

ALA MISSION

The Association of
Legal Administrators'
mission is to:

Promote and enhance
the competence and
professionalism of all
members of the legal
management team;

Improve the quality of
management in law firms
and other legal service
organizations; and

Represent professional
legal management and
managers to the legal
community and to the
community at large.

Let's Hear It For Our Vendor Partners

By Vicky Berry

Have you ever considered a vendor to be a partner in your Firm? I don't mean an actual "owner," but an integral member of the team that enables your Firm to perform an outstanding job for your clients. For example, do you recall the last time you drove to a courthouse to file a document? Or when you last transcribed a deposition, shopped for office supplies, retrieved copies of medical re-

cords or served a subpoena? And, I bet that

drafting a space plan, watering and caring for plants or preparing lunch for a partner meeting have probably (and gratefully) not been on your "to do" list lately. The myriad of services provided by our vendor partners to our Firms is astounding. Their services and support are instrumental in assisting law firms around the world succeed.



In 2001, I was asked to accomplish the near impossible task of opening a branch office in less than two weeks' time in a territory that was unfamiliar to me: Dallas, Texas. The potential for success was minimal; the potential for disaster was monumental. Upon my arrival in Dallas, I was offered a conference room as my temporary office at our Commercial Real Estate Broker's office. The first two telephone calls were placed to local ALA members who provided me with extensive vendor lists. The long lists were

whittled down and over the course of the next few days I successfully hired numerous qualified vendors.

In this particular example, it was the Dallas local area vendors, with their expertise and knowledge that allowed our Firm's Dallas office to open on schedule: April 2, 2001. This is despite the fact that one local vendor and his crew worked through the night to replace furniture which fell off a truck in route to the new office in an incredible rainstorm! Most of the original Dallas vendor partners are still providing services to the office after four years.

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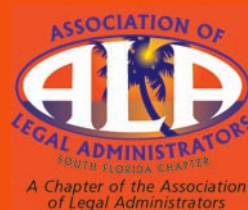
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PRESIDENT'S MESSAGE:

Victoria L. Allen, CLM
Rogers, Morris & Ziegler, LLP
victoria@rmzlaw.com

As 2011 draws to a close, I'd like to thank everyone for their hard work and dedication in making our chapter the best it can be. Our board members, Mario Rumasuglia, Marlon Mendez, Lisa Dasher, Jackie Fleites and Edna Rosen, work hard month after month planning events and budgeting money to get the most benefit for our members. Our committee chairs, Andrea Ellison, Claudia Hoffman, Gigi Gonzalez, Paula Lawson, Grace Lopez, Judi Pawloski, Bernadette Peters, and Gary Smith, work just as hard on their committees every month to bring you the best of the best. Thanks to the many other members who have served over the years and who volunteer at specific events when needed.

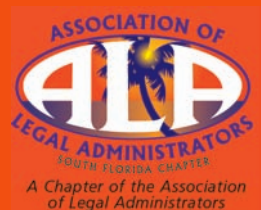
Also, we could not exist without our Business Partners whose financial support enables us to host webinars, send people to conferences and bring in excellent speakers. They are true partners, not just writing a check, but also volunteering at events when help is needed, generously sharing their knowledge and experience with us, and helping promote ALA to potential new members.

While most of this month we're looking ahead to 2012, I like

to look back to measure how far we've come. So much has changed this past year. We lost a few friends to death, retirement, geography, and economics. The world seems to get smaller and bigger at the same time. At a recent chapter meeting, the speaker read a statistic that information is now doubling every six months. No wonder the days are flying by and I sometimes feel like a hamster on a wheel running in place! At the same time, almost every new person I meet knows 10 of the same people I do, making the world feel cozy. The Kevin Bacon game has been renamed from six degrees to four. (Call and ask me if you haven't heard of this game).

For me, joining the ALA was a gift that keeps on giving. I really don't know how other people keep up with everything they need to know without the help of an organization like ALA. Are you are taking full advantage of all your membership benefits or are many of them still wrapped up and hidden away?

I wish each of you a very merry holiday season and a healthy and happy New Year!



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CERTIFICATION

Notes from Certified Legal Managers

Janet Fraka Casiano, CLM
Manatt, Phelps & Phillips, LLP
jcasiano@manatt.com

Mimi DeMars, CLM
Wilson Elser Moskowitz Edelman & Dicker LLP
mimi.demars@wilsonelser.com

Bronya Vygodskaya, CLM
Koehler & Isaacs LLP
bronya@koehler-isaacs.com

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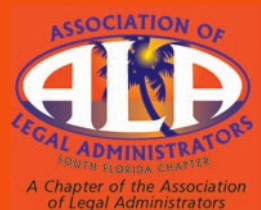
Welcome to the first of, what we hope will be, enlightening notes, quizzes and study tips simplifying or enlarging upon some of the knowledge areas inside the brain of a Certified Legal Manager (CLMSM). Rather than expecting you to attend meetings on specific topics (which we welcome you to do), we will share a variety of points covered within the essentials, chosen by managers like you, for the exam. Of course we are trying to encourage you to take the test, but we are also willing to give you small bites in each newsletter until you're hooked. I, personally, took over two years of ALANYC education sessions before I committed to attending the study group. I hesitated and doubted myself repeatedly. You don't have to be like me. We are here for you!

So, what's holding you back? I hadn't been in a classroom since

a year I won't admit, but I slowly picked up where I left off and recovered the ability to take a deep breath and approach multiple choice questions without fear. Enough about exams, however. This column is aimed at revealing what you already know and how to build on it.

One important point I would like to share right away is this: You already live and breathe on a daily basis many aspects of what a CLM knows. Lots of the skills of a functional specialist touch on other departments. If you've managed a firm for a few years, you are responsible for a little of everything, but might not have a specialty like a functional specialist. Both types of legal managers are welcome to become CLMs. You probably need just a little better understanding of what is needed to qualify for the exam.

As you have probably heard, according to the expert input of leaders just like you in the Association of Legal Administrators (ALA), there are five areas of



knowledge suggested as vital to management of a law firm:

- Communication and Organizational Management
- Financial Management
- Human Resources Management
- Legal Industry / Business Management
- Office Operations Management

These topics were updated and gleaned from surveys of ALA members quite recently. The broad categories actually were reduced from 56 competencies suggested by our peers throughout the country. If you dig deeper, you will find that these areas cover the tasks and knowledge base that you rely on every day. That is why we are bringing some tips and test tricks your way in hopes of demystifying the process and expanding the basic topic areas. We also hope to show you that you already know much more about all of this than you think you do. So, here goes:

Understanding Health Benefits Policies

Are you stymied by labor laws with initials like COBRA and FMLA? You don't have to be. These two benefits are probably the most familiar. If your firm has offered health insurance to employees and partners, you have to offer COBRA upon their departure in all cases except if they were fired for an egregious issue. Even divorced spouses and/or dependent children will typically qualify for the departed employee's COBRA, and everyone has a full 60 days to decide

if they want coverage. I am willing to bet that nearly everyone reading this article already knows many things about COBRA.

FMLA is for firms with more than 50 employees, and there are other requirements regarding length of employment and length of leave granted. Your own firm's policy will determine if you pay for any portion of this leave by requiring the use of the employee's accrued time off.

However, there is no obligation to pay salary during this type of leave. If your firm is small you may not offer FMLA; but, the topic should be understood because law firms come in many sizes and you may change jobs – especially after you've earned your CLM designation! Click here to learn more about The Family and Medical Leave Act: www.dol.gov/whd/regs/compliance/whdfs28.pdf Changes to both FMLA and COBRA have

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occurred due to recent emergency legislation.

Here's a Financial Question

Did you realize that many law firms use an accrual basis method to record their revenues?

Others use the cash basis method, and still others combine the two. The recent New York State Bar Association publication, *Best Practices in Legal Management: A Comprehensive Guide*, written by ALANYC members and business partners, contains a very informative chapter covering financial management.

Two very nice things about the Certified Legal Manager exam:

1. Nothing from your local city or state law is included, because the test is national and covers the broad range of legal environments throughout the country.
2. Recent changes to labor laws (the new ADA amendments, for instance) will be incorporated into future tests when the new laws are in practice.

The next CLM exam will be held in Orlando in May 2011, and should address topics through 2008; there might also be a sample question testing a more recent development. There are at least 20 - 25 questions introduced as sample questions for possible inclusion as "real" questions on future exams. You are not graded on those questions and are unlikely to realize which ones are under review.

Human Resources makes up

35% of the exam, so there will be a body of knowledge covering adverse impact, compensation and defined benefit plans. That might please the HR-conscious and frighten the accountants. Don't worry.

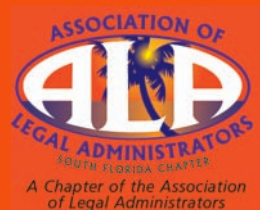
Luckily, in the study group you will find CPAs and human resource specialists. You will find out how other firms are operated, and receive first-hand accounts from CLMs who will share their study tips. You will learn about leasing office equipment, and how to measure office space, directly from principals in those fields. The knowledge gained from studying with Certified Legal Managers will give you the tools to set yourself apart and gain credibility with your attorneys and staff. There is never an obligation to apply for the test.

Challenge yourself and join us at any or all study sessions. They are held once a month and announced in the ALANYC calendar on our website. For more on these and other CLM topics, email any of us who manage the NYC Study Group, or go to this page on the national ALA website: www.alanet.org/clm/about.aspx

Janet Fraka Casiano, CLM, is Office Manager at Manatt, Phelps & Phillips, LLP. She can be reached at (212) 790-4666 or via e-mail at jcasiano@manatt.com

Mimi DeMars, CLM, is Office Administrator at Wilson Elser Moskowitz Edelman & Dicker LLP. She can be reached at (212) 915-5298 or via e-mail at mimi.demars@wilsonelser.com

Bronya Vygodskaya, CLM, is Office Administrator at Koehler & Isaacs LLP. She can be reached at (917) 551-1335 or via e-mail at Bronya@koehler-isaacs.com



BROWARD SCENE

By: Judith Pawloski, CLM
Peterson Bernard



Lisa Medina & Nick de Rochefort of Evolution Legal Technology Solutions presented to the group at the September meeting. Document management solutions were the focus and the myriad of options available to law firms.

At the end of September, the Broward group came together with the Chapter at the Broward County Bar Association. J. Sullenberger from The Florida Bar spoke on

Trust Accounting which qualified as a 1 hour credit for ethics.

The room was packed when OTS Legal Office Products sponsored the October luncheon. Ralph Reyes, Annette Quimper and Debbie Boutin of OTS presented various ideas for cost cutting, including remanufactured toner and generic brands. OTS is committed to maintaining its relationship with local law firms

even though Jeff Kahn has retired.

November's luncheon was a round table discussion. Topics from the recent ALA Regional Conference in Charlotte, NC were discussed including Conducting Legal Investigations, Administrative Assistant Team Building and Marketing & Business Development.



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Continued from page 1 >

The legal community requires its vendors to have a proven expertise. Our engagement of vendors is tantamount to hiring a highly- skilled, trained, knowledgeable member of our team. References are checked and potential vendors are asked to prove that they can “talk the talk AND walk the walk.” We are extremely grateful for their innovative ideas and entrepreneurial vision. Thus, we do not have to reinvent the wheel, but rather can rely on vendors to help us as we strive to run our offices seamlessly, efficiently, cost effectively and successfully.

As a member of the ALA National Vendor Relations Committee I have been afforded the opportunity to meet with national, regional and local vendors who provide services to law firms around the world. The Committee's primary focus is

to facilitate communication among vendors, ALA international, ALA regions and ALA chapters as well as provide a resource for member and vendor feedback. Prior to my work with this Committee, I served as the Regional Projects Officer in Region 6 and as President of the Orange County Chapter where I had numerous opportunities to speak to our partners — ALA's sponsoring vendors. Unfortunately, many of our vendors voiced a concern about the difficulties they encounter when attempting to have an audience with an Administrator.

ALA's vendor partners play an intricate role in assisting our Firms (and us) to provide the excellent service our clients, attorneys and staff expect. They are kind and generous sponsors of ALA at national, regional and local levels.

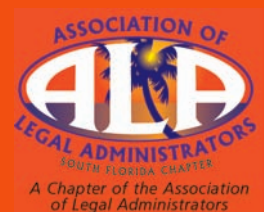


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Vendors contribute incredible support (time and funds) to assist our organization provide educational opportunities to its membership at all levels.

But we all know there is "NEVER" a good time to receive a call from a vendor because as Administrators, we are always in the middle of putting out a fire. So with fire extinguisher in hand, the phone rings and guess who — it is an unknown vendor on the line. I put my extinguisher down, take a deep breath and try to gracefully switch my hat from firewoman to administrator again all in one split second to speak to the caller. At the same time another unsolicited e-mail message appears on my screen from yet another vendor. In lightening speed,

I try to respond but do not always succeed. Interestingly enough, so many times over the years when I have taken the time to converse with a new vendor, saving money and providing excellent state of the art service has been the result for both my Firm and its clients.

The next time you receive a call or e-mail message from a vendor sponsor, I strongly encourage you to respond. By taking a moment and creating a partnership with them you may discover a product or service that will assist your Firm to remain on the cutting edge in this ever-changing legal industry.

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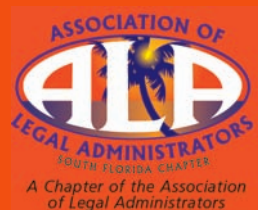
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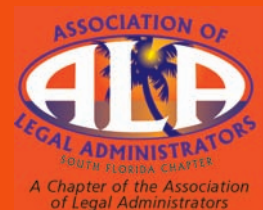
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PAST PRESIDENTS

On September 15th, the Past Presidents/New Member Mentoring Luncheon was held at the Epic Hotel in Miami, Florida. During the luncheon, a brief presentation took place, highlighting some interesting facts of the almost 40 year history of the South Florida Chapter ALA.





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Member Spotlight

Meet Maria Matiz

Manager, HR and Finances

Alexander Reus P.A. d/b/a DRRT

Firm Size: 25

Years in Field: 7.5

What do you enjoy most about your job: Interaction with co-workers, finances, training new and younger employees

What do you dislike most about your job:
Having to terminate someone that I like

What impact has ALA had in your job performance?: ALA has given me a lot. I have been a member only for one year but I have the benefit of the newsletters as well as all the seminars I attended this year. It opened many doors and I was able to communicate and learn from other people doing the same job.

The most difficult situation I have had to deal with was: At the very beginning when we started the firm and I was not very familiar with all U.S. laws.

To be successful, legal administrators have to:
Be patient, be smart and be very organized

As a legal administrator, I never thought I'd have to: Build desks and chairs.....

In the office I try to set an example by: Working as hard as anyone and giving everyone the feeling they are a very important part of the firm.

If I weren't a legal administrator I would like to be A LEGAL ADMINISTRATOR... I have had many interesting jobs that many people would die for, but I have never been as happy as since I started doing this job.

Favorite Musical Artist: I am old school... Cat Stevens, Brian Adams, Simon and Garfunkel

Last Book Read: A German Thriller... I could not imagine my life without books (e-books :-))

Hobbies: Family, traveling, reading, boating, anything that is fun!





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Calendar

January 12, 2012

12:00 - 1:30

Broward Lunch Meeting
Timpano's, Fort Lauderdale

January 12, 2012

5-6 pm

Downtown Miami
Happy Hour
Location: TBA

January 18, 2012

2:00 - 3:30 pm

Webinar:

"Selling Blue Elephants:
Client Marketing,
Retention and Loy-
altySafe Stress"
Free to members at two
locations: Offices of Bilzin
Sumberg OR Broward Bar

January 19, 2012

5-6 pm

Broward Happy Hour
Location: Morton's, Corner
of Broward and Federal

January 25, 2012

12-1:30 pm

Monthly Member Luncheon
Hyatt Downtown Miami

January 26, 2012

5-6 pm

South Miami Happy Hour
Location: TBA

February 9, 2012

12:00 - 1:30

Broward Lunch Meeting
Timpano's, Fort Lauderdale

February 9, 2012

5-6 pm

Downtown Miami
Happy Hour
Location: TBA