

courtyard

ASSOCIATION OF LEGAL ADMINISTRATORS – HOUSTON CHAPTER

2014 Fall Edition

SCHOOL UNIFORM DRIVE A SUCCESS!

For several years now, the Chapter's Community Connection Committee has made a commitment to the Communities in Schools students at Jefferson Davis High School to provide school shirts to its CIS students.

CIS is a nationwide network of professionals who work in public schools to surround high risk-high school students from low income homes with a community of support with a goal of empowering them to stay in school and to make better lives for themselves. We are happy to report that in 2014, 100% of the seniors in the Davis CIS program graduated from high school.

Meghan Loera, LMSW, is the new Project Manager for CIS of Houston, Inc. Meghan is a former graduate of Jefferson Davis High School and participated in the CIS program when she was in middle school. Meghan shared the following with us: "I am a graduate from Jefferson Davis HS, and this school holds a very special place in my heart since it was the whole reason I pursued my education in social work. I was also a student at Marshall MS right across the street, and it was there that I was a participant of the CIS program. I feel like everything has come full circle for me and I am so grateful to have the opportunity to give back to my community."

Each year brings a new group of students into the program who cannot afford to buy the shirts they need to wear to school each day. Your generous donations that totaled \$1,185 helped us meet our goal of purchasing 200 shirts for these special students. Jody Gressett, Linda Smith, Becky Leggett, DeAnna Lopez and Scott Kelley (It Advocacy Strategist for Aldridge) delivered the shirts to Jefferson Davis High School on September 5, 2014. Thank you for making this fundraiser such a great success!



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A Chapter of the
Association of Legal Administrators

PRESIDENT'S MESSAGE

By Candace Childress

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**Candace Childress
President, Houston Chapter
2014—2015**

***"Are you ready for the
change?"***

Are you ready for the change? That was the title of our Houston Chapter Leadership Institute (HCLI) held on August 22nd with the Houston ALA Board of Directors, Committee Chairs, and Past Presidents. We had a very productive meeting planning and brainstorming ideas for our chapter's future.

The meeting title was spun from the Chapter Leadership Institute (CLI) held in San Antonio in July. I've attended several CLI sessions while serving on the board, but to me, this one was by far the best. As you know, ALA is undergoing some dramatic changes – one of them being the new design of the Fall Business of Law Conferences, formerly known as the Regional Conferences. Region 4 encompasses Texas, Louisiana, Colorado, Utah, Oklahoma, Arkansas and New Mexico. Members from those states would attend the Region 4 Conference. The new Business of Law Conferences will take place at various locations across the country and members can choose to attend any of the conferences. The Houston Chapter historically reimbursed the cost of the early bird registration for members attending the Regional Conference. The chapter will continue to reimburse one early bird registration for members to attend one of the Business of Law Conferences. *See the dates and locations on page 29 of this newsletter.*

At CLI we also learned that, after 43 years, the name of the Association of Legal Administrators will be changed to accommodate the title of all legal administrators, managers and professionals, including finance, marketing, human resources, information technology, library, etc. There was much discussion, with some opposition, about changing the name of ALA. I personally understand the need for change upon listening to the explanation to encompass all legal professionals involved in the management of law firms, corporate legal departments and government legal agencies. We definitely have a diverse group of professionals in our chapter.

On ALA's website under "Strategic Plan" is Executive Director Oliver Yandle's explanation: "ALA has embarked on an ambitious strategic plan to lead the business of law. In this time of unprecedented change in the legal industry, you need a forward-thinking, supportive and engaging organization committed to delivering modern resources, expert guidance and invaluable connections. We've been hard at work developing new programs, products, services and initiatives designed to deliver on that promise."

PRESIDENT'S MESSAGE

By Candace Childress

cchildress@BlankRome.com

At HCLI we discussed how our chapter is also thinking forward. We are doing things we have never done before; for instance, taking a four-day cruise for our chapter's 40th anniversary. We are opening discussions about the possibility of a combined retreat for the Texas Chapters: Houston, Austin, Dallas, Ft. Worth and San Antonio. We revamped our website and, during HCLI, we created a new Social Media Committee to keep up with the digital age. Have you checked out the chapter's Linked-In site? The Membership Committee is moving full force with a campaign for new members to join the Chapter.

Stay tuned to find out ALA's new name and brand in the coming months. The Houston Chapter will also revamp with the new name and brand. Change is coming and we will all embrace the forward-thinking strategy to move our Chapter to the next level!

ALA Job Bank — Now Better Than Ever!



Job Seekers:

- *Career Connection*, a new opt-in email newsletter
- Access frequently updated job advertisements anytime
- Post your résumé and cover letter — FREE for ALA Members

Employers:

- **Save** — post five job ads for the price of four!
- Advertise position openings — Reduced rate for ALA Members
- Search online résumés to find qualified candidates

ALA Management ConnectionsSM
Make the Connection

www.alanet.org/jobs

**DID YOU KNOW??????**

By Laura Schmidt

lschmidt@ajamie.com**DID YOU KNOW THE HOUSTON CHAPTER HAS A NEW WEBSITE?**

I know! Exciting, right?!?

Go to alahou.org to check it out and see what's new! With a brand new interface, members can view the chapter calendar of events, past and future meeting information, and previous newsletters. You can even pay your dues via credit card right on the site!

Can't put a face with a name or wondering who exactly is soliciting list-serve help?

Check out the new and improved member directory. Hopefully your profile picture is a good one! If not, and/or if you need to update your contact information for your profile, click on "Member Area" and then "Member Information Editor" to update.

Did you know you can Rsvp to meetings from the website as well?

Click on "Member Area" in the upper right hand corner

Click on "Meetings" – second tab along the top next to "about us"

All upcoming meetings will be listed and an Rsvp is just a click away!

Meeting descriptions and specifics are included for upcoming meetings. Rsvp by clicking "Register Now." Your contact information will be pre-populated. Double check everything is correct. If not, you can update your profile with the correct information. Press "Continue." On the next page you can add yourself and a guest. After adding the appropriate detail, click "Continue" to verify all details and pay for your guest, if required. Click "Continue" for a confirmation and to print a receipt. You should immediately receive an email confirming your registration.

Did you know that you can also Rsvp to meetings via the emails from our Chapter Manager Wendy Crane?

When you click on "Register Now," you will be directed to the website. Follow the instructions above to Rsvp directly from the email.

Get going. Get connected. Get everything you need at alahou.org!

COMMITTEE CHATTER

Membership Committee

The 2014 membership drive will be held in conjunction with the October 15th chapter meeting and there are several reasons for you to bring a prospective member:

- Harold Mangum, President of the Memory Technologies Institute will speak on “The Benefit of a Powerful Trained Memory”
 - 1) Learn how you can meet 15-20 clients at the same time and remember their names!
 - 2) Be able to stand up and give a 2-day presentation without referencing notes!
- Prize drawings: One for a guest and one for members!
- ALA is too great to keep it to yourself, share the love and share the knowledge!

An invitation is included below; please share with anyone you think might be interested in joining ALA.

If you have any questions about the Membership Drive or the Membership Committee, please contact Monique Mahler at 713-422-1204. We look forward to seeing you (and your guests) in October!

YOU'RE INVITED

Please join me in attending “THE BENEFIT OF A POWERFUL TRAINED MEMORY”

Speaker: Harold Mangum, President of the Memory Technologies Institute
When: October 15, 2014, 11: 30 a.m.
Where: The Four Seasons Hotel
1300 Lamar Street
Houston, TX 77010

Please visit the ALA Houston Website: <http://alahou.org/calendar.php> for more information about the event or to register.

COMMITTEE CHATTER

Retreat Committee

After much planning and gathering of ideas and goodies, the time is here. Get your Passport Ready!

We are just days away from departing from the Port of Galveston for “The Fabulous at 40th Retreat”. We are happy to report we have 64 members and guests joining us on this adventure. The days will be filled with fun activities which will float us right into the evening with dinner and dancing. Although, spending hours by the pool may be a popular activity for some in this group.

It is the Retreat Committee’s pleasure to welcome back our special ALA friend, Tracy Spears. Tracy has guaranteed the educational sessions on our cruise will be both fun and memorable. Saturday morning we arrive at our special destination, Cozumel, Mexico! Each guest has the opportunity to choose their activities while in Cozumel. Many of us have chosen to spend the day at Mr. Sancho’s Beach Club for a fun filled afternoon in the sun.....***Don’t miss the boat!***

Sunday’s cruise back to Galveston is guaranteed to be a memorable day for all. Members and their guests are invited for a Colorful Educational Session with Tracy Spears.

We hope each one our guests have a larger than Texas time with us on the “The Fabulous at 40th Retreat”.



A Chapter of the
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COMMITTEE CHATTER

IT/Operations Committee

The IT/Operations Committee hosted a section breakfast meeting on Tuesday, September 9, 2014, at DLA Piper. The meeting topic was “There’s an app for that!” Attendees learned about applications available for iPhones and iPads that can empower employees with tools, technologies and apps to better perform their jobs so they can focus more on executing strategies and solving real-world problems. The guest speaker was Ellen Collazo, iOS Director for Apple’s South Area (based in Atlanta) and Don Gulick, Systems Engineer for Apple’s South Area (based in Dallas). Two \$25 iTunes gift cards were given away at the end of the meeting. The next IT/Operations Section Meeting will be held in January, 2015.



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Association of Legal
Administrators

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Your connection
to knowledge, resources and networking

Find what you're looking for in the ALA Legal Marketplace

Your time is valuable. Why waste it?

With a simple search in the **Legal Marketplace** you can have immediate access to a variety of business partners who know your needs and can deliver the goods.

Whether you're looking for consultants or computing, outsourcing or office supplies, retirement plans or record management, the Legal Marketplace will save you time and effort.

Start your search now in the ALA Legal Marketplace:

www.alanet.org/legalmarketplace

Your connection
to knowledge, resources and networking



THE 411 ON THE CLM

By Tanya Urban



turban@gibbsbruns.com

As another CLM study course gets underway (11 chapter members are busy studying!), some of you are toying with the idea of taking the spring exam. Or perhaps you are thinking about auditing the course study materials. But then you also might be thinking: *Do I have the time to do this? Is it really worth my while? What really is this CLM fuss all about?*

To get the real nitty-gritty, I went straight to our Houston CLMs, several of whom were very eager to share the 411 on the CLM exam and its benefits. Gracious thanks to Jody Gressett, Administrator at Shook, Hardy & Bacon; Heather McConnell, Administrator at Legge, Farrow, Kimmitt, McGrath & Brown, LLP; Stacey Ransleben, Administrator at Thompson & Horton LLP, and Kathryn Vidal, Administrator at Squire Patton Boggs; for generously sharing their experiences with us for this Q&A article feature.

How do I qualify to take the exam?

HM: First, make sure you are qualified to take the exam. [ALA National has a webpage dedicated to the CLM.](#) The tenure and educational requirements are all set forth on the website.

Is the exam essay or multiple choice?

HM: The test covers four different areas, Financial Management (30%), Human Resource Management (35%), Legal Industry (17%) and Office Operations (18%). The exam is 125 multiple choice questions but only 100 of those questions count toward your score. You will not know which questions count and which ones do not.

What was the studying like? Is it intense?

JG: I enjoyed the actual classes more than anything – the speakers for the CLM program I attended were interesting, engaging and informative. In addition, it was good to approach the process as a group and it provided great networking with my ALA colleagues. For the final studying cram session, another member and I teamed up to review the source materials that were on the ALA resource list. We quizzed each other and discussed concepts presented in the materials. I believe this is why we both passed on the first exam and this is my key recommendation for anyone taking the exam: get a study buddy and study the source materials. This works in college and it works for this. We studied pretty intently for about a day and a half.

HM: I studied a little bit each evening for about three months. I studied using the flash cards, the study group presentations and the study guide. Also, I would recommend that you devote adequate time to each of the four subject areas. Don't study less for one subject simply because you deal with that area in your everyday job. I learned new things about IT, for instance, even though it is the main responsibility of job. Is it intense? YES!! It was the hardest exam I have ever taken. But, don't be discouraged! I am a terrible test taker and I still passed. If I can do it, so can you!

SR: During the introductory meeting about the study course a few weeks ago, each of us who are already CLMs, were asked to share how we studied for the exam. I was probably the last to speak -- mostly because I was embarrassed to say that I did not study as hard as many of my friends. I remember one person saying she put a different topic in each room of her house and, as she would do things in a room, she would spend time studying that topic. I tried to read the books suggested by ALA. And I did make it through one, though, the title escapes me now, BUT it was probably the most useful HR book I have read in a while. I am not a good studier. I absorb knowledge and information by listening and by doing. My years of experience as a generalist and taking the courses and making notes were probably the best thing I could have done.

THE 411 ON THE CLM

By Tanya Urban

turban@gibbsbruns.com

I've got family matters to tend to after work-hours – is the course manageable for members with very limited free time?

HM: I believe so. I studied in short bursts rather than in long time blocks so it made it easier to manage my time.

JG: Absolutely! Think of it as an investment in your future, like any other educational experience.

KV: How to juggle studying with work and family? Since I had my kids while I was in graduate school, this felt a little like déjà vu for me. But the course was only once a week, so it just meant getting into a new routine and sticking to it. My children were in high school and college when I did the CLM so I just studied alongside them. I hope it set a good example! My husband was working a lot at night at this time. Luckily, our children were old enough to fend for themselves with a microwave and leftovers! Getting home at nine o'clock once a week for two months was not much more burdensome than working late or on weekends to finish up prebills, or month end, or whatever emergency seems to get thrown our way anyway!

What did you learn during your CLM course study that was completely new to you?

HM: I learned so many new things it is hard to narrow it down...however, one thing I learned quite a lot about was office leases and space planning. In the past, I did not deal with these issues so it was all completely new to me. And, that knowledge really came in handy in 2012 when my firm had an office move. While I did not have direct involvement in negotiating the lease, was nice to understand the terminology and concepts when the partners discussed the terms.

KV: I signed up for the CLM course the first time that our chapter offered it and during the second year of the program's existence, partly because I was encouraged to do so by my managing partners at the time, and partly because I felt like my job in a mid-sized boutique firm was giving me exposure to only about 50% of the full spectrum of skills and knowledge needed in legal administration. The CLM study course was an eye-opener and an opportunity to hear from experts. Admittedly, some of the material was pretty tedious; but learning in a group always makes things much more engaging. It's always more fun when we can all complain about it together! Even today, I still refer to the study materials that were provided as a starting point for addressing a range of issues, projects, or problems – there are a lot of good resources that never really get outdated.

SR: I learned so many things and remember walking away several evenings thinking: *Wow! I didn't know that!*

How did the study course and overall learning experience enhance your career, and even your approach to day-to-day responsibilities? Would you do it again?

KV: The certification gave me confidence during the application and interview process when changing jobs. I received a lot of recognition for my credentials while interviewing and also after I accepted the position. And I am such a glutton for punishment that when ALA called on existing CLMs to volunteer to retake the test while they revamped some of the questions, I jumped right – just for fun! While I studied the material again, I found the review really refreshing and reinvigorating. I know that sounds like I don't have a life, but really, I do! It's just that we all can use a little jump start to continue to challenge ourselves to learn something new from time to time, so that is my excuse.

HM: Since my job focuses on financial and IT matters, I learned a lot about other areas of legal administration that I am not exposed to daily, and how my peers manage tasks in those different areas. I also learned a lot about human resources from the study group and was able to apply that knowledge to my daily job responsibilities.

THE 411 ON THE CLM

By Tanya Urban

turban@gibbsbruns.com

SR: I love to learn new things and even though I have already passed the CLM, I am taking the study course again this year - which, by the way, applies toward recertification. The amount of knowledge that can be attained just by taking the course is amazing. Heather and I joke about if we could absorb everything in Sue Robinson and Debra Batzell's heads, we would be the perfect administrator. LOL! Sue and Debra are each teaching a portion of this year's course study. Given their knowledge and experience, it is worth the price of admission just to listen to them talk. Would you take the course/exam again?

JG: The credential is helpful for potential future job searches. More than anything, though, it is about the knowledge and application of the knowledge that has value. And your own personal confidence.

HM: I have taken the study group series three times! By gaining knowledge in areas outside my normal day-to-day job description, I believe I have become a greater asset to my firm.

How long does exam take? When and where do you take the exam?

HM: You have four hours to take the exam which is computerized. The exam is given at the Pearson Vue testing centers (four Houston locations) in the spring and fall. The next exam date is November 10, 2014. The spring exam is May 4, 2015 with an application deadline of March 4, 2014.

CLM – go for it?

JG: It depends on your situation with respect to where you are in your career and what your career objectives are. I would definitely recommend it for you if you are responsible for multiple functions within your office. Not only will the initial course provide some foundational information, but the continuing education requirements will help ensure that you keep current.

HM: Absolutely! You have nothing to lose and a lot of knowledge to gain. I learn something new every time I take the courses. The classes also give me a chance to get to know other ALA members that I may not have a chance to meet at other events. The classes also count toward CLM recertification hours.

SR: If you can make the time investment, the CLM study sessions are invaluable. Even if you specialize in an area or two, the knowledge you can gain from these courses will make you at least understand what your peers in other firms do. Often if we understand the why, we can comply with the how. Communication and understanding are key to all things and these courses help in that regard. The camaraderie that comes with spending nine or ten evenings with this group of people is amazing. I made some new friends. We bounced ideas off each other and we discussed issues going on in our own firms and how to deal with them. Come join us! It is so worth it!

But there is no formal study group for the spring exam – how can I prepare?

HM: Even though the fall exam study course is underway, you can still join us! There is a \$250 fee that gets paid to the chapter. Also, I have a lot of study material gathered from over the years. If someone is interested in taking the exam in the spring, I would be happy to pass all of the information along! The materials are all PDFs and PowerPoint presentations so we can prepare USB drives for the materials.

THE 411 ON THE CLM

By Tanya Urban

turban@gibbsbruns.com

How do I handle exam day jitters?

HM: It is important to keep yourself calm and eliminate as much stress as possible. Get plenty of rest the night before and make sure you arrive a little early to the test site. You can bring a pencil, eraser and a calculator with you. If you have test anxiety like I do, do whatever you need to do to keep yourself calm during the exam. My strategy was to bring my lucky pencil to take the exam. I also paused several times during the exam to take some deep breaths. You have four hours to complete the exam so there is no need to rush through it.

How long until you know you've passed?

HM: It takes about six weeks to receive your score back from the national office. You will receive a letter letting you know if you passed. The letter will also detail how well you preformed in each topic area of the exam. The national website has more information regarding how the exam is scored.

Final words of encouragement for those considering the opportunity...

SR: I get excited talking to people about taking the CLM because it was such a huge personal accomplishment for me. The more we can do to show the world we are valuable members of the team, the better. If a piece of paper gets their respect, then let's paper the walls and floors! We work hard for our firms and deserve the recognition for our hard work, contributions, and sacrifices to get the job done, and done well, no matter what else is going on. I think legal administrators are some of the hardest working and most caring people in the professional world.

JG: More than anything, the requirement to maintain your CLM status ensures you will continue to attend educational sessions and stay abreast of developments in the profession. Also, having the CLM designation is a plus when talking to your firm about attending ALA meetings and conferences – you clearly have some “skin in the game.”

HM: My father always taught me that if you stop learning, you quickly become obsolete. I have taken this study group series three times now and I learn something new each time. This series of courses are a great way to become a well-rounded administrator, even if you have no intention of ever taking the CLM exam. Not only do you learn from the instructors, you also learn from each other.

SR: I decided to take the CLM to prove to myself that I really knew what I was doing. I don't have a college degree; but, at the time of my exam, I had been working with attorneys for 28 years (most of those years as an administrator). I am self-taught and attended a lot of continuing education courses to stay current. I cannot describe the relief I experienced when I learned that I had passed the thing! You never know where life will lead you. And, as you get older, every ace you can put in your pocket is a good thing.

THE 411 ON THE CLM

By Tanya Urban

turban@gibbsbruns.com**Current study group details:**

The study course fee is \$250. Credit cards can be used for payment or checks can be made payable to the Houston Chapter and sent to Wendy Crane. The fall study group commenced September 9th, but you can still join! Ours is a seven-week workshop and registration is open to all ALA members, whether or not you plan to take the exam. The courses also qualify for CLM recertification credit.

Tuesday Evenings
5:30 p.m. to 8:00 p.m.

Galloway, Johnson, Tompkins, Burr & Smith, PLC
Fulbright Tower, 3 Houston Center
1301 McKinney, Suite 1400
Houston - 77002

Free parking!
Fulbright Tower - 3 Houston Center

Dinner will be served!
Classes will begin promptly at 5:30 p.m.

Still have questions?

Heather McConnell, CLM, has answers! And, if she can't help you, she will find someone who can! 713.917.0888 or hmcconnell@leggefarrow.com.

Good luck to everyone prepping for the exam! We anxiously await those three letters to begin appearing after your name...



THE PERILS OF PAULINE, AN OFFICE ADMINISTRATOR

By DeAnna L. Lopez, CLM, SPHR

dlopez@thompsoncoe.com

5:30 a.m. – Rise and shine! "What a beautiful day" and "I love my job" are my daily get-into and get-out-of-bed mantras. I turn off the alarm and begin to rub my eyes. Thank goodness for that brief meditation phase in my life!

6:00 a.m. – Fresh out of the shower. Oops! My cell phone alarm just went off. I have an interview at 7:00? Yikes! No time for exercise and coffee this morning. Time for the extra-speedy make-up and hair regimen. Thank goodness my "I really look like an Office Administrator" suit is clean and ready-to-go.

6:45 a.m. – I'm pulling out of my driveway. I think I'll be on time. My cell phone rings. Family mini-crisis. Good news – it's only a 10-minute mini-crisis this morning. I'm still on schedule.

6:55 a.m. – Yeah! I made it to work with 5 minutes to spare. I can smell the coffee. It's calling my name. Oopsie! I forgot to tell the security guard that the applicant needed elevator access this morning. Why can't the security company issue cell phones to these guys? Back down the elevator I fly. Yikes! She's already here. Smiling, I ask her if she would like a cup of coffee, to which she replies "I can't stand the smell of the stuff!" Darn! No coffee for me right now. Can I just ask her to leave now?

8:30 a.m. – She's gone – at last! I now know the life story of this total stranger and have quickly decided that she could easily compete with the Chatty Cathy doll I owned as a little girl. One small favor – the chattiness allowed me to discover that she really hates detail work, proofing, filing and law firms with lots of rules to follow. So why is she applying for this job??? Guess I'd better call the recruiting agencies again (then I can get my coffee).

9:00 a.m. – My calls are made. I'm out of my chair – heading to the kitchen. My phone rings. I look down at the display panel. It's one of my Managing Partners. We need to meet "right now." Off I go feeling very important for a very tiny milli-second.

11:00 a.m. – The meeting is finished. My new assignments and long-term goals are in-hand. I'm heading back to my office.

12:25 p.m. - Six "Can I talk to you for a few minutes?" stops later, my office door is finally in sight. I now know all about Jessica's cramps, Marie's hormone therapy and hot flashes (i.e., "Will you adjust the air conditioning again for me?"), Jacob's depression caused by his recent break-up with his girlfriend, Nancy's mole that needs to be removed, Sally's ingrown toenail pain and Angela's concerns about the new secretary (note to self: Angela needs more work to do). There goes that blasted cell phone alarm again. How could I have forgotten about the 12:30 conference call? I didn't know I could move so fast! I shut my door. The phone rings. Sigh of relief. I made it by the hair of my chinny-chin-chin (which are being lasered off on Saturday – "be nice to me" day).

2:30 p.m. – How long can someone talk about seating, menu and wine selections for one dinner? Obviously it took 2 hours today. Mama Mia! Thank goodness I've mastered multi-tasking. I manage to complete a Worker's Comp claim, read and return 30 e-mails, select and order my daughter's birthday gift (what did we ever do before internet shopping?) and do some filing during the call. Now it's time for a little break. And then, as I prepare to open my door, there's a knock on the other side. Uh oh! What's waiting out there for me now? Smile – it's Connie!

THE PERILS OF PAULINE, AN OFFICE ADMINISTRATOR

By DeAnna L. Lopez, CLM, SPHR

3:00 p.m. – Do I really need to know all of the details about the nausea, diarrhea, headache and runny nose that are causing Connie to go home 2 hours early today? I think not. I keep assuring the employees that there is no need for an explanation - TMI. Just saying "I'm sick and need to go home" will suffice. Really. I mean it. I do believe you. Now, I don't care if the building burns down, I'm going to the bathroom. Has it really been over 8 hours since I last did this? Aahh! My cell phone rings – it must be ignored, as I know how badly bathroom noises echo over a cell phone. Ever gotten one of those calls before? Gross!

3:10 p.m. – I detour from the bathroom to the kitchen to get my long-awaited first cup of coffee, only to find that someone just took the last cup. What kind of heathen would do such a thing? I make a pot for the next ungrateful person who comes along. Oh my! No lunch or coffee today is making me very cranky. Exiting the kitchen, I spy a cupcake on the table left over from yesterday's party for Connie - the one who is now nauseous, has continuous diarrhea (you won't believe this – oh, I forgot who I'm talking to here – of course, you would - but I even know what color it is), a headache and a runny nose. Oh well, food is food, and I learned many moons ago that a little microwaving can do wonders to even the stalest of food items. I still have no coffee, but at least my stomach will stop growling for my 4:00 o'clock business partner meeting. There may be relief in sight. I'm being shown a new (and bigger) coffee machine. Yeah!

4:00 p.m. – The good news is that the business partner is on time. The bad news is that he doesn't want to go with me to get a cup of my freshly-brewed coffee, since he insists that his coffee (brewed in the new and bigger coffee machine) is the only one he or anyone else should ever drink.

5:00 p.m. – The business partner is gone now. Great product, but not cost-efficient (I'd have a hard time justifying this extra expense to my Managing Partners, especially since they have sworn off caffeine – at least for this week). By the way, with all of the Type A personalities in a law firm, have you ever wondered why we even offer caffeine to our employees? Uh oh! What's Laura doing in my doorway? She's usually heading for the elevators right now. She closes my door. Tension fills the air.

5:30 p.m. – I am desperately trying to catch recruiters before they leave for the day. Laura's boyfriend left her a month ago, she met someone new, but he lives out of state, and even though they've only known each other for 3 weeks, she needs to move there to be close to him (right now). Besides, her evaluation was unfair this year, her bonus really sucked, her workload is heavier than anyone else's in the office, and the secretary beside her has always driven her crazy talking to herself and making farm animal noises all day long. First I've heard of all this? Of course! Can or do I want do anything about it? No. Okay – I'm getting cranky again, but at least I'm not yet beyond the point of recognizing that I'm cranky. Now to start on Laura's exit paperwork. I whine to myself, "Why my best secretary? Why?"

6:30 p.m. – I hear the cleaning crew. They're here early tonight. I dash to the kitchen, and as I round the corner, I spot the stainless steel god (the coffee pot). Not only is it empty, but it has been cleaned out and left to dry for the night. No stale cupcake this time, but may many blessings fall upon the person who left an apple on the table with a post-it note attached to it that says "eat me." Instead of trying to find out who left the note in the event that it offended an employee, I laugh and accept the gift for dinner, knowing that I will receive a visit or an e-mail tomorrow from someone if they were offended (or even if they weren't).

6:45 p.m. – Time to make my ALA phone calls to encourage attendance at the next General Meeting. I make a game out of picking the best voicemail greeting from all of the Office Administrators I call this late in the evening. I then get scared at how easily I am entertained these days.

THE PERILS OF PAULINE, AN OFFICE ADMINISTRATOR

By DeAnna L. Lopez, CLM, SPHR

7:15 p.m. – Catch-up time! I'm now sorting through the mail I didn't have time to open, answering the calls I couldn't return (even though they won't be there, at least they will know I tried), returning the e-mails I couldn't respond to and reading all of the ones I haven't opened yet. Uh oh! Am I in trouble now! My sister wrote this morning to remind me that it's our Grandmother's birthday. With the time difference, I'll have to make that phone call tomorrow. Bad granddaughter! Sorry, Grandma! Now for a review of tomorrow's calendar – adding an entry that says, "Call Grandma for Birthday and Be Ready to Apologize For Not Calling Yesterday." Oh my, perhaps I should not have seen all that I have to do tomorrow! Should I just camp out here tonight? No, that's where I draw the line. But the thought did cross my mind at least once.

8:30 p.m. – My computer is off and my desk drawers and office door are locked. I can't quite make it home until I've had my second bathroom stop of the day. How do you spell relief? Aah! That done, I run to the elevator, arrive at the Lobby and finally see the "escape hatch" (the front doors of the building) – and then my car. Yippee! I'm on my way home.

9:00 p.m. – I'm home at last! I make my long-awaited cup of coffee (but decaf now so that I can still fall asleep), adding a bit of Bailey's (there has to be some Irish in me somewhere). I savor every drop.

9:30 p.m. - Time for candles, bubbles, relaxation and "me" therapy. Calgon, take me away!

10:30 p.m. – Mantra time again. "What a beautiful day." "I love my job." Zzzzzzzz....

Welcome New Members!

Johanna Moreno, Assistant Administrator — Baker Botts LLP

Sandra Calhoun, Human Resources Director — Shannon, Gracey, Ratliff & Miller, LLP

Mick Pritchett, Director of Operations U.S. — Akin Gump Strauss Hauer & Feld LLP

Diane K. Baumgartner, Office/Accounting Manager — Rapp & Krock, PC

Laura P. Clark, Office Manager — Munsch Hardt Kopf & Harr, PC

John Strange, Director of Pricing and Project Management — Baker Botts LLP

Arlene F. Nixon, CLM, CFO — The Lanier Law Firm, PC

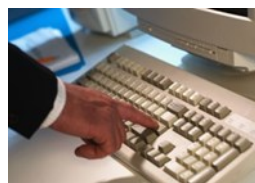
Roza Phocas, Controller — Burleson LLP



UNCOMMON NATIONAL HOLIDAYS

October

- 7 You Matter to Me Day
- 15 Take Your Parents to Lunch Day
- 17 Mulligan Day
- 22 Cap Locks Day



ON THE MOVE



DeAnna L. Lopez, CLM, SPHR is moving from Office Administrator at Thompson Coe Cousins & Irons L.L.P. to Office Administrator at DLA Piper

Holly Turnock is moving from Office Administrator at White Mackillop & Gallant PC to Office Administrator at Thompson Coe Cousins & Irons, L.L.P.

UNCOMMON NATIONAL HOLIDAYS

November

- 4 National Chicken Ladies Day
- 12 Fancy Rat and Mouse Day
- 17 National Unfriend Day
- 28 Buy Nothing Day



DON'T MESS WITH TEXAS PATIENT PRIVACY HOUSE BILL 300

By US Legal

The Health Insurance Portability and Accountability Act of 1996 ("HIPAA") and the Health Information Technology for Economic and Clinical Health ("HITECH") Act are federal rules governing patient privacy. HIPAA defines entities bound by the privacy standards as "covered entities" and includes; health plans, healthcare clearinghouses and healthcare providers who conduct certain financial and administrative transactions electronically. HITECH expanded some of the HIPAA rules, requirements and penalty provisions to include business associates of covered entities.

Texas has gone a step further. The Texas Legislature adopted House Bill 300, which amended the Texas Medical Records Privacy Act of the Texas Health and Safety Code and took effect on September 1, 2012. HB 300 revised and expanded the definition of a covered entity in Texas. The Texas Health and Safety Code defines covered entities as any individual, business or organization that:

- Engages in the practice of assembling, collecting, analyzing, using, evaluating, storing or transmitting protected health information ("PHI");
- Comes into possession of PHI
- Obtains or stores PHI
- Is an employee, agent or contractor of a person or entity described above if they create, receive, obtain, maintain, use or transmit PHI.

Under HITECH (passed in late 2009), law firms representing covered entities were required to safeguard PHI and were subject to fines and penalties similar to their healthcare clients. HB 300 defines *any* law firm handling medical records, health insurance records or healthcare billing records as a covered entity. This means that plaintiff firms, previously exempt from many HIPAA regulations, are now considered covered entities. Also included are record retrieval companies, court reporting firms, legal copy companies, schools, accounting firms and many other businesses. Under HB 300 they all must follow the new requirements and may be subject to new fines and penalties.

HB 300 Requirements and Penalties for Covered Entities Include:

Employee Training: Covered entities must now provide ongoing, customized training on both the federal and state laws for employees within 60 days of hire and again at least once every two years. Employees should sign a statement verifying attendance. Tex. Health and Safety Code, §181.101(b)

Electronic Health Records ("EHRs"): Covered entities utilizing an electronic health records system must provide a record in electronic form to the patient within 15 business days of receiving a written request. Tex. Health and Safety Code, §181.102(b)

Fines and Penalties: Civil penalties range from \$5000 to \$1.5 million for covered entities that wrongfully disclose PHI. HB 300 can impose these fines in addition to any federal fines imposed by Health and Human Services. Negligence, intent and evidence of frequency to constitute a pattern are all considered when assessing the penalties. Tex. Health and Safety Code, §181.201(b)

Law firms, litigation support companies and any other business engaging in the use or storage of PHI must take appropriate safeguards to comply with HB 300. Policies and procedures involving the proper storage and destruction of paper and electronic PHI, data encryption, user IDs and passwords for electronic devices, facility access and security measures and employee training must be implemented immediately.

For information on a HIPAA CLE for your firm or training on HIPAA and HB 300, please contact: Heather L. Hughes, J.D., U.S. Legal Support HIPAA Privacy Officer, hhughes@uslegalsupport.com

**TECHNOBABBLE**

By David Silverman

dsilverman@hallmaineslugrin.com**Ready for Cloud Based Document Management, Brought to You by Microsoft?**

At the ILTA conference in Nashville, Microsoft demonstrated a preview of Matter Center for Office 365. Matter Center is a document management and collaboration application for Office 365 that organizes files by client and matter within Outlook and Word. Office 365 is Microsoft's cloud offering of current Office products, used online and "rented" (also called software-as-a-service, or SAAS).

Matter Center is marketed as a fresh new technology that aims to replace aging document management platforms that have done very little to move to the new era of collaboration. While attorneys have become accustomed to the two-second delay presented by kludgy pop-up document management interfaces when saving documents, they have watched the evolution of easy storage and collaboration tools like Office 365, Google Drive and Box in the consumer space. So a simple Outlook-centric, tag-based, drag-and-drop interface is a welcome replacement to a traditional, form-driven approach to document management. Even better, teams will be able to collaborate on the same document from any mobile device. Long gone are the days of check-out and e-mail version control.

It gets better...here are more features:

- You get 1TB of storage and a personal briefcase that syncs your documents to any device
- Share documents. Work simultaneously on documents
- Easy search to find documents
- Drag, drop and save emails and attachments into the right matter
- Security and permission control

IT benefits include:

- Deployment based on user's schedule
- Adding Matter Center to existing SharePoint and Exchange systems adds value to the system
- Built-in enterprise-grade security and administrative controls
- Always up to date
- Reduced overhead – the entire system is on the cloud

While this sounds like the panacea of document management systems, brought to you by Microsoft Marketing, I'm not buying it. Here's why:

- Microsoft's "mobile-first, cloud-first" focus is based on the same old strategy - that "when legal departments and law firms serving outside counsel adopt Matter Center, they will be poised to collaborate on documents and communicate better with their corporate clients that also adopt Matter Center and the Office 365 platform". Or better put, when everyone is using the same thing then collaboration and communications will be better. Duh!
- You can bet that Microsoft ignored what small firms want and need. Microsoft defines a small business as having less than 100 computers, and their definition has not changed over the years. They have no use for small business. They cater to the mid-sized business where they can sell add-on configuration services to make this stuff work. I've worked with small businesses for my entire career, and I can tell you that to a small business owner, 25 computers is a lot. So expect this to be more complicated than you would expect it to be, and more costly than you imagined.
- Are you ready for your data to be on the cloud? I worked at a place where all of our data and email were on the cloud. It was ok, because I knew who I was working with, I knew where their servers were located, and I knew the security behind it. Sorry Microsoft, I know you're big but you scare me. In the past you were my application provider, and now you want to be my hosting service. I don't know you, and I really don't trust you either.

TECHNOBABBLE

By David Silverman

- When I look at their marketing materials, I find that my “kludgy” iManage system works pretty well and does the same thing as this “new, fresh technology”. I can drag and drop, and can auto-profile my documents and email. I can search. Yes I fill out a form, because usually we want to change the name or something about the document, and the form lets me do it easily.
- I wonder, wasn’t SharePoint supposed to achieve the same thing? No mention of SharePoint in articles I’ve read, except to say that Office 365 somehow integrates with it.

Will Microsoft change the way law firms communicate and collaborate? Eventually the only software you will be able to use will be internet based, so this kind of solution is coming. Microsoft put out Windows 8.1 several years ago and the adoption rate is very slow, because it fundamentally changes the way people compute when not on their phones. Mobile, the cloud, touch (over mouse), and software-as-a-service are four leading drivers of technology over the next 10 years. As we know that no Microsoft dot.0 software product has ever worked properly, I think Microsoft is just looking to the future to see how they can dominate the new landscape once it gets here. By then we will trust the cloud, and get all our software online, and hopefully Matter Center will be ready for prime time and deliver what is promised.

Online sources:

Law Technology News, “Will Microsoft Change the Way Law Firms Communicate and Collaborate?”, Sept 3, 2014

Microsoft News, “Microsoft Matter Center for Office 365 boosts law firm productivity”, Aug 14, 2014

UNCOMMON NATIONAL HOLIDAYS**December**

- | | |
|----|-----------------------------------|
| 8 | Pretend to be a Time Traveler Day |
| 15 | Cat Herders Day |
| 24 | Egg Nog Day |
| 29 | Tick Tock Day |



2014 BUSINESS PARTNERS

ON BEHALF OF THE HOUSTON CHAPTER ASSOCIATION OF LEGAL ADMINISTRATORS,
WE WOULD LIKE TO THANK OUR BUSINESS PARTNERS FOR THEIR SUPPORT!

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Salary Survey

[Cindy Graves, CLM](#)

Technology

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THE POINT OF THE POINTS—MEMBERSHIP BENEFITS

The Houston Chapter encourages education and participation in the chapter and its initiatives. As a reward for participation, the Houston Chapter awards member scholarships to the Annual Conference by drawing from the top 10 point earners at the end of the calendar year. This member receives a scholarship to cover travel, hotel and registration to the Annual Conference. Below is a chart of how the points are tallied:

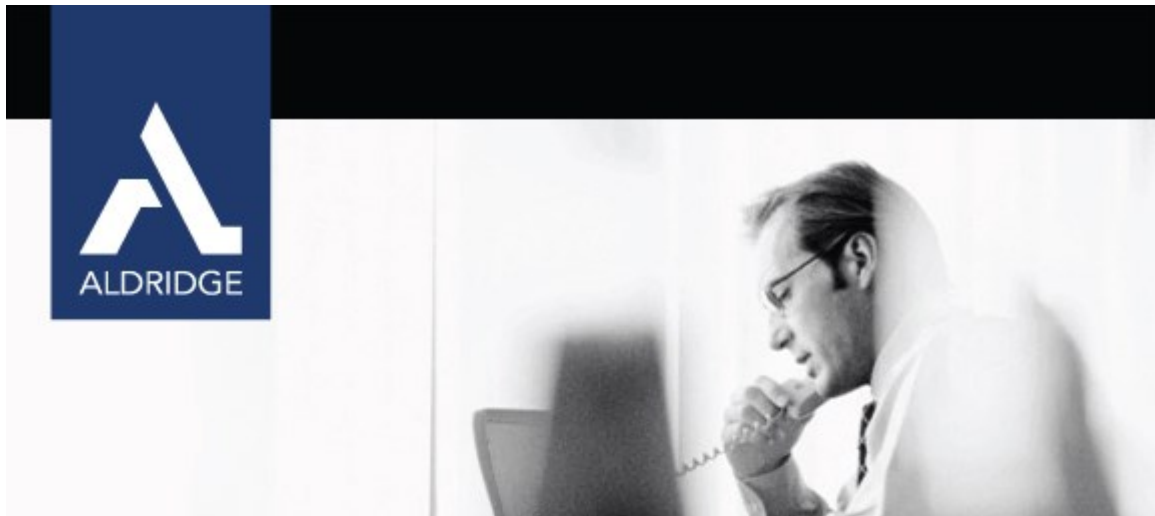
Criteria for Scholarship Point System
Points are accumulated each year between
January 1 — December 10

Description	5 Points	10 Points
<u>Attend Business Partnering Event</u>		X
<u>Attend Chapter Educational Session</u>	X	
<u>Attend Chapter Luncheon</u>	X	
<u>Attend Chapter Retreat</u>	X	
<u>Attend Conference—Annual</u>	X	
<u>Attend Conference — Business of Law or Specialty</u>	X	
<u>Attend HCLI</u>	X	
<u>Attend Other ALA Related Events</u>	X	
<u>Attend Section Meeting</u>	X	
<u>Participate in Chapter Salary Survey</u>		X
<u>Participate in CLM Study Group</u>		X
<u>Participate in Community Challenge Initiative</u>	X	
<u>Refer a New Business Partner that registers with our program</u>		X
<u>Refer a New Member that joins our chapter</u>	X	
<u>Serve as a Committee Chair or Co-chair</u>		X
<u>Serve as an Active Committee Member</u>	X	
<u>Serve as a New Member Mentor</u>		X
<u>Serve as a Newsletter Columnist</u>		X
<u>Submit or Contribute Newsletter Article</u>	X	

Current board members are not eligible to participate.

A member is not eligible if they have received a scholarship within the previous two years.

Top 10 point earners will be entered in a drawing at the Holiday Luncheon for the following year Annual Conference Scholarship. Qualifying members must be in good standing at time of drawing and at time of the conference to receive scholarship.



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ALA UPCOMING EVENTS

By Barbara Brill

barbarabrill@paulhastings.com



October

- 1 Board Meeting – Noon
Blank Rome
- 6-8 ALA Ft. Worth – Business of Law Conference
- 15 Houston Chapter Meeting – Four Seasons
11:30 a.m. – 1:00 p.m.
Membership Campaign
“The Benefits of a Trained Memory While Staying at the Top of Your Game”
Speaker: Harold Mangum – Memory Technology Institute

November

- 12 Board Meeting – Noon
Blank Rome
- 19 Houston Chapter Meeting – House of Blues
11:30 a.m. – 1:00 p.m.
“8 Credible Steps to Becoming a Successful Interviewer”
Speaker: Jay Abiona – Credible Security Solutions

December

- 10 Board Meeting
- 17 Houston Chapter Meeting – The Houston Club, One Shell Plaza
11:30 a.m. – 1:00 p.m. Holiday Celebration



HOUSTON HAPPENINGS

By Barbara Brill

barbarabrill@paulhastings.com



HOUSTON HAPPENINGS

October

- 4 First Saturday Arts Market in the Heights
11:00 a.m. – 6:00 p.m. <http://www.firstsaturdayartsmarket.com/>
- 7 31st National Night Out presented by the City of Houston
All Neighborhoods
6:00 p.m. – 9:00 p.m. <http://www.nno.org/>
- 9 Houston Texans vs. Indianapolis Colts – NRG Stadium
7:25 p.m. <http://www.houstontexans.com/>

November

- 1 Color Fun Fest 5K – Sam Houston Park
4:00 p.m. – 10:00 p.m. <http://colorfunfest5k.com/>
- 13-16 34th Annual Nutcracker Market – NRG Center
http://www.houstonballet.org/Nutcracker_Market/Nutcracker_Market_Overview/
- 18-23 Dirty Dancing – Broadway at the Hobby Center
<http://houston.broadway.com/>

December

- 15 Fleetwood Mac – Toyota Center
8:00 p.m.
<http://www.houstontoyotacenter.com/>
- 19-21 Houston Antique & Art & Design Show – GRB Convention Center
<http://www.houstonantiquesartdesign.com/>
- 26 Critical Mass December -
7:15 p.m. <http://www.marketsquarepark.com/>



HOUSTON HAPPENINGS

By Barbara Brill

barbarabrill@paulhastings.com



HOUSTON'S BEST DESSERTS (according to Houstonia Magazine)

Peanut Butter & Jelly Ice Cream, Cloud 10 Creamery

Chris Leung is known for his exotic and unusual desserts—especially his ice cream flavors at the newly-opened Cloud 10 Creamery. Among his roasted carrot-miso ice cream and his red beets-caraway ice cream, the peanut butter and jelly flavor just might be his simplest creation.

Coconut Banana Cream Pie, Mark's American Cuisine

Sam Major was the valedictorian of his class at the CIA, where he studied Baking and Pastry Arts before moving to Utah and winning nearly every pastry chef prize the state has. His banana cream pie at Mark's American Cuisine may not look like the banana cream pie of your childhood, but it tastes every bit as good (and maybe even better).

Chocolate Macaroon, The Houstonian

Catherine Rodriguez brings a refined European flair to her desserts at The Houstonian Hotel, Club & Spa thanks to her time spent studying the art of pastry in France and Switzerland. Her chocolate macaroons stack up against the best in Paris.

Fluffernutters, Fluff Bake Bar

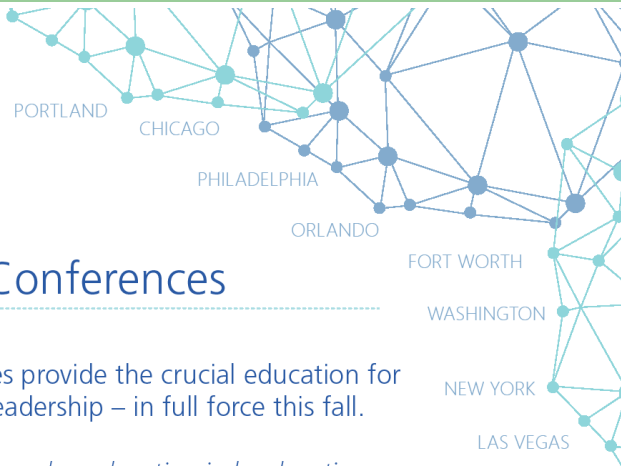
Rebecca Masson of Fluff Bake Bar is as well-known for her work on Bravo's Top Chef: Just Desserts (and her popular, sell-out fundraising dinners benefiting Lucky Dog) as she is her fluffernutters, oatmeal cookies sandwiched with peanut butter-flavored marshmallow fluff that taste like home.

Chocolate Chip Cookies, Michael's Cookie Jar

Michael Savino has been making the city's favorite all-butter cookies since 2006, from shortbread to biscotti and everything in between. You'd think the CIA-trained chef was putting secret ingredients in his best-selling sugar cookies, but the real secret is simply using all-natural ingredients starting with little more than butter, eggs, sugar, and flour.

Jintonikku (Gin & Tonic Dessert), Uchi

Sharon Gofreed is new to Houston, but not to Uchi. The pastry chef moved to Houston from Austin to bring a dessert repertoire to match chef Kaz Edwards' portfolio of ultra-modern Japanese dishes. Her jintokku, Japanese slang for "gin and tonic," showcases the effervescence of tonic and the fresh juniper flavor of gin.



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ALA's Business of Law Conferences

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

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September 4-6, 2014 (Thursday-Saturday)

Hilton Portland and Executive Towers, Portland, OR

September 11-13, 2014 (Thursday-Saturday)

Palmer House, Chicago, IL

October 6-8, 2014 (Monday-Wednesday)

Renaissance Worthington, Fort Worth, TX

October 27-29, 2014 (Monday-Wednesday)

Sheraton, Philadelphia, PA

Specialty Conferences

Intellectual Property Conference for Legal Professionals

September 18-19, 2014 (Thursday-Friday)

Westin City Center, Washington, DC

Large Firm Principal Administrators Retreat

September 18-20, 2014 (Thursday-Saturday)

Waldorf-Astoria, Orlando, FL

ALA Corporate Law Department Symposium

October 15, 2014 (Wednesday)

Thomson Reuters Building, New York City, NY

Human Resources Conference for Legal Professionals

November 3-5, 2014 (Monday-Wednesday)

Paris Las Vegas Hotel, Las Vegas, NV

For more information,
visit alanet.org/events.



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The Newsletter Committee welcomes articles, letters, suggestions and comments.

Request for permission to reprint any part of the publication should be addressed to the editors.



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OUR MISSION STATEMENT

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

QUESTIONS, COMMENTS AND/OR SUGGESTIONS?

Please contact: [Tanya](#) and [Laura](#)

The **courtyard** is published quarterly by the Houston Chapter of the Association of Legal Administrators as a service to chapter members. The newsletter is circulated to 250 people including Houston Chapter Members, Business Partners, National and Regional officers, and the Presidents and Newsletter Editors of other Chapters.

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