



January 12th, 2010 Meeting

By [Peggy Gruenke](#)

Wellness Training Program

By **Matt Champa** *Benefits Consultant* **USI Insurance**

Start the new year off with a wellness program. Join us for a discussion on how you can start a program in your office. To be discussed:

- I. Why worksite wellness – Impact on your Firm’s cost
- II. Getting started:
- III. Baseline Data: Surveys, Health Risk Assessments, Screenings
- IV. Levels of Engagement
- V. Incentives
- VI. Compliance/HIPAA
- VII. Return of investment
- VIII. Evaluation/ Maintaining wellness program offerings
- IX. Resources
 - a. Carrier
 - b. Disease specific
 - c. Program: fitness, stress, weight loss, nutrition, smoking
- X. Question and answer session

Our January 12, 2010 meeting will be at the Netherland Plaza in the Mayflower 3 Room on the lower level at 12:00 p.m. Please RSVP to Lisa Kunz by **1/6/2010** at lkunz@bakerlaw.com with your choice of entree. The cost is \$20.

Menu Selection

Salad

Romaine and Iceberg Lettuces with Grape Tomatoes, English Cucumbers and Grated Carrots with Choice of Dressing

Entrée (Select One)

Tri -Color Cheese Tortellini with Grilled Chicken, Sundried Tomatoes and Broccoli

Sliced Flank Steak with Roasted Shallot Au Jus with Oven Roasted Potatoes and Chef's Choice of Vegetables

Dessert

Chocolate Cake

Thank you to our December Social Event Sponsor!



Thank you to our January meeting Sponsors!



ALA – Greater Cincinnati Chapter**Meeting Minutes****October 13, 2009****By Tom Freeman**

- The October meeting was held at Cincinnati Netherland Hilton.
- Kim Nickolas, Chapter President, welcomed everyone to the meeting and asked for a motion to approve the minutes from the September 8th meeting. Motion was made, seconded and the minutes were approved.
- Erin Miller provided an update on "ALA Challenge – Coats for Kids" and asked everyone to have their coats dropped off to the Katz Teller office.
- Janet Sullivan reported that the 2009 ALA Greater Cincinnati Chapter Educational Seminar will be held Thursday November 5, 2009 at the Cincinnati Netherland Plaza Hilton. There will be 2 seminars: *Bottom Line Marketing* lead by Timothy Corcoran and *Financial Management* lead by Alan Olson both of Altman Weil, Inc. The day will include a vendor fair with approximately 12 vendors participating. Registration is being handled through Lori Moser at KMK. The seminar has been approved for 4 CLE's in Ohio and pending for 4 CLE's in Kentucky.
- Janet reported on her attendance at the Region 3 ALA Council Meeting noting it was a success with strong attendance. A few takeaways from the meeting include: new ALA logo must be implemented no later than November 1st; a wide variety of online courses are available on the ALA web-site that members may wish to take advantage of; new member orientations have been successful in growing and involving new members in chapters.
- Kim thanked the membership for submissions for the new ALA Greater Cincinnati Chapter pin. There were quite a few good submissions with the winner being the Suspension Bridge by Lori Moser. New pins were passed out to all attendees. Kim congratulated Lori and awarded a free registration for the November Chapter Conference.
- Peggy introduced Peter Mueller of Harper Engraving who provided an overview of their company's services. Peggy thanked Peter and Harper for producing our new chapter stationary.
- Peggy introduced Scott Simpson of Precision Staffing who provided a thoughtful presentation on "How to Effectively Staff your Law Firm" which included small group discussion and insight sharing.
- Peggy closed the meeting and thanked everyone for attending. The next meeting is the November 5th Educational Seminar.

**ALA Greater Cincinnati Chapter
Board Meeting Minutes
November 4, 2009**

Attendees:

Kim Nickolas	Baker & Hostetler
Janet Sullivan	Statman Harris
Jeff Middendorf	Katz, Teller, Brant & Hild
Judy Groene	Katz, Teller, Brant & Hild
Erin Miller	Katz, Teller, Brant & Hild
Peggy Gruenke	Finney, Stagnaro, Saba & Patterson
Tom Freeman	Peck Shaffer & Williams
Lori Moser	Keating Muething & Klekamp
Mary Lynn Wagner	Keating Muething & Klekamp
Julie Pile	Drew Law Firm

1. Kim thanked everyone for participating and started with a report from Janet regarding tomorrow's seminar. Janet shared that 33 registrations have been received for the educational seminar tomorrow at the Hilton downtown; on-site registration will be available. Registration starts at 8:30 am and the program begins at 9:00 am.
2. Kim recognized Judy and Erin on the successful "ALA Greater Cincinnati Chapter Coats for Kids" community challenge. 84 coats were collected and the Chapter will be recognized by Warm 98 for this successful effort.
3. The Chapter's next roundtable is scheduled for November 18, 2009 and tentatively includes discussion on: opportunities to improve the chapters salary survey and participation; H1N1 preparedness; discussion of CLM. This event will be hosted by KMK, begins at 8:00 am and is expected to last approximately one hour. Peggy will send an email announcement to members. We will have a vendor representative joining us.
4. Kim provided an update on the year-end social event scheduled for Tuesday, December 8th at Havana Martini Club downtown from 4:00-6:30 pm. All members are encouraged to attend.
5. Kim shared that the Chapter website logo has been changed and the vendor links are now working. There are quite a few more ALA links that we would like to put on the website to make it more useful for the members. The board brainstormed website enhancement options and will evaluate in the future. Kim will discuss these ideas with Jim Crosset.
6. Kim shared that the Chapter web-site links are now working. The board brainstormed web-site enhancement options and will evaluate in the future.
7. Mary Lynn provided an update on articles for the CBA. ALA Cincinnati Chapter has agreed to provide 6 articles for the year. Anyone interested in writing an article contact Mary Lynn who can share various topics.
8. Julie reported on progress implementing Quickbooks. Also, the board agreed to change banks from Fifth Third to PNC.
9. Kim lead a discussion on how best the Chapter can facilitate communication between members on a timely, unobtrusive basis. Various methods including blogs, listserves, and LinkedIn were discussed. This topic will be evaluated further.
10. Kim passed out copies of the Greater Cincinnati Chapter By-Laws as well as the updated 2009 Presidents' Award of Excellence Guidelines which was reviewed. The Chapter has made considerable progress and Kim expressed thanks to all.

2009 Local Educational Session Photos

Photos By: [Roxanne Benjamin](#)



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Certified Legal Manager (CLM)

Members are encouraged to become Certified Legal Managers or CLMs. For more information on becoming a CLM please visit <http://www.alanet.org/education/cert.aspx>.

Benefits of the Certified Legal Manager (CLM)SM Certification Program

Certification identifies qualified practitioners, ensures recognition of their expertise, and assists in their 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.

Objectives of the Certified Legal Manager (CLM)SM Program:

- to raise the standards of the profession;
- to encourage self-assessment by offering guidelines for achievement;
- to identify persons with acceptable knowledge of the principles and practices of legal management;
- to award recognition to those who have demonstrated a high level of competence and ethical fitness in the profession; and
- to improve performance in the profession by encouraging participation in a continuing education program of professional development.

Benefits of certification to the individual:

- increased self-esteem;
- increased respect and recognition in the industry;
- increased opportunity for upward mobility, and better ability to compete in the job market;
- increased remuneration and job benefits; and
- increased professional credibility.

Benefits of certification to the association:

- reflects favorably on the Association's sincerity to promote professionalism;
- encourages orderly and efficient collection and consolidation of the body of knowledge;
- increases member interest in continuing education; and
- provides a vehicle to reward members who have developed a high level of professionalism.

Benefits of certification to the employer:

- serves as an aid for recruitment;
- provides a way to encourage and improve job performance; and
- acknowledges training and development of the individual.

In addition, firms with a Certified Legal Manager may be eligible for professional liability insurance discounts.



Member Objectives

1. A member will abide by the Association's Code of Professional Ethics.
2. A member will take an active part in ALA through participation in chapter, regional, and/or international activities.
3. Through continuing education and other activities, a member should enhance his/her skills as a professional manager and as a responsible leader within the employer organization. Members are encouraged to communicate to the appropriate leaders topics or issues which will benefit them and enhance their ability to perform their job responsibilities.
4. A member should share his/her knowledge and expertise with other ALA members through volunteer efforts and activities.
5. A member should support the Governance Policies which outline the roles between and among ALA, its regions, its chapters, and its members.
6. When acting for or on behalf of a chapter, region or the Association, a member should do so in a responsible manner by utilizing appropriate due diligence and/or following appropriate and necessary bylaws, rules, standards and guidelines of the Association.
7. A member should make every effort to advance the profession of legal management and to help the Association of Legal Administrators increase its stature within the legal community.

ALA Resources

Were you aware of these valuable resources that are available to us? Check them out:

ALA Management Solutions (SM) –

<http://www.alanet.org/memberaccess/login.aspx?ReturnUrl=%2fmembers%2fsolution%2fdefault.aspx>

ALA Management Encyclopedia (SM) -

http://thesource.alanet.org/portal/server.pt/gateway/PTARGS_0_2_103824_0_0_18/Welcome_to_the_ALA_Management_Encyclopedia.htm

The Legal Management Resource Center (LMRC) - <http://thesource.alanet.org/portal/server.pt>

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Calling all our Business Partners (aka Vendors)

The Greater Cincinnati Chapter of ALA would like to invite our Business Partners to subscribe to the e-newsletter entitled *ALA Means Business*. To subscribe, please visit <http://www.alanet.org/resourceforvendors/vendornewsletter.asp>.



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Chapter Performance Objectives

1. The chapter provides, on a regular basis, quality educational opportunities (beyond routine networking and/or social events) for its members and individuals of the legal management team. On a regular basis, the chapter will provide a Chapter Education Summary of all its educational programs and presenters to the Regional Education Officer.
2. The chapter creates an awareness among its members of the Association's mission statement, goals and Code of Ethics, and highlights the activities of all levels of the organization. This awareness can be developed through written communication (e.g., newsletter, minutes, etc.) which are provided to members on a regular basis and during chapter meetings or events.
3. The chapter strives to enhance the visibility and credibility of the profession and the Association through activities such as community service projects and alliances with bar associations and other law-related professional associations.
4. The chapter creates a workable structure to maximize its efficiency which focuses on member involvement and capitalizes on the interests, enthusiasm and expertise of its members.
5. The chapter maintains a continuous recruitment effort to attract a diversity of new members to the Association.
6. The chapter's president and/or president-elect participate(s) in at least one ALA leadership training session each year. To facilitate effective leadership training opportunities, all chapters will install officers in April of each year.
7. The chapter has a regional council representative who attends council meetings and provides reports of each meeting to the members of the chapter.
8. The chapter obtains tax exempt status and files annual tax returns, where appropriate and as indicated by pertinent regulatory bodies. The chapter also maintains procedures for ensuring that annual filings and renewals are made with appropriate agencies. In addition to any insurance coverage the chapter may secure, the chapter takes appropriate action (such as by incorporation) to ensure the personal assets of its members are protected.
9. The chapter's treasury is not commingled with employer or personal funds and the chapter maintains appropriate internal controls to ensure financial security. The chapter maintains procedures for regular, periodic review of books, accounts and records by chapter officers (other than the treasurer or other officer with primary financial responsibilities) and/or by outside, independent auditors.
10. The chapter adheres to and abides by its own bylaws. In addition, the chapter seeks and obtains Headquarters' approval of proposed amendments to chapter bylaws prior to a vote by members to make them effective.
11. All compensation/economic survey questionnaires are reviewed and approved by Headquarters prior to dissemination. The chapter is responsible for creating and maintaining awareness of antitrust issues, including those published in ALA's Antitrust Guide.
12. The chapter uses the ALA logo and other Association symbols pursuant to guidelines provided by Headquarters.
13. Immediately following the chapter's election of officers, the chapter president (or designee) provides ALA Headquarters with a list of the individuals who will assume chapter office as of April. Within 45 days of taking office, the chapter president updates and returns the chapter's *Chapter Profile* to ALA Headquarters. Semiannually, chapters will review and return chapter member verification reports to ALA Headquarters.
14. The chapter will, at all times, ensure that all members of the chapter are members of ALA. On an annual basis, the chapter president will submit a timely statement certifying compliance with this bylaw provision.

Link - http://www.alanet.org/members/chapters/performance_chapters.aspx



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With seasoned speakers and a host of timely programs, ALA's vigorous Webinar program is guaranteed not to disappoint in 2010!

[Learn more](#) about each of these informative programs and register online!

- **March 17, 2010**
Law Firm Innovation: Will You Lead or Follow?
Speakers: Gary and Catherine Mitchell of GEM Communications
- **April 21, 2010**
Administrator's Role as Coach in a Multi-Generational Workplace
Speakers: Judy Hissong and Camille Grabowski
- **May 19, 2010**
The Social Networking Revolution
Speaker: Ross Fishman
- **June 16, 2010**
The Keys to Develop and Implement the Firm's Dreaded Strategic Plan
Speaker: John Remsen
- **July 21, 2010**
Legal Risks to Assessing Candidates by Social Network Sites
Speaker: Shelly Freeman, J.D., HROI
- **August 18, 2010**
Law Firm Profitability Enhancement
Speaker: Richard Turnbow
- **September 15, 2010**
Electronic Records Management: How to Manage your ESI in the 21st Century
Speaker: Dana Moore

Priced at \$169 for a site license (\$225 for Law Firm Profitability Enhancement), open up your conference room or office and invite an unlimited number of people to share the program.

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Chapter website: www.alacincinnati.org

Chapter Event Dates

Meetings are normally held on the 2nd Tuesday of each month

Dates of Future Events:

Tuesday, January 12, 2010 @ 12:00 – Wellness Training Program Luncheon – Netherland Plaza Hotel

Tuesday, February 9, 2010 @ 12: 00 – To be announced Luncheon – Netherland Plaza Hotel

Tuesday, March 9, 2010 @ 12:00 – To be announced Luncheon – Netherland Plaza Hotel

2009–2010 Board of Directors and Committee Chairs

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