



THE COGNIZANT

REGION 4

APRIL 2010

GREETINGS Region 4 Members!! I am honored to be serving you this year as your new Region Director. Thank you for your support and confidence to lead Region 4 this year. I am excited to be in this position, and hope I will be able to live up to my *own* expectations!

There are some wonderful and exciting new things taking place within NALS this year. I thought I would touch on a couple. First, NALS Online Learning Center is going “behind the wall.” You may have discovered this if you have recently attended an education session. Accessing the OLC is easy! On the NALS home page, simply click “member log in” on the left hand side of the page. Log in following the directions, and then simply click the link to the Online Learning Center. You must do this to attend any Online Learning Center Session or meeting held in the OLC. While you’re logged in, take a minute or two and check your contact information. Update it if necessary. Additionally, WebEd sessions are available for purchase through the NALS store. These sessions are a great way to get CLE to your members if you would like to change things up a little in your chapter or state.

Second, Think Big! is back with some tweaks. This year, there will be no \$1,000 grant from the NALS Foundation for each region. The region with the highest percent retention will get Your Think Big team members this year are: Babs DeKeyser, PP, PLS (AL), Deborah Waters (FL), Marie Ringholz, PP, PLS (GA), Stacy Burke, PP, PLS (SC), and Tiffany Buford (TN). Additionally we want the input and involvement of SMCs/LMCs, new members, seasoned member – WE WANT YOU!! While membership across the country is down, now is the time to stay with NALS. Stay on top of current legal trends, education, and stay current with your certifications. Take advantage of *all* your membership benefits and share that advantage with your employer! Share your education, your knowledge, and your passion for NALS.

Have you registered for the Region 4 Conference in Asheville, North Carolina? The early bird deadline is May 15, 2010. Patricia Infanti, PP, PLS, 2010-2011 NALS President, will speak on Sunday about “All Things NALS.” If you haven’t had the opportunity to hear Patti speak, I urge you to attend the conference this year. You won’t be disappointed. Registration forms are available in this newsletter.

I recently had the wonderful pleasure of attending the LSPSC Annual Meeting in Greenville, South Carolina. Wow! What a warm and friendly welcome I received. When I went, I knew only a handful of members. When I left, I absolutely felt like I had known everyone for years! I would like to thank all the members of LSPSC for inviting me. I had an amazing time and enjoyed being part of your group! I hope to see many of you in Asheville in July.

Again, thank you for having the confidence in me to lead Region 4 this year. It is truly an honor to be Region Director and a member of the NALS Board, and I look forward to serving you this year.

Lisa



NALS Professional Development and Education Conference

March 11–13, 2010

Submitted by:
Helene L. Wood, PP, PLS, TSC
NALS Secretary/Treasurer

Tulsa welcomed conference visitors to the 2010 NALS Professional Development and Education Conference where we continued our journey to Think Big with Patricia E. Infanti, PP, PLS.

Tulsa weather was a little nippy, but a welcome relief from tons of snow in other parts of NALSland. Members and visitors arrived ready to network, share, and learn and were energetic and enthusiastic. Everyone was ready for their infusion of NALS after the winter.

Preconference Activities

For the first time in many years, certification exams were held prior to the official beginning of the conference, with a cram course offered on Wednesday prior to the exams being administered on Thursday.

The conference officially began on Thursday afternoon with orientation for the 2010-2011 NALS leadership team, consisting of board members, committee chairs, committee members, task force members, and staff led by Julie Abernathy, PP, PLS. Julie shared with us the values, purpose, vision, and mission of NALS to help us understand our duties and responsibilities as members of the leadership team and the important role we play in maintaining and growing the NALS programs to ensure the future of our association.

The Hum-Vee limo made its return this year, ferrying members to Top Dollar (where the Foundation jewelry is purchased). There was a lot of sparkle and shimmer on display the rest of the weekend as everyone showed off their latest finds.

Opening Announcements

NALS President Julie Abernathy opened the conference by welcoming everyone to Tulsa for a weekend of continuing to Think Big by having opportunities for learning, networking, renewing acquaintances, and forging new friendships. She then introduced Faynell Poe, PP, PLS, the NALS Foundation Chair, who introduced the keynote speaker, Pamela Hemann, CAE.

Keynote Speaker

Pam Hemann is president of Association Management Services, Inc. (AMS), a management company founded in 1988, which serves regional, national, and international organizations, and is accredited by the American Society of Association Executives (ASAE).

Prior to founding AMS, Ms. Hemann held senior positions with nonprofit organizations in Washington, D.C., including the American Association of Colleges for Teacher Education, the International Newspaper Guild, the Color Pigments Manufacturers Association, and the National Automobile Dealers Association.

She earned her CAE designation in 1989 and was inducted into the ASAE Fellows in 1996. She is a past chairman of ASAE and was a member of the ASAE's "7 Measures of Success" task force. She chaired the ASAE strategic planning committee for two years during her service on the ASAE board of directors and executive committee.

During her keynote presentation, Pam lead us down the "Pathway to Leadership." She talked to us about the importance of engaging our members and discussed the latest trends in leaderships, what we should look for in the future, and issues we should be considering. She enumerated the steps to success and advised us to know our association and our resources. Pam enlightened us about the important conversations we should be having and how important it is that we Think Big. Pam told us that the best things in our association are free—our mission and brand.

President Julie closed the opening session by encouraging us to visit the exhibitors and the NALS Store and be prepared to Think Big and have lots of fun this year. She reminded us that by recruiting five members, we would have our national dues waived for the year and to pay that forward by telling our recruits that they too can get their next year's dues waived if they recruit five members within their first year of membership.

Regional Meetings

Regional meetings were held Friday morning before the Networking Luncheon giving each Region a chance to plan for the coming year with the continuation of the two-year Think Big membership campaign.

Networking Luncheon

At the Networking Luncheon on Friday (March 12), NALS 2009-2010 President Julie A. Abernathy, PP, PLS, ask the members of the select group of those attending their very first NALS professional development conference to stand and be recognized. The next group introduced by President Julie was the NALS Past Presidents. We were honored to have eight NALS Past Presidents attending:

Anita Cottrell, PP, PLS
Donna Dendy, PP, PLS, CLA, TSC
Marie Ringholz, PP, PLS
Jill Hall, PP, PLS, CLA
September Holmblad, PP, PLS
Mary Burns, PP, PLS
Cathy Hankins, PP, PLS
Dee Beardsley, PP, PLS

President Julie then introduced the Resource Center staff:

Sandra Bates, Membership Services Manager
Jennifer King, NALS Meetings and Marketing Assistance
Jay Moore, Communications Manager
Diana Price, Education and Certificate Manager
Shirley Tune, Membership Services Assistant
Tammy Hailey, CAE, Executive Director

Tours were scheduled to begin at 6 p.m. for anyone wishing to catch the shuttle to visit the NALS Resource Center which houses the NALS staff.

President Julie recognized the 2009-2010 Board of Directors and the NALS Leadership Team, which consists of volunteers serving as committee chairs, cochairs, and subcommittee chairs, committee and task force members, and Online Learning Center presenters.

Next President Julie recognized and gave special thanks to the 32 members of the NALS Think Big Team. Each of the eight teams was composed of the regional director, one member from the Foundation, one member from the Membership Committee, and one member from the Marketing Committee. The teams met monthly online and shared many wonderful ideas. While no one region met the challenge made at the beginning of the campaign to grow a net 10 percent, many new members joined NALS and of those new members some will serve on the coming year's leadership team.

President Julie made the following announcements:

- NALS Education Conference and National Forum, October 21–24, 2010, Branson, Missouri, at Branson Chateau on the Lake Resort & Convention Center (call 1.888.333.5253 for reservations). The block rate for a double room is \$119. Registration and education session information is available on the NALS Web site. Tours can be coordinated with Jennifer King and will also be posted to the Web site.
- On Thursday (October 21), there will be a bonus leadership training session with David Horowitz (speaker). Also, there is an optional event on Thursday evening to the Dixie Stampede (a ticketed, off-site event) with transportation provided to those who get their tickets through NALS.
- On Friday morning Erick Burton, CSP [Certified Speaking Professional] (author of “The Leadership Accelerator”), will be the opening keynote speaker. He will also offer an additional ticketed Executive Coaching session.
- On Saturday David Horowitz, as the closing keynote speaker, will enlighten us on The Value of Showing Up.
- The 2011 NALS Education Conference and National Forum will be held October 13–16, 2011, at The Hyatt Regency Cincinnati, with a room rate of \$115.

Following President Julie's closing remarks, President-elect Patti Infanti, PP, PLS, came to the podium for a special announcement: To increase the ROI—return on investment—of our membership, a very important change will take place in the NALS Online Learning Center immediately following the conference. The OLC and the sessions held there will be available only to NALS members. The education offered in the OLC will be exclusively available to NALS members. Members will access the OLC by logging on to the NALS Web site through the “members log in here” link on the home page.

President-elect Patti asked what we thought about the new electronic magazine, *the NALS docket*. She assured us that the small *d* in “docket” was not a typographical error, but intentional. This new publication is going to be the voice of NALS for NALS members. While *@Law* is a great resource for information on the industry, *the NALS docket* is our resource for information on NALS and is the new monthly digital newsletter giving us valuable information from NALS in a less formal format. It will also include *e-Learn* and *Leading the Way*.

Next President-elect Patti promoted the Webinars saying that NALS had beefed up the Webinar offerings for the year ahead and the schedule appears on the NALS Web site. The session on March 25 will be held at 8 p.m. and the topic will be “Word—Avoiding Disaster,” which discusses document corruption and how to void it. The April 8 topic is the future of the legal secretary.

President-elect Patti asked if we were part of the many social media networks such as the NALS Community at Ning, Linked In, Facebook, and Twitter. She said if we were not, we were missing a wonderful opportunity to stay connected with our NALS friends, our family, and our colleagues throughout the year. She encouraged us to check out Jay Moore’s session following the luncheon.

We were reminded that the Think Big Campaign would be continuing with the recruit-five-members-and-get-your-national-dues-waived program. The five new memberships must be in the same category of membership as we are. We were additionally reminded to Pay It Forward by letting our recruits know that they, too, can get their national dues waived by recruiting five new members in their same membership category.

President-elect Patti announced that, while the NALS Life Membership category had been closed for a few years, the NALS Board had received a request from one of the state associations to reopen that category of national membership. In response to that request, the NALS Board has reopened the national Life Membership option at a cost of \$1,500, which is offered only through one single payment. Anyone wishing to take advantage of the option should communicate with Sandra Bates, NALS Membership Services Manager.

The next announcement President-elect Patti made was about the Think Tank, which is a group of people NALS has pulled together to find ways to improve NALS and keep us moving along for the next 80 years. This group is comprised of people from around the country, working in large firms, small firms, new members, seasoned members, educators, and attorneys. Patti asked us to participate in any surveys and to participate candidly because NALS also needs the members’ input. We also need to participate in focus groups and other information gathering activities, not to mention the “suggestions” button at the bottom left-hand corner of the NALS Web site. Members will be updated on the progress of the Think Tank. If we have comments or suggestions we want to share, NALS has set up a special e-mail address for this purpose: thinktank@nals.org.

President-elect Patti recognized the exhibitors at the conference: Avansic, Avery Dennison, Liberty Mutual, Sam’s Club, Glass Jewelry by Carol Jorgenson, Tammy Mullins (author of *Preston Falls Up*), and Brenda Moyes of Pretty Picture Purses. The sponsors and exhibitors give a lot to the association. Since they support NALS, we should show them our support as well.

NALS 2010–2011 President Patricia E. Infanti, PP, PLS, introduced and swore in the 2010-2011 NALS Foundation Trustees:

Faynell Poe, PP, PLS, Chair
Mary Burns, PP, PLS
Mary Jo Denman, PP, PLS
Cathy Hankins, PP, PLS
Mary Lenhart, PP, PLS
Meri Nelson, PP, PLS, TSC
Nikkie Rice, PLS
Julie Abernathy, PP, PLS, as Trustee and Board Liaison

And working with the trustees:

Foundation Deputy Executive Assistant Jennifer King
NALS Executor Director Tammy Hailey, CAE

Foundation Chair Faynell Poe said the Foundation is looking forward to another great year working hand in hand with NALS under Patti's leadership and then spoke briefly about how the Foundation "puts your dollars" to work. Since last March, the Foundation has presented \$21,600 in grants, as well as to various regions, chapters, and state associations. Along with all eight region, the Foundation funded Dr. Gavin Manes and Lisa Marie Platske, the keynote speakers in Irvine, and will also present two keynote speakers in Branson.

Faynell also said our contributions and participation make it possible for the NALS Foundation to continue to fund quality education programs for all levels of our association. Many of us participate in their fundraising efforts by donating sweepstakes and auction items and many more participate by buying tickets. In addition, many members have chosen to make a financial contribution at one of the Foundation's Investment Circle levels. Faynell recognized the following circle organizations:

<u>Bronze Circle</u>	<u>Silver Circle</u>	<u>Gold Circle</u>
NALS of Orange County	Texas ALP	Region 2 Region 4 Region 6

Faynell next recognized the individuals attending the conference who had joined the circles and acknowledged that these contributions to the Foundation had come from the heart.

Faynell announced that Dee Beardsley, PP, PLS; Cindy Lane Hughes, PP, PLS; Debbie Nickerson, PP, PLS; and Marie Ringholz, PP, PLS, would no longer be serving as Foundation Trustees. She said it had been a pleasure working with them, she had learned a great deal from them, and their dedication and commitment would be missed. She presented Dee and Marie with a certificate of appreciation and said she would mail Cindy's and Debbie's certificates since they were not attending the conference.

Next Faynell announced there would be no ATM grants at the conference and there would be no Think Big grants to the regions this year, but the Foundation would be offering twenty scholarships to the 2011 Professional Development Conference. Further details are available on the Foundation's page on the NALS Web site.

The luncheon concluded with the announcement there would be a wrap-up session on Saturday from 4:30 to 5:30 p.m. during which the Foundation will hold their drawings.

Installation and President's Reception

On Friday following the afternoon leadership and education sessions, NALS Past President Mary Burns, PP, PLS, installed the new board and administered the oath of office to the 2010–2011 NALS Board of Directors:

- President—Patricia E. Infanti, PP, PLS (PA)
- President-elect—Kathleen R. Amirante, PP, PLS (MI)
- Secretary/Treasurer—Helene L. Wood, PP, PLS, TSC (TX)
- Certification Director—Doris Compton, PP, PLS (AR)
- Education Director—Jeannie Shaw, PP, PLS (MS)
- Marketing Director—Karen McElroy, PP, PLS (AZ)
- Membership Director—Tina Boone, PLS (TN)
- Region 1 Director—Antoinette VanSchaick, PP, PLS (NY)
- Region 2 Director—Rita Ann Gilson, PP, PLS (PA)
- Region 3 Director—Barbara A. Stone, PP, PLS (MI)
- Region 4 Director—Lisa J. Mitchum, PLS (GA)

Region 5 Director—Renee L. Kleinjan, PLS (MN)
Region 6 Director—Tina Hurley, PP, PLS (TX)
Region 7 Director—Brynne Williamson, PP, PLS (WA)
Region 8 Director—Karen Becker, PP, PLS (CA)
NALS Foundation Chair—Faynell Poe, PP, PLS (TX)
Immediate Past President—Julie A. Abernathy, PP, PLS (TX)
NALS Executive Director—Tammy Hailey, CAE (OK)

Julie Abernathy, PP, PLS, presented the president's pin of office to the NALS 40th President, Patricia E. Infanti, PP, PLS, along with the traditional gavel. Patti reciprocated by presenting Julie with her past president's pin and gift before the past presidents welcomed Julie into their fold.

Patti spoke to the attendees of the sacrifices we make when we love something and compared that to love of NALS. She discussed the fact that change is constant and we must embrace change in all its diverse forms. Sometimes change can be painful as we let go of long-revered policies and procedures and embrace a new vision of our chapters and state associations. Patti reminded us that the greatest achievement we as leaders reach is when new or younger members accept the challenge to be leaders and succeed. Patti concluded by inviting all of NALS to Think Big and embrace a journey of possibilities!

The President's reception followed. Attendees enjoyed champagne toasts to President Patti and cake, along with the famous Philadelphia's treats of Tastykakes and Hershey Kisses (Keep It Simple, Sweetie), as we celebrated Patti's special day with her NALS family and friends. The President's reception was made possible through the generous donations of:

Ballard Spahr LLP
Legal Directories Publishing Company
NALS Region 2
NALS of Pennsylvania
Philadelphia LSA
NALS Local Chapters and Individual Members

Recognition Luncheon

The Recognition Luncheon is always one of the most anticipated events of the Tulsa conference as the successes of our leaders, chapters, states, regions, and members are announced. President Patricia E. Infanti, PP, PLS, began by recognizing the hard work and dedication of the Oklahoma members, who were instrumental in putting together the conference. Certificates of appreciation were presented by Doris Compton, PP, PLS, NALS 2009-2010 Education Director, to Oklahoma members Joanne Davis, PP, PLS; Cindy Squier, PP, PLS; Gay Sellers, PP, PLS; and Katherine Warren, PP, PLS.

As President Patti announced the 2009-2010 leadership team members in attendance, Immediate Past President Julie Abernathy, PP, PLS, presented leadership pins to them, which included the Board of Directors, committee chairs and members, task force members, NALS Foundation Trustees, and Online Learning Center facilitators and moderators. Over 145 individuals served on the 2009-2010 leadership team.

President Patti also recognized the individuals who had received a CLE Award during the past year:

Original

Theresa Estopare, PP, PLS
Anne Jack, PP, PLS

Renewal

Linda Adair, PLS
Rita Alesi, PP, PLS, CLA, TSC
Teresa Garber, PP, PLS
Bonita Hole, PP, PLS, RS, CNSA, CPCA, ACP
Patricia E. Infanti, PP, PLS
Janice Miller, PP, PLS, CPS
Carol Pyle

After recognizing the NALS Life Members in attendance, President Patti recognized the individuals in attendance who had achieved certification during the past year:

ALS

Elizabeth Moore, ALS
Gina L. Knight, ALS

PLS

Amy Doran, PLS
Barbara LeCaptain, PLS
Samantha Tandy, PLS

PLS—Recertification

Julie Abernathy, PP, PLS
Susan Acklin, PLS
Bridget Allen, PLS
Kathleen Amirante, PP, PLS
Kathleen Cusack, PLS
Theresa Estopare, PP, PLS
Jill Hale, PP, PLS, CLA
Catherine Hankins, PP, PLS
Sharon Johndrow, PLS
Mary Lenhart, PP, PLS
Misty Lewis, PP, PLS
Cynthia Pitts, PLS
Jeannie Shaw, PP, PLS
Debra Taylor, PP, PLS
Mary Vickers, PP, PLS
Loretta Ulmer, PLS

Professional Paralegal

Virginia Brownell, PP, PLS
Christine Clayton, PP, PLS
Teresa Garber, PP, PLS
Janet Gordon, PP, PLS
Micki Warnecker, PP, PLS

Professional Paralegal—Recertification

Rita Alesi, PP, PLS, CLA, TSC
Donice Alford, PP, PLS
Kathleen Amirante, PP, PLS
Nancy Anderstrom, PP, PLS
Karen Becker, PP, PLS
Talley Brathovd, PP, PLS
Delores Champ, PP, PLS
Marilyn Chenoweth, PP, PLS
Jamie Early, PP, PLS
Theresa Estopare, PP, PLS
Vickie French, PP, PLS
Rita Gilson, PP, PLS
Kelly Hickey, PP, PLS
Michelle Haughey, PP, PLS
Karen Kuhn, PP, PLS
Wendy Latham, PP, PLS
Karen McElroy, PP, PLS
Janice Miller, PP, PLS, CPS
Meri Nelson, PP, PLS, TSC
Gay Sellers, PP, PLS
Jeannie Shaw, PP, PLS
Barbara Stone, PP, PLS
Peggy Sullivan, PP, PLS
Debra Taylor, PP, PLS
Mary Vickers, PP, PLS

All certified members in attendance were asked to stand and be recognized. The members who administered certification exams were also recognized.

NALS Foundation Chair Faynell Poe, PP, PLS, thanked the state and chapter associations who submitted a program for a Jett Award. Assisted by Immediate Past President Julie Abernathy, PP, PLS, and President Patti, Faynell announced this year's Jett Award winners:

Cornerstone Awards

Houston ALP—Think Big Membership Development
NALS of Lansing—50th Anniversary Celebration
NALS of West Michigan—Ethics in the Workplace

Keystone Awards

NALS of Missouri—Mock Exam Development
Philadelphia LSA—Secretarial Boot Camp

Founder's Award

NALS of Greater Seattle—"Where's Eula Mae?"

President Patti congratulated NALS of Greater Seattle and reminded us that we could hear more about the "Where's Eula Mae?" program at the NALS Jett Award Founder's Award session this afternoon. She then thanked us for an enjoyable luncheon and sent us on to our next session.

Closing and Wrap Up

NALS Foundation Chair Faynell Poe thanked everyone for their support of the Foundation and announced that approximately \$6,000 had been raised over the conference.

Networking Dinner

The Networking Dinner held on Saturday evening was the perfect end to a wonderful conference. We changed from suits to jeans and tees, and enjoyed a good dinner with good company followed by music and dancing.

Leadership Sessions

Leadership training was jointly conducted for both state/chapter presidents/presidents-elect and state/chapter membership chairmen beginning Friday morning.

Presidents/Presidents-elect

- **Social Media: Join the Conversation.** Jay Moore, the NALS Communications Manager, presented this session. He discussed the differences in the way people today think and communicate than in the last generation. He explained the different social media and how to break through the clutter and make social media work for us. Jay concluded the session by explaining that all marketing is a conversation with current and potential customers, and social media gives us a unique way to open up the lines of conversation to make it a two-way process. He advised that we should be (1) authentic, (2) brave, and (3) consistent and have fun.

- Decision to Volunteer (Findings from the ASAE Research Study). Pam Hemann, CAE, presented this session. During her presentation, she discussed why we have volunteers, how we manage their experience, and ways to apply it to our organization. Pam shared the key findings of a study sponsored by ASAE and the Center for Association Leadership. The study found that not all volunteers are alike and that there are patterns to association volunteering. These patterns are categorized as Local Leaders (who focus on local chapter boards and committee services), Writers (who are the subject matter experts of an organization), Teachers (who are the mentors, coaches, and tutors), and Shapers (who engage in every activity and perform the majority of the volunteer work within an association). Pam also discussed why members begin volunteering, why members do not volunteer, and why volunteers leave. This was an interactive and energized presentation, and we exchanged ideas and challenges.
- NALS University. As the state and local presidents and presidents-elect entered the auditorium, each was given a red rubber Class of 2010 bracelet. Following orientation, the students attended the classes of their choices. Classes were 20 minutes in length with a 5-minute passing period. In all ten different classes were held, but students could attend only seven because of the time. The subjects (with professors) included:
 - Building Blocks—Your Governance Documents (Helene Wood, PP, PLS, TSC)
 - Positive Leaders Elevate Anyone to Succeed With Enthusiasm (“PLEASE”) (Leadership/Motivation/Overcoming Negativity) (Karen McElroy, PP, PLS)
 - Financial Planning—Demystified (Finance and Budgets) (Jeannie Shaw, PP, PLS)
 - Spiders Create Webs to Catch Flies—Create Your Web to Catch Members! (Marketing) (Barbara A. Stone, PP, PLS)
 - Don’t Be Afraid to Negotiate! (Negotiating Contracts) (Tammy Hailey, CAE)
 - Strategic Planning—Huh? What Happened to Long Range Planning? (Julie A. Abernathy, PP, PLS)
 - Made to Stick Fundraising (Deborah Waters, FPR)
 - Ask Not What Your Community Can Do For You (Community Service) (Cathy Hankins, PP, PLS)
 - Titles—What’s in a Name? Grab Them With Your Programs (Programs With a Punch) (Tina Hurley, PP, PLS)
 - Don’t Just Run With the Pack, Lead It (Leading Effective Meetings) (Lisa Mitchum, PLS)

At the conclusion of the University, each student in the 2010 graduating class received a diploma in recognition of their accomplishments from President-elect Kathie Amirante and Secretary/Treasurer Helene Wood.

- NALS University Graduate Session. NALS University was followed by the Graduate Session, which was a panel emceed by Helene Wood, who provided information on what the students could expect as local and state presidents and presidents-elect. The panelists were:

Tammy Hailey, CAE, NALS Executive Director
Diana Price, NALS Education and Certification Director
Lisa J. Mitchum, PLS, NALS Region 4 Director
Brynne Williamson, PP, PLS, NALS Region 7 Director
Karen McElroy, PP, PLS, NALS Marketing Director
Kathie Amirante, PP, PLS, NALS President-elect
Theresa Garber, PP, PLS, NALS of West Michigan

Tammy provided information regarding NALS. Diana requested the students' assistance in designating testing sites and exam administrators for the coming year. Lisa spoke on planning meetings and good communications. Brynne spoke about dealing with difficult people. Karen spoke on delegation and how to get members involved. Teri made a short presentation on a program developed by her chapter with their local business college.

At the conclusion of the Graduate Session, students were provided with the NALS University Presidents Tool Kit on cd.

Membership

- Decision to Volunteer (Findings from the ASAE Research Study). Pam Hemann, CAE, presented this session. *See Presidents/Presidents-elect for a description of the session.*
- Social Media: Join the Conversation. Jay Moore, the NALS Communications Manager, presented this session. *See Presidents/Presidents-elect for a description of the session.*
- NALS Membership Chair Sherri Kravitz, PP, PLS, and NALS Membership Director Tina Boone, PP, PLS, continued the membership sessions with a workshop on Saturday (March 13), which was divided into morning and afternoon sessions. The workshop was upbeat and gave everyone many ideas to take back to their state associations and chapters. Sherri and Tina tag-teamed, with Tina opening the morning session with everyone introducing themselves and answering the question about the one thing they wanted to know more about in NALS. An explanation was provided about the different positions on the NALS Membership Committee and the duties of the committee. Information was also provided on the second year of the Think Big membership campaign, the values of NALS, getting organized, the NALS social and professional community groups, and a nuts-and-bolts guide for SMCs and LMCs. During the afternoon session, Sherri guided the members attending the workshop through the Membership Tool Kit, engaged them in conversation and brainstorming, and continued the discussion about the second year of the Think Big membership campaign. She also encouraged them to use the Recruit Five theme to recruit and retain members throughout the year.

Professional Development and Education Sessions

The sessions offered this year covered a variety of professional development and education topics:

- Communication—It's More Than What You Say. Peggy Sullivan, PP, PLS, focused on the communication process, barriers to communication, and ways to improve our communication skills and make them more effective.
- Trial and Pretrial Conduct on Paper and in Practice: A Cut Above the Ordinary. John Tucker, a partner in Rhodes Hieronymus, conducted a panel discussion and presented video vignettes of pitfalls in proper trial and pretrial conduct.

- Go Green With Avery. Karl Schoen, a consumer education specialist with Avery Dennison, a NALS corporate sponsor, talked about exciting new and existing Avery products that help us reduce, reuse, and recycle in our workplace or home office.
- Cut + Paste = Copyright Infringement. Rachel Blue, a former trademark examining attorney with the U.S. Patent and Trademark Office, discussed the impact of copyright law on everyday actions.
- Professional Dress for the Office. Doris Compton, PP, PLS, spoke about the good, the bad, and the ugly and how to make the most positive and professional first impression.
- Christmas Packages, Birthday Presents and Hair Are All Good Places for Ribbons—But in Microsoft WORD . . . You Decide. Julie M. Yoder, a systems trainer for Crowe & Dunlevy, discussed the changes that come with Microsoft’s new 2007 interface and how to customize it, work with shortcut keys to find features faster, and use it to your advantage in increasing your productivity.
- Loss During Tough Economic Times. Barbara A. LeCaptain, PLS, discussed dealing with stress and loss during difficult times.
- Everything You Wanted to Know About Chapter 11 Reorganization But Were Afraid to Ask. William H. Hoch, a shareholder in Crowe & Dunlevy, presented a program designed to provide a quick primer on Chapter 11 reorganization for legal assistants so they can add value to client representation.
- Marketing Tips—Getting Your Name Out There. Joyce Bassett, PP, PLS, presented tips to more effectively promote chapter and state association names and events.
- Duties & Functions of U.S. Marshals Service. U.S. Marshal Chad Hunt discussed the various duties and functions performed by the U.S. Marshals Service, such as service of process, processing and handling of fugitives, and transporting prisoners.
- Employment Law Update. Patrick W. Cipolla, a managing attorney in human resources with ONEOK, Inc., gave an overview of how the changes to the ADA and FMLA have impacted the day-to-day practices of employers and the status and impact of the Employee Free Choice Act.
- E-Discovery & Digital Forensics and Electronically Stored Information: Focus on Data Processing and Metadata. Gavin Manes, Ph.D., a nationally recognized expert in digital forensics and currently the president of Avansic, a NALS corporate sponsor, discussed the processing stage of electronically stored information and detailed the advantages and disadvantages of the currently available tools in relation to the specific information being processed, as well as their relative cost.

And A Final Thank You

Special thanks to our corporate sponsors, exhibitors, and advertisers: Aflac; Avansic; Avery Dennison; Eley TV Legal Video; Esquire Solutions; Glass Jewelry by Carol Jorgenson; Legal Directories Publishing Company, Inc.; Liberty Mutual; Brenda Moyes of Pretty Picture Purses; Tammy Mullins (author of Preston Falls Up); NALS of Atlanta; NALS of Pennsylvania; Philadelphia Legal Secretaries Association; ReadyTalk; Sam’s Club; Texas Association of Legal Professionals; Thomson Reuters/West; and Helene L. Wood, PP, PLS, TSC.

Special recognition goes to the staff of the NALS Resource Center. Without their tireless efforts, our association would not function. Our fabulous Resource Center staff includes:

Tammy Hailey, CAE, Executive Director
Saundra Bates, Membership Services Manager

Diana Price, Education and Certification Manager
Jennifer King, NALS Meetings and Marketing Assistant
Jay Moore, Communications Manager

Words cannot express how thankful we are for each of them and their dedication to our association and its members.

Tulsa Photo Recap!





Don't miss out next year!
Start making your plans today for Tulsa 2011!

Think Big! For Members: *Are You Engaged?*

by Marie Ringholz, PP, PLS, Region 4 Thing Big Team

No matter your age, your experience, or your generation, NALS wants to be *your* network. I participated in a NALS webinar recently and came away from it with a renewed awareness of the enthusiasm, inspiration, and motivation NALS members share when they network. While so many things have changed since I joined NALS in 1978, one thing hasn't. The members in NALS want me to succeed in anything I decide to do. And it is not just me. They want every member to succeed in everything they decide to do. What has changed is the options we have to engage each other. No longer do we have to meet in person to network or mail a letter or publication (yes, I'm talking mail with a stamp). While those options are still available, we can also engage through a post on Ning or Facebook, a #NALS message on Twitter, through a seminar in the chat room or a webinar, through a blog, or YouTube, or email.

That means you can open the doors to the network you belong to at any time. You can limit your network to your local area, your state, your region, or go NALS-wide; the choice is yours. Need to know about a change in your local rules, get in touch with your chapter president or membership chairman or a name that you've seen. If you don't know who to contact, go to www.nals.org. You can click "membership" then "states and chapters" and find your way. You can contact your Regional Director. Or you can choose one of the links from the front page: NALS Community, Twitter, Facebook, or LinkedIn and ask. You'll get a response and someone will find the right connection for you.

Maybe you don't have any questions to ask. You can still engage your network. Share some good news. Share a story about someone who helped you or did a good deed. Share a quick tip you use every day. It can just take a minute ... but you may find it makes a difference for a lifetime. NALS network is like that. It will *maximize your potential*.

Just engage a couple times and see where you go!



Think Big!

Change your association. Change yourself!

Year 2

It's back! You heard about Think Big all last year, Region 4 didn't win, and Think Big is still here. Enough already! Sorry ... Think Big is here to stay. It's a philosophy in NALS (and actually buzz words – Google it) so let's take a quick look at what's involved.

Think Big – Change Yourself – Change Your Association

NALS' promises to *maximize your potential* and that promise is predicated upon change. There is just no way we will excel in the legal profession or our daily lives if we are unwilling to change. Actually it is pretty hard to be a member of NALS these days and not be exposed to something new. The information flow is increasing from so many different channels. @Law is full of information about the legal profession and new opportunities available to us as members. The “e-zine” NALS Docket is full of information about our association and includes links to all types of information about the profession. It incorporates Leading the Way and E-Learn, has articles from NALS staff, and follows legal information on Twitter and in Blogs. NALS E-News continues to pop into our inbox every couple of weeks. There are FREE (to members) webinars from the “new” Future Leaders committee and “Think Big” webinars (specifically on NALS leadership) sponsored by the NALS Foundation, great education webinars for \$35, and (still free) educations and certification study sessions in the Online Learning Center (you must log in as a NALS member first). However you want to get your information, NALS wants to be there for you. So take a look at what interests you. Challenge yourself to learn something new. Are you ready for certification? What about involvement in your chapter ... no matter how long you've been a member, there is something you haven't done or a new way to do something you've done before. OH – just think, you can change yourself and change your association in one-quick swoop! It is that easy ...

State and Local Membership Chairs...GET INVOLVED! We need your assistance to make this work. You are one of our strongest links to the membership!

Think Big – Change Yourself – Change Your Association!

P.S. Just so you know – NALS leaders are right in the middle of this Think Big challenge. NALS President Patti Infanti, PP, PLS, and President Elect Kathie Amirante, PP, PLS, did their first podcast interview for Paralegal Voices on Legal Talk Network. You can listen to their interview at <http://legaltalknetwork.com/podcasts/paralegal-voice/2010/04/how-professional-association-membership-will-advance-your-paralegal-career/>. It is really easy—if you have sound on your computer you can literally click, click and listen! This was a first for both of them and they did a great job.

~~ My special thanks to Marie Ringholz, PP, PLS, for contributing this article!



TO REGION 4

Alabama

Carmen L. Duckett, ALS
BLSA

James Reid
MALS

Florida

Shawndrea J. Campbell
Member at Large

Donna Spencer
Member at Large

Georgia

Cindee Epperson
Cobb County LSA

South Carolina

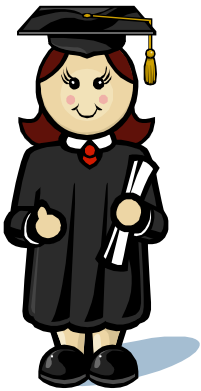
Suzanne Ponder
Legal Staff Professionals of the Lowcountry

Jacquee Williamson
Member at Large

Tennessee

Tonya Bowman
NALS of Nashville

Melissa Smith
Chattanooga Legal Professionals



CONGRATULATIONS!!

Newly Certified Members of Region 4!



Tina Hadley, ALS (AL)

Angel Lake, ALS (AL)

Cecile Lillie, ALS (FL)

Debra Rasmussen, ALS (AL)

Clara Taborda, ALS (FL)



Jessica Freeman, PLS (AL)

Cindy Maze, PLS (AL)



Amelia deBuys, PP (AL)



KNOWLEDGE IS POWER!

Get yours with NALS WebEd and the
Online Learning Center!



[April 29, 2010 - 8:00 p.m. Central](#) (FREE TO MEMBERS!)

[Leading without Authority](#)

Regardless of whether you are in a position of authority, you have the ability to lead yourself and others to greatness. Attend this session to learn what you can do to become a leader in life ... at home, at work, within your volunteer organizations or community." Dee Beardsley, PP, PLS, NALS Past President (2008-09), is presenting. *You have until Thursday, April 29, 2010 at 12:00 noon Central time to register on-line for this webinar (see instructions below).* Speaker: Dee Beardsley, PP, PLS

[May 13, 2010 - 8:00 p.m. Central - 1 hour CLE](#)

[Excel Tips and Tricks - How You Can Work More Efficiently in Excel](#)

Instructor: Nancy Wright (Perkins Coie)

Excel is a powerful application that continues to gain wider use in law firms. Excel's capacity to handle large amounts of data makes it great tool for managing document indexes, address lists or other lists. Excel can also perform a wide variety of calculations on dates, financial information or other data. But how do you get started if you are not a seasoned Excel user? In this session, we will cover how to quickly input and format data, including the AutoFill and Format Painter features, and other tips and tricks that will have you working more efficiently and exploring the power of Excel!

[May 20, 2010 - 8:00 p.m. Central](#) (FREE TO MEMBERS!)

[Think Big – Insights on the Knowledge Needed to Serve on the National Level](#) (Leadership Development) Sponsored by the NALS Foundation Learning Center

Instructor: Julie Abernathy, PP, PLS

[May 27, 2010 - 8:00 p.m. Central - 1 hour CLE](#)

[PowerPoint...Pronto!](#)

Instructor: [Melodi Pentico](#) (Haynes & Boone, LLP)

We have all been asked to produce quality work on impossibly short deadlines: PowerPoint presentations are no different. Even PowerPoint pros feel the pressure when asked to complete an engaging, informative, and professional presentation by the end of the day. In PowerPoint...Pronto we will discuss effective ways to create presentations *fast*. We will begin with fundamental concepts of design and continue into a demonstration of powerful PowerPoint tools; such as slide designs, color schemes, slide masters, and custom templates. I'll even share with you some of my favorite resources when you are just flat out of creative ideas.

[June 10, 2010 - 8:00 p.m. Central - 1 hour CLE](#)
[Copyright, Not Copy, Right?](#)

Mitigating Copyright Risks in the Business Enterprise

[June 17, 2010 - 8:00 p.m. Central](#) (FREE TO MEMBERS!)

[Setting Goals](#)

Instructor: Dee Beardsley, PP, PLS

Schedule for Online Learning Center and Online Study Group Sessions

May 5, 2010 - Future Leader Development

May 19, 2010 - Proofreading Techniques
by Kathy Sieckman

June 9, 2010 - Future Leader Development

June 23, 2010 - Location Tracking and GPS - Legal and Privacy Issues

June 24, 2010 - 8:00 p.m. Central - 1 hour CLE

[Word 7 \(topic may change\)](#)

Instructor: Mary Chesser, Director of Learning & Development (Shook, Hardy & Bacon)

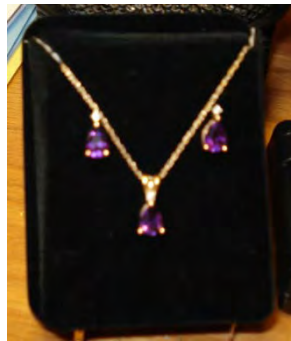
July 8, 2010 - 8:00 p.m. Central

[Communication \(topic may change\)](#)





Once again, the NALS Foundation has graciously donated a premium prize jewelry item to each Region to be used in conjunction with their Region Conference and the NALS Foundation Auction. Region 4 received an amethyst pendant and matching earrings. Tickets are \$5.00 each or 5 for \$20.00.



INSTRUCTIONS FOR NALS FOUNDATION TICKETS FOR REGION 4:

- ❖ You will find the tickets on the following page. Please **print on card stock** and cut along lines.
- ❖ Please make checks payable to **NALS FOUNDATION**.
- ❖ Tickets should be returned by **Tuesday, July 20, 2010**, to:

Lisa J. Mitchum, PLS
NALS Region 4 Director
c/o Smiley Bishop & Porter LLP
1050 Crown Pointe Parkway
Suite 1250
Atlanta, GA 30338

- ❖ If you would like to donate an item for the Foundation raffle, you can either send your item to me at the above address or e-mail a description of the item and bring it with you when you come to the conference.

 <p style="text-align: center;">NALS REGION 4 Premium Prize Drawing Amethyst Pendant and Earrings</p> <p style="text-align: center;">Drawing to be held Sunday, August 1, 2010 at the Region 4 Conference in Asheville, North Carolina Need Not Be Present to Win. Proceeds benefit the NALS Foundation, a 501(c)(3) nonprofit corporation. This is your receipt. \$5 each or 5 for \$20</p>	<p style="text-align: center;">NALS FOUNDATION PREMIUM PRIZE</p> <p>Name: _____ (Please print)</p> <p>Address: _____</p> <p>Phone: _____</p> <p style="text-align: center;">\$5 each or 5 for \$20</p>
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THE NALS FOUNDATION

NALS FOUNDATION GRANTS – YOUR \$\$\$ AT WORK

Since 1992 the NALS Foundation has pursued its mission to ensure top-notch legal services by funding quality education programs for legal professionals. One of our strategies to accomplish this mission is our quarterly grant program — designed to assist all NALS chapters, state associations, and regions. Applying for a grant is a simple two step process.

Step One: Decide on a project!

Grants will be awarded for programs which support certification and education. Applicants are encouraged to develop new and exciting programs — but it does not have to be a new program! Need program ideas? Check out our extensive program idea bank for award winning, successful programs under Jett Awards on the link in the NALS Foundation section of the NALS website.

Step Two: Complete the on-line grant application!

Outline your proposal by completing the easy on-line application form and answering each question as thoroughly as possible. To qualify for consideration, all requested information must be included with the application. When your application has been completed, simply click on the submit button to automatically and electronically submit your grant proposal. The deadlines for receipt of proposals are:

- March 1st
- **June 1st**
- September 1st (note – deadline is fast approaching)
- December 1st

You CAN receive a grant - it's that easy!

So what's the catch?

There is no catch! All grant proposals will be reviewed by the NALS Foundation Board of Trustees and grants will be awarded at the discretion of the Board. The only two things the NALS Foundation requires in return are:

1. The grant recipient's participation in a post project follow-up interview and/or report.
2. All marketing and distributed materials relating to the funded program must include the Foundation Logo with the following statement, **"This project was made possible through a grant from the NALS Foundation."** Downloadable statements with the logo are available upon request.

If you have any questions, please contact Jennifer King at reed@nals.org or call her at the NALS Resource Center 918-582-5188 ext. 23. Applications may also be mailed to the NALS Foundation at 8159 East 41st Street, Tulsa, Oklahoma, 74145.

So go ahead – have your chapter, state, or region apply for a grant and let the certification and education "FUN" BEGIN!!!

Mary Burns, PP, PLS
2010-2011 NALS Foundation Trustee



CODE OF ETHICS

Members of NALS® are bound by the objectives of this association and the standards of conduct required of the legal profession.

Every member shall:

- ❖ Encourage respect for the law and the administration of justice;
- ❖ Observe rules governing privileged communications and confidential information;
- ❖ Promote and exemplify high standards of loyalty, cooperation, and courtesy;
- ❖ Perform all duties of the profession with integrity and competence; and
- ❖ Pursue a high order of professional attainment.

Integrity and high standards of conduct are fundamental to the success of our professional association. This Code is promulgated by the NALS and accepted by its members to accomplish these ends.

Canon 1. Members of this association shall maintain a high degree of competency and integrity through continuing education to better assist the legal profession in fulfilling its duty to provide quality legal services to the public.

Canon 2. Members of this association shall maintain a high standard of ethical conduct and shall contribute to the integrity of the association and the legal profession.

Canon 3. Members of this association shall avoid a conflict of interest pertaining to a client matter.

Canon 4. Members of this association shall preserve and protect the confidences and privileged communications of a client.

Canon 5. Members of this association shall exercise care in using independent professional judgment and in determining the extent to which a client may be assisted without the presence of a lawyer and shall not act in matters involving professional legal judgment.

Canon 6. Members of this association shall not solicit legal business on behalf of a lawyer.

Canon 7. Members of this association, unless permitted by law, shall not perform paralegal functions except under the direct supervision of a lawyer and shall not advertise or contract with members of the general public for the performance of paralegal functions.

Canon 8. Members of this association, unless permitted by law, shall not perform any of the duties restricted to lawyers or do things which lawyers themselves may not do and shall assist in preventing the unauthorized practice of law.

Canon 9. Members of this association not licensed to practice law shall not engage in the practice of law as defined by statutes or court decisions.

Canon 10. Members of this association shall do all other things incidental, necessary, or expedient to enhance professional responsibility and participation in the administration of justice and public service in cooperation with the legal profession.



Reach for Greater Heights at the NALS Region 4 Conference in Asheville, North Carolina

July 30 – August 1, 2010

Holiday Inn Asheville – Biltmore West
(See information below)
435 Smokey Park Highway
Asheville NC 28806
Toll Free 1-800-678-2161

Please make checks payable to
“NALS Region 4” and mail to:

Lisa Mitchum, PLS
Smiley Bishop & Porter, LLP
1050 Crown Pointe Parkway
Suite 1250
Atlanta, GA 30338
Tel. (770) 829-3847
lmitchum@sbpllp.com

First Time Attending Region 4 Educational Conference Yes No

Member Non-Member ALS PLS PP

Name: _____ Name for Badge: _____

Chapter: _____ NALS Member Number: _____

Street Address: _____

City: _____ State: _____ ZIP: _____

Company Name _____

Address: _____

Phone Number (Home): _____ (Business): _____ (Fax): _____

Email Address: _____

If currently serving as National, State or Chapter Officer, please specify capacity:

National Officer: _____

NALS Foundation: _____

State: _____ State Officer: _____

Chapter: _____ Chapter Officer: _____

Early Bird Registration (before May 15):	Member: <input type="checkbox"/> \$110.00	Non-Member: <input type="checkbox"/> \$125.00
Regular Registration (before June 30):	Member: <input type="checkbox"/> \$125.00	Non-Member: <input type="checkbox"/> \$140.00
Late Registration (after June 30):	Member: <input type="checkbox"/> \$140.00	Non-Member: <input type="checkbox"/> \$155.00

If you are bringing guests with you, please list their names:

HOTEL INFORMATION

Please contact the **Holiday Inn Asheville – Biltmore West at 1-800-678-2161** and state that you are with the “**NALS Region 4**” conference group. Room rate is \$99.00 plus 11.75% tax per night. This rate will be available three (3) days prior and post meeting. The hotel rate will be available three days before the conference and three days after the conference if you would like an extended stay, based on availability.

HOTEL DEADLINE IS JUNE 30, 2010!!!



Reach for Greater Heights at the NALS Region 4 Conference in Asheville, North Carolina

Sponsors/Advertisers Form

Cost for Sponsors:

- Platinum Sponsor \$500+ (includes a full-page ad)*
- Gold Sponsor \$250 - \$499 (includes a half-page ad)*
- Silver Sponsor \$101 - \$249 (no ad space included)*
- Bronze Sponsor \$100 (no ad space included)*

Cost for Ads:

- Full-page Ad \$100*
- Half-page Ad \$75*
- Quarter-page Ad \$50 (business card or something comparable)*

Contact Name: _____

Business Name: _____

Address: _____

Telephone: _____ Fax: _____

E-mail Address: _____

Please return this form and your check made payable to "NALS Region 4" to:

Lisa Mitchum, PLS
 Smiley Bishop & Porter, LLP
 1050 Crown Pointe Parkway
 Suite 1250
 Atlanta, GA 30338
 Tel. (770) 829-3847
 lmitchum@sbpllplaw.com

THANK YOU FOR YOUR SUPPORT!!



Reach for Greater Heights at the NALS Region 4 Conference in Asheville, North Carolina

Exhibitor Registration Form

Contact Name(s): _____

Business Name: _____

Address: _____

Telephone: _____ Fax: _____

E-mail Address: _____

Saturday, July 31, 2010 (8:00 a.m.-3:30 p.m.)

Cost to Exhibitor - \$125.00

**Exhibitors will be provided one 6-foot draped table and two chairs
Lunch will be provided for one exhibitor. Any additional guests will be \$20.00**

Please return this form and your check made payable to "NALS Region 4"
to:

Lisa Mitchum, PLS
Smiley Bishop & Porter, LLP
1050 Crown Pointe Parkway
Suite 1250
Atlanta, GA 30338
Tel. (770) 829-3847
lmitchum@sbpllplaw.com

THANK YOU FOR YOUR SUPPORT!!