

RIVER CITY REVIEW

Association of Legal Administrators

Sacramento Valley Chapter Newsletter

Summer 2009

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Shauna Manner
President, SVALA

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Send your Newsletter feedback
here:

thkreis@murphyaustin.com

ala-sacramentovalley.org



Shauna Manner

The first half of 2009 has passed (with lightning speed), and so far, the year has proven to be a good one for the Sacramento Valley Association of Legal Administrators (SVALA), despite unstable and difficult economic times, particularly in California. Now, more than ever, it is critical that we “stick together” in support of one another, specifically by sharing suggestions and information regarding how to survive this economic climate. Thanks to all of you for your continued membership in SVALA, and to the 2009 Board of Directors for your hard work and enthusiasm.

In May, the 38th Annual Educational Conference and Exposition was held in New Orleans. While not as well attended than prior conventions, the conference was as impressive an event as always - well-organized, focused, and very helpful. Our “local” Region 6 conference is approaching fast: September 25-26 at the DoubleTree Hotel Sonoma Wine Country in Rohnert Park, California. Sign up early for the best hotel rates!

Again, although it may seem like an unnecessary expenditure and therefore unworthy of dwindling extra funds, these ALA conferences offer information that will help your firm survive these complicated economic challenges. In addition to organized lectures and discussions, there are numerous informal opportunities for sharing ideas and suggestions among your peers, providing a firsthand look at what has worked and what has not. Gathering phone numbers and emails at these conferences builds an immensely valuable, personalized database of information for you to tap into later. The conferences highlight the latest relevant technology and provide the chance to talk to new vendors, offering you a unique chance to compare different services, rates, ideas, etc. quickly and conveniently. Explaining these overarching, long-term benefits to the partners of your firm may assist them in understanding why these conferences are worth your attending, even if it may seem initially as an unnecessary expenditure. The pay-off, so to speak, is extensive.

In a quick update, your 2009 SVALA Board is in the process of updating the chapter's website, working to increase participation among members, and has updated each board member's “job descriptions” (check them out on the website). The new website will incorporate ALA's new look.

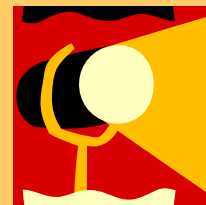
A reminder that our Community Challenge Weekend will be October 16-18. Join us as we come together to contribute our time, energy and resources toward improving our community. Also, don't forget our monthly webinar programs on various topics, each one presented live by an expert on the subject. This is a high quality, efficient, and cost effective method of learning for legal administrators. We also hope you will join us regularly for our monthly luncheons.

Again, thank you for your focus and participation in the Sacramento chapter of the Association of Legal Administrators. It is my hope that the economic recession helps revitalize and reinforce the importance of helping each other as we work to create best practices and sustainable businesses in a struggling economy. See you this fall!

VENDOR ADVERTISING INDEX

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Click on any vendor name for an easy jump to their ad!



SPOTLIGHT ON GALLAWAY COMMERCIAL, INC.

Please visit page 7 for this edition's Vendor Partnership Spotlight!

Each edition will feature a different vendor in order to educate and inform the membership about all of our wonderful sponsors!

We appreciate each and every one of our sponsors! Thank you for your partnership and your support of the SVALA.

2009 — 2010 VENDOR PARTNERS

PLATINUM

Pacific Storage
Sierra Office Supply & Printing
Jenkins Insurance Group

GOLD

Sacramento Placement Services
Gallaway Commercial, Inc.

SILVER

Baker + Cadence Solutions LLC
Equitrac
First Legal

River City Review Submission Deadlines

Submissions of articles, quotes, calendar items or advertisements are welcome! Please submit materials for the quarterly Newsletter by the following dates:

Fall 2009	September 15, 2009
Winter 2009	December 15, 2009
Spring 2010	March 15, 2009

All submissions must be provided via e-mail in Microsoft Word, Microsoft Publisher, pdf, jpg, or tif format. Please submit all materials to the Newsletter Chair:

Trish Hughes Kreis
(916) 446-2300
thkreis@murphyaustin.com

Thank you for your contributions!!

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LETTER FROM YOUR EDITOR



Welcome to the summer edition of the *River City Review*. Lucky for us Sacramentans, a slight breeze (topping out at 2 MPH) is cooling us off right now! We must be hovering around 105 degrees which is sooo much better than the 110 we've experienced recently.

Well, forget about the heat! Sit back, drink some fabulous iced tea and read all about the recent Annual Educational Conference and Exposition in New Orleans or the Chapter Leadership Institute in Arizona (can't we have a conference in Alaska occasionally?).

In this issue, we also have a preview of our Community Challenge Weekend, an article about Greening Your Office (I'm thinking it is not suggesting setting the a/c to "super cold") and feature Paul Meredith of Olson Hagel & Fishburn, LLP in our New Member Profile!

Trish Hughes Kreis

Murphy Austin Adams Schoenfeld LLP

We also are Spotlighting Gallaway Commercial, Inc. in our Vendor Spotlight feature. Please see their ad on page 6 and read all about

their company on page 7.

Our luncheon preview and recap is full of information in case you missed the luncheons or are not yet committed to attending. Remember the luncheons are now a part of your membership dues so lunch is on us!

A "cool" event to look forward to is our Region 6 Conference being held this year in Sonoma Valley. It should be another educational and re-energizing conference. Please see page 23 for numerous reasons to attend.

Finally, look for the "pop quiz" hidden in these pages. We have had some fast responders the last few issues so make sure you email me as soon as possible with your answer! The prize is a \$25 gift certificate! (Board members are not eligible to win — sorry, guys!).

Enjoy the newsletter and make sure you keep hydrated.

See you in the fall!



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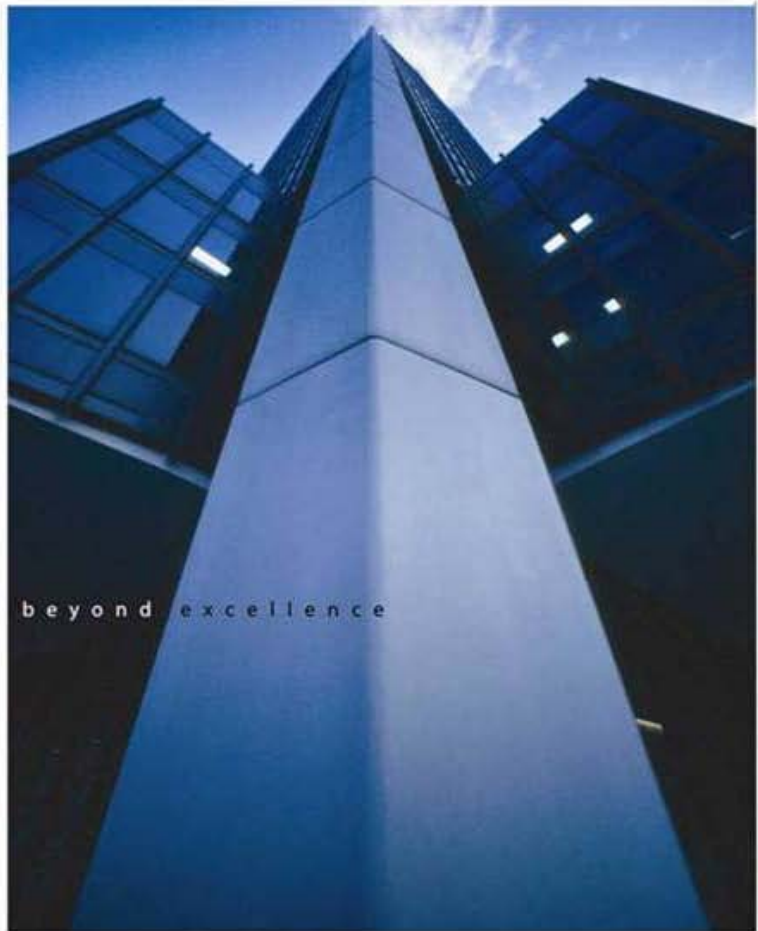
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THE DIFFERENCE

- ✓ Gallaway Commercial Inc, (GCI) is the largest Tenant Representation firm in Sacramento
- ✓ GCI is the only firm in Sacramento offering in-house project management at no additional cost
- ✓ 96% of GCI's business is repeat or referral

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RUSSEL W. GALLAWAY, CCIM
PRESIDENT
rgallaway@gallawaycommercial.com



BRIAN KUKLISH
SENIOR PROJECT MANAGER
bkuklish@gallawaycommercial.com

In 2005, GCI completed the largest private sector deal in the greater Sacramento Valley

- FDI Collateral Management (84,900 SF)
- Countrywide (13,186 SF)
- Keller Williams (13,261 SF)
- Financial Title Company (24,118 SF)
- Wilke Fleury Hoffelt & Birney, LLP (25,124 SF)
- Child Action (34,835 SF)



VENDOR PARTNERSHIP SPOTLIGHT

Gallaway Commercial, Inc.

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

Gallaway Commercial, Inc.:

GCI is a commercial real estate brokerage specializing in representing businesses in lease negotiations, acquisitions and dispositions. We also provide full project management services to our clients at no cost. Our primary niche is representing law firms, so we became a vendor sponsor of SVALA to support our clients' educational endeavors. I have found that being a sponsor of this organization has been helpful in relationship building and has provided our team with a thorough understanding of our clients' expectations, especially as it relates to the environments that they work in and how we can help to minimize their real estate costs.

Editor: Please tell us about **Gallaway Commercial, Inc.** and the services you provide.

Gallaway Commercial, Inc.:

Russel Gallaway, the founder of GCI, has specialized in representing tenants and buyers for 20 years. GCI differentiates itself from many of the large brokerage firms by having a corporate policy prohibiting taking listings with Landlords. This means that we will always be 100% on your side so you don't have to worry about conflicts of interest. GCI also provides an unconditional guarantee of value. Part of our value-added services are the project management capabilities we provide our clients at no cost to them. This allows clients to focus on day-to-day operations while we handle the details.

Editor: Give us a little background about yourself. How long have you been in the business? How long have you been with **Gallaway Commercial, Inc.?**

Gallaway Commercial, Inc.:

I have been a Broker in the real estate industry for 20 years and am a 5th generation Sacramentan. While attending UC Davis, I began my real estate career and quickly realized I wanted to own my own business. Upon graduation, I continued to work in real estate and eventually formed GCI.

Editor: How is it different working with law firms than other non-legal businesses?

Gallaway Commercial, Inc.:

Working with law firms is unique because it requires working with teams of individuals. It is critical to create a consensus amongst the team so there are quantifiable objectives. Due to the high cost of law firm tenant improvements, law firms typically have to sign long term leases. When committing to long terms leases, it is critical to negotiate a multitude of issues including creating flexibility to expand/contract and to negotiate minimizing collateralizing the lease. This is usually done through letters of credit or personal guarantees by the equity partners. There are several ways to reduce and/or eliminate this exposure.



VENDOR PARTNERSHIP SPOTLIGHT

GALLAWAY COMMERCIAL, INC.

Editor: Tell us how you would describe your working style. What makes you successful at what you do?

Gallaway Commercial, Inc.:

Our working style is based on acquiring a complete understanding of our clients' expectations and exceeding those expectations to foster long-term relationships. 96% of GCI's business is repeat and referral.

Editor: Tell us something fun you enjoy doing outside of work.

Gallaway Commercial, Inc.:

I love to spend time with my friends and family. We enjoy boating and skiing at Lake Tahoe.

Editor: What do you want the SVALA members to know about you and **Gallaway Commercial, Inc.?**

Gallaway Commercial, Inc.:

We are an assessable, client-oriented team of educated and seasoned professionals who create solutions for our clients on a daily basis. We are so confident in the value we provide that we give our clients the unilateral right to adjust our fee if they are not satisfied with our services. To date, this has not happened. We pride ourselves on our ability to adapt to market conditions and the current economic climate to sustain the business of our clients.

MARK YOUR CALENDARS AND HOLD THE DATE

Our ***Fall Labor Law Seminar*** is scheduled to take place on **Thursday, September 17**. Like last year, we are planning a breakfast meeting at one of the downtown hotels, time and location to be announced by the end of July.

Our event sponsor this year is ***Give Something Back***, a business products company that provides great and green office products at superstore prices, while raising funds to support our community. For more information about this organization follow the link www.givesomethingback.com

Community Challenge Weekend October 10, 2009



This year, the Community Challenge Weekend (CCW) which will be held on October 10, 2009 for the Sacramento Valley Association of Legal Administrators will focus their efforts on the Sacramento Ronald McDonald House (RMHC). Information about this organization can be found on their website, www.rmhcnc.org.

“The **Sacramento Ronald McDonald House** is a nonprofit organization whose mission is to help children and their families by providing an atmosphere where families can rest, reflect, and find mutual support. This home-away-from-home provides shelter and comfort to families who must travel to the Sacramento area in order to receive medical treatment for their child. The House offers family members of seriously ill and injured children a refuge from the hospital setting.”

Jeaninne Jenna-Budowich, CCW Chair

Administrator/Bookkeeper
Abbott & Kindermann, LLP

The first part of this fundraiser for RMHC is the collection of pop tabs. Pop tabs are the small metal tab on the top of aluminum beverage cans. The Sacramento Ronald McDonald House collects

these pop tabs to recycle, and puts these proceeds towards the Adopt-A-Family Program. This fund helps subsidize the cost of families staying at the Sacramento Ronald McDonald House.

Of course, cash donations are an important part of the support for the Charity and help in providing families with well-maintained facilities. If it were not for the kindness and support from Sacramento RMHC's local community, RMDH would not be able to provide the housing and stability to the families and children that are staying at the Sacramento location during their time of need.

On October 10, 2009, volunteers from SVALA will be working at the Sacramento RMHC's location to help out with outside and inside work – anything from gardening to cleaning inside their facilities. Volunteers are needed, so please call Jeaninne Budowich at (916) 456-9595 to sign up.



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MARK YOUR CALENDARS TODAY!

2009 Schedule

<i>January 21, 2009</i> Indispensable Legal Technology	<i>August 20, 2009</i> Law Firm Profitability Enhancement
<i>February 18, 2009</i> Leaves of Absence	<i>September 16, 2009</i> Strengthen Your Bottom Line With a Well-Built Budget
<i>April 22, 2009</i> Mastering Time (Time Management)	<i>October 21, 2009</i> Stepping Out of the Rubble: Developing a Disaster Recovery Plan
<i>June 17, 2009</i> Strategies for Digging Out of the E-mail Bag	<i>November 11, 2009</i> Control Stress Before It Controls You
<i>July 15, 2009</i> Alternative Work Arrangements	
<i>August 19, 2009</i> Records Management -- Finding the Needle in the Haystack	

Registration Opens in December 2008

Program descriptions and educational credit details can be found at www.alanet.org/webinars or call (847) 267-1252 for more information.

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All I really need is love, but a little
chocolate now and then doesn't hurt!
- *Lucy, Peanuts*

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SVALA CHAPTER ANNIVERSARY RECOGNITION

January 20 was our chapter's 30 year anniversary! The Sacramento Valley Chapter of the Association of Legal Administrators was chartered January 20, 1979. This is quite a milestone for our chapter and congratulations go to all those administrators who started the chapter and have worked on behalf of the chapter over the years.

On a more somber note, one of our founding presidents was BJ Ward who passed away on May 13, 2009, after a brief illness. BJ was instrumental in forming the current chapter of the Sacramento Valley Association of Legal Administrators (SVALA). BJ worked in the legal community for 45 years. She worked with Hardy Erich Brown & Wilson for 35 of those years and another 10 years with Schuering Zimmerman Scully & Doyle, LLP.

Camilla Arnds of Downey Brand remembers BJ as a boss, a mentor and very dear friend. Camilla says BJ shared her wealth of knowledge about the legal field, the ins and outs of how to survive in a law office, as well as shared many funny moments (and tears over the not so funny ones) over the years.

If you have memories of the chapter from these past 30 years (and they are printable) please forward to the editor at thkreis@murphyaustin.com for a future article on our chapter. Thank you!



SACRAMENTO VALLEY ASSOCIATION OF LEGAL ADMINISTRATORS 2009—2010 BOARD MEETING SCHEDULE

All SVALA members are invited to attend. Meetings will be held at Resources Law Group, at 555 Capitol Mall, Suite 650 and will begin promptly at 5:30 p.m. Please RSVP to SVALA Secretary, Jessica Miller, at miller@sweeney-greene.com before attending.

August 13, 2009

September 17, 2009

October 8, 2009

November 12, 2009

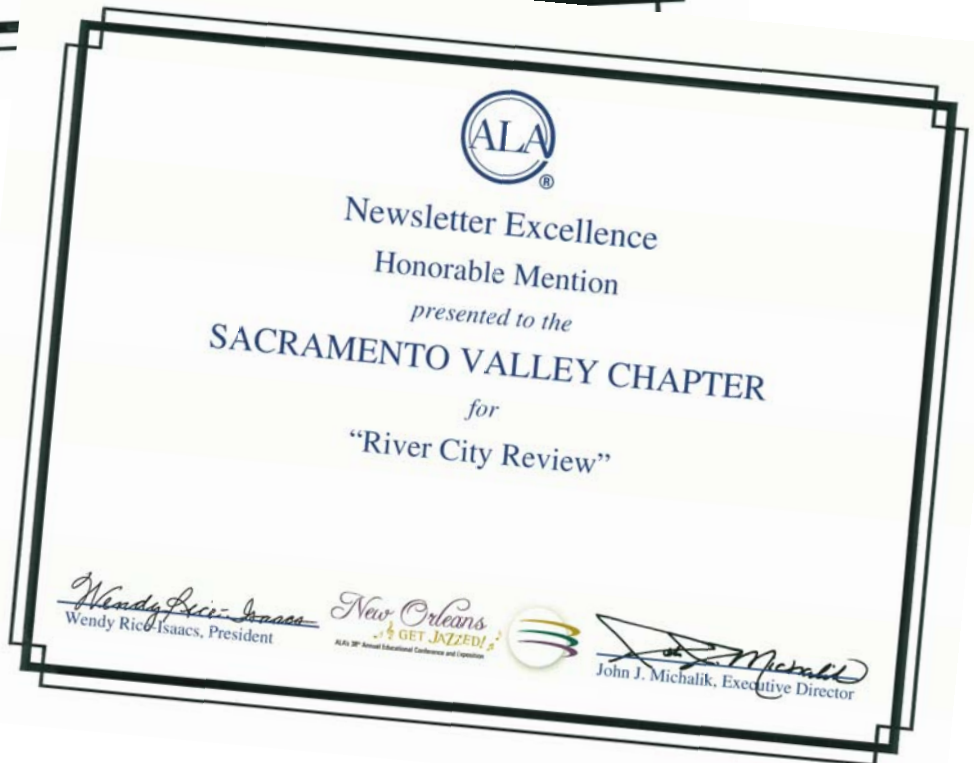
December 10, 2009

January 7, 2010

February 11, 2010

March Joint Board Meeting — TBA

PRESIDENT'S AWARD RECOGNITION



WELCOME TO OUR NEW MEMBERS!

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MEMBER CHANGES

Changes are in BOLD

Cindy A. **Snook** (formerly, Cindy Broughton)
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Editor Note to Cindy: Congrats on your nuptials!!

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**I come from family where gravy is
considered a beverage. Erma Bombeck**

NEW MEMBER PROFILE:
E. Paul Meredith
Olson Hagel & Fishburn, LLP

Editor: Thank you for being in our Summer Newsletter New Member Spotlight! Please give us a little background about yourself, including how you became a Legal Administrator.

Paul Meredith:

After spending 8 years as the Accounting Manager of Derby Cook Quinby & Tweedt, I was asked to be the Firm Manager of a split-off firm (XYZ). In addition I was to keep all the accounting duties. Trial by fire was my training. Our firm grew from 6 to 9 attorneys in 2 days. We grew more in the next few years and we downsized later and eventually split again. I later joined the firm of Titchell, Maltzman Mark & Ohleyer as the Accounting Manger but was soon performing many Office Manger duties. I was back to wearing multiple hats as usual.

In March my work moved from the Bay Area to Sacramento when I joined the firm of Olson Hagel & Fishburn, LLP as the Controller.

Editor: Please tell us why you joined the Sacramento Valley Association of Legal Administrators.

Paul Meredith:

I have been a member of the Golden Gate Chapter since 1990 and upon moving to Sacramento I wanted to continue having the networking and educational resources of the local ALA.

Editor: What is the most unusual or humorous task you have had to do as a Legal Administrator?

Paul Meredith:

I have had the tasks of closing down the last 2 law firms I have worked for. I do not want to do it again!!!

Editor: What is your favorite activity outside of work?

Paul Meredith:

Long distance road cycling up to 200 miles a day.

(profile continued on next page)

MEMBERSHIP INFORMATION

Know someone interested in joining SVALA? Have you moved??
Please notify our Membership Chair, Linda Magyar at Linda.magyar@pillsburylaw.com

NEW MEMBER PROFILE:
E. Paul Meredith
Olson Hagel & Fishburn, LLP
(continued)

Editor: What is a project or accomplishment you have been proud of?

Paul Meredith:

When asked to help set up a new law firm, “XYZ,” in 1990 it was a covert operation. No one knew in the DCQT firm except for the 6 attorneys leaving the firm and myself. We had to have a separate fully operational office by the time of announcement. After a few months of preparation we were down to the last week before the confrontation of the Partners.

On Monday the carpet went down for the law firm of “XYZ.” Tuesday the furniture was delivered. The computers were delivered on Wednesday. On Thursday we configured the computers and brought in the telephone lines. On Friday we configured the telephone systems and continued with the computer configurations. Saturday we fined tuned everything.

On Sunday the Partners met with the “Old Firm” and made the announcement. Sunday afternoon faxes went out to our clients to transfer the files to our new firm. On Monday we had 2 trials with 3 attorneys in full overdrive. By Wednesday we added 3 more attorneys and 3 secretaries.

I was locked out of the “Old Firm.”

Whew!! It was time to rest. Hardly. My work was just beginning as a new Administrator.

Editor: What is something people would be surprised to know about you?

Paul Meredith:

One of the following is “Not True.”

Decade #1: I was born in the first town named after George Washington and it isn’t Washington, D.C.

Decade #2: I once lived next to Blue Beard the Pirate’s old house.

Decade #3: I hitchhiked over 10,000 miles, hopped a freight for 1,200 miles, lived in 6 states and traveled throughout 46 states and 10 countries.

Decade #4: I walked into a maritime law firm for a one week temp assignment and ended up working for the CFO for 20 years.

Decade #5: In addition to starting up a new law firm as an Administrator I toured with the World’s top professional Handbell Ensemble on weekends.

Decade #6: I shut down my last 2 law firms after their best years of operations.

Thank you for your participation and welcome to the SVALA!!



www.JenkinsInsGroup.com

Contact Michele Martin: 916.576.1604

For more than 70 years Jenkins Insurance Group has called Northern California home. We are proud to partner with Sacramento Valley Association of Legal Administrators in making this region a great place to live and work. SVALA has shown great commitment to the law firms in our region and to our community.

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Greening Your Office – It’s Easy Being Green

by Meghan Moda, Resources Legacy Fund

As stories of climate change and environmental issues are increasingly covered by the media we are all becoming more aware that our actions – both in our personal lives and at work – have a large impact on the environment. While the issues may seem overwhelming, there are a variety of small, simple steps that you can take at work to reduce your negative impact on the environment and simultaneously save your firm money. Many of these steps are as simple as changing habits or providing co-workers and employees an opportunity to take environmentally friendly actions.

Greening your office starts with small steps. The mantra of ‘reduce, reuse and recycle’ can guide you as you implement environmentally friendly practices at your office.

Reduce

Decreasing the amount of supplies and energy your office uses can quickly and easily result in significant environmental improvements. Office use of paper, ink, plastics, and metals all have an impact on the environment due to the large amount of natural materials, energy, water, and transportation that goes into making and delivering supplies to your office. Unfortunately, most supplies end up in a landfill after one use. Here are some steps that you can implement at your office to reduce energy and material use:

Level of Effort	Tips/Suggestions
EASY	<ul style="list-style-type: none">• Only print when absolutely necessary; use digital copies for internal drafts, memos, and agendas; and set all printers to print double-sided.• Use paperclips instead of staples.• Set computer monitors to sleep after 10 minutes of nonuse as opposed to allowing the screensaver to run.
MEDIUM	<ul style="list-style-type: none">• Set thermostats low in winter (67 degrees) and high in summer (78 degrees) and ask staff to dress accordingly.• Install automatic light sensors that turn on the lights when people enter the room and be sure to turn off lights, computers, and other electronic equipment at the end of the day.• Get rid of the water cooler and its plastic cups and put a pitcher of tap water in the refrigerator.
ADVANCED	<ul style="list-style-type: none">• Encourage telecommuting, carpooling, public transit or biking to work.• Install energy efficient equipment such as refrigerators, dishwashers, HVAC systems or even solar panels.• Use teleconferencing or web-based conferencing instead of in person business meetings.• Purchase carbon offsets for necessary business travel and to offset your firm’s carbon footprint. There are many online retailers that can make this process simple and inexpensive allowing your firm to reduce its contribution to global warming.

Many of the steps above can save your firm money on paper, printing, and supply costs while lowering energy and travel bills. The purchase of new energy efficient equipment requires an initial investment but long-term energy savings in addition to incentives or rebates offered by local and federal government and by many utilities can make these purchases moneysaving investments. When you do purchase supplies, such as paper or cleaning products, shop green and look for recycled or environmentally friendly products.

Greening Your Office – It's Easy Being Green

by Meghan Moda, Resources Legacy Fund

(continued)

Reuse

While reducing energy and supply use in the office, be aware of potential areas where items could be reused. Reusing items can result in the same cost savings that are found through the reduction of use. Here are some tips on how to encourage reuse:

Level of Effort	Tips/Suggestions
EASY	<ul style="list-style-type: none">• Misprints and one sided copies that are no longer needed can be used for scrap paper in printers, as notepads, or as fax cover sheets. Put scrap paper in clearly marked bins near phones, printers, or faxes or staple together to make notepads.• Hang on to boxes from deliveries to store supplies, serve as recycling bins, or to give out to employees who may be moving.• Reuse inter-office envelopes, folders, and binders.
MEDIUM	<ul style="list-style-type: none">• Encourage employees to use non-disposable plates, cups, silverware, and napkins whether supplied by the firm or brought from home.• As equipment or furniture is replaced in the office, offer employees the opportunity to take these items home or donate them to charity.
ADVANCED	<ul style="list-style-type: none">• When purchasing furniture for the office, look for lightly used furniture. Double check the office to find extra pieces that employees aren't using or consider leasing furniture.• Purchase refillable pens and pencils, as well as sugar and cream dispensers.

Reusing items is an opportunity for you and your office to be creative by finding new uses for items once they have served their original purpose. Each time you reuse an item, you minimize the amount of trash going into landfills and allow less energy and natural resources to be consumed, while saving your office money by delaying the purchase of new supplies.

Recycle

Even when successfully achieving the first two "R"s there will still be waste. This is where the third "R" steps in. The creation of recycled paper creates 74% less air pollution than paper produced from trees and for every ton recycled, 17 trees are saved. There are many statistics like this that bolster the need for recycling programs in every office. The following tips can help you increase recycling in your office:

Level of Effort	Tips/Suggestions
EASY	<ul style="list-style-type: none">• Start or expand your recycling program. There are many recycling businesses that will pick up paper, plastic, cardboard boxes, and soda cans or bottles that you collect in your office. For those not wanting to hire outside help, arrange an employee recycling team that takes turns bringing home the office recycling and adding it to their home recycling.• Make recycling easy – put paper recycling bins under each desk and by printers.• Return all toner cartridges to the manufacturer.
MEDIUM	<ul style="list-style-type: none">• Collect difficult to recycle items such as batteries, cell phones, light bulbs, or electronic equipment and periodically take it to designated recycling centers that collect this type of waste.
ADVANCED	<ul style="list-style-type: none">• Purchase a small compost bin for lunch scraps and coffee grounds and coordinate volunteers with compost piles at home to take home the scraps. By recycling compostable materials you can reduce serious greenhouse gas emissions from landfills and create valuable fertilizer for your home garden.

Greening Your Office – It's Easy Being Green

by Meghan Moda, Resources Legacy Fund

(continued)

Ultimately the success of your efforts to green the office will rely on the education of and cooperation from staff and executive leadership. Engage co-workers and employees in planning, implementation, and rewards associated with making your firm more environmentally friendly. Write environmental practices into employee handbooks, address procedures during orientations, provide frequent updates on the progress of efforts and the positive outcomes, and make sound environmental practices a fundamental part of the firm culture. There are many resources on the internet and at your local library to help to on your path to green. By taking simple steps today you will find that it is easy to be green, even at the office.



Those who dance are considered insane by those who cannot hear the music. - George Carlin

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Vendor Partnerships in our Legal Community Michele Tracy, Vendor Relations Chair

This is the second year of our local chapter's *Vendor Partnership Program* and many firms have had the opportunity to become better acquainted with some of the best legal business vendors in our community. What sets our partners apart from other suppliers is their commitment toward building long term relationships within our membership, which requires great service. As administrators, we place high value on working with people whom we can rely upon to get the job done right the first time.

Great service from our partners means that you can rely upon them to “go the extra mile” for you. They are prepared to handle special requests, customization and offer expertise based on your unique business concerns. In this economy, we are all required to produce more results with fewer resources and this means our partners have to be willing to stand along side us and face the issues and challenges posed by our partners and shareholders.

Let's face it, law firms are demanding clients. If you are in need of quality products or services, please ask our partners first. If you would like to know whom the firms are currently working with our vendor partners, contact me and I will be happy to send a membership email making that inquiry on your behalf. I can be reached at mtracy@mulfil.com

For those of you, who have not yet had an opportunity to personally meet with our partners, let me assure you that they have come to us with recommendations from firm's within our membership community. Be open to new business partners who may offer new ideas and solutions to meet your needs.

Pop Quiz:

Who is in the Vendor Spotlight this issue?

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

thkreis@murphyaustin.com

**Board Members are not eligible to participate!*

Conference Call!

by Steven M. Morris, CLM, Region 6 Projects Officer

It's true. I'm ardently devoted to conference attendance. The Region 6 Educational Conference & Exposition on September 25&26, 2009 at the DoubleTree Sonoma Wine Country will be the 21st time I've attended an ALA sponsored conference. *Taste the Excellence* is this year's theme. Besides the wine, I'm eager to attend for three reasons. I anticipate the educational value, networking opportunities and personal recharge experienced from attendance will make the time expenditure a worthwhile endeavor.

The Region 6 pre-conference brochure highlights more than 20 outstanding topics and speakers at various sessions and round tables available to attendees. Several offerings are two-part sessions designed to enable time for an application element. Whether you're a regular conference-goer like me or attending for the first time, an educational session can provide an enlightening moment applicable to your job the following Monday.

Knowledge gained from conference attendance was instrumental in my passing the CLM examination in 2002 and in recertification since that time. I value the discipline and credibility the CLM process adds to our profession. Conference is a perfect educational vehicle to get or stay on course for CLM achievers.

I've also found ways to maximize my educational investment long after the conference is over. In 1995, when I was a new administrator and ALA member, a presenter recommended creating a topics file. Today, I have folders on 142 topics filling three lateral file shelves. My system continues to grow with presentation handouts from each conference along with magazine articles of interest. As administrators, we handle a wide variety of responsibilities. When asked to weigh in or resolve an issue that hasn't come across my desk lately, pulling one of my topic files has proven to be a time-saver and great starting point on many occasions.

Networking is another invaluable aspect of conference attendance. I met two administrators from various parts of the country at my first annual conference in Baltimore. We have stayed in touch all these years and one was instrumental in helping me find an administrator position. At each conference, I meet additional colleagues and reconnect with administrators throughout the organization. Without a conference to bring us together, it would be geographically impossible to see so many fellow ALA members as often. Sometimes conference feels like the best part of a family reunion.

The Exhibit Hall is another great way to network. There are always social aspects such as beverage breaks and lunch served in the Exhibit Hall. It also serves as a perfect venue to meet with numerous service providers under one roof. When we have choice in the business partners we use at our firms and legal departments, using a company that financially supports ALA is an integral element for the long-term success of our chapters and ALA as an organization. You may not need a business partner's services today, but those connections may be just the resource you need tomorrow.

As rewarding as our profession is, there are times when the personal fuel tank feels like it's running on fumes. Conference attendance can be the rejuvenation needed to meet the daily challenges we face. Many of us may have a full toolbox of administrator tools, but taking time to sharpen them allows one to shine and gain greater efficiency in our professions. Visiting a new city or area of the country while at conference is not a selfish side benefit and serves a worthwhile purpose in the rejuvenation process.

I value the education, networking and rejuvenation benefits that are derivative from conference attendance. This understanding has caused me on more than one instance, to pay for conference, or a portion of it, myself. It's an investment in my career that has paid meaningful dividends. I hope you are making plans to be on the next Conference Call and *Taste the Excellence* with me and your fellow Region 6 administrators in Sonoma County.

Annual Educational Conference Highlights New Orleans



Count your toes, people!

The Association of Legal Administrators (ALA) Educational Conference and Exposition provides a unique opportunity to attend a single multi-day event each year that touches on all the important aspects of legal management. The 2009 conference in New Orleans was no exception. The conference included relevant and informative educational sessions; a forum to network with vendors, peers, and ALA staff; and optional sightseeing and tours of the area - a swamp tour complete with gators, a haunted French Quarter walk, a stroll along the Mississippi, and a wide-eyed jaunt down Bourbon Street for at least one attendee from Sacramento. I strongly encourage each of you to consider attending the 2010 ALA Annual Conference & Exposition May 3-6 in Boston. — Shauna Manner, President SVALA



**Shauna Manner, President SVALA with
Vicki Gordon and Lynn Cole, President
Elect**

**I heard Shauna was house hunting and I
know she's thorough but this is *really*
exhausting all possibilities!**



Conference Highlights

Chapter Leadership Institute

By Craig Price, SVALA Treasurer

I attended the recent Chapter Leadership Institute (CLI) at the Carefree Resort & Villas in Carefree, Arizona. This was my first CLI after 25 years of being a legal administrator.

Just like the national and regional educational conferences and programs offered by ALA, CLI provides many excellent program sessions along with the opportunity to catch up and reconnect with fellow administrators from other ALA chapters as well as to meet the national and regional directors and board members. Many of the sessions were idea exchanges discussing effective chapter management and all that goes into making ALA one of the best professional associations in the country.

A couple of items I was able to take away from CLI included meeting our current president, learning the importance and how much goes into a logo, tagline and branding change for an association of our size, and a new quote and thoughts regarding internet social and contact sites, more specifically twitter.

One of the things that Susan French Koran, our current ALA President from Oklahoma, wanted each CLI attendee to do was to make and take away three new contacts from CLI. Susan turned out to be my first new contact, as I was hers, as we rode the same super shuttle from the airport to the resort. I had never met Susan before and during the ride unknowingly asked her if she was involved in ALA on a national or regional level. Needless to say, I was a little embarrassed when she told me who she was.

A main topic and session of CLI covered the new logo, tagline, and rebranding of ALA including the chapters. This was a huge undertaking and, as you can see from the ALA website <http://www.alanet.org/default.aspx>, a significant change from our former logo and colors. ALA will completely implement the new logo, tagline and brand on all materials by August 1, 2009. The timeframe for all chapters to have ceased using the former ALA logo is October 31, 2009. The SVALA chapter board is currently working to make this happen.

On a lighter note John Michalik, the ALA Executive Director, was quoted as saying during a question and answer period during the closing breakfast, "You can tweet on twitter but you can't twit on tweeter." Even though John said this in jest, websites such as twitter, linkedin, facebook, and blogs are having an impact, both good and bad, on how we conduct business. The generational differences in regard to the understanding of these sites and how they are used and perceived is and will continue to be of interest to us all.

CLI is designed as a training and orientation event for chapter officers and leaders. It provides a unique opportunity for learning about and strengthening chapter leadership roles, sharing ideas and experiences with colleagues, expanding chapter communication networks, and enhancing presentation skills. For me CLI provided all of these and much more. For any current or future chapter officer, board member, committee chair, or leader I would highly recommend attending.

Also, do not forget to register for the upcoming Region 6 Conference & Exposition at the Double Tree Hotel Sonoma Wine Country in Rohnert Park. This is another great educational opportunity and they don't get much closer to home than this.



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UPCOMING EDUCATIONAL AND SOCIAL EVENTS

Remember: The luncheon cost for ALA members is now included in our annual membership dues!

(Fine Print: exceptions are the “special” luncheons such as the Educational Seminar in September, Holiday Luncheon and Managing Partner Event)

Thursday, August 20, 2009

TIME: 12:45 p.m. — 2:00 p.m.
TOPIC: Documenting Employee Performances and Corrective Action
SPEAKER: Dave Perrault, Hardy Erich Brown
SPONSOR: Sierra Office Supply & Printing
LOCATION: Casa Garden Restaurant
2760 Sutterville Road

Thursday, September 17, 2009 **

TIME: Breakfast
TOPIC: Labor Law Educational Seminar
SPEAKER: TBD
SPONSOR: Give Something Back
LOCATION: TBD

*** Details coming soon!*

Thursday, October 15, 2009

TIME: 12:45 p.m. — 2:00 p.m.
TOPIC: Building a Culture of Client Service Among Staff
SPEAKER: Rita Alli, Stoel Rives
SPONSOR: Baker & Cadence Solutions, LLC
LOCATION: Casa Garden Restaurant
2760 Sutterville Road

PREVIOUS EDUCATIONAL AND SOCIAL EVENTS

APRIL 2009

Mike Rogers and Mike Strong from Afineol Consulting joined us in April to discuss “Microsoft Sharepoint: What Is It And How Can It Help Your Firm.”

Afineol explained how Microsoft Office SharePoint Server technology can help our firms facilitate collaboration, provide content management features, implement business practices, and supply access to information that is essential to organizational goals and processes.

Afineol Consulting has been helping firms unlock the efficiencies of their computer systems for the last 10 years. As a Microsoft Certified Partner and a partner with the legal industry, Afineol takes all aspects of a firm into consideration before making any recommendations. Afineol’s corporate motto is Listen. Solve. Support. Get the questions right and the rest simply flows.

MAY 2009

The May Meeting was a New Orleans Conference Recap/Networking Opportunity hosted by Resources Law Group. Attendees of the Conference shared their experiences, session information as well as a snazzy new fashion statement (beautiful masks!). If you can’t make it to the Annual Conference, the annual Roundtable Recap is the next best thing. Now, where do I get one of those masks??

JUNE 2009

Detective Sean Smith with the Identity Theft Task Force, Sacramento County Sheriff’s Dept. spoke to our group about Identity Theft and Personal Protection. The identity Theft Task Force is a unit within the Sacramento Valley Hi Tech Crimes Task Force and their mission is to investigate identity theft related crimes and educate the public to help prevent them from being victimized.

Aside from hearing the scary stories (and there were many and they were scary), we learned from Detective Smith what steps we can take to safeguard ourselves from identity theft. Some take-aways from this luncheon include advice to shred financial documents and paperwork, don’t use obvious passwords, and inspect your credit report at least annually. To learn more about Identity Theft and how to protect yourself, visit www.ftc.gov/idtheft.

Our Vendor Sponsor this month was Gallaway Commercial, Inc. Please see their profile in the “Spotlight” on page 7 of this issue.

PREVIOUS EDUCATIONAL AND SOCIAL EVENTS

JULY 2009

Kevin J. Valine and Vince Juarez of Jenkins Insurance Group led us in a discussion of new trends in risk management for our industry and in the marketplace.

As both Vince and Kevin stated, the landscape for Lawyers Professional Liability is constantly evolving, and the economic downturn is inflicting a new set of changes. What hasn't changed is our dependence on computer networks and both Kevin and Vince discussed this evolving area as well.

For more information, please contact either Kevin or Vince directly or through their website www.jenkinsgroup.com.

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ALA CODE OF PROFESSIONAL ETHICS

The legal profession and business must adhere to high ethical standards to maintain public trust. This ALA Code of Professional Ethics sets forth guidelines or standards for the ethical administration of legal practices — private firms, legal clinics, corporate legal departments, governmental agencies and the courts.

Legal administrators at all levels must become familiar with these standards and incorporate them into their everyday performance. They also should study and comply with all ethical guidelines of bar associations and law societies which apply in their own jurisdictions. Furthermore, they must take the lead in communicating relevant standards to staff personnel who may be less familiar than lawyers with the ethical guidelines of bar associations and law societies, and in communicating appropriate policies and procedures to lawyers.

Principles and Rules of Conduct

Honesty

The professional legal administrator shall:

- Be open and honest in all relationships with attorneys, employees and others.
- Never compromise the reputation or good of the legal practice by dishonest or illegal behavior.

Integrity

The professional legal administrator shall:

- Avoid actual or apparent conflicts of interest. Advise all appropriate parties of any potential conflicts.
- Never engage in activities that would prejudice the ethical performance of job responsibilities.
- Refuse any gift, favor or hospitality that would influence or appear to influence actions, unless such item is fully disclosed to and approved by management.
- Never solicit or accept any personal or family fee, commission, gift, gratuity, discount or loan for performing job duties or providing services to existing or potential clients.
- Pursue and promote fair and equitable employment practices and oppose discrimination which is based upon gender, age, race, religious creed, national origin, sexual orientation, physical disability, marital, parental or veteran status.
- Endeavor to foster a work environment founded on respect and dignity and free of sexual harassment.

Objectivity

The professional legal administrator shall:

- Communicate all information fairly and objectively.
- Fully disclose all known information that would be material to a particular management or financial decision.
- Fully disclose all relevant information required for an intended user to understand management reports, employee communications, business recommendations and comments. and margin accounts, in order to avoid debts and other financial obligations which could compromise independence and professional judgment.

ALA CODE OF PROFESSIONAL ETHICS ***(continued)***

Competence

The professional legal administrator shall:

- Maintain an appropriate level of professional competence and enhance existing skills through ongoing professional education programs, peer group associations and self training.
- Recognize and communicate professional limitations or other constraints that would preclude responsible judgment or successful performance of an activity.
- Ensure that delegated tasks are responsibly assigned and competently performed.

Make every effort to ensure that subordinates have necessary skills and levels of competence.

Independence

The professional legal administrator shall:

- Ensure that all personal political activities are separated from the legal practice.
- Never make investments which would benefit from inside knowledge of the legal practice or its clients.
- Exercise prudence and restraint in personal financial affairs, including speculative investment and margin accounts, in order to avoid debts and other financial obligations which could compromise independence and professional judgment.

Professional Responsibility

The professional legal administrator shall:

- Promulgate a positive image of the legal practice to its clients and potential clients; attorneys and staff personnel; bankers, consultants and vendors; the press; governmental agencies; the legal community; and all other relevant audiences.
- Exercise reasonable diligence in gathering business data and information from internal and external sources and in reporting that information in a manner which facilitates informed decision-making.

Confidentiality

The professional legal administrator shall:

- Never disclose confidential information acquired in the course of employment, whether or not still employed by that legal practice, except when legally obligated to do so.
- Inform subordinates that confidentiality of information acquired in the course of their work is essential, and monitor their activities to ensure that confidentiality is maintained.
- Ensure that all confidential and proprietary information acquired in the course of duty is used solely for legal practice purposes, is not provided to unauthorized persons, and is not used for the purpose of furthering a private interest or making a personal profit.

ALA CODE OF PROFESSIONAL ETHICS
(continued)

Service

The professional legal administrator shall:

- Perform business duties in good faith in a manner believed to be in the best interests of the legal practice.
- Perform duties only within assigned authority.
- Accomplish assigned tasks in a timely manner.
- Promote and monitor guidelines for practice development and marketing activities to ensure that those activities are appropriate for the legal practice and conform with applicable professional guidelines.

(Adopted April 1991)

Press any key to continue —
where's the any key? – Homer
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BOARD MEETING MINUTES SUMMARY

Board of Directors Meeting held April 9, 2009

The April Board of Directors Meeting was held at the offices of Resources Law Group on Thursday, April 9, 2009.

Joelle Stone is going to determine whether a salary survey is warranted this year. She will contact previous participants and those who purchased the survey in past years to determine intent of participation and purchase this year. She will also look into the automated data collection program mentioned on the President's List Serve.

Linda reported we've lost several members, largely due to State budget constraints and the departure of several members from the industry. She will follow up personally with several members who haven't affirmatively indicated they aren't renewing. The Board voted to implement an electronic membership directory, effective immediately, giving Michele Tracy authority to fine-tune the presentation with our vendor partners.

Terrie reported we have 27 total attendees for our April luncheon presentation by Afineol, including presenters and guests. There was a brief but enthusiastic discussion of the survey Terrie sent out to the membership. The topics generating the most interest so far include HR and organizational development.

Cindy reported that Karen was able to update the membership application on the website. Cindy is researching vendors to revamp the website. Cynthia has a rough draft of the 2010 MPE budget already. She presented several possible speakers to the Board; she will send details and/or links on each speaker to the Board members for review. Michele has contacted several potential new vendors. We will defer decisions on scholarships to the Regional Conference until slightly later in the year.

There was an extensive discussion of the chapter budget for the upcoming year. Craig has received proposed budgets from the committee chairs and prepared a budget overview, which we will try to trim to the extent possible.

Board of Directors Meeting held May 14, 2009

The May Board of Directors Meeting was held at the offices of Resources Law Group on Thursday, May 14, 2009. Craig Price distributed the April Financial Report which was approved. Craig updated the 2009 Budget based on the revisions he received and distributed this draft for review.

Joelle Stone recently sent out a short survey to gauge participation and purchase plans for the 2009 Survey. Of the 37 responses received, 81% plan to participate in the survey and 60% plan to purchase the survey. Linda Magyar reported that our total membership is at 77. Linda is following up with several of those members who have already paid ALA dues to be sure they understand that for only \$100 they can renew their chapter memberships, which will include attendance at all 9 regular educational luncheons during the year at no extra cost.

Linda reported that she recently read an ALA article on growing chapter membership, in particular one about the Las Vegas membership writing a letter to send out to managing partners in the area whose firms had no members in the Chapter. Linda is going to contact the Las Vegas Chapter for more details.

BOARD MEETING MINUTES SUMMARY

Board of Directors Meeting held May 14, 2009 (continued)

Susan Hodam reported that she and Terrie Rasica are working on booking speakers, and all vendor sponsors are slated to sponsor luncheons, with the exception of February, which has yet to be filled. Trish asked that Board members be ineligible to win the newsletter quiz, which was agreed on and approved by all.

The budget for website redesign was approved so Cindy Harris will move forward to get proposals to revamp the SVALA website. Cindy is forming a website committee, which currently includes Joelle Stone and Janelle at Resources Law Group. Cynthia Fulkerson reported that the Managing Partner Event, which will be a luncheon this year, is scheduled for March 10, 2010. She is in contact with Ethan Rarick, a noted author who has written books on both the Donner Party and Pat Brown, Jerry Brown's father.

Jeaninne Budowich reported that during Community Challenge Weekend she'd like us to focus on the Sacramento Ronald McDonald House, which houses families whose children are undergoing medical treatments.

Pres. Shauna has formed a committee to monitor our progress on award points throughout the year. Cindy Harris will submit an entry for our website redesign, Michele Tracy is looking into submitting an entry for our Vendor Relations Program, and Trish Hughes Kreis will submit an entry for our quarterly Newsletter.

Board of Directors Meeting held June 11, 2009

The June Board of Directors Meeting was held at the offices of Resources Law Group on Thursday, June 11, 2009. Craig Price distributed the May Financial Reports. We're in good shape and on target so far this year.

Linda Magyar reported we're almost done with renewals. We will have 75 members and we've had 30 people drop Chapter membership this year. Linda will circulate an expertise list from Headquarters for each Board member to review and pick his or her top 5 areas of importance. We will then distribute the culled list to our membership to determine who has expertise in what and the expertise categories will be included on the new membership list. Ken has been in contact with several new members who are interested in committee memberships and he will circulate those names to committees needing help.

Joelle Stone reported on the different website proposals from four different vendors. Cynthia Fulkerson reported on the MPE event and Craig Price sent our deposit to the Sutter Club to hold the date. Neither of our proposed speakers wants to commit this early to a date as far out as March, so Cynthia will follow up with them in early September at their requests. Cynthia, Dottie Noble, and Kathy Davidson-Brown will meet regarding planning our Chapter Holiday Luncheon.

Jeaninne Budowich was unable to attend the meeting but sent in an email from the Ronald McDonald House asking how long we will be volunteering and a letter contract for us to sign regarding volunteering. Shauna will ask Jeaninne to have the RMDH redraft the letter contract to SVALA, and then Jeaninne can sign the letter contract and report we're good for a half day of volunteer time.

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CALENDAR HIGHLIGHTS

August

August 13, 2009

SVALA Board Meeting

Time: 5:30 p.m.
Location: Resources Law Group

August 19, 2009

ALA Webinar

Time: 11:00 a.m. — 12:30 p.m.
Topic: Records Management — Finding the Needle in the Haystack and Why It's Important
Speaker: Dana C. Moore is the National Records Manager for Foley & Lardner LLP

August 20, 2009

ALA Webinar

Time: 9:00 a.m. — 10:30 a.m.
Topic: Law Firm Profitability Enhancement
Speakers: Richard B. Turnbow, (CPA)

August 20, 2009

SVALA Luncheon

Time: 12:45 p.m. — 2:00 p.m.
Topic: Documenting Employee Performances and Corrective Action
Speaker: Dave Perrault, Hardy Erich Brown
Sponsor: Sierra Office Supply & Printing
Location: Casa Garden Restaurant
2760 Sutterville Road

September

September 15, 2009

Deadline for Fall Newsletter!

September 16, 2009

ALA Webinar

Time: 11:00 a.m. — 12:30 p.m.
Topic: Strengthen Your Bottom Line with a Well-Built Budget
Speakers: Steven P. Odum, CFO
Bricker & Eckler LLP

Sarah K. Taylor, Director of Finance
Maslon Edelman Borman & Brand LLP

September 17, 2009

SVALA Fall Educational Seminar

Time: Breakfast Meeting
Topic: Labor Law Update
Speaker: TBD
Location: TBD
Sponsor: Give Something Back

September 17, 2009

SVALA Board Meeting

Time: 5:30 p.m.
Location: Resources Law Group

CALENDAR HIGHLIGHTS

September (continued)

September 23, 2009

ALA Webinar

Time: 9:00 a.m. — 10:30 a.m.

Topic: Evolve to Solve: Build Your Business

Speakers: Gary Mitchell, Managing Director,
GEM Communications

Catherine Mitchell, Business Development
Coach, GEM Communications

September 25-26, 2009

Region 6 Educational Conference & Exposition

DoubleTree Sonoma Wine Country
Rohnert Park, California

Congratulations to Linda Magyar,
Membership Chair, and Deanna
Xryztion!!

Each won a scholarship to the 2009
Region 6 Conference!

A toast to the winners

October

October 8, 2009

SVALA Board Meeting

Time: 5:30 p.m.

Location: Resources Law Group

October 10, 2009

Community Challenge Weekend
Details coming soon!!

October 15, 2009

SVALA Luncheon

Time: 12:45 p.m. — 2:00 p.m.

Topic: Building a Culture of Client Service
Among Staff

Speaker: Rita Alli, Stoel Rives

Sponsor: Baker & Cadence Solutions, LLC

Location: Casa Garden Restaurant
2760 Sutterville Road

October 21, 2009

ALA Webinar

Time: 11:00 a.m. — 12:30 p.m.

Topic: Stepping Out of the Rubble: Developing
a Disaster Recovery Plan that Works

Speakers: A. Ray Lightell, CLM, CPA
Kathryn N. Scourby