And a Great Time was Had by All: The 19th Annual Business Partner Expo

By Joanne A. O'Beirne

They say, "No good deed goes unpunished." I wrote the golf outing article and now they have me writing this one! This is it for the year! *[Editor's note: We'll see about that, Joanne!]*

It was Wednesday night, September 19th, 2012, at Mayfair Farms in West Orange wherein I and my fellow Administrators gathered once again for the infamous Annual ALA Business Partner Expo. It was a night of mixing and mingling with so many wonderful Business Partners, new and old, after a year's time. Lots of talking, laughter, game playing, money grabbing, eating and drinking was going on. And that's only the half of it.

I started this year's event by attending the educational session "Pitfalls of Telecommuting," which many firms are considering, and some are actively participating in already. The pluses and minuses were discussed in detail from both an insurance and legal perspective. Ray Keough of USI Affinity spoke on the insurance liabilities of employees working from home as well as the topics of workers comp, professional liability and short- and long-term disability. Employment attorney, Christopher Mills, Esq., of Fisher & Phillips, LLP, discussed the legal concerns of virtual offices, managing wage and hour laws for virtual non-exempt employees, and obligations of meeting disability accommodations outside the office. It was, to say the least, very interesting and informative. There are lots of variables to consider when offering telecommuting to your employees. This was a meeting not to have missed.

Upon entering the Expo area, we were greeted by Doreen Marino and Robbin Dolan and given a booklet of all business partners who support the NJALA all year long, as well as their locations in the Expo room. There was excitement in the air, and I was ready for action. I make it my personal goal to actually visit every single business partner and thank them for supporting our Association, as without their support we would not only not be able to have our meetings and conferences, but we wouldn't have the necessary tools, new cutting edge technology and information to perform our jobs at the level we now do. It also gives me the opportunity to drop my business cards at each table in the hopes of maybe winning some wonderful prize that the business partners are generous enough to donate and raffle for us.

Jim Van Leir took on the task of selling the 50/50 tickets. He tried to solicit my help, but I was on my mission, and he was soon joined by Greg Deatz to fulfill the NJALA's Community Challenge efforts. This year we are supporting the Covenant House New Jersey, which is the largest provider in the state of services to the homeless and at-risk adolescents under age 22. Jim and Greg had a very logical approach to selling the tickets. They didn't just wait for you to come to them, they came to you and said something to the effect of, "How much are you giving me for raffle tickets?" and you just did. They did not take "No" for an answer. Their extortion efforts produced a whopping $1,300 dollars. So the winners of the 50/50 were The Covenant House New Jersey and Pat McGovern, who further donated a portion of her winnings toward the great cause. Pat, you are a great lady!

I also must mention the fabulous buffet which was prepared by Mayfair Farms and enjoyed by all. I almost forgot about the food as I was running around saying hello to everyone and discussing all the products and services offered by the business partners. By the time I was in to partake of the varied food and desserts offered, I was recruited to break up all those 1,300 50/50 tickets with others at the table. Overall, it was a very fun, rewarding and educational night. I left with my three bags of tchachkes that I share with my neighbors' children, my niece and nephews, and, I admit, I keep the chocolate for myself.

Two Regional conference scholarships and one national scholarship were drawn this evening. See "A Quarter Past" in this edition for the list of winners, a/k/a lucky ducks.

I would like to thank each and every member of the Committee who took on the herculean task of running this event, which is always such a great success. You always exceed our expectations.

And I would like to extend a huge amount of gratitude from all of the members of the NJALA to you, our loyal Business Partners, new and long-time, alike, for your support of our organization, both this evening and throughout the entire year. Without your products, knowledge, expertise, and support we would not be where we are today.

To everyone, I wish you all a very healthy and happy New Year! Enjoy your holidays!

Joanne O'Beirne is the Office Manager of Wolkstein, Von Ellen & Brown, LLC, in Springfield







SUNSET






TAXI

Strategies For Managing Your Firm's Inactive Records—or, "Why Is This Still Here?"

By Debra Ferguson

When a matter is concluded, what does your firm do with the files? If you do not have a records management program addressing records throughout their life cycle, the answer may be haphazard at best. In many instances, each attorney and their support staff become responsible for the handling of their own inactive files. Among other issues, this often results in files being abandoned and accumulating in your prime office space.

Why it is Important to Manage Inactive Records

Have you ever walked past an unassigned office or cubicle and thought, "I need this space, but it is full of attorney X's files. They haven't been touched in months, but I don't know what to do about them."

Even if you have never had that "if only" thought, it is important to take care of files that are no longer actively used. Why should you or your attorneys care about the inactive records piled up the corners of offices, crammed in cabinets and heaped in unoccupied offices and cubicles?

Liability and risk

- Unless everyone in the office or firm knows exactly what is in each pile, stack or cabinet, these records are a risk liability for your firm. It's not enough for an attorney or his/her assistant to "know" what they are. If these records are subpoenaed, need to be returned to a client, sent to other counsel, or referenced for a new case, how can you be certain you have everything?
- Ensuring compliance with federal regulations such as Sarbanes Oxley, which contains recordkeeping provisions, including mandated retention requirements for certain types of records.
- Improperly stored records are more easily damaged, and have a higher risk of being unintentionally commingled with other cases/matters or accidentally destroyed.

Access

- By identifying these records, indexing them in to your records system or on a spreadsheet, and sending them to storage, you reduce the risk factors highlighted above. Also, although it is somewhat counter-intuitive to human nature, the records will actually be more accessible, and retrievable, by becoming visible and "available" to the entire firm.

Space availability

- Addressing inactive records will help ensure prime office space is available for its original or designed purpose. It will also relieve congestion in file cabinets/drawers and on shelves, and allow for easier access to records remaining in those areas.

Appearance of office

- Removing inactive files from visible spaces (conference rooms, offices and hallways) improves the aesthetics of the office.

Whether or not your firm has a centralized record management program, you can establish an inactive records process for your firm. Here I will identify the basic requirements for managing inactive records, and ways to implement this process if you do not have a records management program and staffing already in place.

Even if you have a records program in place, you may be experiencing difficulty clearing out inactive files consistently. If that's the case, you will find several points in this article to be of value.

Is it an Inactive Record?

Inactive can mean different things to different people. The textbook definition of inactive is a series or group of records that are referenced "infrequently," which is generally given as either no more than once per month or less than 10 times per year. In the legal setting, the term inactive typically means a matter is concluded and no more time is being billed to it. If your firm has a formal process for closing concluded matters or matters not billed to for a predetermined length of time, then use that formal closing date as your guideline for identifying inactive files.

In the absence of a formal process for closing matters, there are a few ways to identify inactive files that are candidates for closing in addition to directly asking the attorney who worked on the matter if the matter is concluded. The two most common methods are to review time and billing records, and to look through the files for recent filing activity and communications or documents confirming conclusion of matter. If no time has been billed and no material has been added to the file for several months or longer, then it is generally safe to consider the matter inactive:

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Files for dormant matters can also be candidates for sending to storage. Dormant matters may not be billed to or have material added to the files for several months at a time, but are not concluded, such as intellectual property matters or estates and trusts.

Uniform Organization of Records

To begin with, all records must be identified in a way that allows everyone in the firm to locate them. Records need to be identified by a universal client/matter numbering system so that everyone in the firm can access them without being required to learn each individual attorney's personal record keeping system.

Associate all files with a numeric or alphabetic identifier that is applicable firm wide. Using the primary code/ID used for billing a client is a common method for coding records in law firms (i.e., the "Client Number"). For example, if accounting has assigned ABC Construction, Inc. client billing number 1234, then 1234 becomes the client ID for records purposes. Each matter is typically assigned a consecutive numeric sequence, or standard descriptive identification. Again, when feasible this number should correspond with what other firm systems use to identify a client/matter. You do not need to, nor should you, re-invent the wheel. Use the numbers already in firm systems.

The strongest argument for using this type of numbering is that, in many instances, it is already in use in the firm and those attorneys and staff working on a matter must know or be able to quickly refer to this number in order to bill their time.

If there is no consistent assignment of client billing or accounting numbers, then use of the client name as the ID can be acceptable, especially in smaller firms. Follow basic alphabetic filing rules, and avoid the use of abbreviations or "project" names. Determine a standard system for assigning matter numbers, ensuring that each matter is assigned a unique number/code, but only one that everyone in the firm/office will use. Note that this will be difficult to maintain in larger or growing firms or firms with multiple locations.

The critical part of this is that everyone should use the same identifying (classification) system for files, regardless of which one is selected.

The files themselves should be assigned a number, as well as a brief description that can fit on the file label, so that everyone interacting with the files will be able to reference them quickly and accurately. This is important for the efficient retrieval of closed files from storage.

Have everyone in the firm label their files consistently. The labels must contain client/matter number, client name, matter name and file number and description.

Create a Tracking Process

There are application platforms such as Microsoft SharePoint or Access which can be utilized for records tracking. However, initially the process can be managed with spreadsheet programs such as Excel to capture basic file information during the life of a matter and after the matter is closed. The key is to get a process in place, and not get caught up in the technology aspect, which can delay your initiative. Technology can be implemented later.

Set up your document to track client name, matter name, client/matter number, date opened, date closed, responsible or assigned attorney, a list of folders/pockets and closed box ID number assigned to each folder/pocket. This document should be read-only access by everyone in the firm, but allow a limited number of people to have full access to the document.

Create a separate form for staff and attorneys to complete and attach to files being collected for each closed matter. This form can be short, but must include client/matter number, client name, matter name, date the matter closed, and attorney the files are being received from.

Keep it Under Control

Designate a point person/team to manage the process and ensure conformity. Have this person or team receive inactive files, complete the spreadsheet based on the information provided on the form, process the files for storage, assign the box ID, and be the point of contact for your vendor if you use an off-site storage facility.

If you use a commercial off-site storage vendor, they will supply you with box barcode labels. You should use the unique number on the barcode labels provided by your vendor as your internal box ID number. Do not create an additional closed box or closed file reference number.

Also, if you use an off-site vendor for storage of your inactive files, they will probably have indexing capabilities in their system. However, it is important to keep your own index. You should always refer to your own index when it is necessary to retrieve files from storage, even if it only to verify the accuracy of a vendor's information.

Guidelines are Needed

Develop a guideline for all staff and attorneys to follow in preparing inactive files for storage.

This can be relatively short, such as:

- Ensure filing is up to date
- Return client documents to the client whenever possible
- Label files according to guidelines provided
- Remove and destroy duplicates/extra copies, remove unused portions of notepads and sticky note pads, pencils,

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- Ensure entire file is collected.
- Complete inactive files form or update spreadsheet file index.
- Contact designated staff for final coordination and pick-up.

Storage Options

If you already have an off-site storage vendor servicing your firm, then you should continue with that service. However, if you do not currently have storage services arranged, there are three options for storage of your inactive files.

I. On-Site Space

You may be able to arrange the lease of space at a lower rate in your building than you are paying for your built-out office space. This type of space is most often located in basement or parking levels and will be secured but normally will be otherwise unimproved. This type of arrangement will free up premium office space while allowing relatively easy access to stored files.

There are two primary areas of concern with this option. The first, and initially most important, is protection of your physical materials. These unimproved storage areas may be subject to flooding, temperature extremes and outside contaminants such as insects and rodents.

The second issue to be aware of is growth. You will be regularly adding to the volume of records stored in this space, and need to be sure the space is sufficient for future needs. Many smaller single-location firms initially use this type of storage, find themselves outgrowing the space and seeking other storage options, and end up with both off-site storage and on-site storage to deal with.

At a minimum you will need to fit this space with shelving sized to accommodate standard records storage boxes, a table or work station, and possibly additional lighting and a landline phone, as parking garages and basements often have limited cell service. You do not want staff working in such an area, even for a brief period of time, to be unable to make a telephone call.

This space will also need to be managed to ensure it is well utilized, and that the files stored in this space are uniformly organized and appropriately handled. You will need to establish guidelines to ensure everyone is placing new material in to the space correctly, retrieving items properly and returning items to their correct location. You or a designated staff person will need to regularly visit the space to ensure everyone accessing it is complying with those guidelines and that there are no signs of moisture or other environmental concerns that might result in damage the firms records.

II. Off-Site Rental Space or Firm-Owned Warehousing

Use of an off-site space, either rental or owned, is not common in legal environments. However, if your firm has two or more office locations in a relatively close proximity where one off-site location could reasonably be shared, then this possibility could be considered.

Either of these options requires locating an appropriate structure or storage facility that is not inconvenient for regular travel by staff, as someone will need to go back and forth to place records in the space and to retrieve records. Whether renting or using owned space, there are several factors to consider, including those identified above regarding on-site storage.

In addition to those factors, you will need to evaluate occupancy expenses, technology needs sufficient for allowing productive work in the location, furnishing the space for use as a records storage warehouse, availability and quality of services and transportation, insurance, cleaning and maintenance, and security (primarily for firm-owned space).

III. Commercial Storage Vendor

In the majority of cases, the most practical storage method will be use of a commercial vendor. Maintaining on-site or firm owned/rented off-site storage is rarely cost effective. The use of a commercial vendor eliminates the need for management of these ancillary spaces and their physical contents (whether records or other items). There are often several companies to choose from in an area. Get recommendations from peers and know what your needs are before reaching out to vendors. Avoid the use of storage companies that do not specialize in records storage services as these multi-purpose companies typically do not provide optimal levels of service or security.

Most vendors will have comparable contracts and pricing, as this is a competitive industry. Make sure that each contract you are considering meets your needs and be alert to add-ons that you have not requested. As with any industry, storage vendors have their own terminology and buzzwords. Don't hesitate to request clarification of terminology or ask questions if you are not certain what a particular service on a contract means.

Once your list of potential vendors has been culled down to two or three, tour the facilities, if possible. Large vendors may utilize multiple warehouses in your region, so this may not be practical, but many vendors will willingly provide a tour. If you do tour a facility, you should look for overall appearance, access concerns (lack of security or confidentiality of customer material in the warehouse areas), structural concerns, and an awareness of how the operation appears to be functioning. The building must be climate controlled, and no client materials should be on the ground. They should be on shelves or raised platforms, even during the staging process. Also, if your firm will need vault storage, be sure to specify that you want to see the vault controlled storage area.

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Summary

If each attorney is permitted to do anything they want with their files once a matter is concluded, the end result is chaotic. Files often become abandoned, or closing procedures are incomplete or inconsistent. By following the steps detailed in this article and you will be able to clear inactive files out of the office efficiently and effectively. To summarize:

- Assign all files a client/matter number that is used firm-wide, preferably one already in use within the firm for other purposes (such as billing) so that it is familiar to staff and attorneys.
- Have all files labeled consistently with client/matter information and a brief but clear description.
- Designate a point person or team to ensure the process is followed consistently
- Create a spreadsheet to track files for each matter, allowing everyone to see the information but limiting editing ability to the designated point person/team.
- When a matter closes, the legal assistant completes a form and send files to point person/team.
- Designated person/team completes spreadsheet, assigns appropriate closed box ID and coordinates with storage vendor for pick up or places in firm managed storage.

Ready for the Future

Maintaining inactive records firm wide with a controlled process will place you at an advantage for implementing retention, converting your records indices into an electronic system, or future implementation of a records management program. This is a first step, and a big one.

Debra Ferguson is a Senior Records Manager at Duane Morris LLP in their Philadelphia office

Up to The Minute . . .

Summary of Minutes of the NJALA Executive Board Meetings Held August through October, 2012

By Doreen Marino

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

Membership Drives

The board discussed options for membership drives. It was decided that a reminder will be put in the next bulletin that members will receive a $50.00 incentive to solicit new members.

Programs Report

Audrey Serban reported that all the programs are completed with the exception of February, 2013. Kurt Brown and Audrey are working on a speaker to cover the finance topic. In response to the membership feedback, the board has invested more into the quality and variety of topics and speakers and is very pleased with this year's line-up.

Workshop Report

Robbin Dolan reported that a marketing workshop is being planned for spring of 2013. Robbin and Mary Beth Donoghue are working to secure a presenter for a workshop surrounding personnel records.

Community Challenge

Jim Van Leir reported that the 50/50 fundraiser held on the evening of the Business Partner Exposition was a great success. The Covenant House was very appreciative of the NJALA's donation.

Jim reported that there is also a plan for a gift card drive for Youth Consultation Service (YCS) to take place during the holiday social. The committee is also considering pursuing a Habitat for Humanity gathering in the spring.

Business Partner Relations

Mary Ellen Dolan was happy to report that we have secured four new sponsors, but stressed that we can still use more sponsors. She also reported that they are going to kick off "Coffee Connections" (breakfast events involving business partner sponsors and NJALA members) soon. Mary Ellen and Louise Ruffo will be providing details on this shortly.

Business Partner Exposition

Jackie Pampinella reported that the Business Partner Exposition was a success. Mary Ellen Dolan reported that the business partner turnout exceeded expectations.

ALA Awards – 2012

Gayle Englert reported that the award submissions are due January 14, 2013. The board needs to decide what submissions we qualify for and who will be charged with the submission of each award. The Past Presidents have volunteered to look over the submissions.

Compensation & Benefits Survey/ Equipment Survey

Audrey Serban reported that the Compensation & Benefits survey is completed and published.

Mary Beth Donoghue reported that the Equipment Survey has been closed, and the survey should be circulated by the first week of November, 2012.

Past President's Council

Gayle Englert reported that the Past President's Council will be meeting on October 11th. The Past President's Council has agreed to the following: (1) it will once again host the Golf Outing for 2013; (2) it will review the ALA Award Submissions for accuracy and quality; (3) it will mentor all new members by reaching out to the new members to assist with acclimation into the chapter.

Chapter Audit

Audrey Serban reported that everything for the chapter audit has been submitted to Mike Sikora.

Website

Teri Siegle will now take over the role of website liaison. Michael Harrison requested that all requests for website changes and/or problems be funneled through Teri.

Socials

The NJALA Holiday Social will take place on Tuesday, December 4, 2012, at Canoe Brook Country Club in Summit.

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

What's on Tap

ALA and NJALA 2012/2013 CALENDAR OF EVENTS

Tuesday, January 8, 2013 (6:00-8:30 pm)
Monthly Meeting and Workshop at the Highlawn Pavilion in West Orange. "Secrets of SuperProductivity for Legal Professionals," presented by Neen James of Neen James Communications. A buffet dinner will be served.

Wednesday, January 16, 2013 (2:00 pm)
ALA Webinar. Topic: "MS® Office Tips & Tricks for Law Firms," presented by Ben M. Schorr, Chief Executive Officer of Roland Schorr & Tower. CLM credit available.

Wednesday, February 6, 2013 (2:00 pm)
ALA Webinar. Topic: "Document, Document, Document!" presented by Michael S. Cohen, Esq. of Duane Morris LLP. CLM credit available.

Tuesday, February 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, February 20, 2013 (2:00 pm)
ALA Webinar. Topic: "Profitable Law Firms—There's no APP for That," presented by James T. Allen, CLM, Executive Director of Hand Arendall, LLC. CLM credit available.

Tuesday, March 12, 2013 (6:00-8:30 pm)
Monthly Meeting and Workshop at the Highlawn Pavilion in West Orange. Topic: "Technology Gadgets and Apps," presented by Phillip Hampton and Bill Ramsey of LogicForce Consulting. A buffet dinner will be served

Wednesday, March 20, 2013 (2:00 pm)
ALA Webinar. Topic: "Initiating Alternative Fee Arrangements," presented by Frederick J. Esposito, Jr., CLM, Director of Administration of Meyer, Suozzi, English & Klein, PC. CLM Credit Available.

Tuesday, April 9, 2013 (6:00-8:30 pm)
Monthly Meeting and Workshop at the Highlawn Pavilion in West Orange. Topic: "Enabling Others to Act," presented by Natalie Loeb of Loeb Consulting Group. A buffet dinner will be served.

April 14-17, 2013
This year it's nice and close, so start thinking about registering for the **ALA Conference & Exposition** to be held April 14-17, 2013, at the Gaylord National Resort & Convention Center, National Harbor, Maryland. More information will follow soon!

For information about:

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

Educational Workshops – Please contact Robbin Dolan, CLM, of Laddey Clark & Ryan at 973-729-1880.

NJALA Socials – Please contact Jackie Pampinella of Fox Rothschild at 973-992-4800.

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

PRESENTING... OUR BUSINESS PARTNERS

BY MARY ELLEN DOLAN AND NANCY FOSINA

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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Kenneth E. Winslow, CPA, PSA Partner
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- Meals and entertainment review and compliance
- Debt financing and restructuring
- Retirement and succession planning
- Internal controls and operational review
- Information system implementation
- Retirement and fringe benefit planning
- Related law firm operational and efficiency matters

For more information, please contact Kenneth E. Winslow, CPA, PSA Partner, at 973-530-9115 or *kewinslow@bederson.com*.

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Presenting Our Business Partners

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MCS Management Services

Daniel S. Carroll, Manager, Client Strategy
and Business Solutions
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www.mcsmanagement.com

As an industry innovator, MCS Management Services has been providing business support services to law firms since 1979.

The MCS team handles a wide array of outsourcing functions, from the traditional on-site mail and print center services, to more complex in-house litigation support and records management services. Their dynamic service portfolio and solutions' experts have helped firms improve efficiency and accuracy while reducing operating costs. Their services include:

- Shipping and mail center management;
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Headquartered in Philadelphia, MCS Management Services is a woman-owned business enterprise that started in business support services more than three decades ago. Today, MCS has a legacy of success with a stunning 100% law firm contract renewal rate recorded for 2010-2012, and an overall retention rate of 96% since 1993.

One area where MCSMS provides such satisfaction is in removing operational redundancies, which prevent law firms from running lean. Administrators sometimes tend toward the traditional idea that firm growth means adding headcount when, in fact, headcount reduction is often the key to strategic expansion.

For more information, contact Daniel S. Carroll, Manager, Client Strategy and Business Solutions, at 800-473-5003, ext. 8118, or *daniel.carroll@mcsmanagement.com*.

Millicare DriKlean, LLC

James Hermey, Jr., President and Ron Faas, Chief Operations Manager
973-227- 4367
www.millicare.com

Millicare DriKlean LLC is a New Jersey based carpet and textile cleaning company, a Millicare franchise partner in operation since 2001 and proud member of the NJALA Business Partners. Millicare is the leading global provider of sustainable commercial textile and carpet care services with Green Seal™ certification for environmentally preferred cleaning practices. We are also certified and approved by the US Green Building Council for promoting LEED certification and the IICRC for excellence in training our technicians.

Our dry system improves indoor air quality and extends carpet life while reducing water consumption and saving energy costs by using little to no water in the process. Your carpet is accessible as soon as we are finished cleaning—no waiting for it to dry—with no chemical or soapy residue left behind to draw more dirt and no wet fibers to promote bacteria growth or cause odors as with wet extraction and other methods. With up to 99% of pollutants, VOC, molds and bacteria being removed from your carpet before they become airborne and all products used being biodegradable, we eliminate allergens and irritants to promote a healthy workplace and increase productivity.

At DriKlean our professional staff and skilled technicians are part of your team and we strive to make this important aspect of managing and maintaining your facilities easy, cost effective and as stealth as possible by setting and meeting high expectations of service to your firm. Your carpet is one of the first impressions your clients will have and an investment you make carefully. Protecting this investment and insuring your space looks its best for employees and clients alike is what we do best. To learn more about Millicare DriKlean please contact us at or visit *www.millicare.com*.

Océ Business Services

Fred Levine, Legal Account Manager
212-502-1447
www.ocesolutions.com

Océ Business Services: Advancing Managed Business Process Services to a Higher Level

Océ Business Services, a Canon Group Company headquartered in New York City, provides high quality managed business process services and electronic discovery solutions to 26 of the top 50 Am Law 200 firms. In addition to legal organizations, Océ serves large and mid-sized corporations, educational institutions and the public sector in North America. The company's vertical industry presence primarily includes financial services, insurance, legal, manufacturing, technology, healthcare and pharmaceuticals. Océ clients also include 52 of the 2012 FORTUNE 500® companies.

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Presenting Our Business Partners

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Océ solutions enable organizations to manage, monitor and optimize document intensive processes so companies can improve operating efficiency and performance. The company's solutions span the document lifecycle and include records management, imaging, managed print services, mail and eDiscovery. Océ leverages its comprehensive capabilities and Six Sigma® methodologies across industries and document processes in order to help clients elevate process performance.

One element that distinguishes Océ is the industry recognition it has received. This recognition includes being named to the Leader's Category of the IAOP Global Outsourcing 100 List for the past six years in a row. Industry analyst Gartner included Océ in its "Magic Quadrant for Managed Print Services Worldwide" for the past two years. These and other industry recognitions attest to Océ's ongoing commitment to advance managed business process services to a higher level.

For further information, contact Fred Levine at *fred.levine@oce.com or* 212-502-1447.

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ALA's Value in Partnership (VIP)℠ Program

By Sarah Clark, CLM

The right products and services are key to successful legal administration. Did you know that there is a section on the Association of Legal Administrators (ALA) website that provides links to information supplied by consultants, suppliers, manufacturers, service providers and training organizations? On the ALA home page, look for ALA Value in Partnership (VIP) Program.

ALA has enhanced the services and benefits available to ALA members because it continues to be one of ALA's top priorities. With that goal in mind, ALA has a series of benefit programs that are of value not only to members, but also to their employers and families.

ALA is pleased to offer its line of member benefits, providing an array of resources and services at discounted rates from nationally known companies. ALA members, their employers and their families have the opportunity to enjoy the savings these benefits provide. To secure your benefits, identify yourself as an ALA member and provide ALA's customer number/code (when requested). In some instances, you may also be required to present your current ALA Membership Card.

ALA offers no direct endorsement of products and services represented by business partners. Likewise, ALA assumes no responsibility for the currency or accuracy of information, or the availability of any products or services, noted in any business partner materials. However, this may be a great place to start if you are researching a new product or service.

The VIP programs listed below are for the exclusive use and convenience of ALA's members.

- ABA Retirement Funds
- Affinity Consulting Group
- Allied Van Lines
- Grand & Toy
- GLJ Benefit Consultants
- The Gunlocke Company
- Office Max
- Quill.com
- Robert Half
- Thomson Reuters myPay Solutions
- UPS

While this National Program is offered by ALA, it is also important to remember to forge the same valuable and lasting relationships with the Business Partners who regularly support the NJ Chapter. As one member tells us:

"We are so very lucky to have incredibly strong relationships with our various Business Partners. The importance of those relationships cannot be summed up in a couple of sentences but rather in the potential each Business Partner brings to the table every day as each of us search for new and innovative ideas to bring back to our respective firms. Whether it be new and exciting technology or a less costly way of performing everyday tasks, when we make ourselves available to our Business Partners, it's a win-win for all of us" ~Bernie Merer, Saiber LLC

Our Business partners also realize the importance of these mutually beneficial relationships between members and the Business Partners:

"There is a distinct advantage of having 'business partners' in business. By leveraging partnership relationships, organizations can use the partner's (and partner's partners) associations to its advantage—by bringing in specialized knowledge and resources to address a need. A business partner has in-depth knowledge of 'your' business processes, and can complement them, providing you with industry-accepted best practices to ensure project success with a minimum of pitfalls and challenges." ~Joe James, Microstrategies

Sarah Clark, CLM, is the Office Administrator of McElroy Deutsch Mulvaney & Carpenter, LLP in Newark

Hatches, Matches & Dispatches

By Cindy Landis

The summer for my family has been one to never forget. My mother-in-law was in the hospital for nine days and then three weeks of rehab after a fall; just when we thought things may calm down, my father went into the hospital (unexpectedly) for ten days and two weeks of rehab after quadruple bypass surgery. They are both doing well, so Thanksgiving will be just that…a day to give thanks.

And now for some announcements from our friends….

Karen on her graduation day.

Karen A. Hess (Peckar & Abramson) reports that her oldest daughter, Alyssa, graduated high school with AP Distinction this year, and is now enrolled as a freshman Fine Arts major at The College of New Jersey (TCNJ)—Go Lions! Her younger daughter, Lauren, is now a freshman at Cresskill High School and is involved in volleyball, the Principal Players, Choir and Improv—Go Cougars! As for Karen, she went back to school a few years ago and graduated from the University of Phoenix last September with her degree in Human Services Management, and she is now preparing to earn her PHR Certification (Professional Human Resources). She was also humbled to learn that in August she was honored with a Woman of the Year award, class of 2012-2013, from the National Association of Professional Women. All the while, Karen's Fire Captain husband of 21 years has been incredibly supportive and loving. He is currently sitting number 1 on the Battalion Chief's list for North Hudson Fire & Rescue, with the hope that he will be promoted soon. We're keeping our fingers crossed for you, Karen!

Fran, Tom and friends enjoy Las Vegas.

Fran Puntillo (Weiner Lesniak) had an awesome vacation recently! Her significant other, Tom, drove his brand new Jeep from New Jersey to Las Vegas and picked up Fran and two of their friends at the Las Vegas airport. They managed to get all of our luggage into the back of the Jeep and off they went! They visited the Grand Canyon, Zion, Bryce, Capital Reef and Arches National Parks, Salt Lake City, Jackson Hole, and Yellowstone. At the end of the trip, they drove from Jackson Hole to Denver where everyone but Tom boarded a plane and flew home. Tom drove the aforesaid Jeep back to New Jersey! Fran reports that the weather was wonderful—only the smoke that traveled down from the wildfires in Idaho marred the intense blue of the sky in Utah and Wyoming. Fran says, "We live in an absolutely beautiful country and I encourage everyone to GO WEST and visit the national parks of Utah and Wyoming." We are jealous, Fran—can we go with you next time?

Elli Albert (Berman Sauter) reports that, after six months of major life changes, she and her two sons, Brian and Jordan, are happily settled into their new townhouse in Rockaway, New Jersey. Elli says that she knew she had moved out of the 'burbs and into a more rural setting when she saw a John Deere tractor store in town! She is looking forward to Life: Part 2. In additional news, Elli reports that, for the third time during her 12-year run, her firm has changed names again, and is now known as Berman Sauter Record & Jacobs, P.C. New logo, new letterhead, new everything … "Here we go again," she says!

Jim Van Leir (Epstein Brown) is a lucky guy, as he embarks on an eight-day vacation in Ghana. It will be his first trip to Africa and he is really looking forward to it! We are looking forward to hearing all about it, too, Jim, and seeing pictures of all of your adventures!

Sara and Patricia on their happy day.

Sarah Clark (McElroy Deutsch) gives us the news we have all been waiting for! It is official! Patricia Margaret Clark's adoption was finalized on October 9, 2012. The Honorable Thomas C. Moore, J.S.C. presided over a very heartfelt adoption hearing that was attended by several family members and friends. Sarah is over the moon with joy,

(Continued on page 36)

Hatches Matches & Dispatches

(Continued from page 35)

as the adoption comes just four days shy of the two-year anniversary of Patricia being placed with her. We wish her much happiness and laughter in the years to come.

And that's it for now. Got any big news in your life? New job? New house? New babies? Great vacations? Read a good book or seen a good movie? Let me know what you've been up to for the next edition of HMD!

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

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INTRODUCING OUR NEWEST MEMBERS OF NJALA

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Q&A: TODAY

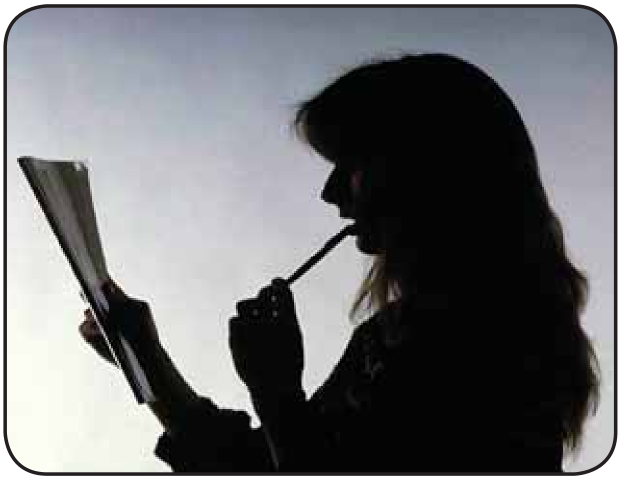
By Anita Setaro

Q: In honor of the recent Presidential election, we have selected "The Art of Leadership" as the theme of this edition. Let us know what top qualities you look for in a good leader.

Ed Miller of Norris McLaughlin & Marcus, P.A.: I think the top qualities of a leader include having as vision, being able to articulate the vision, and to motivate people so that they want to work hard to achieve the vision. Further, the leader must put the organization's needs first, lead by example, and work in an open (not covert) manner.

Kathryn Krylowski of Golden, Rothschild, Spagnola, Lundell, Boylan & Gaubo, P.C.: Dependability, accountability and patience.

Kurt Brown of Einhorn Harris Ascher Barbarito & Frost, PC: Creativity and assertiveness (not aggressive). I want a leader to be creative and have the ability to think "outside the box." I also look to a leader to assert their expectations so there are no misunderstandings.



Adriana Ferrari-Asan of Bevan, Mosca, Giuditta & Zarillo, P.C.: As a firm administrator I have to balance the interests of many classes of people: partners, associates, staff, vendors, clients ... the truth is you can't make all the people happy all the time. But, we must care about all of them in the same way.

Sarah Clark, CLM, of McElroy, Deutsch, Mulvaney & Carpenter, LLP: A good leader takes a position and stands by that position. A good leader understands that he or she must walk the walk in order to lead effectively. He or she must also understand that you are only as successful as the people you are leading, and each member of your team deserves the same respect.

Karen Hess of Peckar & Abramson, P.C.: I think the most important qualities for me are conviction, fairness and inclusiveness.

Ron Henry of Wilentz Goldman & Spitzer, P.A.: The Five Cs: Competence (have or learn the appropriate skills, knowledge and abilities to know what the heck you're doing); Confidence (fearlessness, composure and unflappable self-assuredness to stand up and deliver); Commitment (unquestioned dedication to his/her job, boss, people and profession); Courage (do the right thing and have the guts and mettle to do what's morally and ethically right; and Candor (speak frankly and honestly, telling the truth, responsible for your own actions without blaming others).

Joanne O'Beirne of Wolkstein, VonEllen & Brown, LLC: Someone who really takes charge and can make a sound decision when needed in a moment's time.

Renee Durbecq of Patton Boggs, LLP: The strongest, most effective leaders I have met and had the pleasure of working with care not only about the business, but about the people working in it. They show they care directly through their actions and words. Honesty, humility, fearless, focus, passion, communicative, confidence, respect and empowerment are also qualities I look for in a good leader.

Veronica Hurless of Orloff Lowenbach Stifelman& Siegel, P.A.: The Top Qualities of Successful Leaders: Character; Curiosity; Courage; and in a world full of "can't do's," successful leaders ask, "What can we do?" Bright futures are built with action; bleak ones come from inaction.

Anita Setaro is the Office Manager of Duane Morris, LLP in Newark

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OR IF YOU WANT TO BE PART

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