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## Delaware Valley LEGAL EXPO November 16 2011

By Suzanne B. Cressman, Firm Administrator  
- Rubin, Glickman, Steinberg and Gifford, P.C.

vendors in attendance. In 1994, we moved the Expo to the Philadelphia Marriott West, but we outgrew this space rather quickly. By 1996, we had 40+ vendors participating and had them squeezed into every nook and cranny of the hotel's ballroom. It was time to move on (and upward!)

In 1997, we joined forces with the Montgomery Bar Association and have not looked back. This joint collaboration has allowed us to reach a much broader audience of both vendors and attendees. We found new space for our first joint event at what was the Fort Washington Expo Center in Fort Washington, Pa. This facility provided us with space we never thought we could fill. Fortunately, we were wrong! In 2006, we again found ourselves looking for new space. The Fort Washington Expo Center was being demolished and we were homeless, although not for long.

This was when we moved to Presidential Caterer's in East Norriton which was a good move. Attendance has grown each year and the 2011 Legal Expo was no exception. This year's event was sold out with 84 vendors in attendance. They again filled every nook and cranny. Attendance from the legal community was strong. Everyone came to enjoy the abundance of delicious food, the party atmosphere, and the possibility of winning some terrific door prizes. But, more importantly, they came to meet

The Independence Chapter of the Association of Legal Administrators held its first ever Legal Expo in 1992 and the event just continues to grow each year! This past year's event was no exception. Before I provide details on the event, I would like to provide some background on the Expo, when it started, and how it morphed into what it is today.

Back in 1992 when the Independence Chapter was newly formed, the first ever Expo was held at what I believe at that time was called the Hilton Garden Hotel in King of Prussia. (I could be wrong on the exact name.) It was a relatively small affair with approximately 20



Legal Expo Committee Members  
S. Cressman, J. Wean and F. Hunsberger



Montgomery Bar Association members, co-hosts of the event.

over 80 vendors in one location. This event provides attendees with the opportunity to see and learn first hand about new products coming to the market and to meet new vendors offering services for which they are in need. There was a wide array of products on display including trial presentation technology, telephone technology, cloud computing technology, accounting, practice management and financial software programs, and copy equipment just

## A Closer Look at “Total IT Management for Law Firms” mindSHIFT Technologies’ Turnkey IT Solution Trusted by ALA Member Firms Nationwide

- **Tell us about mindSHIFT Technologies, Inc.** As one of the largest IT outsourcing and cloud services providers, mindSHIFT is a trusted technology advisor serving law firms throughout the country since 1999. Our extensive menu of managed IT, cloud, data center and professional services can help law firms manage any IT challenge that comes their way—ranging from operating system upgrades, email and document management system implementation and support, SharePoint and VoIP, to server and desktop virtualization as well as overall IT management.
- **What recent industry recognition is mindSHIFT most proud of?** In February 2012, mindSHIFT was named the #1 Managed IT Services provider in the U.S. for the fourth consecutive year (2009/2010/2011/2012) by MSPmentor®. This achievement became reality thanks to mindSHIFT’s 500 employees who are committed to living out the company’s tagline everyday: *Delivering IT Peace of Mind<sup>SM</sup>*.
- **What is “Total IT Management for Law Firms”?** Total IT Management for Law Firms is mindSHIFT’s fully managed IT infrastructure solution for law firms—truly a ‘soup to nuts’ solution. This service spares firms the headache and expense of developing, housing and operating their own computing infrastructure.
- **How is the solution delivered?** Total IT Management for Law Firms is delivered as a bundled service, offering firms an offsite, secure computer network with built-in disaster recovery and 24/7 help desk support. mindSHIFT hosts its Total IT Management for Law Firms clients’ desktops, applications and data at a highly secure data center. Attorneys and staff are able to access their entire desktops in the office, at home, at a client location or on the road.
- **Who is using Total IT Management for Law Firms?** Currently, the solution serves law firms of various sizes and practice areas nationwide. As a long-time sponsor and enthusiast of the ALA—both locally and nationally—mindSHIFT has been able to communicate the benefits of our services to the legal community through the platform that ALA provides. This platform is a key reason why the Total IT Management for Law Firms client base consists of many ALA member firms.
- **What benefit do Total IT Management for Law Firms clients enjoy the most?** Besides the cost savings, predictable monthly service fee, access to the latest and greatest hardware and software, round-the-clock technical support and disaster recovery component, the remote access capability is one of the most well-received features of the solution. Attorneys and staff who are working long hours have the ability to access files, applications and systems from anywhere—at anytime. This is a significant benefit both for the work-life balance of the employees and the productivity of the firm.
- **How is the Total IT Management for Law Firms solution different than others in the market?** Having delivered the solution *specifically* to law firms for more than 10 years, mindSHIFT’s experience is unparalleled compared to other managed IT services providers. mindSHIFT’s Total IT Management for Law Firms Operations and Customer Advocate Teams understand the unique technology challenges that law firms face and the solution is tailored to handle the particular software used by law firms. In addition to the Microsoft® Office suite of applications, the solution offers clients access to more than 100 software packages—such as document management, time & billing and litigation support applications—designed for use by law firms. And the list continues to grow.

To learn more, visit [www.mindSHIFT.com](http://www.mindSHIFT.com) or contact Ed Grubb, mindSHIFT Regional Vice President, by email [Ed.Grubb@mindSHIFT.com](mailto:Ed.Grubb@mindSHIFT.com) or phone (267) 852-3211. For the past 27 years, Ed has helped law firms implement cost-effective and reliable business technology solutions.



ED GRUBB

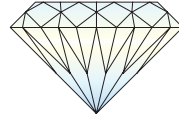




# THANK YOU



Independence  
Chapter



2012 Diamond  
Business Partner

## mindSHIFT Technologies

CASE STUDY:

### Small Law Firm Implements "Cloud Computing" Solution

By Rita Thompson, CLM - Kavanagh Maloney & Osnato LLP

**Cloud Computing:** The practice of using a network of remote servers hosted via the Internet to store, manage, and process data, rather than a local server or personal computer.

*Do you ever lie awake at night thinking about a problem at your firm? Sometimes, the solution to your problem may be closer than you think.*

#### Technology Infrastructure Needs a Makeover

Several years ago, my firm was in dire need of a technology upgrade and it needed to be achieved on a limited budget. I work for a small law firm with 20 computer users, including 12 lawyers. At the time, our file server had been chugging along for six years, disk space was getting low and we used Internet e-mail. With our Internet e-mail system (hosted by an ISP, also known as an internet service provider), outgoing e-mail messages could take three seconds or three hours to reach their destination. Invariably, it always seemed to take three hours whenever my managing partner was in the midst of negotiating an important corporate transaction and prompt receipt of e-mail messages throughout the day was critical. We were dependent on the flow of traffic on the ISP's servers, a process over which we had no control. I had implemented a document management system, Worldox, several years prior and our system had basic safeguards in place, including daily backups, virus and spam protection. Nevertheless, our technology infrastructure was still relatively unsophisticated in comparison to that of many other law firms. In addition, due to the age of our file server, it was inevitable that one day it would fail. Although our data was backed up daily, it would probably take many hours, perhaps several days, to restore service if a system failure occurred. This issue alone was like the "sword of Damocles" hanging over my head.

I have attended many ALA conferences throughout the years, and it was during a stroll through the Exhibit Hall at the 2008 Annual Conference in Seattle, Washington that I stumbled on a solution to my technology issues. I stopped to speak with a friend and long-time New York City Chapter business partner at the mindSHIFT exhibit. I mentioned my dilemma and he told me he had the ideal solution for my problem. I was skeptical. After all, it often seems most vendors purport to have a "must have" product or service for my firm. I politely listened to the pitch and, to my surprise, I heard my friend describe a unique technological solution for my firm's computer system.

#### Total IT Management for Law Firms

He told me about mindSHIFT's cloud computing solution, Total IT Management for Law Firms, where all software and applications are hosted at mindSHIFT's network data center in Philadelphia and are accessible via a high-speed secure dedicated connection. Applications execute completely on centralized, redundant, highly fault-tolerant servers using industry standard technology. The applications my firm currently uses can be hosted by mindSHIFT and, utilizing Microsoft Exchange, we would enjoy vastly improved e-mail including rapid transmission of messages, huge user mailboxes, secure/encrypted e-mail, a metadata removal tool, spam filter, shared address books, shared calendars and wireless syncing of BlackBerry handheld devices. And, when working from home or traveling, lawyers would have secure access to our system remotely via the Internet. What's more, because our data resides at mindSHIFT's data

center, if the firm's facilities were damaged by a fire or other disaster or we were unable to enter the facilities for any other reason, our electronic files would still be accessible to us – a true disaster recovery solution.

Soon, mindSHIFT provided me with a proposal for Total IT Management, including pricing and references. This was beginning to sound like an ideal solution for us but before I could consider proceeding, I had to do my due diligence. I began phoning mindSHIFT customers and querying them about the product and ongoing support and I visited a few law firms to see first-hand how Total IT Management worked at their firms. I liked what I heard and saw.

Nevertheless, housing the firm's data at a remote location, and in another city, was a unique approach so I had to see the data center for myself before I could recommend to my partners that we move our firm's files there. I traveled to Philadelphia via Amtrak one hot July day and was met at the train station by an account representative from mindSHIFT. He took me directly to the data center which is in a building used exclusively for data facilities and telecommunications providers. Built in 1930 by the Reading Railroad, the building is massive. Its floors can support several times the weight of what a normal office building's floors can support and U.S. Army tanks are reputed to have been manufactured in this building during World War II. The building now houses data centers for many large corporations and telecommunications providers including Level 3, Comcast, Verizon, Broadview, Paetec, Megapath and XO. Electricity is provided by dual power sources, essential to communications companies. The facility is secure and impressive. I was hooked.

After returning to my office, I told my partners about mindSHIFT's unique solution and we transitioned to Total IT Management prior to Thanksgiving of that year. Soon after, I informed our litigation department we were now capable of providing the litigation support software they needed. Summation, which would have required a dedicated server and ongoing support to implement in-house, was seamlessly added to our new system. And, last year, we abandoned the 20-year old DOS based law firm accounting software still running on our file server, adding Tabs3 financial software as well.

Today, my firm enjoys convenient, reliable access to all systems and applications from our offices, lawyers' homes and even while traveling and all for a fixed monthly fee. I can sleep at night knowing that we have best-in-class security safeguarding our firm against viruses, spam and other threats. What's more, mindSHIFT's data center offers redundant power and redundant back-up, ensuring that we never lose critical business information. And my time, as a small firm administrator without in-house IT staff, is no longer consumed by technology trouble-shooting, enabling me to devote valuable time to managing the financial and other day-to-day business operations of the firm. At last, the "sword" that dangled over me for so long has disappeared.

*Rita Thompson, CLM is ALA Region 1 Communications Officer and Past President of the New York City Chapter.*



# PRESIDENT'S MESSAGE

**We are finally moving out of the winter doldrums and into Daylight Saving Time.**

I love when it stays lighter longer at night! And moving into spring means that it's time to spring clean some of those old projects off your desk. As you do so, I hope that you will have more time to participate in the many upcoming events in our Chapter during the Spring and early Summer.

The ballots for the 2012/2013 Board have been distributed, and the new Board will be installed at the March 28, 2012 Quarterly Dinner to be held at Plymouth Country Club. I would like to thank all the Board and Committee members who worked so hard throughout this past year, and hope that many of you will be able to attend the dinner.

The Independence Chapter is also celebrating it's 20th Anniversary this year. A big thanks to the founding members who were able to see the potential in our six counties and be able to build and grow our Chapter over the past 20 years to what we are today.

I want to take a moment to remind you about the FREE resources that are available to all members of the Association of



CRISTIN BUCCIAGLIA

Legal Administrators. These resources can be found on the ALA website ([www.alanet.org](http://www.alanet.org)), and include:

The ALA Management Solutions<sup>SM</sup>, an on-line legal management reference service, is available to answer most, if not all, of your management questions. Retreat Planning Plus can assist you as you "Reimagine, Rethink and Reinvigorate" your Retreats. The ALA Management Connections<sup>SM</sup> (Job Bank) connects law firms, corporations, governmental agencies and similar professional service organizations with prospective candidates for nonlawyer positions. The job bank also provides a place for administrators looking for jobs to post a resume. And finally, The Legal Management Resource Center (LMRC), created and hosted by the Association of Legal Administrators, is designed to immediately provide information you need, or to quickly direct you to other resources, most located on the Internet, where the knowledge you seek can be found.

I hope that you will take advantage of many of these resources on ALA's website. You can also find the links to most of these resources on our "Helpful Links" section of the Independence Chapter website.

*Welcome Spring!*



The Independence Chapter has received "PLATINUM LEVEL CHAPTER" Recognition for 2012 in the President's Award for Excellence Category.



*Thanks to all our members for their hard work in helping to achieve this prestigious award!*

  
[www.ala-independence.org](http://www.ala-independence.org)

**Editorial Policy** This newsletter is published by the Independence Chapter of the Association of Legal Administrators. Opinions expressed in articles and advertisements contained herein are strictly those of the contributors and advertisers, and do not necessarily reflect the opinions of the Independence Chapter or its members. Reprinting of any portion of this newsletter by any means including photocopying, recording or any information storage and retrieval system, is prohibited without permission of the Editor and Author.

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**DVLE** *continued from page 1*

to name a few. In addition, many service companies were available including banks, insurance sales, office supply sales, records management services, translation and interpretation services, court reporting services, physical and rehab services, nurse consulting services, and on and on. It is because of the amazing support we have from our vendors that we are able to provide such a great show. The atmosphere was fun and exciting. The food was served butler style throughout the Expo hall, and Presidential Caterers never disappoints. There were door prizes galore given away including two Apple iPads, a flat screen television, Kindles and Nooks, Eagles and Flyers tickets, a variety of restaurant gift

certificates, gift cards, and gift baskets.

If you missed this past year's event, we hope to see you this year. The date is Wednesday, November 14, 2012 - same time, same place!

We are grateful to our vendors, lawyers, law firm administrators and personnel for their continued support of this wonderful event.



*C. Bucciaglia, Steve Hatch of Adaptive Solutions, Inc., A. Williams, Kerry Bell and Natalie Alesi of Just Engage.*



*IC Members S. O'Donnell, L. Andrews, S. Cressman, F. Hunsberger and A. Coral*



*L. Denitz, M. Reid and K. Malcolm*



*J. Molloy, S. O'Donnell, J. Kirk and C. Bucciaglia*



*Vendor Booths*



*Vendor Priority*



*Vendor Worldox*



*Vendor The Queens Kitchen*



**MONTHLY –  
Brown Bag Lunch/Breakfast Sessions:**

- Bucks County – 1st Wednesday (*Mellon Webster & Shelly*)
- Montgomery County – 2nd Wednesday (*Hamburg Rubin Mulin Maxwell & Lupin*)
- Chester/Delaware County – 3rd Tuesday (*RatnerPrestia*)
- Lehigh Valley – 3rd Wednesday (*King, Spry, Herman, Freund & Faul*)

**MARCH 15, 2012**

**Business Partner Appreciation Event**

"Tour of Italy" – 5:30 p.m.

Offices of Brandywine Realty Trust in Radnor, PA

**MARCH 28, 2012**

**Quarterly Dinner Meeting**

5:30 P.M. – Plymouth Country Club

Installation of New Officers

**APRIL 22-26, 2012**

**ALA Annual Conference**

Honolulu, Hawaii

**JUNE 22-23, 2012**

**Chapter Leadership Conference**

Salt Lake City, UT

Please check our website

★ ★ ★ ★ ★  
[www.ala-independence.org](http://www.ala-independence.org)

for additional details.



**WEBINAR**  
*Wednesdays*



**Mark your calendar for the 3<sup>rd</sup> Wednesday  
of the month for ALA Webinars!**

- **CONVENIENT** — Listen and participate from the comfort and convenience of your desk.
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**April 18, 2012**

The Role of Legal Administrators in Legal Project Management – Unprecedented Opportunities & Current Challenges (LI)\*

**May 16, 2012**

Safe Stress! (CM)\*

**June 20, 2012**

Technology Management: The Good, the Bad and the Ugly (IT)\*\*

**July 18, 2012**

Change Leadership: A Boot Camp to Drive Organizational Change (OD)\*\*

**August 15, 2012**

Records Management: The Bermuda Triangle (LI)\*

**September 19, 2012**

Of Foxes, Hedgehogs and Law Firm Profitability (FM)\*

**October 17, 2012**

Marketing on a Shoestring Budget (LI)\*

**November 14, 2012  
(2nd week of November)**

Dealing with Substance Abuse in the Workplace (HR)\*

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[www.alanet.org/webinars](http://www.alanet.org/webinars)

\* 60 minutes

\*\* 120 minutes



At the end of the day...  
**Who's Really Watching Your Firm's 401(k)?**  
 And, what is it costing you?

••••• If you answered no to any of these questions, contact the ABA Retirement Funds Program to learn how we keep a close watch over your 401(k).

- ● ● ● ABA
- ● ● ● Retirement
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Who's Watching Your Firm's 401(k)?

**IGOR FEDOSENKO** Regional Vice President, Sales  
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**JAMES MARINI** Regional Assistant Vice President, Sales  
 (401) 578-5587 · James.Marini@abaretirement.com

[www.abaretirement.com](http://www.abaretirement.com)



The American Bar Association Members/Northern Trust Collective Trust (the "Collective Trust") has filed a registration statement (including the prospectus therein (the "Prospectus")) with the Securities and Exchange Commission for the offering of Units representing pro rata beneficial interests in the collective investment funds established under the Collective Trust. The Collective Trust is a retirement program sponsored by the ABA Retirement Funds in which lawyers and law firms who are members or associates of the American Bar Association, most state and local bar associations and their employees and employees of certain organizations related to the practice of law are eligible to participate. Copies of the Prospectus may be obtained by calling (866) 812-1510, by visiting the Web site of the ABA Retirement Funds Program at [www.abaretirement.com](http://www.abaretirement.com) or by writing to ABA Retirement Funds, P.O. Box 5142, Boston, MA 02206-5142. This communication shall not constitute an offer to sell or the solicitation of an offer to buy, or a request of the recipient to indicate an interest in, Units of the Collective Trust, and is not a recommendation with respect to any of the collective investment funds established under the Collective Trust. Nor shall there be any sale of the Units of the Collective Trust in any state or other jurisdiction in which such offer, solicitation or sale would be unlawful prior to the registration or qualification under the securities laws of any such state or other jurisdiction. The Program is available through the Association of Legal Administrators, an ALA Value in Partnership Program Provider as a member benefit. However, this does not constitute an offer to purchase, and is in no way a recommendation with respect to, any security that is available through the Program.

C12-0201-010 (2/12)

Does your firm's 401(k) feature no out-of-pocket fees?

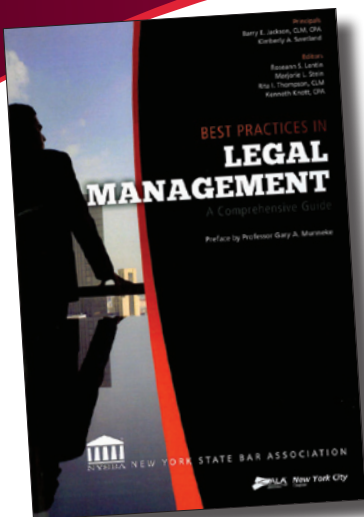
YES	NO
<input type="checkbox"/>	<input type="checkbox"/>

Does your firm's 401(k) include professional investment fiduciary services?

<input type="checkbox"/>	<input type="checkbox"/>
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Is your firm's 401(k) subject to quarterly reviews by an independent board of directors?

<input type="checkbox"/>	<input type="checkbox"/>
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## Best Practices in Legal Management: A Comprehensive Guide

Written by legal management professionals for legal management professionals, *Best Practices in Legal Management: A Comprehensive Guide*, covers all areas of law firm management, including strategic planning, business development, practice management, human resources, finance, disaster recovery, technology, space planning and more.

Published by the New York State Bar Association in conjunction with the New York City Chapter of the Association of Legal Administrators.

Available from the ALA Bookstore — [www.alanet.org/bookstore](http://www.alanet.org/bookstore)  
 Member — \$139 • Nonmember — \$179

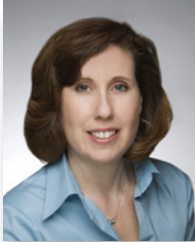
*Your connection*  
 to knowledge, resources and networking

**A Must Read for All Legal Administrators!**

*A Chapter of the Association of Legal Administrators*

**CRISTIN BUCCIAGLIA** President

*Saul Ewing LLP*



Cristin is the Office Manager at Saul Ewing LLP's Chesterbrook Office. She has been a member of ALA since March of 2003 and has served on the Community Challenge and Website Committees and as Vice President of the Board. Cristin resides in Boyertown, PA.

**ANNE L. PAISLEY** President Elect

*Heckscher, Teillon, Terrill & Sager*



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 Publicity and Bar Liaison Committees. Anne resides in West Chester with her husband, Willie, and three children, Katie, Alastair and Andrew.

**SHARON O'DONNELL** Vice President

*Health Care Law Associates*



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.

**LINDA A. ANDREWS** Vice President

*Lentz, Cantor & Massey, Ltd.*



Linda is Office Manager at Lentz, Cantor & Massey, Ltd. in Malvern, PA. She has been a member of ALA since June of 2004 and has served as Secretary, Publicity Chair and Newsletter Co-Chair and Editor. Linda is a resident of Malvern, PA.

**DENA DIBONA LYONS** Secretary

*Gadsden Schneider & Woodward LLP*



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 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*



Conni is the Financial Manager at Heckscher, Teillon, Terrill & Sager, P.C., located in West Conshohocken, PA. The firm specializing 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.





## COMMITTEES CHAIRS AND MEMBERS

**Education** ..... Anne Paisley and Lynn Denitz, *Co-Chairs*

**Education Events and Quarterly Meetings:**  
Lynn Denitz, Barb Foley, Anne Paisley,  
Adelaine Williams and Donna Reimer

**Member Service** ..... Joan Wean and Sharon O'Donnell, *Co-Chairs*

**Brown Bag:** Barb Foley, Lynn Denitz, Joan Wean,  
Susan Case and Deb Faulkinberry

**Technology** ..... Adelaine Williams, *Chair*

**Website:** Cristin Buccigliata, Sharon O'Donnell  
and Adelaine Williams  
**Newsletter:** Linda Andrews, Beth Boyer and Amy Coral

**Community Relations** ..... Amy Coral, *Chair*

**Community Challenge:**  
*Back to School* – Amy Coral  
*October Event* – Kerriane Brady and Holly Porcellini  
*December Event* – Amy Coral  
**Publicity:** Beth Romberger and Amy Coral  
**Bar Liaison:** Janet Molloy and Kitty Malcolm  
**County Coordinators:**  
*Chester* – Kerriane Brady  
*Bucks* – Janet Molloy  
*Montgomery* – Kitty Malcolm  
*Delaware* – Peggy Hayden

**Vendor Relations:** ..... Dena Lyons And Janet Molloy, *Co-Chairs*

**Legal Expo:** Joan Wean, Sue Cressman  
and Faye Hunsberger  
**Business Partners:** Dena Lyons, Barb Foley,  
Joan Wean and Janet Molloy

## WELCOME NEW MEMBERS

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Ft. Washington, PA 19034-7544  
215-540-3627; Fax 215-646-0379



www.ala-independence.org

**Annual Conference & Exposition**

### SAVE THE DATES!

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# MEMBER Profile

## **APRIL FUGATE**



We are pleased to introduce you to **April Fugate**, Executive Administrator at Johnson Matthey Inc. April's primary responsibilities include managing a fabulous support staff, supervising all office operations, overseeing billing operations, serving as the President/General Counsel's right hand, assisting the Company Secretary for all corporate entity matters and handling facilities management, among other duties.

April went to school for accounting – after working about two years for a CPA firm, she started looking for something “more exciting than April 15th.” Her first interview was with a general practice law firm where the owners knew folks in the CPA firm where she was working. . . they said “if you can work for them – you can work for us.” Needless to say, she joined the firm and started taking law-related courses.

She started her legal career in the early '90s working in a small general practice firm outside Pittsburgh (yes, a Steelers' fan!) for four years; April was then offered an office management position at an avionics shop at an airport at the Jersey shore where she worked two years, but even though she grew up in aviation , she knew that she wanted to go back to law. She then accepted a job in a satellite office of one of the largest insurance defense firms in the US as a legal assistant in Harrisburg for about four years. Following that position, she accepted a job as an office manager for a criminal defense firm in Harrisburg where she worked a couple years. April then accepted a job as an office administrator in 2002 for a family law firm just outside Harrisburg where she remained until her husband's job brought them to the Philadelphia area. In 2006, April was offered a position with Johnson Matthey.

When discussing her thoughts about upcoming changes in the legal industry, she sees the future evolving around E-discovery, Social Media/ Cloud – – technology is changing by the minute and with this –technology, privacy, security and related policies must keep up with the changes.

April's biggest challenges include: office space/remodeling issues due to growth; budget planning and oversight year to year; and keeping the support staff motivated. They have implemented a monthly recognition program where they pick a day to focus on for that month – such as “Motivation Monday” or “Teamwork Tuesday” – and each support staff member has their own theme board at their workstation. They use rec-

ognition shout-outs for the support staff to encourage each other, along with weekly drawings for small prizes. In addition, they spend some time during the monthly support staff meetings to focus on that month's theme – the teamwork exercises can get a bit rowdy!

April now lives in Collegeville with her husband, and she has three step sons (the youngest is 13). Her parents were divorced and both remarried to people with children, so with 8 other siblings – there is never a dull moment at family gatherings.

April relates the following story. One stormy late fall afternoon while working at the criminal defense firm (an old Victorian home remodeled into offices), all had gone home for the day and she was in the library busy organizing a file and reviewing some crime scene photos. When just like a scene of a horror movie, the power went out and the place went totally dark. She heard footsteps slowly coming down the back hallway on the hardwood floor. She managed to feel her way across the library to a corner office and grabbed the closest object she could find in the dark as a “weapon.” The door creaked open and all she heard was breathing. April peered around the corner of the desk just in time to see a set of glowing green eyes coming towards her in the dark. She burst out laughing as she realized it was Maddie, the owner's black Labrador. (Unbeknownst to her, he had dropped Maddie off in the rear entrance earlier on his way to a meeting so she wouldn't have to sit in the car.) April still laughs when she's at the office late and it's storming outside thinking about it – and what exactly was she going to do with a lady justice paperweight as a weapon?

As to ALA, the attorneys in April's office are actively involved with DELVACCA (Delaware Chapter of the Association of Corporate Counsel) which has been a great resource and networking tool for them. She started looking for a similar resource for administrators and found ALA. April anticipates that she will have the capability to network with our members and that ALA will offer her the resources to expand her knowledge. We anticipate that April will become even more active with the Independence Chapter, and look forward to her ongoing participation.



[www.ala-independence.org](http://www.ala-independence.org)





# INDEPENDENCE CHAPTER COMMUNITY CHALLENGE EVENT

## **HARLEE MANOR** *When Somethings Occur...*

*By: Kerriane Brady, Office Manager; Wade Goldstein Laundau & Abruzzo, P.C.*

**TIME**, as defined in the Merriam-Webster's collegiate dictionary by MerriamWebster, Inc. is, "*the point or period when something occurs.*"

Family members don't often have the time to visit nursing home members as often as they would like. Caught up in everyday life, it is easy to get distracted, and to even forget a loved one while dealing with the hassles of family, job and money.

I was extremely honored to be a part of a special event on a beautiful Saturday morning in November when members of the ALA, Independence Chapter, their family members and even their pets shared time together with the

residents of Harlee Manor, an assisted living facility located in Springfield, PA.

It was apparent from the start that this was more than just any event; the children brought smiles to the residents, "Trixie" the dog and her pretty little sweater brought laughter and the ALA members helped bring companionship and fun - AND, it was B-I-N-G-O with prizes for everyone!

The time flew and the event ended with lots of long hugs, more laughter and many words of gratitude. The ALA members said their goodbye's, some promised to come back and others took pictures of the day full of stories, laughs and many smiles.

TIME truly is a gift. And, although life is busy, spending just a few hours with the elderly is surely a time that many wonderful and special SOMETHING(S) OCCUR. Just ask the members of the ALA, Independence Chapter.



IC members and residents of Harlee Manor



Willie, the Harlee Manor mascot



Young family members and animal friends.



Residents playing bingo



IC Participating Members with Social Director



Some of the prizes for the bingo winners.



# INDEPENDENCE CHAPTER COMMUNITY CHALLENGE EVENT

## SECOND HARVEST FOOD BANK ALLENTOWN, PA

### Experiences of Independence Chapter Members at Second Harvest

By: Deborah Faulkinberry,  
Gross McGinley, LLP

Not only was my community challenge a humbling experience, it opened my eyes in a very profound way.

The Lehigh Valley ALA's community challenge was to volunteer at Second Harvest. Donna Reimer from King Spry graciously arranged the challenge. We were joined by fellow ALA member Kathy Miller from Zator Law Offices.

I just needed to show up. Surely I could squeeze this into my very busy schedule. I had a meeting at 8:15, but I could be there by 10:00 and volunteer until 2. Perfect.

It was a rainy day, my meeting ran late and I was hustling to get to



IC Members D. Faulkinberry, K. Miller and D. Reimer

Second Harvest (on the outskirts of Allentown) and grumbled as I hit yet another red light. For sure I will be late now.

I arrived a little after 10 and quickly found my place at the conveyor belt, loading two cans of green beans in each box as it rolled passed me. There were probably 75 people quickly performing their assigned tasks. The boxes were loaded onto pallets and taken away by forklifts. I was struck by the massive amount of food that we packaged into boxes. And we were only one shift! I started to get a small un-

derstanding of how great the need is.

We were an exceptional group of workers and finished our "allotment" for the day, an hour ahead of schedule. Great! This will put me a little ahead of schedule. As I started to leave, I was approached

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by an elderly lady. I'll call her Rose. She was accompanied by her special-needs son, who was in his forties. She asked if I was going into Allentown. She stated that she and her son had taken the bus to Second Harvest. Since we finished an hour ahead of schedule, they were going to have to wait for the bus for an hour, in the rain. I told her that I would be happy to give them a ride.

On our way to Allentown, we chatted. Rose and her son take the bus to Second Harvest weekly and volunteer their services. She stated that she felt badly that she wasn't able to volunteer twice a week, but the bus fare was too expensive. I dropped Rose and her son off at a very modest, impeccably neat, row home.

On my way back to the office I reflected. I believe that I will resolve to be on time for the community challenge next year. I won't "squeeze" volunteering in. Heck, I believe that I will volunteer a few times before the community challenge next year.

Volunteering is good for the soul.

*By: Kathleen Miller, Zator Law Offices, LLC*

The experience was both exhausting and wonderful. Donna and I worked very hard and packed nearly a ton of pasta in about two or three hours. It was amazing to think that so much work could be done in so little time. I was also amazed to see all the people working together towards a common goal. Most of us didn't know the others who were there, but somehow we all just pulled together, worked hard and ended up with a record production in record time - all for the good of people we never met.

It was a terrific morning!



*Packing Food at Second Harvest.*



*Volunteers from Lehigh County Area.*

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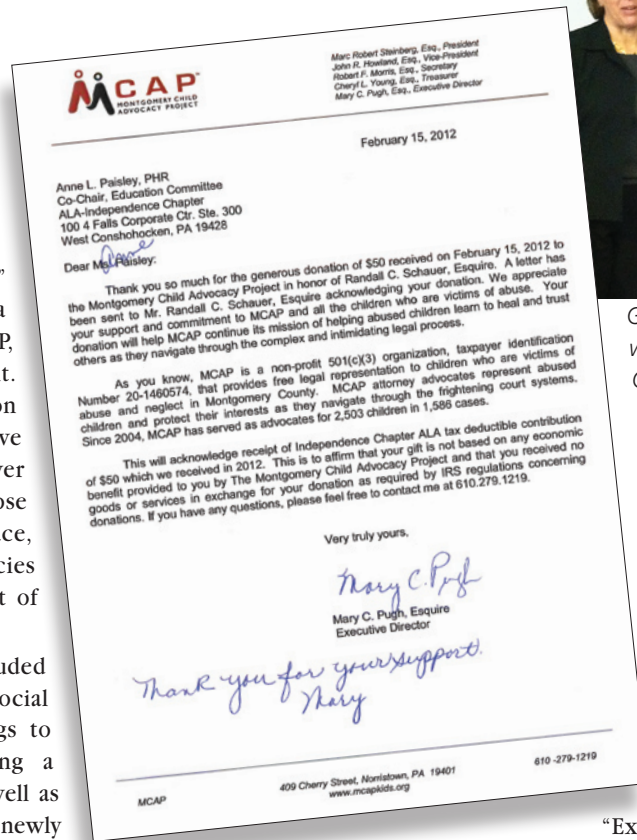


## FEBRUARY EDUCATIONAL EVENT

By: Anne L. Paisley, PHR, Firm Administrator, Heckscher, Teillon, Terrill & Sager

On February 9, 2012, over 25 members and guests gathered at the Courtyard Marriott in Plymouth Meeting for a presentation, "The Impact of Recent Statutory and Workplace Developments on Employment Policies." Randall C. Schauer, Esquire, a partner at Fox Rothschild, LLP, was the speaker for the event. The presentation focused on legislative and administrative enactments and initiatives over the past 12 months, how those changes affect the workplace, and changes to existing policies that should occur as a result of the new laws.

Topics of discussion included the importance of having a social networking policy and things to consider when implementing a social networking policy, as well as recent changes to FMLA, the newly required Lactation Policy, and more timely policies for a Criminal Background Check, Solicitation and Distribution of Literature, and Alternative Dispute Resolution.



Guest Speaker Randall Schauer, Esq. with IC Members A. Paisley, C. Bucciaglia and L. Deniz

The breakfast meeting was sponsored by mindSHIFT Technologies, Inc., with a brief introduction by Ed Grubb, president of mindShift. The Chapter was delighted to see new faces in the crowd, and encourages all members to participate in the upcoming events: March 28, 2012: VOIP Technology (Quarterly Dinner at Plymouth Country Club) and May 15, 2012, "Excel 2010 for the Legal Administrator," a hands-on session to be held at Ratner-Prestia. Keep an eye on your email for more information and registration details.

## INDEPENDENCE CHAPTER HOSTS WEBINARS SPONSORED BY ALA

By: April M. Fugate, Executive Administrator, Johnson Matthey, Inc.

On February 22, 2012, I hosted the live webinar "Drafting Employee Handbooks and Handbook Traps" presented by Michael Cohen, Esquire of Duane Morris.

In attendance were several members of the Independence Chapter of ALA, along with two co-workers of mine, one from the law department and one from the HR department.

Being new to the Chapter, this was not only my first ALA webinar, but the first time hosting an event with other ALA members.

Prior to the start of the presentation, we were given a detailed slide handout to use as a reference.

Michael started by going over the realities and preliminary issues with handbooks. He then proceeded to discuss many topics, including: social media, EEO, wage/compensation, discipline, employee conduct/expectations, benefits, health & safety and other important subjects.

During the live webinar, Michael took time to answer questions and to clarify notations throughout the presentation.

Concluding the two-hour webinar, Michael invited us to use his contact information for any follow-up questions we may have for him. The team here at JM emailed Michael not once, but twice, to which he responded immediately with phone calls to answer our questions.

Whether you were in the process of drafting an employee handbook for the very first time, or updating an outdated version, this webinar offered guidance for either situation.

In closing, my advice to anyone contemplating the use of the ALA webinars as a tool to continue their education is that they are convenient (you never have to leave the office), easy to use (Peach Media offers awesome technical support), and affordable for those of you working with a tight training budget - it is a great way to get training for you and your team.





# The Impact of Recent Statutory, Regulatory, and Workplace Developments on Employment Policies

By: Randall C. Schauer, Esquire, Partner, Fox Rothschild LLP, Exton, PA

March 2012

This article will discuss various developments, – statutory, regulatory and cultural – that are impacting the workplace, and ways to address same by either modifying existing, or adopting new, policies. It is not exhaustive, and covers developments over the last two years

Perhaps the most mandatory development would be the requirement that employers that are subject to the Fair Labor Standards Act *provide a private place for non-exempt nursing mothers to express breast milk*. Employers of 50 or less employees are not required to provide a private place if it is an undue hardship. The location must be someplace other than a bathroom. It is a good idea to enact a Lactation Policy informing employees of this right, and also to simply be aware of it as an employer.

A hot button enforcement issue for the Equal Employment Opportunity Commission has been leave policies that provide for *automatic termination if an employee fails to return from a medical leave of absence*, typically an FMLA absence. The EEOC expects employers to engage in the “reasonable accommodation” analysis under the Americans with Disabilities Act at the time an employee would be expected back from an FMLA or other disability leave. The EEOC regulations under the ADA view a relatively limited fixed duration additional period of leave that will allow the employee to be able to perform the job as an appropriate accommodation and employers who do not engage in that analysis have been a target of EEOC enforcement and significant penalties.

Another item that is receiving increasing attention is the *use of criminal background records to disqualify minority employment candidates*. The Pennsylvania Human Relations Commission is developing a Guidance on when an employer may

deny employment based on a criminal record. That guidance in its draft form provides a presumption that the employer is discriminating if they reject an African American or Hispanic job candidate unless the employer can establish certain defenses that are available under the guidance. The EEOC has already issued and has in place a policy statement on conviction records under Title 7 that was issued in February of 1987. It is a good idea to review these documents, evaluating applicants and your own policy on criminal background checks. Criteria for application of information on arrests for misdemeanors or felonies that may be found in the background checks should be spelled out for managers and others.

Another important policy for any employer is one dealing with *social media*. The courts appear to look for some policy or communication from an employer that tells employees what they can and cannot do relative to use of social media in and outside of the workplace. In addition, the National Labor Relations Board has begun citing and reviewing social media policies for possible violations of the National Labor Relations Act, claiming that many of these policies violate the employees’ right to socialize and discussion terms and conditions of employment, collective. The NLRB initiative is being applied against non-union and union employers in this regard.

If you have not updated your EEOC policies to include not discriminating on the basis of genetic information, you should do so. The employment portions of the *Genetic Information Non-Discrimination Act* went into effect on November 21, 2009, and are a “protected category” as much as age, religion, gender, etc. Employers should also consider policies regarding how genetic information is handled if the employer comes into possession of same.

There have been changes to the *Family Medical Leave Act*, particularly with regard to those in or dealing with members of the armed services that need to be included in your FMLA policy.

In addition, there have been changes to the *ADA amendments Act of 2008*, which went into effect on January 1, 2009. There are not a lot of changes that need to make to policies as a result of these amendments enactment, though an employer want to clarify certain items that were clarified by those amendments.

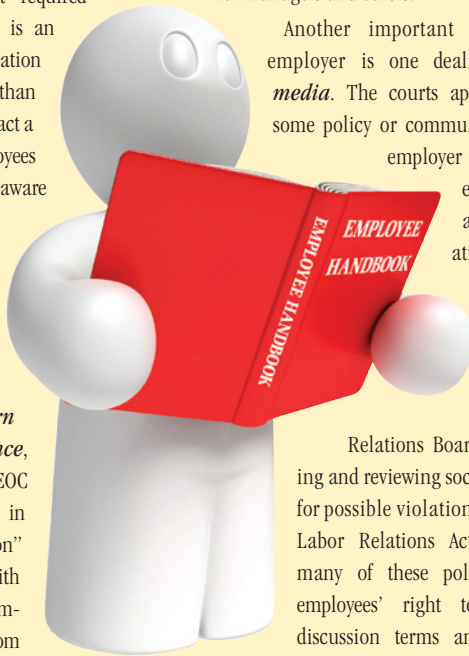
The courts have continued to express support for the use of *alternate dispute resolution procedures* for disputes arising in the employment relationship, when the policies are properly enacted, communicated, and applied. This includes mandatory arbitration of various claims including Title 7 claims. If your firm is interested in utilizing this mechanism to avoid the availability of the courts for employee claims, they need to be properly drafted and applied.

More and more employers are *offering benefit coverages for same-sex spouses, civil unions and domestic partners*. This is sometimes a deciding factor in whether you get employees you desire. There are several aspects of the employment relationship that need to be considered when providing such benefits, including defining a “domestic partner,” proof of same, documenting the termination of same, etc. and a well-drafted policy is very useful in doing so.

Finally, OSHA has announced that it views a *workplace violence policy*, that is one designed to avoid and prevent violence in the workplace, as something required of an employer under the “General Duty” clause of the Occupational Safety and Health Act. These are not complex policies but if you do not have one. You should enact one for several reasons, including becoming a target of an OSHA investigation or audit.

I understand that it is difficult to find the time to amend and keep handbooks current. However, they are an important part of an employers best practices, allow the employer to “Control the playing field” by defining the rules of the relationship, not to mention assisting in minimizing exposure to legal claims in the workplace.

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