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Chapter **Diamond** Sponsors
Morgan Wentworth LLC
AND
mindSHIFT Technologies

Chapter **Ruby** Sponsor
Adaptive Solutions

Chapter **Emerald** Sponsor
All State Legal

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Business Partner Appreciation Event/ New Member Welcome

On Wednesday, June 4, 2014, approximately 25 members and 28 business partners gathered at the Berwyn offices of Saul Ewing, LLP for a casual evening of cocktails and a light supper. The Chapter's Board wanted to do something to recognize the all new members who had joined the Chapter during the past year, and thought that a joint event with our business partners would be a perfect venue to do so. Anne Paisley, Chapter president, welcomed all attendees to the Saul Ewing offices, and thanked Cristin Buccigaglia for her firm's hospitality.

The event committee of Dena Lyons, Cristin Buccigaglia, and Joan Wean provided a wonderful evening for socializing, making new friends and becoming reacquainted with old ones. In keeping with the Chapter's tradition of doing for others, members and business partners provided a trunkful of healthy and fun snacks that were delivered to the Bucks County Housing Group's food pantry for children's lunches during the summer.

Thank you to all who attended for their participation and continued support of our Chapter and our Business Partners.

PHOTOS:

- A** Event Co-Chair Dena Lyons with BP Igor Fedosenko (ABA Retirement Funds)
- B** A. Fugate & S. O'Donnell with BPs Pat Mosesso & Karen Ash (Morgan Wentworth)
- C** BP Jeff Wean (WB Mason), Beth Collins and Lindsey Goldberg
- D** BP Cheryl Pliskin (Jest Notes), Anna Sorensen and Trudy Callison
- E** BP Pat Mosesso (Morgan Wentworth) with Joan Wean and Suzanne Cressman





AdaptiveSolutions

Empowering Business with Intelligent IT

Adaptive Solutions, Inc. was founded in 1998 by three law firm IT professionals with a desire to deliver value to the legal community.

As our company name implies, we recognize that one size does not fit all. Our clients have unique business needs, and today's technology solutions are not one-size-fits-all. Some prefer a low cost, predictable monthly expense and choose to outsource their systems and their IT support by subscribing to Adaptive Solution's cloud-based offerings. Others prefer an on-premise system or wholly-owned private cloud. For these firms, maintaining and advancing internal IT capability is key to their competitive advantage. When major projects or highly specialized needs arise, these clients call upon the engineering experts at Adaptive Solutions to augment their own internal capabilities.

Our ONBOARD service is hosted in Adaptive Solutions' World Class data center and delivers the utmost in flexibility and performance via the use of virtual server and virtual desktop technology. Our physical systems are selected from industry leading hardware providers such as Dell, Cisco and HP; all configured in an N+1 design for maximum system availability. Combined with our industry leading 24/7 legal specific help desk xTend I.T., the ONBOARD solution provides mid-sized firms with the technical infrastructure, performance and support of an AmLaw 100 organization at a fraction of the cost.

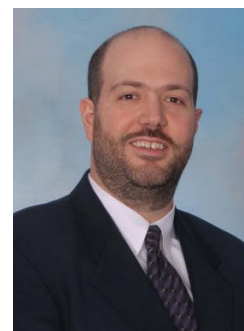
With xTend I.T., our Remote Help Desk service, we offer per incident and unlimited calling plans customizable to your needs: 24/7, during business hours only, or after-hours only. Our high level of customer satisfaction is a result of our people. We employ experienced technicians, many

who come from law firm backgrounds. Since we are also a project services company, many customers see a unique advantage in our ability to escalate critical issues internally to senior engineers and consultants for quick issue resolution. We pride ourselves on our industry-leading metrics and performance – 90% first call resolution, 90% of calls answered on first 4 rings, and voicemail and email response time under 5 minutes.

Recently introduced as an addition to our Help Desk service, Adaptive Solutions xTend Docs Word Processing solution offers on-demand document services. We will discretely and confidentially style and prepare your documents, giving your team the extra support you need to meet your demanding schedule. Our word processing professionals can help you generate correspondence (letters and memos), reports, newsletters, manuals, booklets and brochures, master documents with complex outlines.

We understand the mission-critical environment within which law firms must operate in order to meet client and judicial deadlines. We provide firms with a high quality of service by combining a comprehensive understanding of legal IT requirements with a team of highly skilled engineers.

Our commitment to high service levels carries over to non-legal industries as well. As our reputation has grown, so too has our client base, which includes a growing number of regional service-based not-for-profits, healthcare providers and medium to large corporations with specific departmental needs.



*Chuck Davis,
President of Adaptive Solutions*



E D G / N G TOWARD THE CLOUD

The Case for Cloud Computing

Cloud computing is a relatively new and very broad term used to describe a variety of business strategies, technologies and architectures. In general, a move to the cloud is a migration from owned resources to shared resources in which a firm receives information technology services, on demand, from third-party service providers via the Internet (the public cloud).

These days it appears that the cloud is everywhere. Our digital music and photos are stored there, we binge watch TV from there, and we reach out to friends, family and colleagues to create a sense of community there. What has become a staple in our personal lives is forcefully muscling its way into the world of business. How do we respond, what are some valid uses of this new paradigm, and is it a take it or leave it proposition?

As advisors to many firms of varying sizes we have heard just about every possible opposition to the cloud and at the same time are being bombarded with vendor pitches touting the transformational nature of their particular cloud based offering. Like much of life, we believe that the truth lies somewhere in the middle. The cloud is not yet a one size fits all solution and its application within your firm will be heavily influenced by practice type, requirements, and firm culture. There is little doubt, however, that the cloud is here and is transforming the way we all conduct business.

From an I.T. perspective, the Global Financial Crisis of 2007 has proven to be a deeply disruptive event. Pre 2007 it was possible to point at certain projects and categorize them as technology for technology's sake. I.T. drove implementations and did not often need a business case behind tech activity. This has profoundly changed. It is now the business which drives the technology and a solid return on investment is a prerequisite for any new initiative. It is here that the cloud has begun to make its greatest inroads.

What to dump, what to keep?

While the cloud is still in its infancy, it offers big benefits such as cost reduction, flexibility, scalability, load balancing and speed. Every day a new service is launched, an existing service expanded and an on-premise service retired. If

you haven't yet embarked on this journey, what should you do now, what should you move out of your network, what should you maintain?

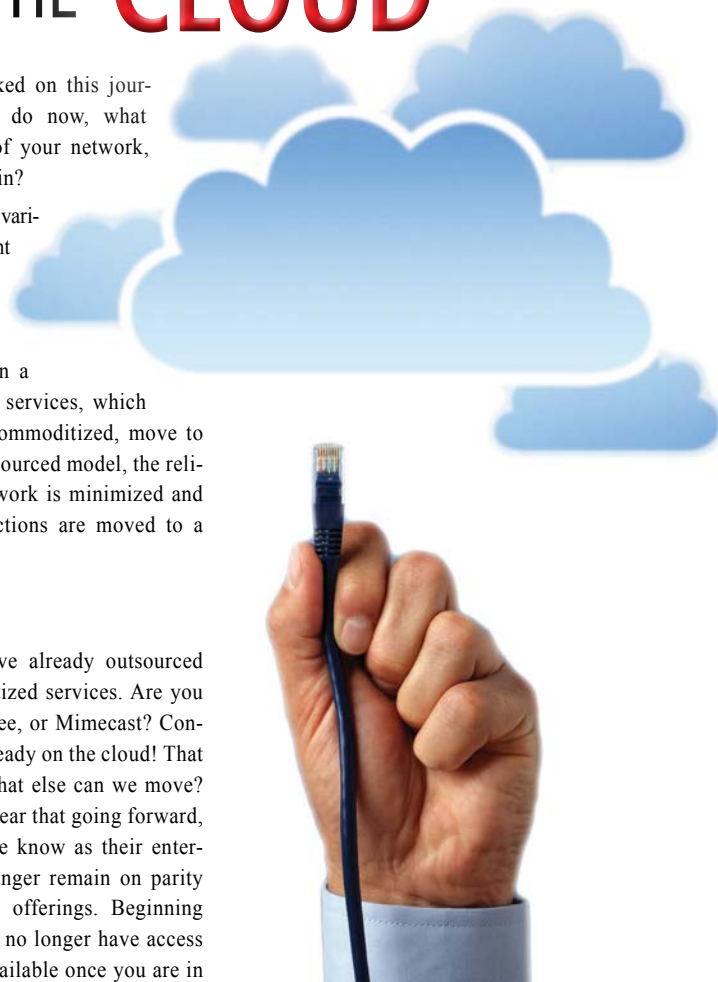
Cloud computing has various service and deployment models, but essentially we can classify the models into two big buckets; hybrid or outsourced. In a hybrid solution, certain services, which we would identify as commoditized, move to the cloud. In a fully outsourced model, the reliance on an internal network is minimized and nearly all network functions are moved to a hosted datacenter.

Hybrid Services

Chances are you have already outsourced some of your commoditized services. Are you a user of Postini, McAfee, or Mimecast? Congratulations, you are already on the cloud! That was an easy one, but what else can we move? Microsoft has made it clear that going forward, the suite of products we know as their enterprise servers will no longer remain on parity with their cloud based offerings. Beginning with Exchange you will no longer have access to the full feature set available once you are in the cloud. Yet the cloud based Microsoft Office 365 offering is a very compelling and robust replacement to the on-premise Exchange server and represents the lowest hanging fruit in an edge to the cloud.

Fully Outsourced

Outsourcing comes in many different flavors: IaaS (Infrastructure as a Service); PaaS (Platform as a Service); and DaaS (Desktop as a Service). In the DaaS scenario the service provider takes full responsibility for all IT infrastructure within their datacenter and presents back to your users a desktop delivering applications and data access. This can be a great option based on your firm's culture and the flexibility of your service provider. In essence this allows you to commoditize the full network experience and shift responsibility for day to day I.T. to the provider and move technology spending to the operational expense side of the ledger. But it's certainly not a light-weight decision, and one that requires due diligence to



ensure that the provider will meet the firm's requirements in terms of cost, quality of service, compliance with regulatory requirements, and risk management.

The Cloud Is Here

The decision to pursue cloud computing is one that many firms have made or will soon make as the technology matures, and many firms are finding that the benefits of the public cloud outweigh the risks. But as with any service provider offering, when evaluating the feasibility of outsourcing to a cloud computing service provider, it is important to look beyond potential benefits and to perform a thorough due diligence and risk assessment of elements specific to that service. Key elements for a sound decision to move a service to the cloud include vendor management, information security, regulatory compliance and business continuity planning.



ANNE L. PAISLEY



An Endless Summer? Why Not!

As I write this President's Message, I can only think about how much I enjoy summer. Fresh peaches, just picked corn on the cob, no traffic on the Schuylkill during the week, seemingly endless daylight. Many of you will take a summer vacation, be it discovering a new favorite restaurant in a far-away land or enjoying the ritualistic week "down the shore". These breaks from our daily routines help to shape our inner self, but more important they give us something to look forward to when life seems to rush along at a frenetic pace.

However, all good things must come to an end. Or must they? Everyone knows what it's like to return from vacation – hundreds upon hundreds of emails sitting boldfaced in your inbox, an endless pile of interoffice correspondence neatly stacked on the corner of your desk, all needing immediate attention, scores of staff waiting to have an urgent question answered. You probably ask yourself, "What vacation?" Or at least I know I do! It's so important for us all to keep the memories of vacation in the forefront of our minds: walking on the beach at sunrise, smelling the sea for the first time in months, lapping up the ice

cream cone you knew you shouldn't have eaten but did anyway "just because". Without looking back at the respite from work and remembering how nice it was to unwind, our minds become cluttered and exhausted.

So how do we keep that just fresh from vacation frame of mind? Make the time to catch up with an old friend or actually go out of the office to lunch (sounds like a trip to a brown bag to me!). Learn a new skill or hone up on an old one (Fall Business of Law Conference anyone?). Do a thorough investigation of that new product you're meaning to buy (Do I hear EXPO?). Your membership to the Independence Chapter provides many opportunities to help YOU do your job better and more efficiently.

I'll be holding on to the smells and tastes of the season as long as I can, and before I know it, visions of sugarplums will be dancing in my head. Until then, I hope to see you at one of the many wonderful events that your board has planned. Remember to visit our website often (www.ala-independence.org) for an up to date calendar and registration information.

Please take a moment out of your busy day and like and follow us on Facebook, follow us on Twitter, and join us on LinkedIn.



Our Facebook page is The Independence Chapter of the Association of Legal Administrators at <https://www.facebook.com/pages/Independence-Chapter-of-the-Association-of-Legal-Administrators/454195598030125?ref=hl>. Please "Like" our page and "Follow" us.



Our handle on Twitter is @Independence ALA. Please "Follow" us.



Our LinkedIn address is www.linkedin.com/in/independencechapterala. Please join us.

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ALA Management EncyclopediaSM

Now Included with Membership Dues
(formerly a \$395 subscription)

*The Knowledge You
Need – When You Need It*

Learn more at www.alaencyclopedia.org



★★★★★
www.ala-independence.org

**REGISTER
NOW**



ALA's Business of Law Conferences

ALA's new Business of Law Conferences provide the crucial education for strategy, innovation, profitability and leadership – in full force this fall.

Flexible schedule offers consistent, cutting-edge education in key locations:

September 4-6, 2014 (Thursday-Saturday)

Hilton Portland and Executive Towers, Portland, OR

September 11-13, 2014 (Thursday-Saturday)

Palmer House, Chicago, IL

October 6-8, 2014 (Monday-Wednesday)

Renaissance Worthington, Fort Worth, TX

October 27-29, 2014 (Monday-Wednesday)

Sheraton, Philadelphia, PA

Specialty Conferences

Intellectual Property Conference for Legal Professionals

September 18-19, 2014 (Thursday-Friday)

Westin City Center, Washington, DC

Large Firm Principal Administrators Retreat

September 18-20, 2014 (Thursday-Saturday)

Waldorf-Astoria, Orlando, FL

ALA Corporate Law Department Symposium

October 15, 2014 (Wednesday)

Thomson Reuters Building, New York City, NY

Human Resources Conference for Legal Professionals

November 3-5, 2014 (Monday-Wednesday)

Paris Las Vegas Hotel, Las Vegas, NV



For more information,
visit alanet.org/events.





OCTOBER 1, 2, 2014

EDUCATIONAL EVENT

Employment Law from the Employer's Chair!"

Plymouth Country Club, 8:30 a.m. – 11:30 a.m.

OCTOBER 27-29, 2014

ALA BUSINESS LAW CONFERENCE

Sheraton, Philadelphia, PA

NOVEMBER 19, 2014

DELAWARE VALLEY LEGAL EXPO — *Presidential Caterers*

DECEMBER 11, 2014

HOLIDAY DINNER — *Zacharias Creek Side Café — Worcester, PA*

JANUARY 28, 2015

QUARTERLY EDUCATIONAL EVENT (TBD)

MONTHLY –

Brown Bag Lunch/Breakfast Sessions:

- Bucks County – 1st Wednesday (*Antheil Maslow & MacMinn, LLP*)
- Montgomery County – 2nd Wednesday (*Hamburg Rubin Mulin Maxwell & Lupin*)
- Chester/Delaware County – 3rd Tuesday (*Johnson Matthey, Inc.*)
- Lehigh Valley – 3rd Wednesday (*King, Spry, Herman, Freund & Faul*)
- West Chester – 4th Wednesday (*Gawthrop, Greenwood*)

Please check our website for additional details.



www.ala-independence.org

EDUCATIONAL WEBINARS AVAILABLE ONLINE

**REMINDER – The following Webinars are Available to All
Independence Chapter Members on our Website through the Members Portal**

The Ethics of Email & Social Media.....11/13/2013

Presented by Thomas E. Spahn, J.D.

Saying the Hard Things with Aloha10/16/2013

Forecasting the Realistic Budget.....9/18/2013

Financial Reporting Methods that Allow

Intelligent Business Decision.....8/21/2013

Presented by Barry Jackson, CLM, CPA

Negotiate the Lease: Maneuver the Maze

of Real Estate Options.....7/17/2013

Presented by Mike Kennedy, SIOR,
Burke Kennedy, J.D., Chrissy Cornelius, CCIM

Leveraging Technology for Small Firms6/19/2013

Presented by Debbie Foster

**Marketing (Mis)Alignmnet: Closing the Gap Between
Marketing and Law Firm Leadership.....5/15/2013**

Presented by Marcie Borgal Shunk, Michael B. Rynowecer

Mentoring: It's Deja Vu All Over Again.....4/17/2013

Presented by Michael Moore, J.D.

Initiating Alternative Fee Arrangements3/20/2013

Presented by Frederick J. Esposito, Jr., CLM

Profitable Law Firms – There's No APP for That2/20/2013

Presented by Karen Steinberger, CLM and Jim Allen, CLM

Microsoft Office Tips & Tricks.....1/16/2013

Presented by Ben M. Schorr, Roland Schorr & Tower

Dealing with Substance Abuse in the Workplace11/14/2012

Presented by Lynn Hanks, MD, FASAM

Marketing on a Shoestring Budget10/17/2012

Presented by Sally Schmidt, Schmidt Marketing

Of Foxes, Hedgehogs & Law Firm Profitability.....9/19/2012

Presented by Vincent M. Bell, J. Mark Santiago

Records Management...Information in All Media8/15/2012

Presented by Dana C. Moore

Change Leadership: A Boot Camp to

Drive Organizational Change.....7/18/2012

Presented by Rachel Schaming

Technology Management:

The Good, the Bad and the Ugly6/20/2012

Presented by Barron K. Henley, Esq., Debbie Foster

Safe Stress!05/16/2012

Presented by Judith A. Hissong, CLM

The Role of Legal Administrator in

Legal Practice Management.....4/18/2012

Presented by Pamela H. Woldow, Esq.,

The Art of Active Listening3/21/2012

Presented by Debra L. Bruce, JD, PCC

Selling Blue Elephants: Client Marketing

Retention and Loyalty1/18/2012

Presented by Dr. Howard R. Moskowitz



Independence Chapter August Member Luncheon.



In lieu of the regularly scheduled August Brown Bag luncheons in each County, on Wednesday, August 14, 2014, at the invitation of Michele Scarpone and Wisler Pearlstine, LLP, approximately twenty-two IC members enjoyed a scrumptious lunch at the Philadelphia Aviation

Country Club (Wings Field) in Blue Bell, PA. on a sun-filled day. It was a wonderful opportunity for all of us to socialize. A special thanks to Michele and Wisler Pearlstine for this gracious invitation.

UPCOMING SEMINARS

Wednesday, September 17, 2014 2:00 pm Central

BILLING AND COLLECTIONS: NO ONE TOLD ME I WOULD HAVE TO DO THIS!

Are you ready to learn how to get firm management and partners to see that running a law firm is a business? Learn how to overcome the political and cultural hurdles associated with the introduction of timekeeping best practices. You will hear how to develop approaches that make time entry an easy, daily function and still be seen as providing assistance without overstepping your bounds.

Thursday, October 2, 2014 2:00 pm Central

LEADING THE WAY STRATEGICALLY

"If you don't know where you are going, any road will get you there," said Lewis Carroll. The varied interests of partnerships can make the development of a singular vision and achievable goals a challenge. Yet through leadership, a systematic planning process, and accountability, it can be accomplished, and implemented. How does firm leadership make this happen and succeed? This webinar will walk you through the role and the approaches a successful leader can use to develop a plan. You will also get the steps that can be incorporated as you work through the process and end with a focused, executable plan.

Wednesday, October 15, 2014 2:00 pm Central

CHANGE MANAGEMENT

Change is a constant, and if you can understand and manage it well, you can handle the challenges in your firm. But strategies for managing change depend on one's role and level of seniority in a firm. Join this webinar to look at managing change from multiple perspectives. We will look at change theory, change psychology and practical aspects of managing change. Leave armed with new confidence in how you manage the challenges of change in your firm and in your life.

Thursday, November 6, 2014 2:00 pm Central

FINANCIAL MANAGEMENT — IT'S MORE THAN JUST BILLING AND COLLECTION

No one would argue cash is king in the business of law. Managers and owners of the law firm need to implement best practices in financial reporting, monitoring and benchmarking their performance to ensure financial success. But there is no "one-size fits all." Join this webinar to discover the keys to identify your firm's specific needs and how to manage these for long-term profitability for your firm.



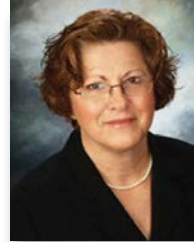
Board Members

ANNE L. PAISLEY President
Heckscher, Teillon, Terrill & Sager 610-940-4194



Anne is Firm Administrator at Heckscher, Teillon, Terrill & Sager, P.C., in West Conshohocken, PA. She has been a member of ALA since 2005. She has been a Board member since 2008 and has served on the Education, Publicity and Bar Liaison Committees. Anne resides in West Chester with her husband, Willie, and three children, Katie, Alastair and Andrew.

SHARON O'DONNELL President Elect
Health Care Law Associates 610-828-3888



Sharon A. O'Donnell is the Office Administrator of The Health Care Law Associates, Inc., in Plymouth Meeting, PA. She has been a member of ALA and the Independence Chapter since 1997. Sharon has served the chapter as Publicity Chair, Second Vice President, Co-Chair of Quarterly Dinner Meetings, Chapter Secretary, and Co-Chair of Education Committee. Sharon resides in Harleysville, PA with her husband, Tom and son, Patrick.

BETH COLLINS Vice President
Volpe & Koenig, P.C. 215-568-6400



Beth is the Executive Director at Volpe & Koenig, P.C., located in Philadelphia. She has been a member of the Independence Chapter of the ALA since 2007 and serves currently on the Publicity Committee. This is her first year as an Officer. Beth resides in Chestnut Hill with her husband, Daniel, and their five children.

APRIL FUGATE Vice President
Johnson Matthey Inc. 610-971-3020



April Fugate is the Supervisor/Executive Administrator for Johnson Matthey Inc. located in Wayne, Pennsylvania. She has been a member of ALA and the Independence Chapter since 2011. April is the second Vice President and Co-Chair of the Newsletter Committee for the Independence Chapter. She resides in Collegeville with her husband, Jim.

DENA DIBONA LYONS Secretary
Gadsden Schneider & Woodward LLP 484-683-2626



Dena Lyons is Board Secretary and Co-Chair of the Business Partners Committee. Dena's work experience spans various positions with The Hay Group, Drinker, Biddle & Reath, LLP and Gadsden Schneider & Woodward LLP where she currently is Firm Administrator. Dena enjoys entertaining and gourmet cooking, travel, and the outdoors spent with her family and friends. She is married with three adult children and lives in Lansdowne.

CONNI SOTA Treasurer
Heckscher, Teillon, Terrill & Sager 610-940-2600



Conni is the Financial Manager at Heckscher, Teillon, Terrill & Sager, P.C., located in West Conshohocken, PA. The firm specializes in trusts and estates along with estate litigation and special needs trusts. Conni has been a member of ALA since 1997 and has been a Board member since 2000. She has served on the Bar Liaison Committee as Committee Member and Committee Chair. Conni is a resident of Cherry Hill, NJ.



ALA MISSION STATEMENT

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



EDUCATION

Chair: Sharon O'Donnell

Committee: Adelaine Williams, Sandy Caiazzo

MEMBER SERVICES

Chair: Joan Wean

Brown Bag: Chester/Delaware – April Fugate
 Montgomery – Joan Wean
 Bucks – Terry Lang
 Lehigh – Kathy Miller
 West Chester – Diane Wenner

TECHNOLOGY

Chair: Beth Collins

Website/Listserv: Cristin Bucciaglia, Beth Collins,
 Anna Sorenson

Newsletter: Linda Andrews, April Fugate

COMMUNITY RELATIONS

Chairs: Amy Coral, Beth Ruggiero

Publicity: Lindsey Goldberg

Social Media: Lindsey Goldberg

Bar Liaison: Janet Molloy

BUSINESS PARTNERS/VENDOR RELATIONS

Chairs: Dena Lyons, Janet Molloy, Katie Johnson

Legal Expo: Joan Wean, Sue Cressman,

Faye Hunsberger, Michele Scarpone

Business Partners: Dena Lyons, Janet Molloy,
 Katie Johnson

★ ★ ★ ★ ★
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WELCOME NEW MEMBERS

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 267-464-8009; Fax: 215-646-0379

Kelly Stewart _____ kstewart@fsalaw.com
 Accounting Manager – Friedman Schuman, PC
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 Jenkintown, PA 19046-3101; 215-635-7200

Brendan Devlin _____ bdevlin@howsoniplaw.com
 Operations Director – Howson & Howson LLP
 Building 620, Suite 210, 350 Sentry Parkway
 Blue Bell, PA 19422; 215-540-9212

New Secondary Member:

Denise L. Barbadoro _____ Barbadoro@nicolsonlawgroup.com
 Firm Administrator – Nicolson Law Group
 Rose Tree Corporate Center II, 1400 N. Providence Road
 Suite 4045, Media, PA 19063; 610-480-6089

IC MemberNEWS

Independence Chapter Member **Anna Sorensen**
 (Stradley Ronon Stevens & Young, LLP) participated in the...



Mudderella Race in Coatsville, PA in the Brandywine Valley on 8/16.
 It was a five mile race with 12 obstacles. She had 16 people on her team
 and proceeds from the funds raised went to charity partner,
 Futures without Violence. <http://mudderella.futureswithoutviolence.org/>

Congratulations

to
Dena and James Lyons
 on the birth of their first grandchild,
Aidan James Lyons.
 Daughter Jamie
 gave birth to Aidan
 on July 18, 2014
 weighing in at 7lbs. 9oz;
 20" long.





TRUDY CALLISON

With all the twists and turns my career path has taken, I never dreamed it would lead me to the legal field. In 1977, I married right out of high school, and began working as a retail clerk and then a bookkeeper for a music store. I left the music store and was working as a bank teller in Quakertown when we purchased a house in East Greenville in 1980. The teller position was interesting as I was often asked to travel to other branches to help out. While banking provided me with valuable customer service experience, my interest remained with accounting.

A friend encouraged me to submit my resume' to a corporation who was opening a new dinner theater and nightclub in Glen Mills. I was hired as the paymaster in 1982, working first out of a construction trailer and later, the payroll grew to over 200 employees including salaried personnel, tipped employees and performers. Although the position was in accounting, the 1-1/2 hour commute each way began to take its toll.

Reading a local newspaper one weekend, I saw an ad for a full-charge bookkeeper for a small manufacturing company closer to my home. I began working for Taurus Furniture, Inc., a Kulpsville based company, in 1984. I was a one-person office, involved in every aspect of the business – from secretarial work to ordering the components of the furnishings, to providing customer service to our clients, to interacting with various sales people as well as maintaining all the bookkeeping. I worked alongside the owner and his wife (an interior decorator) and assisted in managing the manufacturing personnel, including handling their benefits. I was instrumental in moving the company away from a manual one-write bookkeeping system to a computerized system. Best of all, I developed life-long friends and mentors.

Unfortunately, in the late 1980s, the yachting industry took an economic downturn. This shifted the focus of the company to a much smaller part of the business, providing custom furnishings for common areas at colleges, such as libraries and lounge areas. In 1994, the owner began downsizing the business with a view to early retirement. I volunteered to cut my position back to part-time and assisted in the downsizing and ultimate closing of the business while finding an additional part-time position at Advance Lane Training and Employment Corporation, a non-profit organization which provides day activity services for adults with mental and physical challenges.

Initially, I was their bookkeeper and then moved into a full-time position as their secretary/bookkeeper, providing support to the CEO and CFO. As the organization grew, in 1998, I was promoted to Office Manager, overseeing a secretary/receptionist while retaining the bookkeeping duties. During my tenure there, I orchestrated the Y2K conversion to Peachtree® software, resulting in a savings of \$50,000 to \$100,000 by eliminating the need for rewriting/recoding their existing proprietary bookkeeping/billing software. I further streamlined many of the clerical functions by moving the organization to a Microsoft Office® environment.

In late November of 2000, my aunt mentioned her son, an attorney, needed a new legal secretary and she thought I would be perfect for the job. Although not having legal secretarial experience, I submitted my resume and was invited for an interview. Upon arrival for the interview, I was informed they would also like to interview me for the

bookkeeper position in their accounting department, as their former bookkeeper had just left the firm. I felt this was a heaven-sent opportunity to remain in accounting.

I was hired at Timoney Knox, LLP in February of 2001, quickly adapting what I already knew to the legal environment. When I was interviewing for the position at Timoney Knox, the first question the managing partner (an avid baseball fan) asked me was "Are you related to the former Phillies outfielder, Johnny Callison?" I told him, "yes," although not closely related. I never knew if that helped me get the job.

I made it a goal to become knowledgeable about Juris® time and billing software used by the firm. When the Accounting Manager left to pursue other career choices in 2005, I was promoted to that position. I assumed the responsibilities for providing the financial information for the firm, including weekly, monthly and annual reports, preparation of partner draw and year-end compensation and distribution calculations/reports, payroll, oversight of bank and investment accounts, billing, collections, training new personnel in Juris®, and oversight of our bookkeeper who shares in billing and collections as well as handling the firm's A/R and A/P needs.

While I interact with everyone at the firm, I work directly with the Managing Partner, the Director of Administration and the Executive Committee as well as the firm's Accountant. I find the greatest challenge lies in finding creative ways to keep the partners focused on the business needs of the firm in addition to their areas of practice. Having a great interest in IT, I also act as a liaison with Lexis-Nexis and can provide backup to our IT Manager.

Currently, I live in Royersford (a return to the Collegeville area where I was raised), where I purchased a house built in the 1890s. When my father passed away in 2002, I invited my mother to live with me and we have enjoyed making changes to the house while striving to keep it's architectural identity. It is an on-going (sometimes expensive, seemingly unending) project. I enjoy reading, counted cross stitch, baseball (go Phillies!), country music and travel – a favorite travel destination is Nashville, Tennessee. As for family, I have a brother and his family who live near Fort Myers, Florida, a sister and her family who live on a farm in Quakertown with their dogs, cats and chickens, and numerous aunts, uncles and cousins living primarily in Pennsylvania, Ohio and West Virginia.

With the firm's generous support, I have been a member of the Juris Users International Group since 2001. I served as a Board member representative from 2009 to 2013 until I was elected to my current board position of Secretary/Treasurer.

I was encouraged a month ago to join ALA by our then Director of Administration. We felt it vital for me to get to know members of other law firms in the area, not just those who use Juris®, as well as to make full use of the continuing educational opportunities through the seminars and webinars sponsored by ALA. She specifically encouraged me to join the Independence Chapter, speaking highly of members of the chapter and their vast knowledge and expertise. After attending the reception for vendors and new members (where, to my surprise, I reconnected with someone I have known for about 30 years), and then my first brown bag lunch, I'm sure I made the right choice. I was so warmly greeted, made to feel at ease and feel I am on my way to making new friends and establishing valuable connections. I am looking forward to an ongoing interchange of knowledge and ideas at future brown bag lunches as well as other chapter activities and events.



INDEPENDENCE CHAPTER COMMUNITY CHALLENGE EVENT

Backpacks Bring Back School Spirit: ALA Hosts Its Annual *Back to School Supply Drive*

By Amy Y. Coral, Office Administrator, Pepper Hamilton LLP

The end of summer marks a bittersweet time for children. No longer are there carefree days of playing outside without a thought of homework. At the same time, children are excited to see their classmates and exchange stories of their summer adventures. However, this excitement is not shared by every child. For some children, going back to school means worrying about whether or not their parents will be able to supply them with new school supplies and how they will fit in with their peers.

For the last thirteen years the Independence Chapter has sought to ameliorate this situation through their annual back to school supply drive. Employees of the our member law firms were joined this year by a number of our business partners and collected backpacks, pencils, paper, crayons, glue, and other supplies to benefit the children of clients of The Crime Victims' of Center Chester County. The CVC in turn acts as a distribution center for other social service agencies and their clients.



The annual drive has proven to be successful. Once again we collected over 100 back packs and all of the other supplies necessary to allow many children a good start to the school year. In addition, we were able to give the CVC over \$1,000 dollars that was been donated so that the social workers of these agencies could buy new shoes or other items they felt necessary to get a child off to a good start to their school year. Studies show that a good self-esteem sets the tone for how well a child does in school. Imagine how these children feel walking into school with new supplies!

The collection was the brainchild of Pepper Hamilton LLP Office Administrator, Amy Coral.

"My first job out of college was in social services, so I knew there was a tremendous need. We started thirteen years ago and have been blessed with many generous donations. I think we all remember our first day of school. To know that there are children whose circumstances do not allow for new school supplies is heartbreaking."

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INDEPENDENCE CHAPTER EDUCATIONAL EVENT

Can You Hear Me Now?

By Dena Lyons, Office Administrator, Gadsden Schneider & Woodward LLP

*Do I
remain positive
at the office
and
everywhere?*

*Am I
confident?*

*Do people
want to hear
what I
have to say?*

*Do I
communicate
well?*
*Am I
pleasant?*

Have you asked yourselves these questions when you have time to think about your communication skills?

Our daily challenges as law firm leaders can impale one's drive and fortitude to lead. You may have tried yoga, meditation, running, crying or drinking wine as ways to cope and unwind. What really works? We should keep in mind that we ARE the GO TO person and people rely on our judgment, attitude and approach to issues at our firms. At times it becomes difficult to remain positive and emotions can creep up and interfere with reactions. Balance and focus are essential every day.

Larry Lowry of the Dale Carnegie Institute was the presenter at the March 26th Educational Event held at the Plymouth Country Club. After the installation of officers, Sharon O'Donnell and Anne Paisley introduced Larry. Larry immediately held interest with the audience by asking key questions and engaging everyone to respond. He had it! His next step was to give it to us!

Larry grouped the guests into teams and assigned each team with one principle to discuss among themselves. He then asked Team 1 to discuss the importance of their statement and how it affects them in their jobs. Building on Step 1, Team 2 with Step 2 discussed how building Step 2 on Step 1 would impact them...and so on for each team. Larry called on a leader from each group to disclose the findings of the group. We had many a laugh and AH-HA moments too!

As a law firm leader, you need to be heard! Why not take a look at the skill steps developed by Dale Carnegie in his Principles from *How to Win Friends and Influence People* can be life changing – both in the office and home. I suggest you take a look at the link offered below. Maybe you could focus on one Principle each week.

Link to the listed Principles:

www.csus.edu/indiv/l/luenemannu/pdf/CommunicationPrinciples.pdf



(l-r) Sharon O'Donnell, Larry Lowry, Anne Paisley & Brian Levinson





INDEPENDENCE CHAPTER SEMINARS / TRAINING



CHAPTER LEADERSHIP INSTITUTE — **OLE**

By Sharon O'Donnell, Independence Chapter President-Elect

I was a little apprehensive about heading off to the big state of Texas to attend the Chapter Leadership Institute being held in beautiful San Antonio. My flight arrived late, so I missed the opening ceremonies, but compared to some of the weary travelers I ran into at the airport, my trip was a walk in the park. I was able to get a good nights sleep and start the next day with gusto. The Keynote speaker, Scott Burrows, reminded everyone that the challenges we face in our everyday life are not insurmountable. His mantra "Vision~Mindset~Grit" helped him conquer every roadblock that popped up and gave him the strength and courage to go from being diagnosed as a paraplegic, after a life altering event, to walking again. He has let nothing stop him since his accident. He has learned to skydive and scuba dive, to name just two of the goals he has accomplished. It was a wonderful way to pump the ALA members up for a day filled with educational classes, idea exchanges and networking. As the day progressed, everyone seemed to get more excited and wanted to share their ALA chapter ideas with fellow members.

There were no events planned for that evening, so I decided to scour the famous River Walk, which is a public park that is lined with individual businesses, hotels and restaurants. When I returned to my hotel room, my balcony opened up to the River Walk and the Fiesta Noche del Rio was taking place, which is a summer outdoor performance, and I was serenaded by the songs and dances of Mexico, Spain, Argentina and Texas.

Day two of the conference began with a very lively session presented by Dr. Dale Henry on "The Power of TEAM." Bringing the audience to tears of

laughter, he taught us that using common sense in dealing with our "TEAM" members and mixing it with laughter and energy will result in a more successful and collaborative effort. The day continued with a round table discussion on multiple topics. There was something for everyone. We also had the opportunity to meet and share advice and ideas with other chapters from our region, as well as, other medium sized chapters, like our own. It was refreshing to find that our Chapter already has in place most of the procedures there were suggested by other Chapter Leaders. Kudos to the Independence Chapter!

The excitement did not end there. I was awakened at 2:30 AM to someone knocking on my hotel room door and looked out to see Comic Con Characters who were in town for a Comic Con Convention. Obviously their days last a lot longer than those of a Legal Administrator!

All in all, it was a wonderful conference. I would strongly suggest that our Chapter members who are not currently involved consider participating on the board, and you, too, could attend a Chapter Leadership Institute conference. It is a rewarding experience, and the networking and friends you make are invaluable.



Sharon O'Donnell at Hemisfair Park




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INDEPENDENCE CHAPTER SEMINARS / TRAINING

National Conference...

Through My Eyes!

By Lindsey Goldberg, Office Administrator, Fox Rothschild, Blue Bell, PA

I have been a Legal Administrator for 4 years and always wanted to attend either a Regional or National conference but the timing was never right...until TORONTO. My first ALA conference was the 2014 National Conference held in Toronto, Canada from May 19-22.

I got a small taste of what to expect from the advertisements, emails and postcards that began to pour in about a month prior to the event. The businesses sponsoring the conference were eager to grab our attention and showcase all they had to offer to law firms and the speakers were excited to present the plethora of valuable information that could benefit us in our day-to-day life as office administrators. I was both anxious, with the volume of information coming at me, and excited, to network with such seasoned administrators, speakers and vendors.

I arrived the evening of Sunday, May 18. Working for a national law firm with 21 offices gives me an internal Association of Legal Administrators so I found myself torn between spending time with the four

office administrators from my Firm and the wonderful group of people who attended from the Philadelphia and Independence Chapters of the ALA. It is a nice problem to have such a deep pool of competent and knowledgeable mentors at your fingertips.

I was impressed by everything...the obvious time and effort taken to create such detailed reference materials, various methods we could use to organize our schedule for the week, the layout of the EXPOsition and how organized and energetic the company contacts were at each table, the surplus of educational sessions for us to attend and the expertly handled 'winning and dining' effort put forth by the businesses.

I attended several educational sessions but the ones that impressed me the most were the *Keynote Address* by Mark Kelly & Gabby Giffords, *Avoid the Quit & Stay Phenomenon* by Shari Harley, and *The Administrator's Guide* by Michael Cohen, Esq.

KEYNOTE ADDRESS: "Endeavour to Succeed" by Kelly and Giffords

Tuesday, May 20, 8:00 – 9:00AM

Mark Kelly did an excellent job of sharing the challenges that his family faced over the last 3 years. Mr. Kelly painted a picture of several, personal, life-threatening encounters he had and I was thoroughly impressed by his background and experience. Mr. Kelly's professional encounters were nothing compared to the personal devastation that hit his family in January of 2011 when his wife, Gabby Giffords, was shot in the head. Mark described how courageous, devoted, independent and inspirational she was and also how the tragedy taught him patience and gave him true perspective on life.

Ms. Giffords graced us with her presence for a brief time at the conclusion of Mr. Kelly's speech to confirm how we can all overcome obstacles and be resilient with focus and determination. The speech could easily be applied to the entire audience, not only on a professional level but also on a long-term, personal level - how we should focus on our goal and never be afraid to push ourselves beyond our comfort zone.

HR20: Avoid the Quit & Stay Phenomenon by Shari Harley

Tuesday, May 20, 10:15 – 11:30AM

Shari Harley was a dynamic, funny and energetic speaker who confronted awkward situations that we all encounter as administrators. She made heavy topics easier to swallow and empowered the audience to have those tough conversations with employees. I left with so many great ideas that I actually implemented them in my office and presented them at our Firm's Office Administrator retreat in June. Ms. Harley continues to send informative and interesting tidbits via email each week via her website www.candidculture.com

HR22: The Administrator's Guide: HR101 – Basic Training by Michael Cohen, Esq.

Tuesday, May 20, 1:00 – 2:15PM

As Administrators we are expected to know and follow current labor laws. As an employment lawyer, Michael Cohen was an expert in this area and engaged the audience with his relatable examples provided through firsthand involvement in the field. We are often hindered in our human resources responsibilities by the red tape of federal and state laws. Mr. Cohen taught us how to do our jobs in the best (and legal) way.

CONTINUED NEXT PAGE

Annual Conference Attendees





Not only did I learn a lot at the conference in Toronto but I ate and drank like a queen at the numerous evening events hosted by the ALA and our business partners.

- The Philadelphia and Independence Chapters had a joint dinner at the BYMARK on 66 Wellington Street and both the dinner and wine were superb.
- Cushman & Wakefield hosted a happy hour on the 4th floor of The STORYS Building on 11 Duncan Street, which is an inconspicuous 170-year-old building with a lot of exposed brick but furnished with cozy, traditional couches, classy chandeliers and plenty of candles.
- There was a DTI and Royal Cup Gathering on the top of the CN Tower where you could dance while looking out the external wall of windows over the entire city of Toronto. You could even take on the Edge Walk, a 5-foot wide ledge encircling the top of the Tower, which is 116 stories above the ground! A fellow Office Administrator embraced this challenge; I, however, did not.

The overall experience at my first ALA conference was a positive one.

I highly recommend any Legal Administrator to attend at least one conference: the wealth of knowledge and opportunity to network is like no other.



President Anne Paisley
with Award

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