RIVER CITY REVIEW

Association of Legal Administrators — *Sacramento Valley Chapter Newsletter*

Summer 2013 — Vol. XXIII, No. 1

In This Issue

Send Newsletter feedback to:

thkreis@murphyaustin.com

ala-sacramentovalley.org

PRESIDENT'S MESSAGE

Joelle Stone
President, SVALA

Joelle Stone, Murphy Austin Adams Schoenfeld LLP

We are in the middle of summer and that means many great things are coming our way.

We will have our Business Partner Mixer in August at House Restaurant. This is always a well-attended and nice event to relax after work and reconnect with each other and our fabulous business partners. Also, be on the lookout for the 2nd Annual Business Partner Scavenger Hunt. At stake will be another iPad so be sure to participate.

October 31 through November 2 will be the Regional Conference in Reno. Sacramento is the host chapter so we are hoping to get as many of our members there as possible.

We have increased our scholarships this year and will be giving away a total of ten: six full scholarships and four registration only scholarships. The rooms are very affordable and all food is included so this is a great deal. We are also looking into getting a group together to take the train up to Reno. Stay tuned for more on that!

Coming this fall is our Community Connection Event which Paula Lee is putting together as we speak. This is the time of year when we can roll up our sleeves and do some good work in our community.

We have a lot of activity coming our way and I hope to see you all soon!

ALA Association of Legal Administrators
Silver Level Chapter
2013

BUSINESS PARTNER ADVERTISING INDEX

SPOTLIGHT ON

LEAVITT GROUP

AND

SACRAMENTO PLACEMENT SERVICES

Please visit page 5 for an article written by Kevin Valine of Leavitt Group.

Please visit page 9 for an interview with Sacramento Placement Services.

We appreciate each and every one of our sponsors.

Thank you for your partnership and support of the SVALA.

LETTER FROM YOUR EDITOR

Trish Hughes Kreis
Murphy Austin Adams Schoenfeld LLP

Value.

What do we value? Are we valued? Are we getting value for our money/effort?

Everyone wants to feel as if they are valued and to know what they do is important. The Sacramento Valley Association of Legal Administrators is all about value and the proof is in this edition of the *River City Review*.

We value our Business Partners. We have a great group of Business Partners supporting our organization (some new, some with us since the beginning of our program). The partners are not just "selling" us something – they are truly dedicated to helping us make our firms the best they can be. I am happy to showcase two of our Business Partners this issue! Kevin Valine of the Leavitt Group shares an article, "Five Things You Should Know About Protecting Your Law Firm" (p. 5) and Debbie Jordan of Sacramento Placement Services tells us on page 9 what she does to help us find the best fit for our firm.

We value education. The 2013 ALA Annual Conference & Exposition was enjoyed by many local administrators who brought back a wealth of new-found knowledge (p. 13) and an award (p. 17)!

We value each other. The SVALA 2013 Retreat was both educational and fun! The proof can be seen in the comments and pictures shared starting on page 14.

We value our local educational and social events. There is a rich assortment of past and upcoming events which can be found starting on page 29.

I hope you enjoy the summer edition of the *River City Review* and find as much *value* in it as possible!

River City Review Submission Deadlines

Submissions of articles, pictures and calendar items are welcome! All submissions must be provided via e-mail in Microsoft Word, pdf, jpg, or tif format.

Deadline for submissions:

Fall Issue: September 30
Winter Issue: November 30
Spring Issue: February 28, 2014

Please send all materials to the Newsletter Chair:

Trish Hughes Kreis
thkreis@murphyaustin.com

Thank you for your contributions!

BUSINESS PARTNER SPOTLIGHT
Leavitt Group

Five Things You Should Know About Protecting Your Law Firm
By Kevin Valine, Leavitt Group

If you haven't had to file a claim with your professional liability carrier, this topic may be far from the top of your mind. However, all law firms are susceptible to legal malpractice claims, no matter how careful or skilled they are. As a professional liability specialist, I have seen how traumatic these claims can be when they do occur. Make sure your risk management process includes these five critical elements to mitigate your firm's risk:

Client Intake
Many claims are not related to an error in legal services but rather to selection of the wrong client. Client intake is critical. When selecting new clients, trust your instincts and ask yourself "am I really the right attorney for this client?" Is the client experienced in legal matters, or might their expectations be naïve and unreasonable? Don't let business downturns result in relaxed intake decisions, and be wary of prospective clients who have sued attorneys in the past.

Example

- An attorney represented a client (who had worked with two previous attorneys) on a poorly drafted agreement, despite the fact that this client had sued attorneys in the past. When the results were unfavorable for the client, the client sued the attorney, with allegations that amount to rewriting the history of the underlying case. The attorney's defense costs are currently in excess of $500,000, and settlement efforts have been unsuccessful.

Accounts Receivable Management
Diligence and consistency in accounts receivable management can help in minimizing the number of malpractice claims. When firms try to collect their outstanding fees, clients often respond by filing malpractice. Claims result from accounts receivable problems as surely as "night follows day," so maintain strict management of your accounts receivable to minimize the chances of this occurring.

Example

- Prior to working with us, one of our law firm clients discovered his insurance policy contained an exclusion which stated that if the insured instituted any legal action to collect legal fees, any counter-claims for malpractice would be excluded. The discovery came, unfortunately, after the carrier denied coverage for a new claim that arose out of the firm's collections process. Unfortunately the law firm was forced to pay defense costs out of pocket.

Communication and Documentation
How you communicate with your clients is critical to the avoidance of claims. Many claims arise because attorneys may do a great job dealing with legal issues but they aren't engaged enough with their clients, they are not communicating enough with their clients, and they are not convincing their clients how much they care. When an adverse result with a case occurs, the client may end up turning against the attorney. If the attorney had been more communicative, the client may have accepted the adverse result without responding with a malpractice claim.

BUSINESS PARTNER SPOTLIGHT
Leavitt Group
(continued)

Five Things You Should Know About Protecting Your Law Firm
By Kevin Valine, Leavitt Group

We see a surprising number of claims where lawyer and client disagree over what took place over the course of a given case. This is especially true with respect to conversations relating to litigation strategies and potential settlements. Documentation is crucial. Here are a few things to keep in mind about documentation:

- Advice that is not documented might as well not have been given.
- Engagement and disengagement letters are critical documentation opportunities.
- Take care to document what legal services you are not providing. We see a surprising number of costly claims that arise from a legal issue the law firm contends it was never handling for their client.

Examples:

- An attorney was retained to deal with real estate problems that were mishandled by the client's previous lawyer. The attorney was aware of the client's dissatisfaction with that lawyer, and the subject of a malpractice suit did arise at one point. When the client later tried to sue the original attorney, the statute had run. The client then sued the new attorney for failing to warn her that the statute of limitations was running. The claim settled for $1,000,000 plus over $300,000 in defense costs. This firm now includes wording in all their engagement letters stating that they do not handle lawyers malpractice actions, and that if a client is considering suing a previous attorney they should seek counsel as soon as possible to prevent the action being barred by the statute of limitations

- Debtors ask an attorney to represent them in an action from their creditor. The result of costly litigation is unfavorable to the debtors, who then bring a claim against their attorney. The claim alleges that the attorney allowed the debtor to be too optimistic about their prospects, and that he should have recommended early settlement. The file lacks clear documentation of the risks of litigation, as well as the settlement activity that took place, allowing for a "he said, she said" debate to arise.

Report Potential Issues in a Timely Manner
Many of the most serious claims appear to be nuisances early on but then develop into potentially catastrophic matters three or four years down the line. If these claims (or potential claims) are not reported properly at the outset, coverage may be denied after the claim is finally tendered. It is very important that you create a culture in your organization where all of your attorneys know how to report potential claims to management and also understand the importance of doing so in a timely manner.

Law firms typically know they need to tender malpractice claims to their professional liability carrier when they are served with a lawsuit. What firms often overlook is the need to report potential claims early on, before a lawsuit is ever served. It is not uncommon to see claims denied in these instances, and courts have often supported the insurance companies in these denials.

Does your management team know what constitutes a potential claim? Do all of your attorneys—from the newest associate on up—recognize the need to report potential claims? You pay significant premiums for your professional liability coverage—make sure you reap the value of that coverage by reporting potential claims early on.

BUSINESS PARTNER SPOTLIGHT
Leavitt Group
(continued)

Five Things You Should Know About Protecting Your Law Firm
By Kevin Valine, Leavitt Group

Choose a Broker You Can Trust
Professional Liability is one of the most complicated and nuanced areas of insurance. Your selection of an insurance broker should be based on the expertise of the broker in this specialized area, and as well on the level of trust he or she has earned with you. Our greatest value to clients results when we are considered a trusted partner to the firm rather than a vendor. When my clients bring me into the planning process and consider me part of their management team, I can help them to recognize the risks they face early on and recommend solutions while options are still available. We often assist our law firm clients with exploration of new practice areas, or with due diligence involved in potential mergers or lateral hires.

When properly implemented, these elements in the risk management process can help protect your organization from costly professional liability claims. To learn more about the coverage and services we provide for attorneys and law firms, please visit http://www.leavitt.com/Industries/LawFirms.aspx. You can reach Kevin directly at kevin.valine@leavitt.com.

* * * * *

Kevin Valine has been with the Leavitt Group for 15 years and has over 34 years of experience in the insurance industry. He began his insurance career in underwriting and then transitioned into insurance consulting. Early on in his career, Kevin decided to focus his efforts and attention in the professional liability arena because of the required level of technical expertise, which gives him the opportunity to work as a partner with his clients and not just simply a vendor. Kevin and his peer Skip Reynolds have developed a professional liability and management liability practice. They, along with their service team, are able to provide professional liability expertise to their clients.

Spring 2013 Pop Quiz Results:

Congratulations go to Connie Bergstrom, Firm Administrator of Hardy Erich Brown & Wilson who won a $25 gift certificate.
Way to go, Connie!

BUSINESS PARTNER SPOTLIGHT
Sacramento Placement Services

Editor: Thank you for being a Business Partner of the Sacramento Valley Legal Administrators Association. Please tell us why you chose to support our organization.

Debbie Jordan, Owner, Sacramento Placement Services:

I support SVALA because of the many relationships I have established with administrators who are members of SVALA and wanted to support the group that also supports my firm.

Editor: Please tell us about **Sacramento Placement Services** and the services you provide.

Debbie Jordan:

Sacramento Placement Services provides legal support professionals, paralegals and attorneys on a temporary and direct hire basis. SPS specializes exclusively in legal staffing and represents some of the most skilled and qualified professionals in this field.

Editor: How are your services useful to a law firm?

Debbie Jordan:

Time! Through extensive networking and legal organizations I am able to maintain contact with a large group of legal professionals.

Editor: What do you do to ensure you find the right candidate for a law firm?

Debbie Jordan:

By communication with firms and past experience and successful placements I match candidates with firms based on their unique needs. Candidates are pre-screened, tested and reference checked.

Editor: Give us a little background about yourself. How long have you been in the business? How long have you been with **Sacramento Placement Services**?

Debbie Jordan:

I started Sacramento Placement Services after several years of working for another legal staffing agency. I realized I could provide a quick and more streamlined process of finding permanent and temporary candidates at a reduced cost to law firms. I have been successful for over 20 years in achieving these goals and still love what I do. It is very rewarding to see a candidate get a dream job and a law firm very excited over that person!

Coming together is a beginning; keeping together is
progress; working together is success.

Henry Ford

Pop Quiz:

Where will the Region 6 2013 Regional Conference be held?

First person* to email the Editor the correct answer wins a $25 gift certificate!

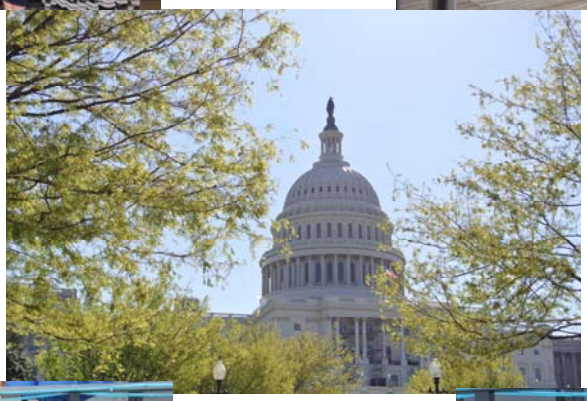
thkreis@murphyaustin.com

**Board Members are not eligible to participate!*

Sacramento Valley Association of Legal Administrators
2013 - 2014 Board of Directors

ALA ANNUAL EDUCATIONAL CONFERENCE AND EXPOSITION

History. Networking. Fun. Laughs. Education. Beauty.
The pictures say it all.



SVALA RETREAT

All the components of a successful retreat were in place: Great speaker (check - Judy Hissong). Inspiring team-building (check - "Strength Deployment Inventory" analysis). Beautiful location (check - Napa Valley). Refreshments (check - Wine, dinner, dessert and … more wine). Camaraderie (check - lots of fellow legal administrators).

The thanks to Joelle Stone, SVALA President, and Judy Hissong of Nesso Strategies poured in for their role in organizing and conducting such an inspiring and fun retreat. The feedback was effusive and have kept the momentum of the retreat going.

Thanks Joelle for coordinating a great retreat! - Paula

The retreat was meaningful, lots of fun and I've come into the office ready to figure out who's what! - Joan

Great memories. - Lynn

Thank you Joelle! And thank you SVALA for sponsoring an informative, educational, fun event! - Julie

Without a doubt one of the best all-day events I've ever been to from beginning to end. Thanks, Joelle! - Jessica

It was a wonderful retreat. I truly enjoyed all aspects; the amazing seminar (Thanks, Judy!!), the camaraderie with the remarkable members of SVALA, and the yummy dinner. Joelle, thank you for all of your time and effort spent in organizing such a special retreat. - Diane

Lots of fun and Judy was amazing (as always). - Cindy

It was so much fun . . . From the educational program to the wine and the wine! I am so glad we had the opportunity to do this. - Joelle

SVALA RETREAT

Drum Roll Please . . .

Congratulations to the 2012—2013 SVALA Board of Directors for achieving the Silver level of the President's Award of Excellence! Your dedication in serving the Sacramento Valley Association of Legal Administrators is much appreciated.

2012—2013 Board of Directors

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Joelle Stone accepting the award on behalf of the membership

30 Creative Ideas
OfficeTeam

What keeps employees motivated to do their best every time? What makes a worker's day brighter? One simple answer is recognition. Employees who believe their work is valued are more likely to remain loyal and often are more productive. Although there is no one-size-fits-all approach for recognizing a job well done, OfficeTeam has compiled 30 creative suggestions for you. Share these ideas with other managers, and start a dialogue with your staff about the forms of recognition they value most.

Praise.

1. Regularly thank employees verbally for a job well done.
2. Acknowledge outstanding team members at a staff meeting so the feedback is public.
3. Make someone on your team "employee of the month" if he or she consistently goes above and beyond the call of duty.
4. Take the time to give specific praise on projects, focusing on what the employee did especially well versus what could have been done better.
5. Ask a senior executive to recognize the work of individuals or teams at a company forum attended by all employees.
6. Share a message sent by a customer or other stakeholder lauding the work of a fellow staff member.
7. Feature stand-out employees in the company newsletter.
8. Prepare a handwritten thank-you note acknowledging someone's great work.
9. Keep reminders of all the contributions your employee has made so you have that information handy and can refer to it during performance reviews.
10. Don't stop at telling individuals their work was excellent – also point out how it will help the company, or assist clients and customers.

Rewards.

1. Encourage employees to become active in professional associations and reimburse them for membership dues.
2. Take your direct reports to lunch to discuss their career goals, as well as department objectives.
3. Encourage your staff members to attend a professional conference or seminar – and cover the travel and registration fees.

30 Creative Ideas
OfficeTeam
(continued)

4. Reimburse your office staff for the cost of exams required to attain professional certifications.

5. Organize activities to celebrate holidays or special events, such as work anniversaries.

6. Bring in treats like bagels or donuts for the team to enjoy.

7. Explore telecommuting, flextime or other work options that provide employees with more control over their schedules.

8. Celebrate the completion of projects with team lunches or outings.

9. Provide on-site services, such as dry cleaning, car washes or other things that can help your staff be more efficient.

10. Offer gift cards for coffee or the movies to employees who go above and beyond on a project.

Growth Opportunities.

1. Ask those on your team to take on a tough problem or a new challenge beyond their normal responsibilities, and recognize their efforts.

2. Empower your employees to make their own decisions and have more control over their work.

3. Ask team members to give a presentation at a staff or company meeting.

4. Encourage employees to learn new software, use new technologies, or expand their skills and knowledge in other ways.

5. Ask for your team's input on departmental issues or a new business opportunity.

6. Ask each professional about his or her career aspirations, and outline specific steps needed to achieve those goals.

7. Match high-potential employees with experienced mentors.

8. Encourage staff members to submit ideas for improving processes or projects, and reward the best ideas.

9. Invest in leadership training for your company's next generation of managers.

10. Have a policy of promoting from within, and make sure staff members know there's a path to growth in your organization.

To Blog or Not to Blog
By Marc C. Sanchez, J.D.

Reprinted with permission from "AALA Connection," the newsletter published by the Atlanta Chapter of the Association of Legal Administrators, Summer 2012

Perhaps, the two scariest words in the legal profession today are, "Start blogging."

The legal blog can strike fear into the hearts of seasoned partners, associates and support staff alike. When I provide workshops or trainings, I can easily sense this fear. Crossed arms, busily typing into a Blackberry or grimaced stares are not unusual. Common complaints include, "I don't have time" or "blogging is a waste of time," and still from others, "I don't get technology or social media."

In the next few paragraphs I hope to remove those obstacles and get you started blogging. Let me begin by telling you how blogging serves my practice. I'm a solo practitioner; daily I manage firm administration along with billable work. I empathize with a busy schedule, but still I daily blog. The time I spend blogging is among the most valuable in my day. Over the past two years of blogging, my practice grew from two clients in one state to a busy international practice, with invitations to present at conferences, along with articles and citations in well-regarded publications, like the Washington Post. All of this from blogging, all of it while completing billable work and firm administration. There is always time to blog!

Blogging is Quick

Blogging is as quick as reading the morning's headlines. Blogging takes time at first – everything comes with a learning curve – but it becomes easier, faster and seamless as you make it a habit. The best tip I can give to make blogging easy is to find a niche. I practice in medical device and food law, and my blog "Food Court" breaks down topics into four subcategories. This makes blogging much more approachable. Every morning I read the day's headlines from industry sources and the FDA and USDA. Headlines are then captured into a short blog. I've taken something I already do to serve my clients – reading industry and agency news – and turned it into a resource. It takes only an additional ten or fifteen minutes.

It's also important to set a blogging schedule. This is a great way to keep you committed and build the habit. It also sets an expectation from readers that your blog will be a go-to and updated resource. For example, you could commit to two short posts a week and one longer post. Stick to your schedule to keep readers engaged.

Blogging is Not Legal Writing

The biggest misconception about legal blogs is that the blogs are legal writing. Blogs are not a brief, memo, contract or any other form of legal writing. Approaching blogging as a professional, yet casual, style of writing makes the process less time-intensive. As with any good writing, know your audience – but write in an editorial style. It's also ok to write a blog for attorneys, but still avoid legal writing. Attorney-oriented blogs are great, because they help other attorneys who need a subject matter expert or a colleague to whom to refer a client when they can't take a matter. Also, keep your blog post short. We all read blogs, and I know that I appreciate blog posts that are short and to the point.

continued . . .

To Blog or Not to Blog
By Marc C. Sanchez, J.D.
(continued)

As part of developing a blog, don't be afraid to use others' work. When I'm in a hurry, I will post a blog that summarizes an article or news story in a paragraph, then copy and cite the source into the post. Other bloggers will also appreciate reposting or invitations to write for your blog. For example, I will repost and invite writing from bloggers who work with financing medical device start-ups. It not only helps me generate content, but also builds relationships with potential referral sources.

The Value in Blogging

Any legal practice depends upon recommendations and referrals. A recent study found that over 70% of participants made a purchasing decision based on positive anonymous reviews or recommendations. How many of us rely on reviews on Amazon or Google maps before deciding what to buy or where to eat? Finding and hiring a lawyer is no different.

Blogging helps with recommendations and referrals in two ways. The first is it positions you as an expert. Clients look for a lawyer who understands the nuances of their business, case or field. Blogging is a way to demonstrate your knowledge and expertise. It gives confidence to clients to hire you and to others to recommend you. A 2012 In-House Counsel Management survey found that in-house counsel and management read legal blogs more than any other source, and said it influenced their decision on whether to hire a firm. You've taken the time to build knowledge in a particular area of law; blogging is simply a dynamic way of broadcasting that expertise.

For associates, blogging is also a means of becoming an expert. Blogging will immerse you in current issues, regulations and statutory changes, and leading cases. Taking the time to read this material and blog about it will make you an expert in and outside of your firm.

Second, blogging increases your visibility. Clients are not only busy, but also increasingly accustomed to using social media and the Internet to read their news and information. Features like an RSS feed can bring busy managers and executives all the news they are interested in with little effort. If you think about how a potential client might find you, it's easier for them to ask a friend or to search on social media. If you are consistently blogging, you are higher up in search results or more likely connected with a reader. Nearly all my clients now come from someone who reads my blog or a referral by someone who does.

I will end by saying that, not only is blogging a great business development tool, it can also be a lot of fun. Since I began blogging, I've engaged more with my audience and explored my field in a way that my practice doesn't allow me to. When else would I have an excuse to write about Dr. Oz's warning about arsenic in apple juice? Blog posts like that help me connect with readers and give my practice personality that a static website simply can't offer. I hope these quick tips will get you started. As you delve deeper and take on the challenge, there are other tips – like a separate Web domain for your blog, podcasting and using images in posts – that can enrich your blogging.

Marc C. Sanchez is an attorney, regulatory consultant and avid blogger. Marc received his J.D. from Lewis and Clark Law in Portland, and has a Masters in International Communication and Policy from Valparaiso University. Marc is well-versed in building a practice through social media, as he has grown his solo practice in large part through his blogging, presence on Twitter, and expertise in use of social media.

MEMBERSHIP INFORMATION

Welcome new members!

DeeAnn MacLaughlin, Accounting Manager
Boutin Jones Inc.
555 Capitol Mall, Suite 1500
Sacramento, CA 95814
Phone: (916) 321-4444
dmaclaughlin@boutinjones.com

Holli Churchwell, Firm Administrator
Churchwell White LLP
1201 K Street, Suite 710
Sacramento, CA 95814
Phone and fax: (916) 468-0620
Holli@churchwellwhite.com

If you are involved in legal management and are interested in joining the Sacramento Valley Chapter, ALA, please contact the Membership Chair, Penny Stauffer at plstauffer@stoel.com or download a Sacramento Valley Chapter membership application at SVALA Membership Application – Renewal 2013-2014.

New or Current Members:

Want to fully take advantage of your ALA membership?
Not sure where to turn?

Visit http://www.alanet.org/newmembers
to see what you might be missing!

A Member Benefit for the Managing Partner!

Subscriptions to the print edition of Legal Management are available exclusively to ALA members and select legal professionals. ALA members may also request complimentary subscriptions to Legal Management for their managing partners simply by submitting a request at http://www.e-circ.net/lgm/lgmsub.asp

Thank you to our
2013/2014 BUSINESS PARTNERS

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Is Your Critical Data Secure?

Your information is at risk every second!
Call us for help managing that risk.

Regulations such as Sarbanes-Oxley (SOX), Gramm-Leach-Bliley (GLBA), The Fair and Accurate Credit Transaction Act (FACTA) and The Health Insurance Portability and Accountability Act (HIPAA), plus the increasing sensitivity of corporate information, places a high priority on protecting corporate information. Despite growing awareness and efforts to safeguard this information, data breaches continue, which result in loss of productivity, damaged corporate reputation and significant financial loss. Data protection is essential in today's dynamic information era.

Pacific Records Management's complete suite of Records and Data Support Services provides you with uncompromising security and management of your critical business assets.

Store

- High security, low cost solution for your business records storage.
- Web-based portal to control and manage your records 24/7.
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Business Records Storage

Scan

- Streamline ability to store, access and digitally manage your documents.
- Scan new information, convert existing documents, or request images on demand.
- Work with partner who can help you decide your best economic options.

Document Imaging Solutions

Protect

- Reliable data protection and recovery assistance in the event of a disaster.
- Access and environmental controls to insure your backup media is secure and recoverable.
- An experienced backup and disaster recovery partner.

Data Protection and Recovery

Destroy

- Satisfy compliance requirements of privacy disposal laws.
- Secure, chain-of-custody management to provide peace of mind.
- Safer and more cost effective alternative than doing it yourself.

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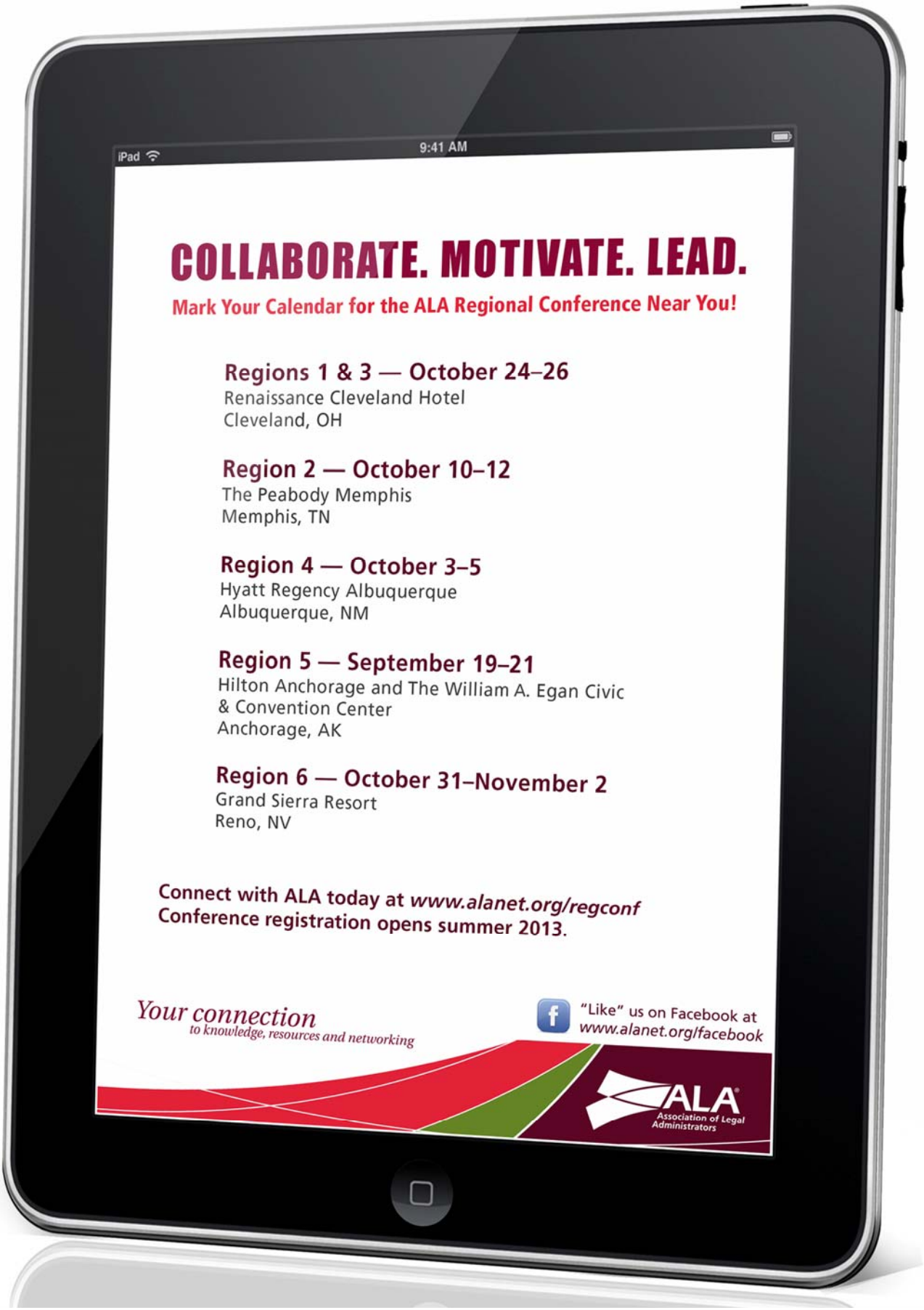
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COLLABORATE. MOTIVATE. LEAD.
Mark Your Calendar for the ALA Regional Conference Near You!
Regions 1 & 3 — October 24–26
Renaissance Cleveland Hotel
Cleveland, OH
Region 2 — October 10–12
The Peabody Memphis
Memphis, TN
Region 4 — October 3–5
Hyatt Regency Albuquerque
Albuquerque, NM
Region 5 — September 19–21
Hilton Anchorage and The William A. Egan Civic
& Convention Center
Anchorage, AK
Region 6 — October 31–November 2
Grand Sierra Resort
Reno, NV
Connect with ALA today at www.alanet.org/regconf
Conference registration opens summer 2013.
Your connection
to knowledge, resources and networking
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ALA
Association of Legal Administrators

PREVIOUS EDUCATIONAL AND SOCIAL EVENTS

Law Firm Leadership Luncheon
March 14, 2013
Program Chair: Julie Denker

The Sacramento Valley ALA's Law Firm Leadership Luncheon was held March 14, 2013 at The Sutter Club and was very well-attended. Our guest speaker, former Air Force fighter pilot, Brian Shul, mesmerized an audience filled with lawyers, administrators and business partners with an inspirational story of survival, courage and sheer determination to one day fly again. The photographs (taken by the speaker) were incredibly awesome.

Many, many thanks to our terrific Business Partners:

Platinum Business Partners:

Terrapin Technology, Pacific Records Management, Sierra Office Supply and Leavitt Group

Gold Business Partners:

Caltronics, DataSafe, Gallaway Commercial, Inc. and Sacramento Placement Services

Silver Business Partners:

First Legal Network, Nationwide Legal, Smile Business Products and Wells Fargo Insurance

Thank you for your continued support to Sacramento Valley Association of Legal Administrators.

PREVIOUS EDUCATIONAL AND SOCIAL EVENTS

Tuesday, April 30, 2013
Casa Garden Restaurant
2760 Sutterville Road in Sacramento, California

Topic: Social Security Benefits and Programs
In this session, we gained insight on the history of the Social Security Program, obtained a foundation for planning for the future, as well as to assist those around us plan.

Presenter: Deogracias (Deo) Santos, Social Security Administration

Mr. Santos is the Northern California Public Affairs Specialist for the Social Security Administration. He was born in Hawaii and moved to California as a young boy. Mr. Santos was raised in the San Francisco's East Bay Area and finished his Sociology Degree at CSU Sacramento. After graduation he stayed in Sacramento for employment opportunities and has been with Social Security since 2003. Mr. Santos has conducted speaking engagements at California State University, Sacramento, as well as, several private, federal, state, and county organizations within California's capital region.

Tuesday, May 28, 2013
Casa Garden Restaurant,
2760 Sutterville Road in Sacramento, California

Topic: 10 Secrets Your Employees Aren't Telling You …And How You Can Improve Morale And Retention

This presentation was about improving morale and retention during this changing economy. The presentation provided insight into what employees are thinking and doing as the market conditions change and opportunities arise. During the changing times, it is imperative that employers focus on retaining their best employees and keeping up morale in the office.

Presenters: Shantel Poole and Kimberley Stiener-Murphy of Robert Half International

Shantel Poole is the Division Director for OfficeTeam in Sacramento, a division of Robert Half International, managing the administrative staffing operations in the Sacramento market for Robert Half. Shantel has found her passion in connecting business professionals throughout the Sacramento marketplace. Kimberly Stiener-Murphy is the Sacramento Branch Manager for Robert Half International, overseeing professional staffing services. She has over 15 years of experience in staffing and human resources. Kimberly has appeared on television and in print many times throughout her career and is considered to be a subject matter expert on career and HR trends affecting the current labor market.

PREVIOUS EDUCATIONAL AND SOCIAL EVENTS

Tuesday, June 25, 2013
Casa Garden Restaurant
2760 Sutterville Road in Sacramento, California

Topic: Strategic Planning: Let me tell you a story

As Judy says, "Numbers talk, and with careful analysis and presentation, long-range planning becomes as simple as telling a story." This session provided us with Judy's story, from the discovery of what numbers to examine, to the other elements that create a tale for your next strategic planning session. Judy walked us through the four elements of a solid financial projection for our organization: Financing, Operating, Staffing and Strategic Planning.

Presenter: Judy Hissong of Nesso Strategies (www.nessostrategies.com)

With over 15 years in C-level management, Judy provides a wealth of knowledge and expertise in successful business planning. Her background in Professional Services makes her an ideal facilitator for strategic retreats and financial analysis. Judy presents at several conferences on the topic of strategic and long range planning for law firms, and legal staff management. Judy also writes articles on the importance of strategic planning in the success of business, and is an instructor for the University of California San Diego.

Tuesday, July 30, 2013
Casa Garden Restaurant
2760 Sutterville Road in Sacramento, California

Topic: Christmas in July –Avoiding the Year-End-Push for Law Firm Collections

Presenter: Dave Hicks, Vice President of Consulting Services for Intelliteach

Mr. Hicks graduated Princeton University cum laude where his independent study focused on media regulation. After receiving his law degree from the University of San Diego, he began concentrating on corporate compliance. Mr. Hicks's career has always been at the intersection of law and technology, where he currently aims to improve both client satisfaction and law firm profitability. He advocates a common sense approach to law firm enterprise software and financial metrics. He lives in Northern California when he is not flying elsewhere to help firms improve their financial performance.

UPCOMING EDUCATIONAL AND SOCIAL EVENTS

Image credit: House Restaurant & Bar Website
www.houseoncapitol.com

SVALA Summer Mixer

August 20, 2013
5:30 - 7:30 p.m.

House Kitchen & Bar
555 Capitol Mall, Suite 155

UPCOMING EDUCATIONAL AND SOCIAL EVENTS

Tuesday, August 27, 2013
12:45 - 2:00 p.m.
Casa Garden Restaurant
2760 Sutterville Road in Sacramento, California

Topic: Can 15 Minutes Really Save You $500?

Presenters: Nathan Johanson and Joseph O'Donnell, Terrapin Technologies

Tuesday, September 24, 2013
12:45 - 2:00 p.m.
Casa Garden Restaurant
2760 Sutterville Road in Sacramento, California

Topic: Budgeting/Office Finance Management

Presenter: Mike Palmer, Allen Matkins

To view ALA's Anti-Trust Guidelines, please visit ala-sacramentovalley.org

UPCOMING EDUCATIONAL AND SOCIAL EVENTS

2013 ALA Region 6 Conference & Expo

October 31 - November 2, 2013
Grand Sierra Resort
Reno, NV

Join us in Reno, Nevada at the Grand Sierra Resort for the 2013 Region 6 Conference & Expo. Stay tuned for more information.

Registration will open in August.

Save the Date!!

This year's SVALA Holiday Luncheon is set for December 12, 2013 at the Esquire Grill and the Law Firm Leadership Luncheon will be held March 13, 2014 at the Sutter Club.

Be sure to mark your calendars now and look to the newsletter for further information!

BOARD MEETING MINUTES SUMMARY

Board of Directors Meeting Held March 15, 2013

The SVALA Joint Board of Directors Meeting was held at 555 Capitol Mall in the offices of Boutin Jones, Inc., on Friday, March 15, 2013. President Vicki Robinson presided, welcomed everyone to the meeting and thanked everyone for their participation. Introductions were made around the table to acquaint the new Board members with the renewing members.

The January 2013 Board Meeting minutes were submitted in January via email and the motion passed unanimously.

The January and February 2013 financials were submitted and briefly discussed before the motion to approve passed unanimously.

Vicki reported with delight that our Chapter has been approved for the Silver Award at the upcoming conference. We will post the appropriate image on our website.

There was a brief discussion of the need to reorder pins for distribution at upcoming conferences, particularly this year's Regional, since we will be the host chapter. Joelle will email a proposal to the Board members so we can vote on the appropriate quantity.

Our much-anticipated Chapter retreat is set and the just-distributed newsletter has information about the retreat.

SVALA is the host chapter for this year's Regional Conference, for which the theme is "Gold Mine Your Education." The venue is the Grand Sierra Hotel, which has been remodeled and is beautiful. The rooms are very affordable, and Vicki informed us that a $20 upgrade will even get us onto a floor with no kids and no pets allowed! It was noted that, between now and October, we should contact the Reno members and invite them to join us. As host chapter, we are responsible for an information table with details about local restaurants, transportation, etc. Vicki solicited a committee of five or so people for planning of preparations for session managers, assistance with registration, ticket collection for meals, registration for exhibitors and so forth. There was a general discussion of ideas for the conference, including a suggestion that we should all take the train up together; have Chapter t-shirts; possibly have a bowling party at the world's biggest bowling alley; and what favors we want to give away at our information table.

Joelle will meet with Patricia to review the procedure for the Salary Survey. As soon as Penny distributes the updated member list, Jessica and Cindy Pilon will produce the member directory for the business partners.

Deana Xryztion advised that the schedule for the upcoming term is set, and she is sourcing for speakers on good topics like stress reduction. Our April speaker will be a representative from the local Social Security Administration. There was discussion of inviting a representative from the Legal Marketing Association to our luncheon, with the thought that we might be able to help each other.

BOARD MEETING MINUTES SUMMARY
(continued)

Board of Directors Meeting held March 15, 2013 (continued)

Paula's final edition of the newsletter was emailed today. (Thanks for a great job, Paula!) Paula and Trish will meet to transition materials.

Jessica Miller reported that all business partner contributions have been received; we now have seven bronze sponsors. Jess has the business partner logos and will send those to Trish for the newsletter. She is working with Isabel to transition the position.

The Law Firm Leadership Luncheon came in very close to budget and was a resounding success! (Great job, Julie!) This year's holiday party will be on December 12th, and next year's Law Firm Leadership Luncheon will be on March 13th. Julie is currently researching possible speakers.

Craig Price distributed a template for the 2013-2014 budget and solicited budgets from the various chairs. He requested that the payee always be clearly identified when we request a check and that an address be provided.

There was a discussion of the suggestion that we should offer additional scholarships to the Reno conference, for a total of six full scholarships and four additional registration-only scholarships. Upon motion made by Jessica and seconded by Deana, the vote was unanimously in favor of this change.

Board of Directors Meeting held April 9, 2013

The April Board of Directors Meeting was held at the offices of Murphy, Austin on Tuesday, April 9, 2013. President Joelle Stone presided. The March 2013 minutes were approved by email in advance of the meeting. The motion for approval of March 2013 financials passed unanimously.

Craig Price provided a draft budget for April 1, 2013 to March 31, 2014 based on actual expenditures in the prior year, plus some input from Jessica Miller and Julie Denker. Committee chairs will provide Craig with budget amounts in order for a final budget to be produced. Craig reports the investment account is not bearing interest and has an annual fee associated with it; Craig recommends transferring the money from the investment account to the general account and closing the investment account. Motion made and passed unanimously.

Jessica Miller reported her plans to create a membership directory and a chapter brochure. Penny Stauffer reported 38 SVALA renewals received; email reminders to non-renewing members will go out April 10. Penny estimates membership of around 70 after the membership drive is complete. Penny will confirm all members are eligible for membership and that all attending luncheons as members are, in fact, members.

BOARD MEETING MINUTES SUMMARY
(continued)

Board of Directors Meeting held April 9, 2013
(continued)

Deana Xryztion completed the educational calendar for the year. The calendar includes luncheons, as well as webinars. Business partner sponsors and speakers are being scheduled for the meetings later in the year, the upcoming meetings are already scheduled.

Trish Hughes Kreis reported (via email to Joelle Stone) the summer issue publication has a deadline for submissions of May 30. Cheri Blethen reported via email updates to the website, including posting of all newsletters. She is continuing work to update the site with the new business partners.

Isabel Garcia reported on a conversation with the potential venue for a "Spring Mixer" and a "Meet the Board Mixer." Isabel will be finalizing details for these two events, and will be coordinating a virtual scavenger hunt. Paula Lee reported plans to work on the Community Connection Event as we get nearer to the date.

Julie Denker reported conversations with Steve Gilliland, potential speaker at the annual leadership luncheon, and planned follow up regarding the event including pursuing alternatives for venues, times, speakers, whether to include other non-member invitees, etc. Julie is also following up to plan the details of the December 12th holiday luncheon.

Joelle ordered chapter pins; they will arrive in time for the regional conference in fall. Deana is looking into a retreat follow up meeting with Judy Hissong and will report back to the board. Deana is partnering with LMA to provide information regarding SVALA events to LMA for forwarding to their membership; LMA is also extending invitations to SVALA members for LMA events.

Board of Directors Meeting held June 11, 2013

The June Board of Directors Meeting was held at the offices of Murphy Austin on Tuesday, June 11, 2013. President Joelle Stone presided. A motion was made to approve the April 2013 minutes which was passed unanimously. A motion was made for approval of April 2013 financials which was passed unanimously.

Craig Price provided April and May 2013 financial statements and reported the investment account is closed as agreed. Jessica Miller reported her plans to create a membership directory. Deana Xryztion reported on upcoming educational sessions and provided a calendar of the luncheons and webinars. Judy Hissong is confirmed for the June luncheon and is coordinating with Deana for a new date for the retreat follow up session. Trish Hughes Kreis reported a seamless transition of the newsletter.

Cheri Blethen reported an increase in activity on the SVALA job bank. Jessica Miller will provide an electronic copy of the business partner directory for posting on the website. Patricia Cooper reported plans to work on the salary survey with a hand off from Joelle as we get nearer the date.

Isabel Garcia thanked those who attended the "Meet the Board Mixer" and reported the event came in under budget. She is planning a "Summer Mixer" for July. Isabel will provide the contacts spreadsheet to the business partners eligible for mailings and will be coordinating a virtual scavenger hunt. Paula Lee reported plans to seek out an animal rescue group for the Community Connection Event.

BOARD MEETING MINUTES SUMMARY
(continued)

Board of Directors Meeting held June 11, 2013 (continued)

Julie Denker was not in attendance but provided information for Steve Gilliland and Jonathon Bowman, potential speakers for the Leadership Luncheon. She also provided a written report summarizing the Leadership Luncheon and Holiday Luncheon, which included dates (3/13/14 and 12/12/13 respectively). Jessica will send the deposit to the Sutter Club, venue for the Leadership Luncheon.

Vicki Robinson will provide an update regarding the nominating committee as the date gets nearer. Joelle reported Cindy Snook, Isabel Garcia, and Cheri Blethen will attend CLI this year on scholarships. One more chapter-sponsored scholarship is available. A motion was made to have the money for the additional scholarship reallocated to a regional scholarship if the CLI scholarship goes unused. The motion passed unanimously. A motion was also made to approve a third hotel night for this year's scholarship recipients since it is in Atlanta and it was approved unanimously.

Vicki Robinson will email the Board a copy of the current scholarship policy. A suggestion was made to consider inclusion of firm practice descriptions in the membership directory. Cindy Snook will inquire at CLI to determine whether other chapters include this information. Platinum sponsors will be included this year in monthly luncheons but they need to pay the cost of their meal.

It will be important for SVALA members to attend the conference this year with our chapter being the host. The chapter is providing scholarships – six that cover all expenses; four that cover registration only; and board scholarships that cover all expenses for the President, President Elect, and two other board members. There will be a blog for the conference – Vicki's topic is "what to do in Reno;" Jessica Miller and Cindy Snook will do the writing. Cindy Snook will coordinate for t-shirts for chapter members to wear to conference. A motion for the chapter to purchase t-shirts for all conference attendees was approved unanimously. Our chapter will be asked to staff the registration desk.

Joelle would like all board members to take a look at the President's Award guidelines and will email them.

CALENDAR HIGHLIGHTS

AUGUST

August 13, 2013

SVALA Board Meeting

5:30 p.m.
Murphy Austin Adams Schoenfeld LLP
304 "S" Street

August 20, 2013

SVALA Summer Mixer
5:30 - 7:30 p.m.
House Kitchen & Bar

August 21, 2013

ALA Webinar
Financial Reporting Methods that Allow
Intelligent Business Decisions

August 27, 2013

SVALA Luncheon
12:45 p.m.
Topic: Can 15 Minutes Really Save you $500?
Casa Garden Restaurant

SEPTEMBER

September 18, 2013

ALA Webinar
Forecasting the Realistic Budget

September 24, 2013

SVALA Luncheon
12:45 p.m.
Topic: Budgeting/Office Finance Management
Casa Garden Restaurant

OCTOBER

October 8, 2013

SVALA Board Meeting

5:30 p.m.
Murphy Austin Adams Schoenfeld LLP
304 "S" Street

October 16, 2013

ALA Webinar
Saying the Hard Things with Aloha

October 22, 2013

SVALA Luncheon
12:45 p.m.
Topic: Cyber Liability, Network Security
And Privacy Risks
Casa Garden Restaurant

October 31 — November 2

Region 6 Annual Conference & Exposition
Reno, Nevada

UPCOMING EVENTS

December 12, 2013
Holiday Party

March 13, 2014
Law Firm Leadership Event