA Large Firm Administrators Retreat, Barton Creek, Austin, TX

October 1-2 **Region 4 Conference & Exposition,**
Four Seasons Resort & Club Dallas at Las Colinas, Irving, TX
 October 4-8 ALA - Professional Legal Management Week (PSMW)
 October 8-10 ALA Community Challenge Weekend (CCW)
 October 13-14 ALA Intellectual Property Retreat, The Drake Hotel, Chicago, IL
 October 13 11:30-1:00 ALA Tulsa Board Meeting
 October 21 11:30-1:00 **ALA Tulsa Chapter Meeting**
Budgeting With a Vision, Jim Hoffmeister

A Look Ahead

October Budgeting *Workshop* (roll up your sleeves and dig into it!)
 November Health Care Update
May 23-26, 2011 ALA Annual Conference Orlando World Center Marriott, Orlando, FL
April 23-26, 2012 ALA Annual Conference Hilton Hawaiian Village, Honolulu, HI
April 15-18, 2013 ALA Annual Conference Gaylord National Resort National Harbor, MD
May 19-22, 2014 ALA Annual Conference Metro Toronto Convention Centre, Toronto, Canada

Once Upon A Time

The following story was presented at ALA Tulsa's June 17, 2010, regular Chapter member meeting.

Once upon a time there was a young woman who worked as a legal secretary and certificated Paralegal; she later became a legal administrator. Meanwhile, she also earned her Bachelor of Science Degree in Business Administration from St. Gregory's University. Still working as an accomplished legal administrator, but not quite satisfied with her educational endeavors, she launched herself into a two-year, full-time (9 credit hours per semester) academic journey in the *Masters in Human Relations* (MHR) program at the University of Oklahoma.

That curriculum *"blends theory, research and practice with a focus on preparing students to aid individuals who need support and coping skills, to understand people who have been alienated or disenfranchised from society, to more effectively reach and communicate with all people and to assist individuals and groups in organizations."*



In December 2009, she was invited into membership, and was inducted into, the *Golden Key International Honour Society*. Golden Key is the world's premier collegiate honor society, providing academic recognition to top-performing college and university students, with members not only in the United States but also around the world.

Then in the Spring 2010 she accepted her MHR designation from OU in a hooding ceremony. She states, *"the night was exhilarating and fulfilling after the hard work expended."* I guess so!!

You may have guessed by now that I'm speaking of our own Andrea Everage, Legal and Benefits Administrator for Fellers Snider's Tulsa office.

Andrea is also a member of the *Society for Human Resource Management* and *Tulsa Area Human Resources Association* where she serves on the College Relations Committee. Most importantly, of course, she is a member of the *Association of Legal Administrators* currently serving on the Association's (national) Diversity Committee, as At-Large Director on ALA Tulsa's Board of Directors and as the Chapter's Outreach Committee Chair.

It is altogether fitting and proper that we acknowledge and celebrate Andrea's achievements and commend her for her commitment to excellence.

News We don't Like to Hear

From the ABA Online Journal: In the latest chapter of an ongoing saga about trusted employees who allegedly have stolen from law firms throughout the country, a former bookkeeper and office manager for a law firm has been charged with misappropriating more than \$225,000 over a nearly four-year period for her personal use.

The firm might still have been in the dark about the alleged thefts by the employee if a credit card company to which she is accused of providing firm checks

to pay her personal bills hadn't blown the whistle, according to the local newspaper.

Prosecutors say most of the money—\$218,000—went to pay the employee's credit card bills, but she covered the thefts by making entries in the law firm's books to create the appearance that the checks had gone to legitimate firm contractors.

Ouch!! This could never happen, right? Unfortunately, it does and it did. HOW ARE YOUR INTERNAL CONTROLS?!

“We’re Stayin’ Alive”



Remember?!

Sincere thanks to our
ALA Tulsa Business Partners
 who generously sponsored our 2010 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.
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- Post Oak Lodge

**Platinum Chapter Award
 for Value to Members**

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- IKON Office Solutions
- MidFirst Bank
- OPVEON Litigation Services
- Paychex
- Standley Systems
- Summit Recruiting, Inc.
- Tulsa Daily Commerce & Legal News
- University of Tulsa Legal Nurse Consultant and Paralegal Programs
- West, A Thomson Reuters Business

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 of Law Office Managers**

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Your connection
to knowledge, resources and networking



got clm?

Add a valuable dimension to your professional development by becoming a Certified Legal Manager (CLM)SM!



Earning the CLM designation:

- ◆ Validates your knowledge and expertise in all areas of legal management.
- ◆ Expands your résumé and opens the door for new career choices.
- ◆ Demonstrates your dedication and commitment to the profession.
- ◆ Enhances your value to your organization.
- ◆ Saves your firm money on its professional liability risk insurance.*

For more information about the CLM program, visit www.alanet.org/clm

*Visit www.alanet.org/clminsuranc.html for a complete list of participating states

CLMSM QUIZ TIME

(taken from FALA-funded project of Valley of the Sun Chapter, CLMSM in a flash!)

Zero Base Budgeting - The process of developing a periodic budget on the assumption that the enterprise is initiating operations at the beginning of the budget period; thus total budget must be developed rather than an increment-over-last-period type budget.

Yield Ratios - Comparisons of the number of applicants at one stage of the recruiting process with number at the next stage.

Wrongful Discharge - An exception to the at-will employment doctrine, wrongful discharge/termination is the unjust or unfair termination of any employee based on breach of a written or oral implied contract or a violation of public policy.

Working Capital - The excess of current assets over liabilities.

Workers Compensation Insurance - A method of providing for the cost of medical care and payments to injured employees or to dependents of those hurt or killed in the workplace, regardless of blame.

CLMSM in a flash! is available for purchase from the ALA bookstore www.alanet.org.

Cont'd: Vista Val Verde from page 1



When we bought the property (a little less than 10 acres), there were no roads to get to it, no water and no electricity. You had to hike up the hill from a gravel road below (about 400 feet difference in elevation) through grass that was taller than me. So the first project was to cut in the roads, but first you have to have a permit for those roads. So you wait. And wait. And wait. Then finally out of the blue when you've given up on the permit and are tired of checking at the *Municipalidad*, you get your permit. (You have to go down and get it - and of course it takes several trips to the *Municipalidad* because you never know when they'll get around to it!) You do not receive it by mail because there is virtually no mail service here - reason? there are no regular street addresses and no street names.

The addresses are more like a metes and bounds description. Our street address is "la entrada asfalto con un porton negro que es 500 metros antes de la entrada del tahoe en Calle Valverde de San Ramon de Alajuela" which means the asphalt entrance with the black gate that is 500 meters before the entrance to the rock quarry in Calle Valverde of San Ramon in Alajuela province. Hard to get that on an envelope!

But we finally got the road cut in, had electric poles installed all the way up the road, and started working on getting water. We had planned to get water from an area called Magallanes because their water tanks are very close to our property line and are just above us. But apparently our property doesn't touch the Magallanes road and so we're not eligible. Our property touches on a San Ramon road. But the water supply for San Ramon is below us - a definite problem. The water saga goes on forever but in the interest of brevity (something I haven't shown much interest in so far), I'll just say that we decided to tap into a natural spring, pump the water into tanks high up on our property and establish a gravity feed water system for ourselves and four other new families below us. So we're also the water company - the water is free but everyone on the system has to pay for electric



power to pump the water up about 600 feet.

Next we started building. More permits required. Even though we designed the two cabins and the building we're living in ourselves, you still have to have an architect. The architect acts as an overseer and is required to check on the project at least every week even if you have a general contractor or act as your own general contractor, which is what we did on the two cabins.

The building methods here are very different from Oklahoma but I have learned that many parts of the US build in a similar manner. Everything is built with concrete block or panels. With the moisture here wood is not a good option and sheet rock acts like a sponge for mold and mildew. High winds (but seldom hurricanes - they seem to break offshore here and not come over land) and earthquakes are a consideration in building. The footings are poured first, then the block walls and then the steel roof structure and roofing (there are fiberglass roofing materials as well as steel; heavy clay tiles are not a good option during an earthquake). Then the concrete floors are poured. It seemed strange to me that you don't pour the floors and build up from there like we did in Oklahoma but apparently having the floor separate from the walls makes the building more earthquake resistant.



See Vista, page 7

Cont'd: Vista, from page 6

Another interesting thing is that we have no heat or air conditioning at our elevation (4000 feet) because the temperature is constant - up to about 80 during the day and down to around 60 at night.

Before, during and currently we have worked on the landscape. We've put in lots of ornamental gardens, but we are also trying to re-forest a large part of our land. It had been used as a pasture land in the past and there are large areas with no trees. We have already put in about 300 small native trees and have ordered 50 more to plant this year. We've also added several hundred palm trees of various types, along with thousands of smaller plants. We're hoping to encourage more wildlife onto the property.

I love the wildlife here. We have lots of birds - parrots, chachalacas, oropendola, flycatchers, toucans, toucanets, hawks and more. There are lizards - mostly geckoes and whiptails. We have coatimundi on the property (similar to a large raccoon). Last year there was a large family of at least fifteen with a fairly aggressive large male. There are also at least two big cats on the property. We have a black jaguarondi that is absolutely

stunning! We don't get to see it often but it is thrilling to watch. We also have a puma and can hear coyote often at night. We have deer, and neighbors have reported fox but I haven't seen any. There are large sloth in the forest.

We don't have monkeys in our forest but there are some down in the valley below us. There is no continuous corridor of trees so it would take something unusual for the monkeys to come to our forest. But I would love to figure out a way to lure them up here. I've planted large tree clumps with four different types of bananas.

We have agouti (which apparently love to eat my pineapple right off the bushes) and porcupine (which I have not seen but our Labrador stuck her nose a little to close to one!)

My Spanish has improved a huge amount and the natives are helpful in the learning process. It seems like it's the simple words that bring a halt to conversation. I still say "no entiendo" and "mi Espanol es terrible" almost every day. Just as in English, some speakers are much more easily understood and some might as well be speaking a language from another planet.

Life has been very good to me and I am so thankful for the opportunity to live in a country other than the country of my birth. I am sure that if more of society got to do this, it would be a more tolerant and peaceful world. If you get an opportunity to do something similar, toss all your fears (and I guarantee there will be some!) aside and go for it! It will enrich your life in ways you can't imagine.



[Editor's Note] Susan Lyons was a long-time member of ALA Tulsa, having served in several officer and committee positions. In fact, she is a past president of the Chapter. For those who know her, stories of these creative endeavors will come as no surprise. In years gone by, our members were invited to her home many times and were treated to the enjoyment of her culinary, craft, stitchery, landscaping, masonry, construction, and, yes, vintner skills....the list goes on and on.



She and husband, Tom Ackley, were the generous donors to the chapter of a 4-day, 3-night Bed & Breakfast stay at Vista Val Verde which we used as one of our FALA Silent Auction contributions in April of this year.

Thanks for the vision, Susan, and for sharing with us one more time.

2010 Chapter Leadership Institute (CLI)



**ALA Tulsa's Representatives,
Anne Turner, Jim Hoffmeister, Judy Anderson**

For many years, the Association of Legal Administrators has provided strategic training for chapter leaders who gather from all across the country, and even from some international locales, to receive training in chapter leadership, to hear experiences of other chapters and members and to share ideas. Early on, it was proven that a synergy exists when chapter leaders come together with ALA's executive officers, board members and professional headquarters staff to discuss the business of managing an ALA Chapter. And chapter management IS a business.

Gone are the days when a chapter could function "by the seat of its pants" without awareness of and adherence to rules and standards of operation. ALA's Executive Director, who himself is an attorney, always presents a twice

repeated session of *need-to-know* issues about financial management of chapter funds, IRS requirements, chapter incorporation and related topics, chapter contract negotiations, fidelity plus chapter officer and director insurance availability, etc. Other HQ staff personnel are on hand to share guidance and answer questions, and, yes, to listen to chapter leaders' ideas, about the myriad list of topics of interest for chapter leaders. Such things as approved use of ALA's logo, Association membership criteria, online and HQ staff resources that are available, etc. ALA's President and other executive officers plus the six regions' management teams are also on hand to facilitate discussions and lead sessions. As with all ALA gatherings, opportunities for networking abound as chapter leaders share concerns, challenges and successes with one another. It's a terrific opportunity to come away with new, or refreshed, ideas for your own chapter.

As President Elect, it was helpful for Anne Turner to represent ALA Tulsa there and even for the President, there are always things to learn. Jim Hoffmeister's official function at CLI this year was as Region 4's Projects Officer, a member of the regional management team. Our chapter will benefit by having that third representative on hand. Because of the vital nature of the program presented there, the Association provides chapters with financial assistance for part of the cost of sending representatives to CLI each year.



**Friends to all and
amazing members of ALA HQ staff:
Nicole Larson,
Chapter Relations Coordinator;
Debbie Curtis,
Director of Membership;
Jan Waugh,
Director of Member Services**

Dr. Jeffrey Magee - Performance Execution: Best Practices for Finding, Interviewing, Hiring & Retaining Great Talent



The highly skilled and talented Dr. Jeff Magee presented our July program for members to an appreciative and complimentary audience. His presentation was full of information and value and he admits he packed a lot into his time with us. Added to the benefit of hearing him speak, he has now provided for us a *Post Program Enhancement "After Action Review."* That document can be found on the Chapter's website on the E-Newsletter page, Article Archive section.

Go Green - Truths & Myths

It's not easy being green. -- Kermit the Frog

"Green is the prime color of the world, and that from which its loveliness arises." -- Pedro Calderon de la Barca, dramatist and poet, the greatest Spanish playwright of the Golden Age 1600-1681.



Any way you look at it, it's probably safe to say that *green* is all around us. On a recent drive in and around northeast Oklahoma, I was struck by the beauty of the multiple shades of green along the countryside and by the lushness of the growth all around. It did turn my thoughts to all the talk about "green."

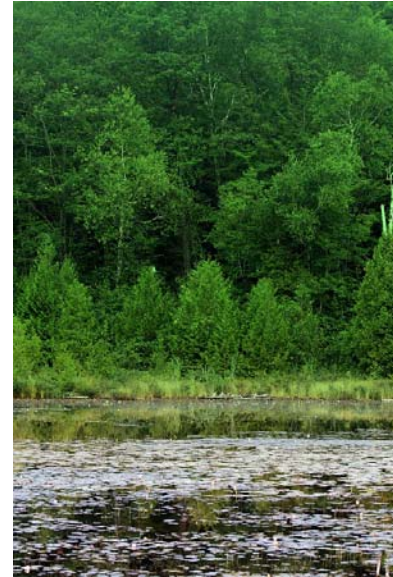
The word "*green*" continues to represent the need for,

and efforts toward, sustainability of people and other living things.

John S. Kirk, *CLM*, from Philadelphia, PA's, Manko Gold & Katcher, has done a number of presentations to ALA groups over the past few years. John paraphrased the United Nation's Brundtland Commission (1987) definition, "sustainability entails meeting the 'Triple Bottom Line' of economic, social and environmental responsibility. It is about fostering respect for people and other living things while at the same time wisely using and managing environmental and economic resources." John also repeats what ALA Tulsa heard at a Chapter meeting several months ago from Michael Patton, "**Reduce, Reuse, Recycle.**" John cites the following examples of **Truths** and **Myths** regarding sustainability.

Truth: Utensils made from corn plastic will melt if used for eating hot soup (but they are fine for gazpacho!).

Myth: Recycled paper works poorly in copiers and printers. (Typically the problem is with the manufacturer's wrap--dust accumulates in the package. Unwrap



and fan the paper ream several times to eliminate the dust.)

Truth: Running a full dishwasher is more efficient than using paper plates.

Myth: When the TV or appliance is off, it's off. (Be aware of phantom power use; use power strips and turn off the strip rather than just the appliance.)

Myth: Leaving lights, computers, and other appliances on uses less energy than turning them off and makes them last longer.

Truth: Most screen savers do not save energy unless they actually turn off the screen or, in the case of laptops, turn off the backlight.



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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...

Recently I participated in a meeting in which the question was asked, "What makes an organization great...what is it that would make you want to join?"

After hearing a few other responses and giving it personal thought, my comments went something like this:

"I would first look for an "anchor benefit" of education...a core plan of training that would meet my needs for continued education as well as professional growth and development. That education core would need to be broad spectrum, covering a wide range of disciplines in which I need continued honing of knowledge and skills.

"Then it seems that there would be a natural outgrowth among the organization's members. As they gather for the purpose of learning and growing professionally, I would envision them developing an interest in networking, in socializing with one another, coming together for community outreach activities, and through their volunteer efforts to develop skills of leadership within the organization even to the point of helping to shape its strategic vision."



*Judy Anderson
President*

As I heard myself speak, it became readily apparent that I was describing ALA. I was describing what ALA is, what it does, and what it has provided for me for over 25 years.

Through ALA membership we have an opportunity to learn, from the basics of our profession to the more sophisticated subtleties of professional management and strategic vision. None of us ever knows it all or has all the answers. Life changes, business changes, management changes as people and our society around us change. Continued learning must be a way of life.

Equally important, at times even more so, are the camaraderie, the support and the friendships developed through sharing life together...the comfort in knowing that someone understands our good times and those not so good. Hard to describe - easy to experience. Come be a part of it.

