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ON THE COVER

By lending a hand to their community, law firms can help their clients, neighbors, and their bottom lines. In this issue, we include several articles describing ways our law firms have helped those in need.

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EDITOR'S NOTE

BY ROBBIN DOLAN, CLM, SPHR
AND DOREEN MARINO, PHR



We would like to take this opportunity to introduce ourselves as the new Editors of the Jer-Z-Journal, and to thank past editors Helen Lysaght, Elli Albert and Anita Setaro (and all of those before our time who we may have missed!) for all the hard work they put into making this a top notch read. We would like to thank the Newsletter Committee for the time they take in the newsletter development and the creativity they bring to the table. And finally we would also like to thank all of our contributors and Business Partners who work hard to produce material for each edition. Without them there would be no newsletter and the Chapter would lose a terrific source of information and knowledge.

Taking over as Editors is not a decision made lightly and we follow in some pretty big footsteps. We will try our best to measure up to the high quality work that precedes us! If anyone in the Chapter or our Business Partners has any suggestions, we welcome them. And of course we are always looking for contributors and timely, pertinent articles are always appreciated. We also welcome ideas for articles. If there are any members that want the newsletter to cover specific topics, we would love to hear from you.

As an introduction, Robbin joined the Chapter in 2006 after having been an ALA member since 2001. She took the road less traveled in becoming involved in the Chapter as her children were young and attending meetings was difficult. But as they grew older she was able to become more involved, starting with the Newsletter, Compensation and Equipment Survey Committees and eventually taking over the Workshops and becoming Officer on the Board of Trustees. She relishes the thought of one day becoming President (well, maybe that was a poor choice of words) and anticipates a degree of sadness when her term on the Board ends (an appropriate choice of words). She lives with her husband Ned, a Business Manager at a car dealership, two sons, two cats, one dog and one mother, in Sussex County. A true menagerie.

Doreen joined the Chapter in 2005 and having always loved to write joined the Newsletter Committee in 2006. She joined the Board of Trustees and is currently serving her second term as Board Secretary. Doreen, unlike Robbin, is in no rush to become President. As much as she likes to make her contributions to this great organization, running around with her 16 year old daughter, Briana, to as many concerts as she can is her priority. And she shares the same taste in music to boot! Doreen also has a 22 year old daughter, Felicia, and a 25 year old son, Kyle, as well as a husband for 33 years, Joe. She can't believe he is still married to her since she concedes that she has to be impossible to live with. Oh, we can't forget the possessed Delilah, the black cat that the Marinos adopted for daughter Felicia during her "child of darkness" stage. A true ferocious beast.

As many of you know from prior announcements, there have been some significant changes in the Chapter made in conjunction with coordinating with ALA National and to enhance services to our members. We are announcing that we are considering different versions of an electronic Newsletter with the goal in mind of providing the newsletter to all our members and friends in electronic format. This will save significant costs in producing a hard copy. We will also replace the current edition naming system with a volume system. Going forward, our editions will be called Volumes 1, 2, 3 and 4 each year. As we are working on this transition, if anyone has any thoughts or comments regarding going electronic, we welcome your feedback.

We are looking forward to a great term with the Newsletter. We will continue with the tradition of consistently addressing current topics for our law firms. We always remain interested and open to membership feedback and are happy to serve the membership in this role.

Doreen Marino is the Human Resources Director of Lerner, David, Littenberg, Krumholz & Mentlik, LLP in Westfield

Robbin Dolan is the Legal Administrator of Laddey, Clark & Ryan, LLP in Sparta



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DOING WELL BY DOING GOOD: TRUE OR FALSE?

BY CHRISTINE S. FILIP, ESQ.

That question may not be as cynical as it appears on its face. Law and other professional firms have invested time and money towards social and charitable causes, as well as community involvement, all for a variety of reasons, such as good citizenship, humanitarianism, and as a means to support the interests of employees and even clients. While the benefits of such socially responsible efforts are difficult to measure, there remain significant reasons for firms to include them in their business development strategy and execution. One good reason is change in the business world.

In the corporate world, where public ownership multiplies the interests and numbers of stakeholders, the issue of whether investments in “corporate social responsibility” (CSR) are positively associated with improved “corporate financial performance” (CFP) remains a debated question. There appears, however, to be a swelling business interest in CSR, because in our wired world, reports of bad citizenship (like having your products made by forced labor, or in dangerous conditions), create both reputational and financial risks businesses would rather forego. There is little hiding from bad corporate behavior anymore.

Important Linkages

What should law firms notice and do about this changed circumstance? On a basic level, as service providers and counselors to businesses, law firms risk business development opportunities if they are perceived of as being socially anachronistic. One has only to notice the questions about diversity (from employee composition to actual participation in interest groups) in almost all Requests for Proposal (RFP) to recognize that being too socially out of step is a critical marketing disadvantage. Simply put, client acquisition, and more directly, client retention, affects the bottom line.

While a small slice of a firm’s revenues may stem from winning RFPs, there are other significant reasons to actively attend to strategy about socially responsible citizenship and community involvement. Beyond the obvious that “doing good” is never a bad thing, we function in a multi-generational workplace, and

the interests of 3 or 4 generations, why they come to work for and stay at a firm vary widely, but-increasingly include interests in social, charitable, and community based causes. This matters financially to a firm because employee retention (in addition to client retention) directly affects profitability.

Meaningful Programs in the Field

Some firms are organized around the choice of causes. Robin F. Lewis, a partner at the West Orange, NJ firm of Mandelbaum Salsburg, chairs their Charity Committee: “The Committee’s rationale for supporting charitable causes is quite simple.... we’re very fortunate and want to give back.” Here is how they have organized their efforts, which focus on local causes or ones connected to employee interests, so that participation is more meaningful and personal:

“This year, we are doing a combination of two things, which we have found seem to work best here:

- We have “denim days” every other month. On the designated day, for a \$5 donation, everyone is permitted to wear jeans or other denim. The committee picks a recipient for each day’s donation, based upon suggestions provided to the committee by employees (staff and attorneys). For example, this year so far, we have contributed to the Heart Foundation, Lauren’s Hope (for brain injured children), and will be collecting next week for a Melanoma foundation. In November, we will donate to an organization serving veterans. We have one or two more days where the charities need to be designated. This kind of event seems to get a good response from our people.
- We do collections on a regular basis for different organizations. After the Sandy Storm, we did a huge collection and we always do holiday time collections – toys, food, often coats. There is a local shelter that we work with and donate to throughout the year.”

Other professional firms link their efforts to their firm’s core values. Sally Glick, a principal at Sobel & Co., LLC, a certified public accounting and consulting firm in Livingston, NJ, notes

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Doing Well by Doing Good

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that at her firm, “We are committed to doing the right thing. We do this because it is our core value—but we also recognize that it is good for employee morale. We have nine core values and one is Care About Your People and Your Community. So it is how we live—but it also a good message for clients and our business colleagues, although that is not our primary driver.”

Sally Glick also notes that “Every year our firm closes the office for an In-Service Day where all our employees participate together on a special project. Because we have nearly 200 nonprofit audit clients, we typically select one who has a particularly compelling or time sensitive need. There have been a wide variety, from helping at a fun fair for kids with cerebral palsy, to building a house with Habitat for Humanity - and this year we are participating in a program with Jersey Cares, raising money and giving our time to clean up some of the NJ shore beaches that were hardest hit by Hurricane

Sandy.”

Finally, besides the more global implications of a firm’s charitable endeavors, people who attend such events are great contacts because their presence bespeaks an activism of the heart and mind. This is exactly the profile of someone who would be great to network with.

Christine F. Filip, Esq. is the Director of Business Development at Saiber LLC in Florham Park



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Wednesdays



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<p>January 16, 2013 (Archived) Microsoft Office® Tips & Tricks for Law Firms (OM)</p> <p>February 6, 2013 (Archived) Document, Document, Document (HR) ** extended, two hour program</p> <p>February 20, 2013 (Archived) Profitable Law Firms: There’s no APP for that (FM)</p> <p>March 20, 2013 (Archived) Initiating Alternative Fee Arrangements (FM)</p> <p>April 17, 2013 (Archived) Mentoring: It’s Déjà Vu All Over Again (HR)</p> <p>May 15, 2013 (Archived) Marketing (Mis)Alignment: Closing the Gap Between Marketing and Law Firm Leadership (LI)</p>	<p>June 19, 2013 Leveraging Technology for Small Firms (OM)</p> <p>July 17, 2013 Negotiate the Lease: Manuever the Maze of Real Estate Options (OM)</p> <p>August 21, 2013 Financial Reporting Methods that Allow Intelligent Business Decisions (FM)</p> <p>September 18, 2013 Forecasting the Realistic Budget (FM)</p> <p>October 16, 2013 Saying the Hard Thing with Aloha (CM)</p> <p>November 13, 2013 The Ethics of Email and Social Media (LI)</p>
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LAW FIRMS LENDING A HAND

BY LISA CUFFARI, CLM

Is your firm involved in charity work, supporting the local community, or perhaps joining efforts to help others at times of natural disasters? I posed this question recently to our membership, by asking how firms encourage employee participation in community service and/or charity. I received some very interesting responses.

Elyssa Goldstein is the office manager for the New Jersey and New York offices of Gonzalez Saggio & Harlan LLP, a national minority-owned law firm established in 1989. Elyssa explains that while her firm doesn't formally reward those who partake in community service or charitable causes, it absolutely recognizes and encourages these efforts. The firm has a monthly internal newsletter that has a section dedicated to this subject. The employees at all 16 offices of Gonzalez Saggio & Harlan are invited to wear jeans on Fridays, in exchange for a \$2.00 donation. The donations are gathered by each individual office one or twice a year and donated to a local organization, collectively chosen by each office's employees.

In addition, Gonzalez Saggio & Harlan participates in the United Way's annual campaign each November. All firm employees have the option to make a one-time donation, and some employees contribute a portion of each paycheck throughout the year. Finally, Elyssa says that the NJ/NY offices get together for the J.P. Morgan Corporate Challenge in Central Park each year. She says this is a great bonding experience and allows everyone to show appreciation for, and give back to, their community.

Wilson Elser Moskowitz Edelman & Dicker LLP is an international law firm with 24 offices in the United States. Our NJALA member, Louise Ruffo, is the office administrator of the New Jersey office, located in Florham Park. Louise organizes several community events throughout the year. For example, her office has participated with Habitat for Humanity by selling paper houses for \$1.00. Louise put a display in the kitchen area in the shape of a house outlined from the small houses they sold. The donations were mailed to Habitat.

Louise's firm participates in the Susan G. Komen Breast Cancer Walks as a team, and provides t-shirts and hats to all team members. Louise notes that they have also locally done the Morris County Bar Association 5K run/walk for charity,

and sponsor a toy drive and/or "adopt a family" at holiday time, with Wynona's House in Newark. It is not always easy to drum up enthusiasm for these events during tough times, but Louise says she continues to organize events that appeal to different interests, so that the spirit of community service continues and gains momentum.

Saiber LLC recognizes the individual charitable activities of its employees, by including information about the causes in their weekly firm newsletter. Karen Steinberger, CLM, the Executive Director of the firm's five offices, says they encourage people to put blurbs in the newsletter seeking contributions for charity. Many in the firm participate in 5Ks and other events, and a firm-sponsored run has promoted camaraderie and good will among the attendees.

Two very interesting and different programs that are sponsored by Saiber support inner-city school children who are interested in pursuing a legal career. One such program is entitled the StreetLaw Program (www.streetlaw.org), which Saiber does in partnership with one of their clients. Karen states that the purpose is to educate the students about law. The students are given hypothetical legal problems to discuss and "defend" in a mock trial format. The other program is called "Saiber Day" in connection with the Law Department of the City of Newark. Students come to the office (in Florham Park) and a group of employees, consisting of lawyers, administrative staff, and a paralegal, talk to them about the practice of law. Saiber also participates in a tour of the Newark courthouse for the students.

Rita Pallotti is the human resources manager for Graham Curtin located in Morristown, NJ. Rita reports that her firm has been involved in many different walks and runs, including "Lawyers for Kids," the Verizon Wireless Corporate Classic, and Share the Care, organized by Morris Habitat for Humanity. Graham Curtin was honored by the Morris Habitat for Humanity in 2012, and by the Interfaith Food Pantry in 2011.

Susan Weinrab, the office manager for Genova Burns Giantomasi Webster's Newark office, tells me that her firm has a group that does the Susan G. Komen Breast Cancer Walk, and that some of the partners at the firm sponsor groups for charitable causes.

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Law Firms Lending a Hand

(Continued from page 8)

Some of our smaller member firms also participate in the community. Cindy Landis, the office administrator for Gennet Kallmann Antin & Robinson, PC, reports that for the last few years, her firm has also collected food for the Interfaith Food Pantry in Morristown. She says she wanted everyone to take a step back and focus on others, and it turned out great.

My firm, Fox and Fox LLP, has participated in recent years in the Lee National Denim Day, a charitable campaign by Lee Jeans in collaboration with the American Cancer Society and its fight against breast cancer. This year, Lee National Denim Day takes place on October 4, 2013.

There are many rewards to be gleaned from doing charity work, not only for the recipients of the “work (or play!),” but also for those who give so willingly to others. Sometimes we are raising money and sometimes we are just spending time with others to show them we care. By doing community service with your firm/company/organization, you are also building a corporate identity and developing bonds between your employees. Not to mention that you are networking and promoting your business at the same time.

Many thanks to everyone who responded to our survey. We would like to continue to tell your stories of community spirit in the coming issues of our newsletter. If you have something to share with our readers, you can contact anyone on the editorial staff. We would love to hear from you.

Lisa J. Cuffari, CLM is the Office Administrator for Fox and Fox LLP in Livingston



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BEST PRACTICES: COLLECTIONS (GETTING YOUR MONEY)

BY MICHAEL SIKORA

Collections are one of the most important, yet difficult tasks for a law firm. Reaching your hourly goals, taking care of your clients' business or billing for your time; these are all important tasks of an attorney, but none of it matters if the money isn't coming through the door. How can a law firm do a better job of collecting what is owed to them?

Many lawyers are afraid that if they pressure their clients to pay them for the work that has already been done, they will lose their client's business. This attitude and culture must change. The partners and attorneys must take ownership of their receivables. This is one of the most important concepts, because the best collection staff cannot put enough pressure on the client to pay. Only the attorney who is doing their work can apply enough pressure. This is not to say that collection people are off the hook. They must work hand-in-hand with the attorneys to get paid: in essence, they have a partnership.

Regular, monthly face-to-face meetings (or even more often if necessary) between the attorney and the collection staff, to analyze problem receivables and determine strategies for collecting on them, is a critical first step. In many firms, the last thing lawyers are interested in is collecting the money. They want to practice law and bill for services and let someone else worry about collecting. But the most successful law firms make sure they are getting paid for their valuable services. Some larger firms may have a receivables committee and smaller firms may designate the managing partner, or some other partner, to oversee and work with the administration or finance group to monitor collection activity.

The activity they must monitor comes from meaningful reports: billing to collections ratios, aging reports, collection activity notes, and status reports. Receivables can be looked at as a factor of billing; for example, your billing is \$1.5 million a month, and your receivable balance is \$3 million. This equals a two-time billing factor, which means your average receivables are being collected in approximately 60 days. This factor can be examined to determine if your overall receivables are increasing or decreasing.

Another component is the aging report. Close attention must be paid to the receivables that are approaching 90 days and over. Some firms, depending on the type of law that they practice, may want to start at 60 days. Each firm must develop procedures and policies so that they stay on top of clients with a telephone call, a statement, or some other personal contact. Some policies to be determined are:

- When will you make a call to the client;
- When will a second or third statement be sent;
- When will your collection staff turn over the account to the attorney to handle;
- How will the attorney handle the account: stop all legal work or have a personal meeting?

It is estimated by some law firm collection agencies that once an invoice hits 120 days, the rate of payment is 50 cents on the dollar. This is why it is so important to have collection efforts begin at 60 to 90 days and not later.

Another tool that can be utilized to assist with collections is the use of a retainer, which in this sense means to secure payment of fees belonging to the client before any work is done. These funds must be deposited into the trust account, and as fees are earned, they can be withdrawn and applied against the earned fees. When the balance of the retainer falls below a certain agreed-upon level, the client must replenish the retainer to bring up the balance to the appropriate dollar amount. By using a retainer and making sure it is replenished in a timely manner, there should always be money to pay the current fees being generated.

The following points summarize collections recommendations to improve results:

- Contact payer (client) frequently.
- Work with the client on a regular basis. Do not issue ultimatums to him/her.
- Offer different payment options, such as using a credit card.
- Call on invoices sooner rather than later.
- Be polite, understanding, and build relationships, especially with adjusters at insurance companies.

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Best Practices

(Continued from page 10)

- Speak to the client personally-it is much more effective than impersonal e-mails.
- Utilize retainers if you can.

Finally, attorneys must be paid for their services. If not, like my former managing partner would say, "Attorneys might as well sit on a park bench and read the Wall Street Journal." The process of collections is a team effort and your collection staff and attorneys must work together to ensure that the firm is paid what it is owed, which makes for a successful, sustainable law practice.

Michael J. Sikora is Administrator/Director of Finance at the Law Firm of Hoagland, Longo, Moran, Dunst & Doukas, LLP in New Brunswick



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CLE ON A SHOESTRING

BY KAREN M. STEINBERGER, CLM

Continuing Legal Education (CLE) accreditation is vital to a lawyer's career, and it is something that is viewed as a "necessary evil" by many. If you are not already part of this process at your firm, it is time to start. By smartly reviewing all options, an administrator can be a valuable asset in guiding lawyers toward appropriate CLE classes, webinars, etc., while keeping a watchful eye on the firm's budget.

Let's start with the basics. What are the requirements for New Jersey and New York lawyers?

New Jersey

In New Jersey, an attorney needs 24 credits in each two-year compliance period; out of those 24 credits, four must be in ethics/professionalism.

During his/her first full two-year compliance period, a "newly admitted attorney" must complete 15 of the 24 credit hours in five of nine subject areas specifically on New Jersey law (New Jersey basic estate administration; New Jersey basic estate planning; New Jersey civil or criminal trial preparation, etc). NJ ICLE offers the courses that specifically satisfy this requirement.

All New Jersey attorneys (newly admitted and experienced) may complete **up to half** of their 24 credits through an "alternate verifiable learning format," i.e., videotape, audiotape, remote-place viewing, on-line Internet computer presentations, webinars, webcasts, podcasts, videoconferences, etc.

New York

In New York, an attorney admitted to the state bar for less than two years is "newly admitted." Newly admitted attorneys must complete at least 16 **transitional** CLE credit hours in **each** of the first two years of admission to the Bar, as follows below:

Newly admitted attorneys must take accredited transitional CLE courses in traditional live classroom settings, or through attendance at fully interactive videoconferences that have been approved by the CLE board for use by newly admitted attorneys. Newly admitted attorneys **cannot** earn CLE credit for writing, teaching or speaking engagements.

Once an attorney has been admitted to the New York bar for more than two years, he/she is considered an "experienced attorney" and is required to complete 24 credits during each two-year compliance period, four of which must be in ethics/professionalism. An experienced attorney may complete all 24 credits online if desired.

What are some ways that credit can be obtained for little or no cost?

Many law firms and other organizations, such as accounting firms, offer their own in-house programming to the public and are more than happy to add potential attendees to their mailing lists. This is a "win-win" because the lawyer gets free education and CLE credit, and in turn the entity providing the educational program gets a marketing opportunity to promote future business.

Lawyers may also earn CLE credit at no cost by teaching an approved CLE course or by moderating or participating in a panel presentation at an accredited CLE activity. Encourage your lawyers to be presenters: Not only do speakers at CLE sessions get double credit, but also getting your lawyers out there serves as a terrific marketing tool.

If lawyers at your firm are multi-jurisdictional, it is important to be mindful of the activities that are acceptable for credit in the

Category of Credit	Before first anniversary of admission	During second year of admission
Ethics and Professionalism	3	3
Skills	6	6
Law Practice Management and/or Areas of Professional Practice	7	7
TOTAL	16 transitional CLE credit hours	16 transitional CLE credit hours

(Continued on page 13)

CLE on a Shoestring

(Continued from page 12)

various states. For example, New York lawyers may receive credit for (a) teaching law courses at an ABA-accredited law school, (b) preparing students for and judging law competitions, mock trials, and moot court arguments, including those at the high school or college level, (c) publishing legal research-based writing, and (d) providing pro bono legal services. In New Jersey, activities that **will not** be given CLE credit include, but are not limited to (a) writing or publications, (b) mentoring another attorney, (c) moot court or mock trial, (d) pro bono work, and (d) teaching law school classes.

Lawyers may obtain many credits at one time by attending professional educational conferences. Although there is an attendance fee for the conference, many times it is cheaper, dollar for dollar, than taking individual paid courses.

There are many CLE programs offered by the State Bar Association at pricing that is generally more affordable than courses given by private companies.

If a lawyer at your firm wants to sign up for a webinar, get the word out to all of the lawyers at your firm so that others may take advantage of this education. Also, consider gathering lawyers from several firms to attend webinars at your office and sharing the cost.

Look to your legal vendors. Westlaw and Lexis will provide free CLE sessions at your firm, and there are other vendors who offer CLE credits for attending sessions on such topics as e-discovery, depositions, etc.

It should be noted that the tracking of credits is crucial to the verification process. Rather than expecting each lawyer to keep track of this, someone in the firm (you, your librarian, a legal assistant, etc.) should be charged with that activity. There are terrific software products available (at a cost) that do the tracking work for you, which are particularly helpful if you have a large number of lawyers in your firm. However, tracking can also be done by an in-house spreadsheet. While a spreadsheet can be very cumbersome if there are a large number of lawyers to track, smaller firms should be able to use this method with ease.

There are many alternative means of gaining CLE credit, rather than attending individual classes. By knowing these avenues and being involved in the CLE process at your firm, you become a more valuable asset to your firm by controlling costs and ensuring compliance.

Karen M. Steinberger, CLM is the Executive Director of Saiber LLC in Florham Park

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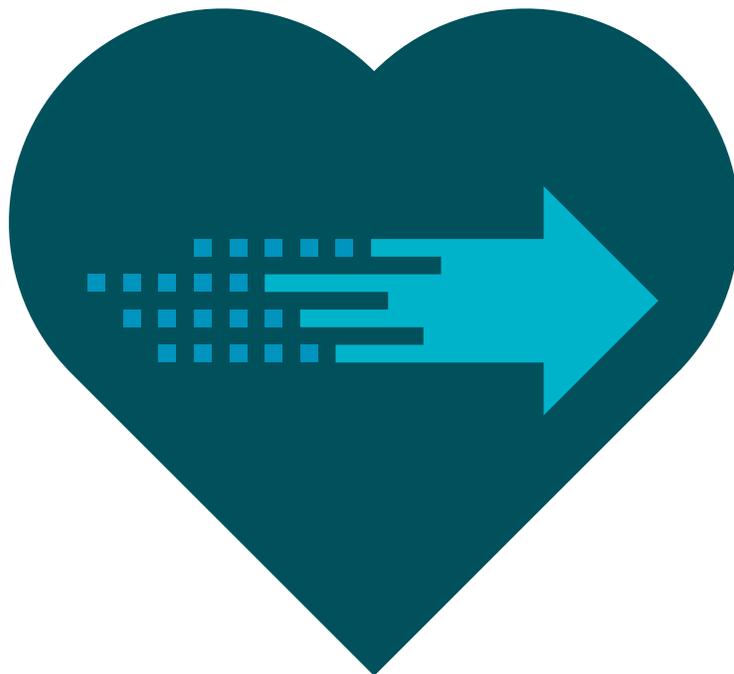
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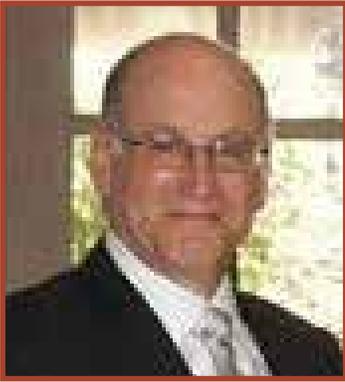
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EXTREME MAKEOVER FOR THE OFFICE SERVICES CENTER

BY FRED LEVINE

As most law firms know, the solutions provided by the Office Services Center – whether the center is managed internally or by an outside provider – have expanded dramatically over the past few years. Certainly the traditional services, including mail and print/copy management, as well as overseeing conference room, reception, and facilities management activities, remain critical to a firm’s success.

However, enhanced staff expertise and new workflow processes and technologies are evolving the traditional office services center into a true “information management center” that can provide document imaging, records management, electronic evidence processing, and more. Another key development driving this trend has been the fact that many legal administrators and attorneys are now less dependent on physical documents and more focused on dealing with information in digital format, such as utilizing online collaborative document review tools and services.

Three Key Questions

As always, an evolution brings both opportunities and challenges. Whether a firm chooses to manage these more complex electronic document management activities internally or via an outside provider, the firm will want to ask at least three key questions to help insure success:

1. Do we have adequate staff expertise? If the answer is “no,” then the firm will have to consider training existing staff in new technologies and processes, acquiring new talent, or outsourcing.
2. Do we have the right technology tools and processes in place? The answer here will vary greatly, depending upon client needs and the firm’s assessment of whether its current systems are meeting defined targets around risk reduction, client service, workflow productivity, and cost containment.
3. Do we need to do a better job of promoting awareness of our information management center capabilities to the firm’s “end users”? As illustrated in the case history below, the firm implemented an internal audit of its attorneys and staff before launching a new document imaging system. The audit

indicated that the system would be adopted based on features that would make it easy to use and provide solid benefits.

While firms try to answer these and other questions, the potential benefits of maximizing their information management center operations are clear. These benefits include improving operational efficiency, streamlining document management administrative activities, and thereby enabling litigation support staff and attorneys to focus more time on practicing law, enhancing client service, reducing risk, and more.

Below is an example of how a firm capitalized on document management processes that went beyond traditional services center activities to include, for example, records management, document imaging, and more technically-advanced mail and print/copy center operations.

Electronic Case Management to the Rescue

An international law firm decided to reduce its dependence on paper-based case management files in order to improve productivity. The firm’s goals also included reducing the time necessary to respond to client requests and improving internal access to case-related materials involving attorneys located in different offices. The firm knew that to realize its vision of creating an environment less dependent on paper, it would face challenges that included making new practices and procedures acceptable to the firm’s attorneys.

Initially, the process by which information was saved electronically was ad hoc. Attorneys and staff would independently scan documents, saving them on individual hard drives, network computers, or as a part of their email. As this practice grew, the network servers became clogged with multiple copies of scanned documents that were saved with different naming conventions, making it almost impossible to easily search and retrieve a specific file. The firm needed to implement a more standardized scanning system that was aligned with its physical records management process, allowing faster and easier access to specific case-related materials.

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Extreme Makeover*(Continued from page 15)*

The firm launched a pilot project to create an electronic case management process that involved saving document images to folders using the same naming conventions as the physical files stored in the firm's central file system. This would provide continuity between electronic and physical files. The scanned images were stored in folders on a shared drive, a process standardized and developed with input by the firm's staff. This resulted in easily accessible electronic case files that reflected the physical records. An internal audit of the firm's attorneys and staff indicated that the document imaging system would be adopted due to its ease of navigation and similarity to the physical file management process.

The resulting solution included collecting all case-related documents from the firm's staff throughout the day and then scanning the documents into the firm's document management system (DMS), using the same naming conventions for both electronic and physical records. Every document was processed before being submitted to the firm's central file system. This included allowing staff to electronically submit emails, court e-file documents, and other case-related materials for inclusion in the system. In instances where a

specific document had already been electronically stored and profiled, a duplicate was not created.

The documents were stored and profiled in the DMS so that the firm's staff could locate them with a minimum of search criteria. In most cases, only three criteria were needed, which included client number, matter number, and file designation. This approach made searching and retrieving electronic files easier because it mirrored the firm's physical records management process.

This is just one example of how law firms are leveraging new processes and technologies to dramatically extend the capabilities of their office services center. By building on a solid foundation of traditional mail, print/copy, and facilities management, firms are advancing the boundaries of document process and information management in order to help insure their success in the days ahead.

Fred Levine is Manager, Sales of Canon Business Process Services in New York, NY

NEW MEMBER SPOTLIGHT

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NAVIGATING THE MICROSOFT LANDSCAPE

BY ANN GORR

Chances are that the migration to an upgraded version of the Microsoft Office Suite or Windows operating system has been a part of your firm's technology roadmap over the past several years. For some of you, it has been an ongoing process as a result of the ever-changing landscape of your firm's requirements. The Windows 8 and New Office 2013 product announcements and releases provided by Microsoft will eventually impact current and future technology decisions for your firm. Some of you are being forced into making decisions as product licensing and support expire, while others are investigating some of the added features and functionality of the newly released products to incorporate within your firm's technology toolkit.

I recently returned from the energizing ILTA 2013 Conference (*International Legal Technology Association*) where all of the latest and greatest of legal technology products and innovative implementations are on display. The exchange of ideas on a wide variety of technology topics was truly amazing. Not surprisingly, the utilization, implementation, and benefits analysis of incorporating the latest Microsoft products into the law office and corporate legal environments was the hot topic of a number of conference sessions. Scott Klososky, the keynote speaker for the conference, provided a unique term/definition that remains fixed in my mind and seems to sum up some of the roadblocks that we encounter in the legal technology world: *"Technology Darwinism happens when the pace of technology innovation is occurring faster than the speed people will adapt to new tools and methods..... Innovate or Abdiccate."*

Changes in technology are indeed moving faster for most of us than we'd care for in the law firm/corporate legal offices. Many of us are feeling behind the 8-ball as we are either just in the process of implementing or are just finishing up the deployment of an Office 2010/Windows 7 Upgrade, subsequent to the December 2012 announcement of the Windows 8, Office 365, Office 2013, and Windows Server 2012 products.

Then, there were those early adopters of the Windows 7 & Office 2007 releases. Their IT Departments no sooner finished up with the 2007 migration when the 2010 product release

occurred. The *"Project Fatigue Syndrome"* becomes very real when firms and IT Staff are tasked with constant upgrades. Adoption of the changes by users becomes a constant worry. How is anyone supposed to keep up with the ever-changing landscape?

As a technology consultant, I actually keep four separate laptop devices active to support the various environments we encounter and support in the law office environment. It's kind of crazy – but I have laptops equipped with Windows XP & Office 2003, Windows 7 & Office 2007, Windows 7 & Office 2010, and Windows 8 & Office 2013..... so I truly do feel your pain! So let's talk about some of these changes and how they impact you and your firm.

Beware: End of Life for Windows XP and Office 2003

At the end of 2012, Microsoft made the announcement that effective April 14, 2014, it will no longer support the Windows XP platform or the Office 2003 Product Suite. In the viewpoint of many firms, they were happy just staying put as *"nothing was broken – so please don't fix it."* However, in the big picture of things, these older products were built on 3rd generation technology, presented higher security risks, and are simply outdated as they related to 3rd party product integration. Many law firms have already migrated to or are in the process of migrating to either Windows 7 & Office 2007 or Windows 7 & Office 2010. If you haven't already tackled this upgrade on your short list of technology projects for 2013, you need to get moving so that you are not left out in the cold when Microsoft turns off the lights! Do not procrastinate because April 2014 will come quickly! (*For Additional Information: See EXCERPT from Microsoft website regarding this scenario at end of this article.*)

What About Windows 8?

The latest release of the Microsoft Windows Operating System—WINDOWS 8—was made available to the general public in November 2012. It is the latest operating system that was developed out of the need to support the trends in device technology that incorporate the use of touch-technology as well as access to keyboards and mouse devices. However, it appears to have hit a roadblock with implementation/early

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Navigating the Microsoft Landscape

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adoption from the legal vertical market perspective. Yet, the dilemma facing law firms is that new laptops and tablets are equipped with the “tiles based” Windows 8 operating system and they are showing up in your firms now. IT Departments are struggling with having to support both environments (again, that reference to “*Technology Darwinism*”). The desktop customization and the ability to lockdown of the new “Tiles” interface is not quite perfected just yet. Personally, I am loving the Windows 8 environment on my Windows Surface Pro Tablet. It takes a little getting used to at first, but it’s really an easy learning curve once you start using it. I have become so adapted to the Windows 8 environment that I find that I am using touch screen motions on devices that are not touch enabled and wondering why nothing is happening. The sales team at “Windex” is loving me as I find that I am having to wipe fingerprints off my non-touch device screens!

What Is The NEW OFFICE?

The “NEW OFFICE” (sometimes referred to as *Office 2013*), along with “Office 365,” were released by Microsoft in February 2013. These products replace the former versions of Office 2010, Office 2007, Office 2003, and all prior versions of the Office Suite product lines. The “New Office” focuses on improving business-class productivity and collaboration within the law office. With its cloud computing capabilities, it allows you to have access to your familiar Office applications, with business-grade email, calendar, video conferencing, and most up-to-date documents across nearly all your devices, from PCs to smartphones to tablets, regardless of whether you are in your office or working virtually. While Office 2013 has some really cool new features and functionality, the familiar interface delivered with the Office 2010 release allows for a smooth and easy transition by users to the “New Office” environment. Overall, the Office 2013 and Office 365 products provide a more polished experience for the user.

What’s The Difference between Office 2013 and Office 365?

Both versions of the New Office product suite are the same in the application’s look and functionality. The New Office/Office 2013 product is the traditional model that you’ve been used to in the past, where the software is installed locally on the user’s device (*i.e., laptop or desktop*). Data and application licensing is addressed/stored via the firm’s local servers. The incorporation of Software Assurance Benefits provides you with the Upgrade and Downgrade rights to the software as well as allowing for Home Use Licensing. The LYNC collaboration tools are taking off like wildfire! The state of the art trending product allows firms to handle online meetings via web conferencing, incorporate firm-wide instant messaging, transition to voice over IP (VOIP) phone system, Integrate with SmartBoards, and provides smooth integration with your calendar and other Office applications.

However, the primary difference is that Office 365 is based on a user monthly subscription pricing model and a cloud based delivery system. With its modular approach, firms can have access to Exchange Online, SharePoint Online, Lync Online Collaboration tools, and Office Pro Plus (as well as Project and Visio for Office 365), without incurring the on-premise operating expenses and hardware investments. Servers and server software are managed in Microsoft’s world class datacenters, with continual updates and upgrades applied as part of the cloud service.

While the word “cloud” tends to evoke fear in many law firm environments, the Microsoft solution allows for the firm to deploy a secure hybrid solution of SharePoint/Exchange where you can identify what gets addressed on premise vs. cloud. Its control and efficiency is measured via a single user interface to purchase and administer with role-based access control. The new structure of the Office 365 per user monthly licensing pricing allows you to have up to 5 device installs of the program for each user as well as streaming on-demand versions for the mobile user to access wherever he/she is located. Overall, Office 365 allows a firm to get started for a fraction of the pricing of a traditional licensing model.

Who Is The Likely Candidate for the Windows 8 and/or New Office Upgrade?

The obvious candidate is any firm that is using the “*soon-to-be-extinct*” Windows XP/Office 2003 platform, who need to do something sooner rather than later. However, there are a number of other use cases for firms to forge ahead to the new environment:

- Those firms who were early adopters of the Office 2007 upgrade are probably already in that “*cycle of change*” mode that typically takes place within firms about every three to four years. They need to have a “*system refresh*” that allows them to move forward to the latest releases and versions.
- Firms who are looking for alternative cloud solutions – particularly in relation to Exchange upgrades – whereby they can obtain a business class email “cloud” solution including utilization of devices, cloud storage and control of Exchange without managing the associated hardware requirements and the expense aspects of an Exchange upgrade.
- Small to Mid-Size firms who want all of the “bells & whistles” with Microsoft’s authoring and collaboration tools that the larger firms have, without incurring the associated hardware investment expenses.
- For those firms and corporate legal departments that are choosing to pursue using SharePoint as a DMS, the New Office upgrade makes perfect sense.
- Firms that have an abundance of users with MACs/IOS devices are finding the Office 365 product to be useful in

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Navigating the Microsoft Landscape

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that it crosses the hurdle to allow all users within the firm to use the same application software to handle the law firm's work product.

- Firms who realize that using “free” email and other apps are putting their content at risk. If you read the fine print on the end user licensing agreement (EULA) for free apps, you may notice that the service providers retain the rights to use your content for their own marketing purposes, and have no service level agreements in providing the service or protecting your content.
- And finally, there's the firm who wants their users to have access to the OFFICE applications everywhere they go – the Office 365 product ensures that this takes place.

Points for Consideration

As is typically the case within law firms, we are often the “last ones to join in the dance” when adopting new technology. The slow adoption of new technology occurs for a wide variety of reasons, but what is often the case is that there are so many “moving” parts within the firm to consider when making any software upgrade. There may be a wide array of disparate systems (Billing, Matter Management, eDiscovery, Document Management Systems) that need to remain connected, and perhaps all of the software applications are not yet compatible with the new release of the product. It sometimes results in a domino effect in that in order to upgrade one component, it requires upgrading all components. Mired in decision-making mode, many firms take the path of least resistance and choose to stay put – *doing nothing*. However, that results in another dilemma...working with outdated and likely unpatched versions of software applications, non-compliant document security situations, and/or facing software support expiration deadlines.

However, one point of consideration for delaying the move to Office 2013 or Office 365 is that some of the major DMS (Document Management Systems) are not yet compatible with the latest Microsoft releases. HP/Autonomy recently announced that it is releasing an Office 2013 Beta version of their WorkSite product in the next several weeks. The same incompatibility issue may be true of other 3rd party applications that you use within your office environment. You will need to double check with all of your other “legacy” applications to ensure that they will indeed work in the new Windows 8 operating system and New Office application environments. There are many Microsoft Certified Vendors who can help you with developing a migration plan that will have a successful outcome. As is always the case, “*don't wait until the last minute*” to make your purchasing and implementation decisions. I can assure you that speedy migrations never end well!

A Final Note

I am not imparting any particular words of wisdom that you don't already know in this final note. The critical component to ensure the success for any migration is having a well-designed

and flexible action plan with an emphasis placed on the need for training, help desk and floor support as the migration occurs. Doing your due diligence to ensure that those Autotext, Macros and Template tools are all migrated over for your users is significant. The move to Office 2013 will not be as drastic as the migration from Office 2003 to either versions 2007 or 2010, simply because of the familiar design and interface of the New Office product. Yet, we all know that change of any kind tends to upset the applecart for some users. Having a friendly face or a supporting hand to help users in navigating the pathway of change always results in positive outcome with any migration project!

Good luck to all of you as you navigate your way through the Microsoft offerings and decision-making process. Don't fall victim to “*Technology Darwinism*.”

“END OF LIFE” EXCERPT from Microsoft Website

After April 8, 2014, there will be no new security updates, non-security hotfixes, free or paid assisted support options or online technical content updates.

Running Windows XP SP3 and Office 2003 in your environment after their end of support date may expose your company to potential risks, such as:

- **Security & Compliance Risks:** Unsupported and unpatched environments are vulnerable to security risks. This may result in an officially recognized control failure by an internal or external audit body, leading to suspension of certifications, and/or public notification of the organization's inability to maintain its systems and customer information.
- **Lack of Independent Software Vendor (ISV) & Hardware Manufacturers support:** A recent industry report from Gartner Research suggests “many independent software vendors (ISVs) are unlikely to support new versions of applications on Windows XP in 2011; in 2012, it will become common.” And it may stifle access to hardware innovation: Gartner Research further notes that in 2012, most PC hardware manufacturers will stop supporting Windows XP on the majority of their new PC models.

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BE-CAUSE MARKETING HELPS ALL

BY ED MILLER

My twenty-two year career has solely focused on law firm marketing. During this time, I have come to understand that a successful law firm marketing program must include the following elements: consistent and client-focused messaging, targeted marketing materials (including social media), a flexible and sophisticated Customer Relationship Management (CRM) system, an educated sales force, superior client service models, sensible pricing strategies, client maintenance and value-added programs, strategic marketing plans, and a commitment to the community, including cause marketing strategies. This article will focus on the value of cause marketing and, hopefully, offer some creative ideas that any firm can implement.

What is cause marketing?

According to Wikipedia, today's number one source for accurate and reliable information (wink wink), "cause marketing refers to a type of marketing involving the cooperative efforts of a for-profit business and a non-profit organization for mutual benefit. Cause marketing differs from corporate giving (philanthropy) as the latter generally involves a specific donation that is tax deductible, while cause marketing is a marketing relationship not necessarily based on a donation."

I am a huge believer in cause marketing because it creates situations which are "win-wins" for all parties involved. The firm wins because it can prove its leadership in the community and by gaining valuable publicity, which can help with both marketing and recruiting. The firm's attorneys and staff benefit by working on projects that are rewarding and fun, while building camaraderie with colleagues. Additionally, the non-profit benefits by getting attention for its cause, as well as financial gain through increased donations.

Throughout my career, I have been involved in many different types of cause marketing events. Some events are well-known and widely-used, such as working with Habitat for Humanity, charity walks, and denim days. These types of events are indeed worthwhile and create essential support for those in need. However, I have found that some of our more original events have a greater impact, which means more awareness for the charity, more publicity for the firm, and more enthusiasm from the participants.

Recently, our firm has co-hosted a series of "celebrity bartending" events with local charities. In short, a couple of our lawyers, and representatives from a charity of our choosing, serve drinks at a happy hour. Both friends and clients of the firm are invited. The bar or restaurant offer drink specials and food specials, and a portion of the proceeds, and all tips, go to the charity. Not only do we raise significant money for the charity, but also the house is always packed, and fun is had by all. We also invite the press, which

leads to significant coverage. Happy hour usually lasts well into the evening, with attorneys mingling with clients and potential clients.

Our women lawyers partnered with a local woman's charity for a cocktail party and silent auction. Again, we invited the firm's clients and friends. The admission fee was a new pair of shoes, because the event was held at a museum featuring an exhibit of the shoes of famous Americans, with an emphasis on New Jersey historical figures. At the end of the event, the charity received significant monetary donations and new shoes for its clientele, the museum received publicity for its exhibit, and the firm's women had a night of team building and networking with the firm's most influential contacts.

I believe that a law firm is uniquely positioned to be a true leader in its community, and cause marketing can enhance this leadership position. Most recently, Curbing Hunger, Inc., held its 19th annual campaign to fuel food donations to the Somerset County Food Bank. As the County's largest law firm, this campaign allowed the firm to take a visible leadership role to help our neighbors. What was unique about being involved in this food drive is that it was the first time that we utilized new technology tools to promote the drive, and to collect significant food donations. We partnered with YouGiveGoods, which operates a platform that companies and non-profit organizations use to run charity drives to support the following causes: hunger, animals, education, veterans, and disaster victims. We used the firm's social media channels, website, and email marketing to share our YouGiveGoods web link. This enabled us to reach a wider audience and collect more goods without actually having to fill boxes with food items. Our donors ordered items through the YouGiveGoods website, and the YouGiveGoods people delivered the items to the Food Bank. In essence, we held a virtual food drive with real, successful, tangible results.

Patrick J. O'Neill, CEO of YouGiveGoods, says, "We see an increasing number of companies, particularly professional services firms, utilizing cause marketing in creative ways as a means to both support a cause they feel connected to and to increase awareness about the firm in a positive manner. Many of these firms utilize technology to leverage what they are able to accomplish to support the cause and to more efficiently achieve their goals."

Not only do I agree with Mr. O'Neill's quote, but I also strongly think all firms should make cause marketing part of their overall marketing program. In the end, all parties are winners.

*Ed Miller is the Chief Marketing Officer of
Norris McLaughlin & Marcus, P.A. in Bridgewater*



OH WHAT A NIGHT

BY DOREEN MARINO, PHR

The June Social, held on June 12, 2013, at the Rock Spring Country Club in West Orange, was a really fun night filled with trivia, challenges, and a chance to make fun of each other (which, I say, we all do rather well). Maybe getting out all that frustration? For those of you that missed it, below is a recap of the evening. For those of you that don't remember, below is a recap of the evening as well. This is truly a social, so the only business conducted is the swearing in of the upcoming Board that became effective July 1, 2013. It is also the time that departing Board Members are recognized.

The evening started with each table becoming a team. So as luck had it, your table was your team, like it or not. The first joint team function was to name your team. The overall theme selected by our own Jackie Pampinella, was "Towns of the Jersey Shore." So, your table was already assigned a Jersey Shore town. How difficult is that?

It was pretty difficult for the table that selected OBGYN as a name. The town name was Ortleigh Beach. Enough said. Some of the other team names included *The Asbury Park Jukes*, *The Belmar Beach Bums*, *The Manasquan Maniacs*, *The Sea Bright Mighty Nights*, and *The Seaside Heights Midways*. I was at the *Maniacs'* table, and I must say, it was a perfect name for us.

The first challenge posed to each team was a "Silent Sing-A-Long," where each team needed to name the artist to selected lyrics. Each team received points for the ones they got right. It's harder than you think:

1. I thought love was only true in fairy tales, meant for someone else, but not for me.
2. Then every head turned with eyes that dreamed of being the one.
3. We got one last chance to make it real, to trade in these wings on some wheels.
4. Strangers waiting up and down the boulevard, their shadows searching in the night.
5. If they don't give me proper credit, I just walk away.

6. And she's watching him with those eyes, and she's loving him with that body, I just know it.
7. And when I hurt, hurting runs off my shoulders; how can I hurt when I'm with you?
8. And when I touch you I feel happy inside, it's such a feeling that my love I can't hide.
9. Our hearts were ringing in the key that our souls were signing, as we danced in the night.
10. I don't need no money, fortune, or fame; I've got all the riches, baby, one man can claim.

The second challenge the teams faced was random trivia questions, posed to each table. Very much like a game show, you were not supposed to give your opponents the answers by shouting out the correct response. But it is clearly more important to administrators to show how smart we are; even if we lose, we are at least smart.

The last challenge, which was clearly the most challenging, was for each team to build a structure from straws and Styrofoam pieces. While being timed, the team that built the tallest structure, that remained standing on its own, were the winners. Architects, we are not.

Winners all the way around received tickets to enter into prize bags for drawings at the end of the evening. As usual, we thank our business partners for the prizes. The Chapter also raffled off two Regional Conference Scholarships, with lucky winners being Louise Ruffo and Mitch Rait. If you missed this event, you missed a great night.

Doreen Marino is the Human Resources Director at Lerner David Littenberg Krumholz & Mentlik, LLP in Westfield





WHAT A GREAT DAY TO SWING SOME CLUBS

BY SARAH CLARK, CLM

Once again, a fabulous day was had by all at the 2013 NJALA Past President’s Golf Outing held on June 17, at Hyatt Hills Golf Club in Clark, New Jersey. It was hot, but not too hot. It was cloudy, but it didn’t rain. It was, as always, competitive, but not so much so that any player felt intimidated. In fact, two of our better known “amateur” golfers played in the winning foursome—way to go Bernie Merer and Bruce Campbell. Our fearless leader, Mary Ellen Dolan, who can golf, was also part of this winning team.

Planning for the outing starts in February, when we secure our sponsors, and in May we work to fill the carts with members. This outing has become an annual event that members and sponsors alike look forward to, because it gives all of us a chance to get out in the fresh air and enjoy some camaraderie with colleagues and friends. Being a member of the planning committee, along with Past Presidents Anita Setaro, Ken Bailey and Pat McGovern, is always great fun, because we have the planning and execution of this event down to a science. Our other Past Presidents also contributed by helping with registration and other tasks at the outing.

Without our Business Partners, this event, and nearly every other NJALA event, would not be possible. The committee would personally like to thank each of our sponsors:

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- Capital One Bank
- Document Solutions
- Jamison
- MCS Management
- Microstrategies
- Preferred Business Systems
- Somerset Hills Bank
- Veritext Court Reporters

In addition, we must thank all of the Business Partners who donated items for our Goodie Bags. There were far too many to list individually, and each Sponsor was acknowledged in the Golf Outing program.

Now, for the good stuff—the winners...

- | | |
|----------------------------|--------------------------|
| First Place Team | John Sabates-Capital One |
| \$75 Gift Card to Pro Shop | Mary Ellen Dolan |
| | Bernie Merer |
| | Bruce Campbell |

- | | |
|----------------------------|---------------------------|
| Second Place Team | RichCampbell-- Preferred |
| \$50 Gift Card to Pro Shop | Business Systems |
| | JoAnne O’Beirne |
| | Jim Van Leir |
| | Jamie Howlett |
| | |
| Closest to the Pin | Jim Van Leir |
| \$50 Gift Card to Pro Shop | |
| | |
| Longest Drive Male | John Sabates |
| \$50 Gift Card to Pro Shop | |
| | |
| Longest Drive Female | Mary Ellen Dolan |
| \$50 Gift Card to Pro Shop | |
| | |
| Most Honest | Rich Walters— All Covered |
| | Pat McGovern |
| | Susan Carrigan |
| | Susan Leone |

In addition, a number of our Business Partners donated prizes to auction off to our players. We truly thank our sponsors for this extra generosity, in addition to all of the support they give us for this outing and throughout year.

We have already decided that we will host the Ninth Annual Past President’s Golf Outing next June, and we really hope to see you there. Remember, you do not, repeat, do not, need to know how to play golf. You just need the desire to come out and have some fun. For those of you who already know this and join us each year, we look forward to seeing you in 2014. Lastly, we must thank our Business Partner Sponsor, Ann Gorr of Microstrategies for capturing all of the fantastic photos you see on these pages from the 2013 Golf Outing. Great work Ann!

Sarah Clark is the Director of Administration at McElroy, Deutsch, Mulvaney & Carpenter, LLP in Newark





NJALA AND ITS BUSINESS PARTNERS ENJOY BREAKFAST WITH A SIDE OF NETWORKING

BY LOUISE RUFFO

The inaugural Business Partner Advisory Board meeting was hosted on April 25, 2013, at the Law Offices of Wilson, Elser in Florham Park. A limited number of Sponsors were invited to encourage more intimate roundtable discussions with NJALA members. Those in attendance included: Alex Van Veldhuisen (InfoStore), Kim Haddock (Veritext), Ashley Bombard and Joe Picariello (Canon), Will Robertson (UPS), Leslie Kaplan (Esquire), Kim Gentile and Richard Walters (MCS), and Ken Winslow and Jonathan Colgary (Bederson & Company LLP).

The Agenda focused on the commitment, investment, and sponsorship of the NJALA. Initiatives to ensure a valuable relationship with members and Business Partners were introduced. Those initiatives include increasing networking opportunities and overall communication between the NJALA and its Business Partners. The discussion focused on the methods that can be utilized to achieve these goals, including developing a Business Partner sponsored education series, simplifying the availability of contact information, and the methods of communication. Receipt of the Business Partner Directory, in hard copy versus an electron version, was discussed. Additionally, the utilization of technology

and social media, for advertising and member contribution, was proposed.

There was an open discussion between NJALA members and the Business Partners regarding the cost for advertising and exhibit booths at the Business Partner Exhibition, as well as the venue of the Exhibition and the guidelines for set-up. Advertising in the Newsletter was another topic, and the Sponsors were again asked their preference for delivery, suggesting that a benefit to electronic delivery could include a link to a sponsor's webpage to facilitate vendor contact. Finally, A La Carte pricing was suggested as an alternative to specific level sponsorships with entitlements.

The breakfast was very well received and offered an informal and inviting setting that encouraged personal introductions and comfortable participation by all in attendance. Further meetings will be planned for the future.

Louise Ruffo is the Administrative Manager at Wilson Elser Moskowitz Edelman & Dicker, LLP in Florham Park



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UP TO THE MINUTE ...

SUMMARY OF MINUTES OF THE NJALA EXECUTIVE BOARD MEETINGS HELD JULY, 2013

BY DOREEN MARINO, PHR

Board Members are Mary Ellen Dolan, President; Audrey Serban, Vice President, Programs; Robbin Dolan, Vice President, Membership; Michael Harrison, Treasurer; Doreen Marino, Secretary; Gayle Englert, Immediate Past President; Fran Puntillo, Trustee; Jackie Pampinella, Trustee; Mary Beth Donoghue, Trustee; Mitchell Rait, Trustee; Jim Van Leir, Trustee; Kurt Brown, Trustee; Nancy Harris, Alternate Trustee; Teri Siegle, Alternate Trustee; and Louise Ruffo, Alternate Trustee.

President's Report

Mary Ellen Dolan reported that ALA National will no longer be having Chapter Awards. A new program *Ideas and Innovation* will be published soon. When that happens the Board will review and determine what, if any, impact there is on the Chapter.

Mary Ellen proposed that the Board develop an "Outstanding Volunteer" award program to be conducted within the Chapter. The Board agreed and preliminary plans are underway.

Mary Ellen proposed that the Board look into hosting at least one event closer to Central Jersey to see if we can capture the Southern New Jersey Members. Information will be gathered to see if this is financially reasonable.

Sessions

Audrey Serban has laid out plans for upcoming speakers. The Board continues to support investment in educational programs. Audrey is beginning to pull topics together in employment law, finance and diversity. Additional topics are currently being collected and it is already looking like an outstanding educational year for our members.

Workshop Report

Nancy Harris has proposed two workshops and continues to plan for the remainder of the year. There will be information circulated as soon as plans have been finalized. The Board approved additional funds to be invested in workshops to ensure the quality of the speakers.

Community Challenge

Jim Van Leir and Mitchell Rait have scheduled a Habitat for Humanity to be held on November 2nd. Information will be sent

to the members shortly. They are also collecting from the Board recommendations for additional recipients of charity efforts.

Board Member Changes

Jackie Pampinella is relocating to Maine and has withdrawn from the Board effective immediately. The Nomination Committee has moved Kurt Brown from Alternate Trustee to Trustee. Mary Ellen Dolan, speaking on behalf of the Board, thanked Jackie for her service to the Board and wished her well on her move.

Financial Report

Michael Harrison presented proposed budgets for the upcoming Chapter year and requested the Board to review and provide any comments or concerns within the next few weeks. The Board voted to include in the budget 5 national scholarships at an amount not to exceed \$2,250 each and 5 regional scholarships at an amount not to exceed \$1,500 each. The Board has all agreed that the scholarships are approved to cover registration, hotel and transportation costs only.

Events

The Business Partner Exposition is scheduled for September 24, 2013.

Membership

Renewals are still coming in and there remain to be significant outstanding members; however, it is anticipated that these dues will arrive during the next month.

Website

The Board is very interested in upgrading the Association's website to be user friendly and more productive to our members. Since we are also looking into publishing the newsletter electronically, we may need to enhance the website in order to make that happen. Mary Ellen requested that a committee be put together to investigate the costs and options for this enhancement.

Doreen Marino is the Human Resources Director of Lerner David Littenberg Krumholz & Mentlik, LLP in Westfield

What's on Tap

ALA and NJALA 2013 CALENDAR OF EVENTS

Tuesday, September 24, 2013 (6:00-9:00 pm)

Join us once again for the highly successful **Business Partner Expo**, which returns to Mayfair Farms in West Orange. The BPE is a great opportunity to network with business partners, new and old, preview new products and services, and enjoy a great evening with your NJALA peers. This year's Expo will again feature a conference scholarship drawing as well as great prizes provided by our business partners, so don't forget to bring a stack of business cards! Prior to the Expo an educational workshop on spreadsheet basis for Non-Financial People will be presented by Joe James of Micro Strategies. A buffet dinner will be served.

Wednesday, October 16, 2013 (2:00 pm)

ALA Webinar. Topic: "Saying the Hard Things with Aloha," presented by Jayson Dibble, Ph.D., Assistant Professor in the Department of Communications at Hope College. CLM credit available.

October 24-26, 2013

Region 1 and 3 Conference in Cleveland, Ohio. Regional conferences provide all the benefits of the national conference—including workshops, guest speakers, and plenty of networking time with business partners and peers—but in a more intimate setting. Registration is underway! See www.alanet.org for details.

Wednesday, September 18, 2013 (2:00 pm)

ALA Webinar. Topic: "Forecasting the Realistic Budget," presented by Steven Wingert, CLM, Executive Director of Marshall, Gerstein & Borun, LLP. CLM credit available.

Wednesday, November 12, 2013 (6:00-8:30 pm)

Monthly Meeting and Workshop at the Highlawn Pavilion in West Orange. Topic: TBA. A buffet dinner will be served.

Wednesday, October 8, 2013 (6:00-8:30 pm)

Monthly Meeting and Workshop at the Highlawn Pavilion in West Orange. Topic: TBD. A buffet dinner will be served.

Wednesday, November 13, 2013 (2:00 pm)

ALA Webinar. Topic: "The Ethics of Email and Social Media," presented by Thomas E. Spahn, J.D., partner at McGuire Woods. CLM credit available.

For information about:

Monthly meetings – Please contact Audrey Serban of Fisher & Phillips at 908-516-1061.

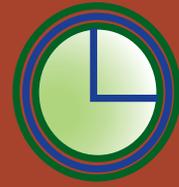
Educational Workshops – Please contact Nancy Harris, of Gordon Rees at 973-549-2500.

NJALA Socials – Please contact Judy Sotardi of Forman Holt Eliades & Youngman, LLC at 201-845-1000, ext. 376.

ALA Webinars: Registration and general information is posted on the ALA site, www.alanet.org/education/regconf/telesem.html.



A Quarter Past



April, 2013

The Monthly Meeting Educational Session was held on Tuesday, April 9, 2013, where Natalie Loeb of Loeb Consulting Group ignited our members with Enabling Others to Act as part of Loeb's Leadership Development Series. At this interactive educational session, members learned some of the secrets of high performing firms, through leadership that inspires everyone to make things happen. This was a favorite session for many members.

April 14-17, 2013 was the ALA Annual Conference and Exposition at the Gaylord National Resort & Convention Center in National Harbor, Maryland. Another fantastic conference!



May, 2013

Managing Partner Night was held on Tuesday, May 14, 2013, at The Manor in West Orange, New Jersey. Ari Kaplan presented Recovery, Renewal & Reinvention: Navigating the Next Decade. Mr. Kaplan also had his book, Reinventing Professional Services (Building Your Business in the Digital Marketplace) for everyone! A surprise treat.

June, 2013

On Saturday, June 8, 2013, Community Challenge efforts had several of our members spending their day as volunteers with the Morris Habitat for Humanity. Not only was this a very rewarding service, but also the members had tons of fun to boot! Thanks to all our members that participated in this community challenge.

The June Social was held on Wednesday, June 12, 2013, at the Rock Spring Country Club in West Orange, NJ. The members had a blast of a time competing in a Night of Team Trivia. Elsewhere in the newsletter there is a recap of this evening for your enjoyment.

The NJALA Past President's 8th Annual Golf Outing was held at the Hyatt Hills Golf Course in Clark, New Jersey on Monday, June 17, 2013. Those that can golf, and those that cannot, all had a great time.





SUSAN WEINREB

BY FRAN PUNTILLO, CLM

I'd like to introduce NJALA to our Chapter member, Susan Weinreb. Susan is the Human Resources Director of Genova Burns Giantomasi Webster LLC, a general practice law firm with 80 attorneys. Susan works in the firm's Newark, NJ, office. Susan oversees the administrative personnel in the firm's five offices and reports to the Managing Partner. She is responsible for recruitment, training, orientation, reviews and evaluations, payroll, employee benefits, and compliance issues. She also assists in the coordination of on-campus recruiting and her firm's Summer Associate Program. In her "spare time" while at work, she coordinates firm-wide special events like the Holiday Party and a summer picnic. When asked, she reports that she enjoys the diversity of tasks in her current job; she's never bored, as every day brings different challenges. Her least favorite tasks in her job are the "financial" ones. To Susan, numbers aren't quite as stimulating as people.

Most of the positions Susan has held since her graduation from Ithaca College have been in the legal field. She started as a litigation paralegal at a firm in Rochester, NY, the city of her birth, and had contemplated going to law school. Since she enjoyed working with lawyers but wanted the "big city" environment, she moved to New York City and took a senior litigation paralegal position with Lehman Brothers. From there she went to Dewey Ballantine to serve as their paralegal coordinator and legal recruitment and training coordinator. It was at Dewey that Susan found the manager she considers most influential and motivating professionally. Susan learned by watching this Director, who kept a clear head and tolerated no nonsense. Her next step up was to Duane Morris, where she worked as the Director of Legal Recruitment and Retention, and was responsible for the legal hires and training of same. She loved the job but decided to leave to start her family.

Susan has two daughters, Talia and Elizabeth, ages twelve and thirteen. The girls, close in age and diverse in personalities, have been known on occasion to get along famously (the sisters are currently enjoying two different summer camps and admit that they miss each other). Susan's eyes sparkle when she speaks of her children.

Julia Roberts also lives with the family in Fanwood. I probably should mention that Julia Roberts is one of several rescue animals that Susan, her partner Peter, and her children have adopted. The

current head count at the Weinreb residence is four cats, two dogs, and "four nutty people being overrun by pets" (that's a direct quote from Susan). The household sounds far from what I'd call "nutty." The two-footed family members all sit down together for dinners Mondays through Fridays. Dinner sounds like a very special event at their house. No texting or phone calls are allowed during the family mealtime. Since the family is a member of Allen's Orchard Co-Op in Westfield, they pick up a box of fresh, locally-grown, pre-selected produce each week from the co-op. Susan, who loves to cook and bake, creates the week's menu based on whatever "mystery" items appear in that week's box of produce. Susan says she's tried lots of new ingredients she's never tasted and/or cooked before she found them in her co-op box. She's a more creative cook now, relying less on cook book recipes to create the meals for her family. Instead, she follows her instincts, relying on smell and taste to combine ingredients and add spices to perk up the dishes. And she feels that, overall, she's had many more successes than failures with her culinary efforts.

For vacations, Susan and her family often travel between Rochester and Florida, where her parents live. Peter's family has a place on Cuttyhunk Island in Maine. Susan says when you arrive on the island, you take off your shoes and don't put them back on again until you leave. "You just relax—it's like heaven on earth." Susan has done some travelling further away as well. She's been to Israel four times, once spending three months there on a work/study program.

I asked Susan about her professional goals. She said she'd like to find more time in her work day to do the "soft stuff," i.e., creating a Wellness Program for her firm. She'd like to do more recruitment and training in her current position. She'd like to make her firm a "Best Place to Work." She's also considering taking SHRM's PHR (Professional In Human Resources) or SPHR (Senior Professional In Human Resources) certification exam.

Susan joined ALA and NJALA in 2009. She is also a member of SHRM. She values her membership in NJALA primarily for the networking opportunities and professional resources it offers. I asked Susan if she could suggest ways NJALA might be improved. She thought if we had larger tables during the meal/cocktail hour, it might allow more members to mix with

(Continued on page 33)



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The summer months go so quickly.

My son, Steven, came back home for the summer while working at the Office of Public Defenders in Morristown. He is now packing up to return to law school to finish up his third year, which will commence with graduation on Mother's Day, 2014. I will be one of many proud mothers (and yes, fathers).

My daughter and son-in-law, Carol and John, are enjoying home ownership in Chestertown, Maryland. I am looking forward to a trip "down south" shortly to look at the progress.

And now from NJALA members:

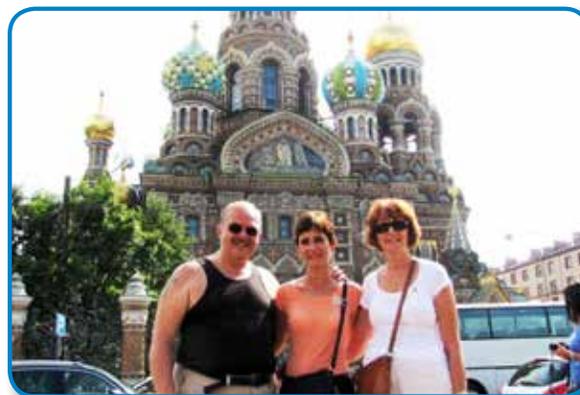
Helen A. Lysaght (McManimon, Scotland & Baumann, LLC) tells us that her niece (who lives in Newton, MA near Boston and who is more like a daughter to Helen than a niece) gave birth to her second child on June 23rd. The baby was a healthy little girl that weighed in at 8 pounds and measured 19 inches. Her new "great niece" was named Seraphina (Sara for short). Her sister, Nora, and she spent a week in Newton helping Mommy once she came home from the hospital.



Anita Setaro (Duane Morris, LLP), along with husband, Angelo, and Cheryl Pessolano visited one of the many churches in St. Petersburg, Russia this month—one of the stops on their cruise of the Baltics, where they also visited Germany, Estonia and Sweden. Cheryl was especially excited to return to Finland, where she once lived for six months during a long, coooold winter more than 20 years ago. Incredibly, she could still remember many Finnish words that she learned from watching TV.

HATCHES, MATCHES & DISPATCHES

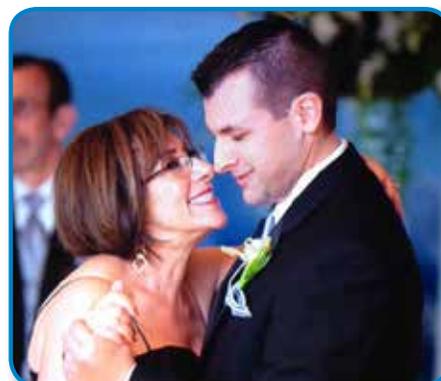
BY CINDY LANDIS



Mazel tov to **Susan Weinreb (Genova, Burns, Giantomasi & Webster)** and family on the June B'not Mitzvah of her daughters, Talia and Elizabeth.



Angela Segal (Latham & Watkins, LLP) and husband **Steven Segal (Podvey Meanor)** are happy to announce the



(Continued on page 33)

Hatches, Matches & Dispatches

(Continued from page 32)

marriage of their son, Andrew, to Marissa Carullo on Friday, June 21st, at the Newark Club. Congrats to the happy couple!

Sarah Clark (McElroy, Deutsch, Mulvaney & Carpenter, LLP) has been selected to become a member of ALA's Diversity and Inclusion Committee. The term is three years. Sarah, we aren't surprised at your success!

Soon the leaves will be changing and falling to the ground. With that comes football games, hot apple cider, pumpkins and more. Take time to enjoy all that the season has to offer.

*Cindy Landis is the Office Administrator of
Gennet Kallmann Antin & Robinson in Parsippany*

Susan Weinreb

(Continued from page 30)

others before the educational portion of our monthly meetings begins. She suggested we might consider having "assigned seating" occasionally during the cocktail/meal hour, to promote more interaction among the membership by "practice area" (i.e., HR or Finance or IT). That might facilitate more productive networking among like-members with those specific specialties.

When asked what she is most proud of, she states that it's the life she made for herself and her family. She's a Libra—and tries to be fair in all things. Susan feels balance is very important in all aspects of her life. She's proud of her work ethic. Although she feels that she is a tenacious person, compromise, balance, and peace are the words she tries to live by. And when you talk with her, you can see she's succeeding!

So make a point to introduce yourself to her at our next NJALA meeting, if you haven't already done so! She's a very lovely lady.

*Fran Puntillo, CLM, is the Office Manager of
Weiner Lesniak, LLP in Parsippany*

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NJALA is grateful for the continuing support of its sponsors, and recognizes that their sponsorship and assistance make possible many of the educational programs and opportunities offered to our members. Please visit www.njala.net for full sponsorship information.

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Q & A: TODAY

BY ELLI ALBERT



All work and no play makes a firm a very boring place! What does your firm do for fun?

Nancy Harris of Gordon & Rees, LLP: Every month we have a social event. In the spring and summer, we go for a run where we compete against each other: two Mud Runs a year, or cycling. In the winter, we go bowling, or play Trivia (whoever gets the most questions answered gets a comp day where they are not allowed to check in with the office).

Karen Steinberger, CLM, of Saiber LLC: We do a lot of fun things, including staff/attorney cocktail hours at 4:30, and special event-driven things like our Corned Beef and Cabbage lunch in March, the Cinco de Mayo party in May, our Halloween Party in October, etc. We have had many other events like a luau, an afternoon barbecue on the Café patio downstairs, an attorney social (generally at a country club or partners' home, but we have also held them on boats sailing around Manhattan and on a pier in Hoboken), attorney cocktail hours (professionally catered and more formal than the staff/attorney ones, where we bring in modest snacks), bowling, softball games (partners vs. associates; winner plays staff), and trips to Yankee Stadium. We also have a holiday party in December at an off-site location such as a Country Club or banquet facility, and close the office at 12:30 that afternoon. My administrative team and I try to go out to lunch together every Friday, and we have been known to call sporadic "staff meetings" where we meet briefly at the end of the day for some refreshments.

Karen Hess of Peckar & Abramson, P.C.: We have a pretty seasoned group here who have worked with one another for a good number of years, so we do silly things like ice cream Fridays during the summer, or even have a group that goes out for happy hour from time to time. We stopped company picnics years ago because of the extra expense, but

we still enjoy our holiday and Administrative Professionals' Day parties. Unfortunately, as the group got older, so did our softball team, so we no longer do that.

Sheila Sherman of Marcus, Brody, Ford & Kessler, L.L.C.: We have a monthly birthday celebration where we sing happy birthday to those who are celebrating that month. We bring in cake and fresh fruit.

Teri Siegle of Ansell Grimm & Aaron, P.C.: We have several things that we do for the staff on a regular basis. We have breakfast delivered each Friday. Every other year or so we will have a summer beach party for staff and family. We have a holiday party at a different venue each year for staff only. Some of the staff will also do a cookie exchange around the holidays.

Veronica Hurless of Orloff, Lowenbach, Stifelman & Siegel, P.A.: We had a bake off one year with everyone (including a few partners) bringing their favorite desserts. They were brought in for viewing in the large conference room in the morning, and then tasting and voting occurred over the lunch hour. The results were announced in the afternoon with blue ribbons presented to the winner and smaller participation ribbons given to everyone with an entry. It was a welcome entertainment during the February doldrums.

Susan Weinreb of Genova Burns Giantomasi Webster: We are having a firm-wide picnic soon—closing the office at 12:30 and traveling to the country (Warren—that's country for us Newark folk) for picnic games, DJ, karaoke, and FUN.

Elli Albert is the Administrator of Berman Sauter Record & Jacobs, P.C. in Cedar Knolls



PRESENTING...

OUR BUSINESS PARTNERS

BY MARY ELLEN DOLAN AND LOUISE RUFFO

The following Business Partner Sponsors continue to support the NJALA with their generous donations and the sharing of their expertise in their respective fields. We thank them for their support and applaud their efforts in bringing their knowledge and expertise to our members. In appreciation, please support all of our Business Partners whenever you can.



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(Continued on page 36)

Presenting our Business Partners

(Continued from page 35)

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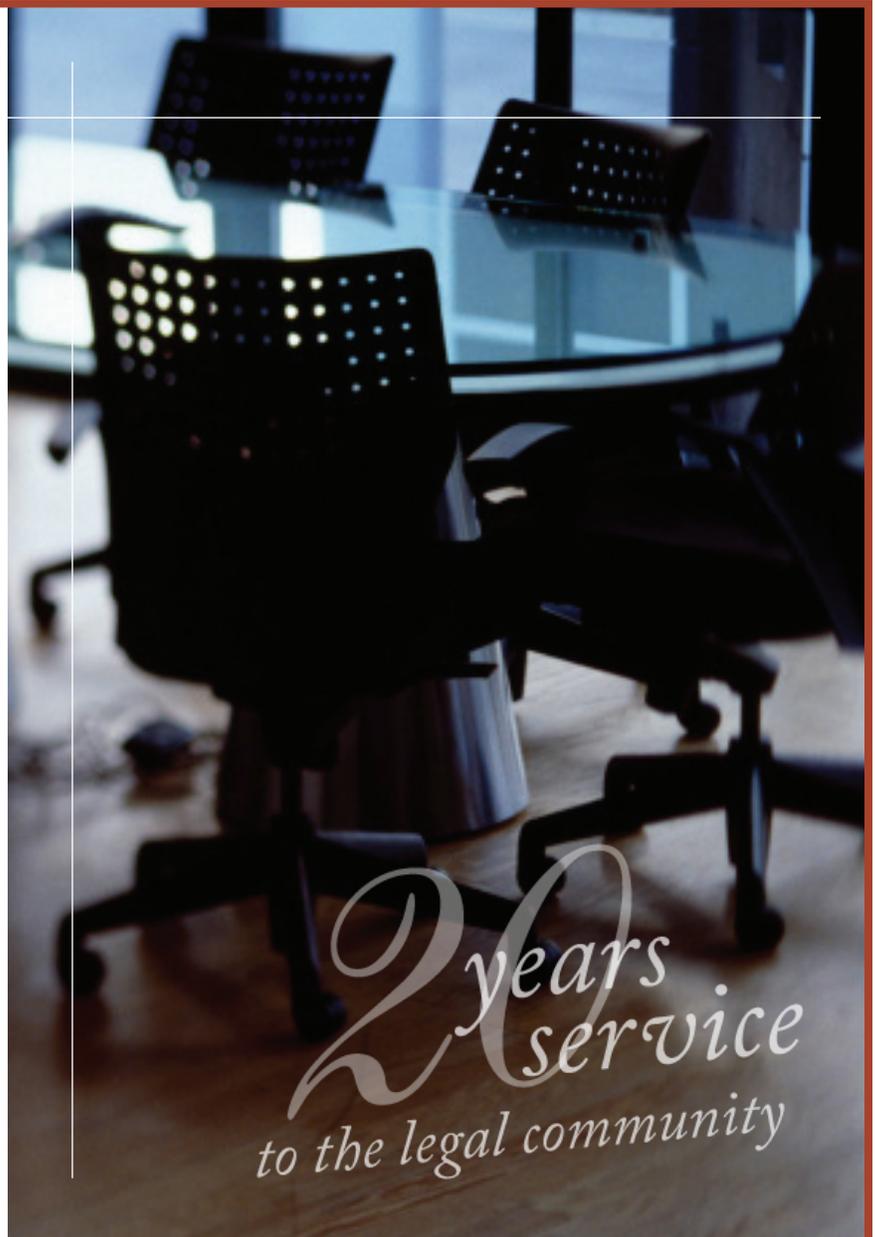
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