

**2010-2011  
Region 4  
Management Team**

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**SPRING 2011**

**A Year ~~Two~~ Years In Review**

By: Jim Hoffmeister



What a ride it has been! I am not referring to Greg Madden's Harley. I am talking about the two years I have been honored to serve Region 4 as a regional officer. I recall receiving a letter from ALA in 2008 informing me that I had been nominated. It included some information about regional officers, and a questionnaire to complete and return to ALA. I thought about it for some time, checked with my firm management, completed the questionnaire, and submitted it. I was already in the midst of a term as Tulsa Chapter president, but I thought that assignment would end at about the time I would begin with Region 4, so there would not be a big problem. However, things do not always go according to plan; I ended up serving the Tulsa Chapter an additional year as president.

In December, 2008, I received a letter from ALA congratulating

me on being selected as a Region 4 officer. Although my term on the team would not officially start until the New Orleans annual conference in May, 2009, duties began immediately. I started participating in monthly team conference calls and attended my first RTO (Regional Team Orientation) meeting in Chicago in February that year. RTO is like regional officer "boot camp." You attend breakout sessions detailing your regional officer assignment as well as a variety of other informative sessions. The regional team meets to discuss team assignments and to begin initial planning of the regional conference.

Regional teams are comprised of an ALA Director, at that time Tom Ivey, currently Toni Beasley, an ALA At-Large Director (assigned to two regions), and three regional officers: Communications, Education and Programs. The Communications officer is primarily responsible for reviewing new member reports from ALA, contributing Region 4 articles/pictures to *ALA News*, taking minutes of regional planning

meetings, conference calls and regional council meetings, and producing the Region 4 electronic newsletter. The Education officer has responsibility for collecting chapter education summary forms and posting them in the chapter programs database on ALA's website, assisting chapter education chairs with program ideas, handling the play-by-play for the regional conference, plus recruiting, coordinating and instructing regional conference session manager volunteers. The Programs officer is primarily responsible for maintaining the business partner master matrix, working with ALA staff to send out the business partner prospectus and periodic blast emails for the regional conference, and coordination of the exhibit hall at the conference. All regional officers participate in monthly conference calls with ALA staff, in addition to the team monthly conference call usually held immediately after the conference planning call. Other joint duties of each officer is to participate in regional conference planning,

*(Continued on page 2)*

suggesting and contacting potential regional conference speakers, making quarterly focus chapter presidents' calls, attending and participating in regional council meetings, attending and participating in CLI (Chapter Leadership Institute), and making chapter visits from time to time.

I don't quite recall when it was, whether it was before RTO or at RTO, but I was contacted by Tom Ivey who informed me my first assignment as a regional officer would be to serve Region 4 as the Projects officer. What he did not know was that I was thrilled I wasn't named Communications officer as I just do not like to take and record minutes! I actually felt the Projects officer assignment would be good for me since I have been involved for many years with our business partner program with the Tulsa Chapter. Still, I had no idea what to expect; but the prior Projects officer, Toni Beasley, would continue to be on the team and that helped. RTO that year went by very fast. There was so much information and I do not think I retained half of it. Each region had breakout sessions where detailed information was passed from the outgoing regional officer to the incoming regional officer assigned to each area. Region 4 has had some fantastic leadership in the past. The Region 4 Operations Manual, a brain child of a prior Region 4 Director, Judy Anderson, is a bound volume detailing information about each officer position as well as other pertinent information about Region 4. Region 4 was the first region to start this type of manual and it is a great help in learning the various responsibilities and positions. Many of the ALA regions have duplicated Region 4's manual in some fashion. 2011 has seen the operations manual evolve into an electronic

version which will now be available to all regional officers on ALA's website.

Following the February RTO meeting in Chicago, the regional team traveled in March to San Antonio to plan the October Region 4 conference. The planning meeting included a site tour and then a full day of conference planning. After that it was off to the annual conference in New Orleans where I had some responsibilities with the regional council meeting and in the exhibit hall. I was officially introduced as a new regional officer for Region 4 at the New Orleans annual conference. In June, CLI was held in Carefree, Arizona, during which all regional officers are generally assigned specific duties. Region 4 presented a session titled "Running Successful Chapter Meetings" and each officer was responsible for a specific section of the presentation.

My work as Projects officer began immediately after the March conference planning meeting. I worked with ALA staff and the regional team to develop the business partner prospectus and the regional conference member brochure. I began refining the Region 4 business partner matrix comprised of more than 500 Region 4 business partners. E-mail addresses were confirmed, new contact information was researched and new business partner prospects were added to the matrix. The entire team works with trying to secure exhibiting business partners and business partner sponsorships.

I will not itemize all the details of my second year as a regional officer, but it was every bit as enjoyable and challenging as the first. During that year planning the Region 4 conference in Dallas was exceptionally problematic since the weekend we met, Dallas experienced 8+ inches of snow. Needless to say, 8 inches

of snow shuts down Dallas along with a lot of incoming flights. If you know Rosemary Shiels, ALA's Professional Development Program Manager, ask her about our snowball fight!

There is much more work and many more time commitments being a regional officer than I ever imagined. However, I have enjoyed every bit of it. I have made many new close ALA friendships, not only with new ALA members but also by getting to know our Region 4 business partners, who really do a lot for our Association. I feel honored to have worked closely with Tom Ivey, Toni Beasley, Mark Lott, Teresa Douglas, Rita Ali, Steve Wingert, and Sabine Curto. And I have a new found appreciation for ALA headquarters' staff. I have developed close friendships with Rosemary Shiels, Jane Mundell and Jackie Stasch, as well as many other dedicated ALA staff members.

Highlights of my service as a Regional officer have been to facilitate a Dallas board retreat; speak at the 2010 Region 4 conference; present at an Oklahoma City chapter meeting, a Tulsa chapter meeting and Wichita chapter meeting (I know Wichita is not in Region 4, but they are fairly close to Tulsa). I have been truly honored to serve Region 4. My two-year term will end at the annual conference in Orlando. At the beginning of that conference, a call for nominations will be made. If you get a call from someone in ALA, I highly recommend that you consider putting your name in the hat as a potential regional officer. It will be quite a ride!

## REGION 4 MANAGEMENT TEAM: 2011—2012

### Region 4 Director



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#### *Biographical Info:*

Toni Beasley, CLM, is currently the Region 4 Director and will continue serving in that role for the 2011-2012 term. She served from 2008-2010 as the Region 4 Projects Officer and Education Officer. Beasley is affiliated with the Austin Chapter where she held several positions including President, Membership Committee Chair and the Chapter Liaison on the Board of the Austin Bar Association. She currently serves on the Chapter's Past President Advisory Committee and the Compensation and Benefits Committee. Beasley has also served on the Regional Nominating Committee and earned her CLM designation in 2008.

### At Large Director



*Stephen G. Dempsey, CLM*  
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#### *Biographical Info:*

Stephen Dempsey is the Director of Administration at Sidley Austin LLP's Washington D.C. office. He has been in legal administration for 17 years and an active ALA member for 16. He has served in leadership positions in the Dallas and Capital Chapters, and in a national capacity as the Chair of the Diversity Task Force, the Committee on Diversity and on the Conference Planning Committee for the 2009 Educational Conference in New Orleans.

## **Projects Officer**



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### ***Biographical Info:***

Teresa Douglas has been the Administrator for Adams, Hoefler, Holwadel & Eldridge, LLC, a small firm in New Orleans since 1998. A legal administrator for 14 years, she joined ALA in 1997. She obtained her CLM designation in 2004. As a member of the New Orleans Chapter, Teresa has served as the Chapter's President, At-Large Director and on its Board of Directors. Also at the Chapter level she has served as the Vendor Fair Chairperson, Retreat Committee Chairperson, Nominating Committee Chairperson, CCW Chairperson and Education Committee Co-Chairperson. On the national level, she has served on the 2009 and 2010 Annual Conference Committees and was the local liaison for the 2009 conference that was held in New Orleans. She has also served as a Chapter Awards Judge, Region 4 Council Representative and on the Regional Conference Committee.

## **Communications Officer**



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### ***Biographical Info:***

An ALA Member since 1999, Andrea Everage has served on the Regional Nominating Committee and currently serves on the Committee on Diversity. In her Chapter she served as President, President-Elect, Past-President and At-Large Director. Additionally, she has served her Chapter as Secretary, Treasurer, Education Chair, Website Chair, Community Challenge Weekend Chair and as a member of the Member Retreat/Vendor Relations committee. She holds a Masters Degree in Human Relations and Bachelors in Business Administration

## **Education Officer**



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### ***Biographical Info:***

Shari is the Director of Administration for Sedgwick's Dallas and Austin offices. She has been a member of the Dallas Chapter of ALA for 19 of the last 23 years. Shari has served the Dallas Chapter in many roles as Chair of Membership, Social, Human Resources and Multi-Office. She has served on the Board as Secretary, Director at Large, President Elect, President and Past President. Shari is looking forward to her new role of Region 4 Education Officer.

## MEMBER SPOTLIGHT

## Joy Anderson — Legal Administrator at Heroux Helton

Five Questions with Joy AndersonLegal Administrator at Heroux Helton

**Q: What was your first job, and what were your responsibilities?** My very first job was for a small clothing store. Helping customers, re-hanging clothes, etc. My first full-time professional job was as a legal secretary for a solo practitioner.

**Q: How long have you been in the legal field, and how did you become a legal administrator?** I began working in the legal field as a college student in 1994 as a research intern at a small firm and then worked full time after graduating. I stopped working full-time in 2001 to stay home with my son, and did contract work and part-time jobs, and returned to full-time work in May of 2010 as a Legal Administrator. My experience while working at MCI WorldCom and a lot of the contract work I did gave me the management and accounting experience for the position.

**Q: Being a new member to the Association of Legal Administrators, and the Tulsa Chapter of ALA, what are you hoping to gain by being a member?** My background has not included very much HR experience so I need lots of resources in that area! I'm learning on the fly.

**Q: What do you see as your biggest struggle in legal management and law firm leadership?** For me the biggest challenge is the rapid “hat switching” that goes on. I may be in vendor mode one second, and will have to switch to HR Manager mode in the next, and accounting in the next. Because I also function as a Legal Assistant at Heroux & Helton, I may have a client emergency right in the middle of a vendor meeting. I am never bored! I have great communication with our Partners, however, and they are always aware of my work-load and demands so that helps to keep things from getting too out of control.

**Q: Now the fun stuff; tell us a little bit about your personal life (married, pets, interests & hobbies):** I am married with three sons, ages nine, eight & six. I'm a Cub Scout Den Leader for Jenks Pack 385. We have two dogs and several cats (A couple of them I never see). Before going back to work full-time I enjoyed scrapbooking and genealogy, but I don't have much time for that now. I am, however, an avid reader. As a family, we have embarked on the fun of “geocaching” which is a great way to get outside and hike! I also LOVE gadgets! Any kind of gadget (office, kitchen, craft, tools, etc) though I spend more time playing with tech-gadgets, (iPod, iPad, GPS) We enjoy getting away for weekends at our family cabin on Ft. Gibson Lake.



## Should You Upgrade from Microsoft Office 2003 to Office 2010?

By Ryan Russell, Senior Network Engineer - **Andrews Kurth LLP**

Regardless of your role, it's a safe bet that you use some part of Office almost constantly, every day. Whether it's Word, Excel and PowerPoint at the office, OneNote during meetings, or Outlook, well, everywhere, for most of us, Microsoft Office is an integral part of business communication today. Big changes in Office require a big decision: to upgrade or not to upgrade.

If those changes have kept you on the Office 2003 platform through the release of Office 2007 and now into the release of Office 2010, it is time to examine some of the pros and cons of an upgrade.

A couple of good reasons to make the switch are the new interface and the new file format. A couple of difficulties surrounding the upgrade: the new interface and the new file format.

The new interface is lean and mean. Toolbars are now context-sensitive and organized by function. The experienced users will find commands and functions they commonly use immediately available with a single click rather than a series of menus or obscure keyboard shortcuts (which still work, by the way). The new users are able to quickly and visually identify the next step in their task on the Ribbon interface at the top of the screen.

Live Preview allows both new users

and old pros to see the differences a style change or a cut and paste operation will make to their document before the change is made. For styles, this saves the time of applying and undoing style after style in search of the appropriate format. The preview for cut and paste also saves valuable undo time and is even available between Office applications.

Despite the new features and functionality, a new interface provides challenges to an established environment. User training may consume the bulk of the upgrade period. There is not an option to restore the original Office toolbar configuration. This is largely due to Microsoft's complete rewrite of the Office design.

The complete design rewrite also includes new file formats. These are seen as is a welcome change by many. The new formats are XML-based which allows documents to be viewed, at least materially, from any XML-capable application. These days that includes the ubiquitous web browser.

The new file formats are broken into internal parts which include the XML data (your content, formatting, meta-data, properties) and the non-XML data (images, charts, tables, macros). This separation makes your new Office files less sensitive to corruption. If the chart or table portion

of a file is damaged, you still have access to the content. With previous formats, the entire file must be intact to function correctly.

If you still use Office 2003, you may have already experienced some of the issues involved when opening these new file formats in your previous version of Office. Once Office 2010 is in place, users must be aware that not all recipients of their new files can easily open them. Options are in place when saving files to use the older formats. However, if you are thinking of switching to Office 2010, but continuing to use the older format, be aware: the new file formats are compressed. This can result in significant drive space savings, especially if you keep a large number of documents on hand.

Microsoft Office 2003 is still a viable application suite. Compatibility packs have kept it functional and usable through a full new version and into the next. Mainstream support for Office 2003 ended in April of 2009. While extended support lasts into April of 2014, Microsoft no longer supports free incidents, warranty calls or feature requests. Non-security hotfixes are also no longer available without a purchased agreement. Whether you choose to upgrade now or later, the clock is ticking.

## ORLANDO CONFERENCE SCHOLARSHIP WINNERS

At the Regional Council Meeting in Dallas, Texas, scholarships were awarded to the Arkansas and Oklahoma City Chapters. Each of these scholarships provide for registration to the ALA Annual Educational Conference and Exposition and a \$400.00 stipend for the winners.

To be eligible to participate in the scholarship drawings a chapter must:

- Be in good standing with the association
- Have a representative at the preceding Chapter Leadership Institute
- Have a representative at the Regional Council meeting in which the scholarship is awarded

This year's winners are:

ARKANSAS

Marie K. Ray  
Office Administrator  
Eichenbaum, Liles & Heister, P.A.

OKLAHOMA CITY

Lori A. Mackey  
Controller  
Feller Snider Law Firm

# Regions 3 & 4 Educational Conference in Kansas City, MO

## Save the Date



**September 15—17, 2011 at the  
InterContinental Kansas City at the Plaza**

This year we will have a joint Regional Conference with Region 3. This promises to be another excellent conference for both our regions. In addition to the wonderful educational sessions and Business Partner exhibit hall, this year's conference is at the InterContinental Kansas City at the Plaza. Just steps from Country Club Plaza entertainment district featuring more than 150 shops, restaurants, quiet courtyards, sparkling fountains, and stunning sculptures, a stroll through Country Club Plaza is an exhilarating walk through Kansas City's rich history. Your Regional Management Team is hard at work planning this wonderful conference. Mark the date on your calendar and we will see you in September!



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