

Oct / Nov 2017
Vol. 2017, No. 5

FINANCE



DON'T MISS:

Pg. 6

Figures Don't Lie

Pg. 10

Dress for Success Event

Pg. 18

Got CLM?

TABLE OF CONTENTS

EVENTS

- 5 Calendar of Events
- 9 2017 Leadership Event
- 10 Dress for Success
- 11 Networking Event at Target Center

MEMBERS

- 3 2017 - 2018 ALAMN Officers & Directors
- 4 2017 - 2018 ALAMN Committees & SIGs
- 9 Welcome New ALAMN Members
- 9 Shining Star
- 13 Board and Nominating Committee
- 16 Community Service Meeting Minutes
- 18-19 Got CLM?
- 21 Get to Know Your Board

COLUMNS

- 6 Figures Don't Lie

Just For Fun

- 6 October/November To Do List
- 12 Sudoku
- 14 Autumn Life Hacks
- 15 Dear Laura Advice Column

MORE INSIDE

- 8 2017 ALAMN Business Partner Sponsors
- 22 Advertisers in this Issue

THE VERDICT STAFF

Editor

Gretchen Luessenheide, MBA
Robins Kaplan LLP
612 349 8476
gluessenheide@robinskaplan.com

Advertising

Shelly Losinski
IntrinXec Management, Inc.
952.564.3077
slosinski@intrinxec.com

Letters to the Editor

Letters to the Editor of *The Verdict* are welcome and can be e-mailed to gluessenheide@robinskaplan.com. In your letter, please include your name, firm name, mailing address, daytime phone number, and e-mail address. Letters that do not contain full contact information cannot be published. Letters typically run 150 words or less and may be edited. Your letter may be on any topic. You will be contacted before your letter is published. Thank you.

2017 - 2018 ALAMN OFFICERS & DIRECTORS

OFFICERS



PRESIDENT

Sarah Evenson, JD, MBA
Barnes & Thornburg LLP
612.367.8717
sarah.evenson@btlaw.com



PRESIDENT-ELECT

Abby Rooney, PHR, SHRM-CP
Foley & Mansfield
612.216.0369
arooney@foleymansfield.com



PAST PRESIDENT

EDUCATION DIRECTOR

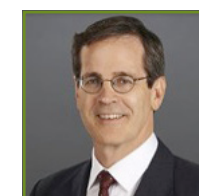
Sarah Didrikson
Nilan Johnson Lewis PA
612.305.7614
sdidrikson@nilanjohnson.com

DIRECTORS



ADMINISTRATIVE DIRECTOR

Kelly Thaemert, CLM
Hellmuth & Johnson PLLC
952.746.2170
kthaemert@hjlawfirm.com



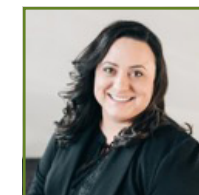
FINANCE DIRECTOR

Philip Rush, CLM
Moss & Barnett
612.877.5402
phil.rush@lawmoss.com



COMMUNICATIONS DIRECTOR

Laurie Greenberg, SPHR
Briggs and Morgan, P.A.
612.977.8608
lgreenberg@briggs.com



MEMBERSHIP DIRECTOR

Jessica Gerhardson
Monroe Moxness Berg PA
952.885.5999
jgerhardson@mmblawfirm.com

ALAMN has adopted ALA's Mission Statement

To improve the quality of management in legal services organizations; promote and enhance the competence and professionalism of legal administrators and all members of the management team; and represent professional legal management and managers to the legal community and to the community at large.

2017 - 2018 ALAMN COMMITTEES & SIGs

ALAMN COMMITTEES serve as liaisons between membership and the respective director, representing the ALAMN Board of Directors.

BUSINESS PARTNER AND CONFERENCE

Patti Ploehn 763.560.5700 pploehn@hennsnoxlaw.com
Tracy Grill 612.333.8844 tgrill@gustafsongluek.com

COMMUNICATIONS

Nick Manty 612.465.0346 nick@mantlylaw.com

COMMUNITY SERVICE

Darlene Downs 612.252.2865 d downs@hensonefron.com
Norma Thayer 612.341.0400 norma.thayer@zimmreed.com

COMPENSATION & BENEFITS SURVEY

Jodi Schmidt 612.632.3321 jodi.schmidt@gpmlaw.com
Tammy Warren 612.492.7120 twarren@fredlaw.com

DIVERSITY & INCLUSION

Jessica Diede 612.349.8500 jdiede@robinskaplan.com
Curtis Okerson 612.492.7552 cokerson@fredlaw.com

EDUCATIONAL PROGRAM

Caitlin Niedzwiecki 612.216.0211 cniedzwiecki@foleymansfield.com
Tracy Johnson 612.236.0160 tjohnson@ecklandblando.com

HUMAN RESOURCES

Sarah Duerscherl 612.216.0247 sduerscherl@foleymansfield.com
Kim Hansen 612.977.8554 khansen@briggs.com

LARGE FIRM

Ann Rainhart 612.977.8288 arainhart@briggs.com

MEMBERSHIP DEVELOPMENT

Catherine Gorr 612.879.1817 cgorr@mulliganbjornnes.com
Deb O'Connor 651.332.8315 deb@aj-law.com

NOMINATING

Katherine Hubbard 612.604.2592 hubbard@mdh-law.com

SMALL & MEDIUM FIRM

Jessica Johnson 612.341.0400 jessica.johnson@zimmreed.com
Kim Pepera 651.351.2129 kpepera@eckbergglammers.com

ALAMN SPECIAL INTEREST GROUPS (SIGs) are educational forums specific to functional specialty. Special Interest Group (SIG) meeting attendees need not be ALAMN members.

FACILITIES MANAGEMENT

Michelle Brauch 612.492.7589 mbrauch@fredlaw.com
Cynthia Trana 612.977.8686 ctrana@briggs.com

FINANCIAL MANAGEMENT

Josh Wolff 612.305.7616 jwolff@nilanjohnson.com
Julie Zierden 612.216.0321 jzierden@foleymansfield.com

INTELLECTUAL PROPERTY

Val Studer 612.573.2008 vstuder@dbclaw.com
Susan Sutton 612.349.5764 sutton@ptslaw.com

PRICING, LEGAL PROJECT MANAGEMENT, AND KNOWLEDGE MANAGEMENT

Bree Johnson 612.335.7101 bree.johnson@stinsonleonard.com

ST. CLOUD

Ann Entenmann 320.656.3538 aentenmann@rinkenoonan.com

SYSTEMS & TECHNOLOGY

Craig Wilson 612.604.6455 cwilson@winthrop.com



ALAMN CALENDAR OF EVENTS

OCTOBER 2017

SU	MO	TU	WE	TH	FR	SA
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

OCTOBER

- 3 ALAMN Fall Social
4:00 pm – 7:00 pm
Bauhaus Brew Labs
- 5 ALA Webinar: Communication Strategies for Building Trust in the Workplace
2:00 pm
Zimmerman Reed
- 5-7 ALA Finance and Law Practice Management Conference for Legal Professionals
Chicago, IL
- 5-7 ALA Human Resources Conference for Legal Professionals
Chicago, IL
- 5-7 ALA IP Conference for Legal Professionals
Chicago, IL
- 12-14 ALA Regional Conference
Nashville, TN
- 13 Board Meeting
8:30 am – 10:30 am
Barnes and Thornburg
- 17 Leadership Council on Legal Diversity Annual Meeting
8:00 am – 4:00 pm
Washington, DC
- 17 It's Time to Talk: Forums on Race
11:30 am – 1:30 pm
Minneapolis Convention Center
- 17 Facilities SIG Meeting
12:00 pm – 1:00 pm
Gray Plant Mooty

***PLEASE NOTE:**
SPECIAL INTEREST GROUP (SIG) attendees need not be ALAMN members

NOVEMBER 2017

SU	MO	TU	WE	TH	FR	SA
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

- 17 Membership Development Committee Meeting
4:00 pm – 5:00 pm
Madigan, Dahl & Harlan, PA
- 18 ALA Webinar: Five Principles of Productive Email
2:00 pm
Zimmerman Reed
- 19 Education Committee Meeting
4:00 pm – 5:00 pm
Madigan, Dahl & Harlan, PA
- 23 Cook for Kids
3:00 pm – 7:00 pm
Ronald McDonald House
- 25 Diversity & Inclusion Committee Meeting
8:30 am – 9:30 am
Bowman & Brooke
- 25 Communication Committee Meeting
12:00 pm – 1:00 pm
Briggs & Morgan
- 2 ALA Webinar: Workplace Violence: How to keep Your Organization Safe
2:00 pm
Zimmerman Reed
- 7 HR Committee Meeting
11:30 am – 1:00 pm
TBD
- 9 Finance SIG Meeting
12:00 pm – 1:00 pm
Gray Plant Mooty
- 10 ALAMN Board Meeting
8:30 am – 10:30 am
Barnes and Thornburg
- 14 Law Firm Leaders Networking Event
4:30 pm – 7:30 pm
Radisson Blu
- 15 Community Service Committee Meeting
11:30 am – 1:00 pm
Zimmerman Reed
- 15 ALA Webinar: How to Build a Budget you Can Count On
2:00 pm
Zimmerman Reed
- 16 Education Committee Meeting
12:00 pm – 1:00 pm
Foley & Mansfield
- 21 Facilities SIG Meeting
12:00 pm – 1:00 pm
Ogletree, Deakins, Nash, Smoak & Stewart, P.C.
- 21 Membership Development Committee Meeting
4:00 pm – 5:00 pm
Madigan, Dahl & Harlan
- 22 Communication Committee Meeting
12:00 pm – 1:00 pm
Briggs & Morgan
- 28 Young Professional "Ask Anything" Round Table and Dinner
5:30 pm – 7:00 pm
Young Joni

NOVEMBER

FIGURES DON'T LIE

By Philip Rush, CLM

Figures don't lie. But liars can figure.

Like the old adage implies, your financial records can tell you the truth, but if you only get part of the picture, they can mislead you.

When reviewing your financial picture, whether it is the firm's financials, the budget, the projection for a build out, or a lease/purchase decision, make sure you get all the facts. If you don't, you could end up making the wrong decision based on a subset of the whole picture.

For example, when budgeting, if you are expecting to add new timekeepers, make sure you have added the compensation costs for the same time period of time that the new timekeepers will be there. You will need to add benefits. When do they start? Also, you need to take into account whether there is a placement fee that needs to be added. Similarly, does the receipt of cash start one, two, or three months after they start producing time? What is the standard practice of the firm?

Other factors in your budget are more straightforward. Supplies, stationery, and rent are most often nearly the same as they were in the prior year. Sometimes a lease has an escalator clause that will increase the rent and needs to be taken into account. Another situation could be buying in bulk for your stationery, and this is the year to stock up. Or license renewals or notary renewals are all coming due in the budget year.

Some of these factors, if budgeted incorrectly, add up over the course of the year. Others may affect the budget from a certain point and then throughout the remainder of the year. This would be the case if you miss an important accrual that is to be paid in January. This would make your budget ineffective for the whole year, as opposed to just being a little more off each month.

Presenting the whole picture in the budget not only gives you a look at what the future might look like, it also gives you a benchmark, should your actual results vary from the budget. Analysis of these variances will let you manage your firm better.

But remember to look at the whole picture as to why you have a variance from budget. It could be hours are low, but is it in all categories of timekeepers or just one? Is it from one particular client group or the whole firm? Maybe it is an industry trend. The figures don't lie, but finding the truth takes some digging.



Author Bio:

Phillip Rush, CLM, is the Finance Director at Moss & Barnett.

October/November To Do List

- Make sure you have addresses and tax ID's for anyone to whom you are sending a 1099
- Have employees update their addresses so mailing W-2's can be done for those not on site
- Start discussion with bank for any financing needs you may have
- Be ready to set up new check signers
- Contact your payroll provider to confirm your year bonus and tax deposit schedules can be accommodated
- Determine cut off for turning in marketing expense reimbursements
- Set up payroll system with new benefit costs

(ideas from Phillip Rush, CLM, Finance Director at Moss & Barnett)

ALA WEBINARS*

Crucial education – 24/7



ON DEMAND • ON TOPIC • ON YOUR SCHEDULE

Gain essential education on:

- Increasing profitability
- Decreasing inefficiencies
- Advancing professional development



SUBSCRIBE TODAY!
alanet.org/webinars

*in partnership with WestLegalEd

2017 ALAMN BUSINESS PARTNER SPONSORS



Emergent Networks, LLC



Alerus Financial
Marco Technologies, LLC



Associated Private Client Services	Loffler Companies Inc.
Fluid Interiors	Marsh & McLennan Agency LLC
Innovative Office Solutions	Ricoh USA, Inc.
LexisNexis	Wells Fargo Bank N.A.



ADP	Cushman & Wakefield NorthMarq	ProCircus Technologies
Affinity Consulting Group	Depo International	PROSHRED Minnesota
All-State Legal	DTI	Rippe & Kingston
Aramark Refreshments	Element Technologies	Robert Half Legal
Atomic Data	First Choice Services	RSM US LLP
bdh+young	FRSecure, LLC	Shred Right
Beacon Hill Staffing	Greiner Construction	Special Counsel, Inc.
Berry Coffee Company	Hays Companies	Success Computer Consulting, Inc.
BigHand	Henricksen	TechFactory, LLC
Bremer Bank	IST Management	Thomson Reuters
Business Essentials	Lurie LLP	UPS
Canon Business Process Services	Minnesota Lawyers Mutual Insurance	US Bank Equipment Finance
ClientPay	National Institute for Trial Advocacy	Verus Corporation
Coffee Mill, Inc.	Northland Business Systems Inc.	Western Bank
Consolidated Communications	Olsen Thielen & Co, Ltd.	Whizkids Tech
Coordinated Business Systems, Ltd	Parameters	Willis Towers Watson
Cottingham & Butler	Payroll Direct, Inc.	Windstream



ABA Retirement Funds Program	Compliance Discovery Solutions	Studio Hive Inc. + DLR Group
ALPS	Echelon Fine Printing	
AVI Systems	Staples Advantage	

2017 LEADERSHIP EVENT

ALAMN invites managing partners and law firm leaders to a networking reception featuring speaker Russ Haskin.

Tuesday, November 14, 2017
4:30 – 7:30 p.m. (4:30 networking, 5:30 speaker)
Radisson Blu

Presentation at a glance: As law firms identify revenue growth as a top priority, many are losing sight of bottom line profitability, client satisfaction, employee satisfaction, and organic growth. This session will address the various challenges surrounding not only the growth of the firm, but the individuals within it. Mr. Haskin will begin with an interactive discussion and end with a case study that will touch on virtually all aspects of law

firm personnel challenges, including mentorship, career alignment, succession planning, diversity, and growth.



About the presenter:
Russ Haskin is the Director of Business of Law Consulting at Wilson Legal Solutions. In this role, he serves as a trusted advisor to hundreds of law firms across the globe, ranging from small boutiques to those within the Am Law 10. He has more than 15 years' experience in consultative work and research, achieving recognition as an expert in profitability, matter management, alternative fee arrangements, and partner compensation.

PLEASE WELCOME OUR NEWEST ALAMN MEMBERS

Francis Glover
APS Manager
Fish & Richardson, PC

Anastasia Walhovd
Office Manager
Contreras Edin & Associates

And the next ALAMN Shining Star is...**Tracy Johnson, CLM, SPHR, SHRM-SCP, C(k)PF**

The Board is pleased to announce the selection of Tracy Johnson, CLM, SPHR, SHRM-SCP, C(k)PF as a Shining Star for the Minnesota Chapter. Tracy is the Executive Director at Eckland & Blando LLP. Tracy has been a member of ALA and ALAMN since July 2010. Tracy was a member of the CLM study group, passed the exam, and then offered to co-chair the group. Tracy is a strong advocate for the CLM program. She came forward and asked how she could get more involved in ALAMN, became an integral member of the Education Committee, and is now co-chair. Since joining the Education Committee she has worked to get education sessions approved for both SHRM and CLM credits whenever possible. Tracy embodies what it means to be an active member of ALAMN.



DRESS FOR SUCCESS WAS A SUCCESS!

On Wednesday, September 13, nine ALAMN members and business partners joined together to assist low income women in the Twin Cities prepare for work. Volunteers worked with clients conducting mock interviews and providing image coaching and wardrobe selection to prepare them for work. The mission of Dress for Success is to empower women to achieve economic independence by providing a network of support, professional attire, and the development tools to help them thrive in work and life.

Thank you to the following ALAMN members and business partners:

- Deb Busch – Wells Fargo
- Rebecca Mickelsen – Wells Fargo
- Wendy Cornelius – Metropolitan Airports Commission
- Laurie Greenberg – Briggs and Morgan
- Lauren Livingston – Hays Companies
- Greta Larson – Fredrikson & Byron
- Beth Sullivan – Beacon Hill Staffing
- Jack Duffy – Arthur J. Gallagher
- Sarah Paisley – Robert Half legal



ALAMN HOSTS NETWORKING EVENT AT CITY WORKS AND TARGET CENTER

Home to the NBA Minnesota Timberwolves and 3-time WNBA World Champions Minnesota Lynx, Target Center has been undergoing renovations this year. The project, New Era – New Digs, includes additional premium seating spaces, technology upgrades and a glass-walled, five-story atrium to enhance natural lighting. A new addition, a very cool art piece which will span the atrium, is in the works as well. An abstract basketball will appear to be falling through a lighted net!

Business Partners and ALAMN Members took an up-close and personal tour of the now 80-90%-completed project on September 19. Donning hard hats, safety vests, glasses, and gloves, the tour included behind the scenes viewing of the Timberwolves and Lynx locker rooms, complete with eight-foot showers!

Before and after the tour, Business Partners and members spent time networking at City Works, just a short walk through the skyway to Target Center.



SUDOKU - ANSWERS ON PAGE 20

					9			5
6	5		8	1	2			
2	3						8	
	4					5		9
8	1		5		4	3		6
9	6		2		3		4	
	2	6		4			9	
3	7	4	9				5	2
			6	2	7	4	1	3

REGISTER FOR ALAMN FALL SOCIAL OCTOBER 3

ALAMN members, business partners,
potential members and potential
business partners are invited to attend
the ALAMN Fall Social.

Tuesday, October 3, 2017, 4:00 - 7:00 p.m.

Bauhaus Brew Labs, 1315 Tyler St. N.E.,
Minneapolis MN, 55413

[Click here to register.](#)

SEEKING NOMINATIONS FOR ALAMN BOARD OF DIRECTORS!

ALAMN has been blessed with a strong tradition of volunteering. Our volunteers contribute to the strength and prosperity of our chapter. To continue the tradition, we are seeking nominations for the 2018-2019 ALAMN Board of Directors. I am asking for your assistance in two ways. First, if you know of any member who exhibits strong leadership skills, and you feel he or she would be a good candidate for the Board, please nominate that person! Second, consider nominating yourself for a position on the Board. Volunteer ranks commonly have members who were self-nominated.

Submit all nominations by Monday, November 13, 2017 by completing the online form.
www.alamn.memberclicks.net/alamn-board-nomination

Contact Sarah Didrikson at sdidrikson@nilanjohnson.com or 612.305.7614 with any questions.

Eligible nominees must have chaired or co-chaired an ALAMN Committee in the past for consideration. Also, if you are interested in being considered for a Board position, you are not eligible to serve on the Nominating Committee this year. Thank you for considering this opportunity to serve ALAMN!

Simplify the
complexity.

FL
UI
D
FLUID INTERIORS

workplace design · office furniture
collaborative technology · facility services



BEST
IN CLASS
HAWORTH
DEALER

fluidinteriors.com · (612) 746-8700

EVOLVE

Is your technology outdated?



Today's successful law firms are all about automated processes and technological efficiency. Typewriters, stacks of paper and locked file cabinets have been replaced by handhelds and laptops, digital document workflow and management, and secure networks. If your firm's technology is gathering dust, maybe it's time to EVOLVE.

LOFFLER

COPIERS & PRINTERS · IT · VOICE · SECURE PRINT · COST RECOVERY
ADVANCED SCAN WORKFLOWS · ONSITE MANAGED SERVICES

WWW.LOFFLER.COM · 952.925.6800



VOLUNTEERS NEEDED FOR ALAMN NOMINATING COMMITTEE!

If you have been looking for a way to get involved in ALAMN with a short time commitment, here is your opportunity! Volunteers are needed to serve on the ALAMN Nominating Committee. The Nominating Committee has the important responsibility of selecting and presenting a slate of officers for the 2018-2019 term of office. The Committee will meet 2-3 times between November and January, and have a few hours of work out-

side of the meetings. To be eligible for the Committee, ALAMN regular members must have at least one year of membership and cannot have served on the Nominating Committee last year.

If you would like more information on the Nominating Committee, please contact Sarah Didrikson at sdidrikson@nilanjohnson.com or 612-305-7614 by November 3, 2017.

AUTUMN LIFE HACKS

Make Pumpkins Last Longer

If you buy your pumpkins too early, by Halloween your jack-o-lanterns will look like a rotten, withered mess. Wait too long, and the only ones left are the weird-looking, misshapen ones. Instead of trying to coordinate timing to hit the sweet spot, go ahead and buy pumpkins early, but spray them with a mixture of water and bleach. This will preserve the pumpkins and prevent them from rotting before Halloween night.



Bake the Bugs out of Pinecones

The pinecones that fall from trees this time of year can be fantastic to use as seasonal decorations in table centerpieces, assorted crafts, and the like, but it is a good idea to stick the pinecones in the oven and bake them first in order to destroy any insects that may have established a secret home inside a pinecone before they can set up shop somewhere inside your home. Cook at 250 degrees on a foil-lined cookie sheet for about an hour, checking to make sure they do not burn.



DIY Fall Potpourri

Who needs scented candles or plug-in air fresheners to bring a fresh fall smell into your home when you can create our own easy-peasy autumn potpourri? Simply add a peel of one orange, a sliced apple, two large cinnamon sticks, and a tablespoon each of cloves, vanilla extract, and almond extract to 1 ½ cups of water, and simmer on the stovetop throughout the day (make sure to keep adding water). Your house will smell amazing!

<http://www.hgtv.ca/diy/photos/14-fall-hacks-for-an-awesome-autumn-1052955/#>

DEAR LAURA ADVICE COLUMN

Dear Laura,

My boss is such a micromanager! She is always checking up on me to see what I am doing. I get my work done, so is it so wrong that I catch up on Facebook once in a while during the day?
Signed, Micromanaged in Minnetonka

Dear Micromanaged in Minnetonka,

It's time for a chat with your Managing Partner or supervising Director. (Sorry, I won't use the term "boss.") As a legal business professional, you are an exempt employee, and you are likely working many more hours than the firm's non-exempt employees. Sit down with your supervisor and let her know you want to discuss managing expectations—hers AND yours. Just be honest with her. Tell her you work hard and remind her that you do a great job. Let her know it concerns you when she hovers around seemingly to catch you doing something wrong. Ask her outright if you have done something to lessen her trust in you. It's amazing how open conversations positively impact relationships.

As for your Facebook time, none of us like to walk around the office to see employees on Facebook, Amazon, or even CNN. But, we all go there once in a while. We monitor our checking accounts, get a CaringBridge update, or check Facebook to see how our friends in Miami and Houston are coping. But, if your supervisor sees you on Facebook throughout the day, that is not OK, and she is right to be upset by that. Spend a minute to take an honest personal inventory to determine if you should modify your social media activities during work hours.

Dear Laura,

What is your go-to dance move?
Signed, Dancing in Dassel

Dear Dancing in Dassel,

You know I love to dance! That's how I got to be friends with so many members of ALAMN. We would go to ALA conferences, and we danced. All the other ALA members commented on how cool it was that Minnesota was always the first on the dance floor. We should dance while we're in Minnesota! Oh right. Back to your question

... I don't have a go-to dance move, but I will say that one of my favorite dances is the Polka. A little secret ... Dick Nigon is the BEST Polka dancer!



Author Bio:

Laura J. Broomell, CLM, is the COO at Greene Espel PLLP. She served as the 2016-17 ALA President, and has contributed to numerous ALAMN committees during her 20+ years as an ALA member.

Rich with experience in the legal industry and in ALA, Laura has become the ALAMN de facto go-to person for advice of all kinds. Leading by example, she strives to educate all legal professionals to be diplomatic problem-solvers.

How can Laura help you? Please send your "Dear Laura" questions to *The Verdict* editor, Gretchen Luessenheide, at gluessenheide@robinskaplan.com



Office Essentials | Interiors | Technology
Breakroom & Coffee Services
Cleaning & Facility Supplies
Printing & Promotional Items



ALAMN Silver Sponsor

WE BELIEVE IN
Yin YOUR
SUCCESS

Janet Tschida | 651.486.1291 | jtschida@innovativeos.com

COMMUNITY SERVICE MEETING MINUTES

September 20, 2017 | 11:30-1:00

Zimmerman Reed – 1100 IDS Center, 80 South 8th Street

Attendees: Sarah Didrikson, Darlene Downs, Laurie Greenberg, Sheila Johnson, Tracy Smith, Pat Stender, Wendy Cornelius, Norma Thayer and new member Anastasia Walhovd

1. Current committee members
2. Recap of prior events:
 - » September 13th Dress for Success/Interviews
3. Recap of upcoming events:
 - » October 23rd Ronald McDonald Meatloaf and Baked Potato Meal: **Coordinators: Pat Stender and Sheila Johnson**
 - » TBD (Tentatively early December) Blessing Bags for Avenues for Homeless Youth **Coordinator: Norma Thayer**
 - » January 18th Happy Hour Squared joint event with Legal Marketing Association **Coordinators: Darlene Downs and Norma Thayer**
4. 2018 events:
 - » January - Happy Hour Squared
 - » February – Simpson Meal
 - » March – Platinum Sponsor Request at Annual Conference
 - » April – People Serving People
 - » May – Cookie Cart
 - » June – Simpson BBQ
 - » September - TBD
 - » October – Baby Blankets
 - » December - TBD
5. Need to send postcard mailing to Business Partners and Members with 2018 events
6. Attached is an updated committee roster
7. Budget report
8. Proposed 2018 meeting dates
9. Next meeting is November 15, 2017 at Zimmerman Reed (1100 IDS Center)

EXPECT MORE FROM YOUR FINANCIAL ADVISOR.

It's important to partner with someone who understands the challenges you face and is prepared to help you develop a strategy to keep you on track. Whether you're just starting out or getting ready to retire, Associated Bank provides a full line of personal and business financial solutions to meet your needs.

RETHINK YOUR CURRENT RELATIONSHIP.

CONTACT SCOTT FOR A COMPLIMENTARY FINANCIAL REVIEW.



Scott Ellingson | Private Banking
Professional Services Team - Law Firms
St. Louis Park | 952-591-2778



Associated Bank, N.A. is a Member FDIC and Associated Banc-Corp. (1/16) 8269

AssociatedBank.com   



Emergent Networks

Strategy

Solutions

Support

Taking tech to your
happy place? We
totally **support** that.

Emergent Networks serves our clients as a **trusted technology advisor** by offering complete IT Strategy, Solutions and Support. We seek to understand our clients' needs, environments and industries in order to **create the right business solutions** every time.

The Emergent Networks team strives to **make IT easy and transparent** so that our customers can focus on their business.

emergentnetworks.com / 612.213.2600



connections made simple.

GOT CLM?

What is certification?

Certification is defined as a credentialing process by which a profession grants recognition to an individual who meets certain predetermined qualifications specified by that profession.

Why certification?

ALA's voluntary Certified Legal Manager (CLM) program was developed in order to provide legal administrators with an opportunity to demonstrate a command of the core areas of knowledge identified as essential to the effective performance of a principal administrator. CLMs are recognized as administrators who have met the work experience requirement, displayed a commitment to continuing education, and passed a comprehensive examination.

What does competency mean?

In 2012, ALA conducted its fourth Competency-Based Education Job and Needs Analysis. Through this extensive research, ALA investigated the job of a legal administrator and identified an impressive 65 competencies (knowledge, skills, and abilities) critical to successfully perform the administrator's job. These analyses are the guidelines used in the development of ALA's educational and certification programs.

How does becoming certified benefit me?

Certification ensures recognition of your expertise, and assists you in your development and self-improvement by identifying a body of knowledge and establishing professional standards. In addition, certification helps junior-level professionals gain top-level management approval, while enabling senior practitioners to remain current in the field and improve their performance and proficiency.

How does this benefit my employer/organization?

Certification serves as an aid for recruitment, provides a way to encourage and improve job performance for its employees, and acknowledges training and development of those who are certified.

What must I do to become certified?

To become certified, ALA members or nonmembers must meet the eligibility requirements and pass the certification examination given by the Association of Legal Administrators. Legal administrators in Canada and other countries are eligible to become certified, but must realize that major portions of the examination are based on U.S. federal law.

Continued on p.19

GOT CLM? CONTINUED

continued from page 18

Interested in taking the next steps? ALAMN's CLM Study Group is here to assist you!

A preview of discussion topics studied are as follows:

- Legal Industry – Conflict of Interest Issues/Law and Regulations re Business Insurance Coverage/Professional Liability Insurance/Trust Account Procedures and Regulations/ABA Model Rules of Professional Responsibility/Changes & Trends in the Legal Industry
- Financial Management – General Tax Regulations/General Accounting/Analysis

- Human Resources Management – Employee Selection & Promotion/Performance Management/Compensation & Benefits/Organization Development
- Office Operations – Technology & Automation Management/Office and Project Management/File Management/Strategic, Disaster, and Business Planning

For further information regarding ALAMN's CLM Study Group, please contact Tracy Johnson at tjohnson@ecklandblando.com

CLM Sample Exam Question

If a firm terminates its 10-year lease in the middle of the seventh year, what would be the effect on the firm's year-end financial statement if the firm had made a \$500,000 outlay for tenant leasehold improvements?

- A. The firm's current assets would be reduced.
- B. The firm's depreciation/amortization for the year would increase.
- C. The firm's total operating expense for the year would decrease.
- D. Although the firm's income statement would be affected, the year-end balance sheet would not change as a result of this transaction.

Answer on page 20

GET TO KNOW YOUR BOARD

Answer from p.12

4	8	1	7	3	9	2	6	5
6	5	7	8	1	2	9	3	4
2	3	9	4	5	6	7	8	1
7	4	3	1	6	8	5	2	9
8	1	2	5	9	4	3	7	6
9	6	5	2	7	3	1	4	8
1	2	6	3	4	5	8	9	7
3	7	4	9	8	1	6	5	2
5	9	8	6	2	7	4	1	3

Answer from p.19

Answer: B

Growing your business is easier when you have a dedicated team

At Wells Fargo, we take time to get to know businesses

By getting to know you and your business, our experienced business bankers can offer financing options tailored to meet your financial needs.

Visit us at a location near you or talk to a banker at 1-800-35-WELLS (1-800-359-3557).

wellsfargo.com



All credit decisions subject to credit approval.
© 2014 Wells Fargo Bank, N.A. All rights reserved.
Member FDIC. (1170161_11041)



Welcome to a financial partnership that's all about you.

When you work with Alerus, you'll partner with one trusted relationship manager, an experienced professional who understands the unique financial needs and challenges of law firms.

Together, we'll go where you lead.

ALERUS.COM :: 612.436.3519

BANKING :: MORTGAGE :: RETIREMENT :: WEALTH MANAGEMENT

ALERUS



What was your favorite Halloween costume?

Sarah Evenson, President

My most favorite childhood costume was dressing up as a WWE (back then WWF) wrestler.

Sarah Didrikson, Past President and Education Director

I made a dice one year out of a cardboard box.

Abby Rooney, President-Elect

I dressed up as Cyndi Lauper from the "Girls Just Wanna Have Fun" video for my costume in 5th grade. Had my hair dyed red and everything.

Kelly Thaemert, Administrative Director

The first thing that comes to mind is the time I dressed up as a gorilla. I worked at Fox 9 at the time and someone else dressed up as a banana. This was not planned. When the producers found out there was a gorilla and banana in the building, they made me chase the banana on live TV. I couldn't see very well so I looked like I was in slow motion while the banana looked like he was quickly getting away. Of course the producers played the Benny Hill theme song while I chased the banana.

Laurie Greenberg, Communications Director

My favorite Halloween costume was Cinderella when I was 6 or 7 years old, because what girl doesn't love a tiara?

Jessica Gerhardson, Membership Director

My favorite was a Princess Jasmine costume I wore when I was about 5. My grandmother handmade it herself, and it was just beautiful. I remember being SO bummed that Florida had an extremely rare cold Halloween day and my parents made me wear a sweater over it to trick or treat.

ADVERTISERS IN THIS ISSUE

Page Advertiser

20	Alerus Financial
16	Associated Private Client Services
17	Emergent Networks, LLC
12	Fluid Interiors
15	Innovative Office Solutions
12	Loffler Companies Inc.
22	Marco Technologies, LLC
22	Marsh & McLennan Agency LLC
18	Ricoh USA, Inc.
20	Wells Fargo Bank N.A.



GOLD
ALAMN
A National Association of Legal Administrators
2017 Business Partner

Marco puts the power of top-notch technology expertise to work for the legal industry. We'll help you choose the right technology and keep it running smoothly day in and day out. Our performance-driven approach **empowers you to make the most of your technology investment.** That's working smarter.



Erin O'Kane
Technology Advisor
IT Solutions



Ryan Zimmer
Technology Advisor
Copy & Print Solutions



Jason Biechler
Technology Advisor
Copy & Print Solutions



taking technology further

marconet.com



MARSH & MCLENNAN
AGENCY
marshmma.com

REDEFINING WHAT INSURANCE AGENCIES SHOULD BE.



At MMA, providing insurance and employee benefits is just the beginning.

We **identify, prevent** and **manage** your risk so you can focus on running your firm.

Pat Whannell 1 763 746 8287 pat.whannell@marshmma.com	Ryan Wahlund, J.D. 1 763 746 8558 ryan.wahlund@marshmma.com	Seth Spreadbury 1 763 746 8553 seth.spreadbury@marshmma.com
---	---	--

WORLD CLASS. LOCAL TOUCH.

SILVER
ALAMN

CISCO
AUTHORIZED DEALER