



The Juggling Act: A Holistic Approach to Wellness for Managers

Law firm leaders wear many hats and juggle multiple responsibilities every day. Learning to juggle all of our tasks in a more efficient way with maximum impact allows us time to find a work-life balance, nurture and empower our staff, and improve the culture of the offices we work in.

Welcome to the 2017 Oregon Chapter Retreat!

Cushman & Wakefield, Kelley Imaging, and Staffing Solutions are this year's Retreat Sponsors. Thank you for your support!!

Friday October 6, 2017	Session/Event	Location
2:30 p.m.	<i>Welcome Friends!</i> Elise Brickner-Schulz Oregon Chapter President Elect, Retreat Chair	Huckleberry Room
2:35-3:45 p.m.	<i>Roundtable Idea Exchange: Illuminating Office Processes</i> Kathee Nelson Past President Exchange ideas on operations with your peers and take home fresh perspective you can implement immediately on the following topics: <ul style="list-style-type: none"> • Stress-Free A/R Collection Calls • Tracking & Counseling for Billable Hours Goals • Managed Services – Ins and Outs of Outsourced Staffing • Records Best Practices (Closing Files, Storage, Digital File) • Client Conflict Systems & Procedures 	Huckleberry Room



3:45-4:00 p.m.	<i>15 Minutes of Fame!</i> Dean Hildreth, Kelley Imaging	Huckleberry Room
4:00-5:00 p.m.	<i>Keynote: The Balance</i> April Campbell, ALA National President Elect Can you do it all? What does that even mean? April Campbell, President-Elect of ALA will share tips and tricks for staying sane in our fast-paced roles as legal management professionals. In addition to exploring ways to find your balance, she will highlight some of the latest initiatives from ALA aimed at providing members the resources and tools you need to function at your highest level, both professionally and personally.	Huckleberry Room
5:00-5:15 p.m.	<i>BREAK; CHECK IN</i>	
5:15-6:15 p.m.	<i>Social</i> <i>(appetizers, beverages)</i>	Zig Zag/WyEast Room
6:15-7:15 p.m.	<i>Dinner</i>	Zig Zag/WyEast Room
7:15-10:30 p.m.	<i>Cocktails and Business Partner Reception and Fun!!</i> Relax with our friends and sponsoring business partners at a reception brought to you courtesy of Cushman & Wakefield, Kelley Imaging, and Staffing Solutions	Zig Zag/WyEast Room

Saturday October 7, 2017	Session/Event	Location
8:30-9:05 a.m.	<i>Breakfast Buffet & Chapter Report</i> Matthew Masini Chapter President	Huckleberry Room
9:05-10:40 a.m.	<i>Transforming the Evaluation Process – Juggling the Benefits and Rewards</i> Lisa Sterritt, Regional Representative The practice of law is evolving. So are our workforces. Today's employees look for continuous learning and feedback, efficiency, work-life balance and abundance of opportunity. The traditional annual performance review is a thing of the past, replaced with a collaborative and rewarding experience for everyone. Attendees will learn how to: <ul style="list-style-type: none"> • build an evaluation process that is inclusive, informative, and makes a difference • develop a performance evaluation instrument that aligns personal performance with firm strategy • take the "tug-of-war" out of gathering data • make the evaluation of performance a positive and enriching experience for everyone 	Huckleberry Room
10:45 a.m.- 12:00 p.m.	<i>Roundtable Idea Exchange: Illuminating Office Culture</i> Kathee Nelson Past President Exchange ideas on 'soft topics' with your peers and take home fresh perspective you can implement immediately on the following topics: <ul style="list-style-type: none"> • Termination Meetings – How to Survive Them • Dealing with Gossip • Flexible Alternative Work Schedules • Great Recruiting Interview Questions • Community Giving Ideas for your Office 	Huckleberry Room
12:00-1:00 p.m.	<i>Lunch</i>	Zig Zag/WyEast Room
1:00-1:15 p.m.	<i>15 Minutes of Fame!</i> Amanda Andrew, Staffing Solutions	Huckleberry Room

<p>1:15-2:45 p.m.</p>	<p><i>Staying Alive in a Disaster: Training Your Muscle Memory</i> Dana Labow Trevers, Office Administrator – Lewis Brisbois - Costa Mesa</p> <p>The concepts in any firm’s disaster preparedness plan should be tested to determine their effectiveness in different scenarios. Workplace violence is not predictable. Tabletop exercises simulate the pressures of an intense situation, injecting unforeseen factors with little or no time to think and many distractions. The exercise helps to assess the individual participant’s level of preparedness. Test your ability to adapt to quickly changing scenarios with minimal factual information and no ability to obtain approval through normal channels. A “hot wash” discussion with the entire group after the exercise will troubleshoot the issues that may have been left unresolved by each group. We can read and plan and practice but the “hot wash” is where the real learning begins.</p> <p>This exercise will help to train the administrator’s mental muscles to be prepared to turn reaction into a reflexive response. Reducing the response time by even a minute or two may greatly improve the chances of everyone surviving a violent incident.</p>	<p>Huckleberry Room</p>
<p>2:45-3:00 p.m.</p>	<p><i>15 Minutes of Fame!</i> Alexandra Henderson, Cushman & Wakefield</p>	<p>Huckleberry Room</p>
<p>3:00-4:00 p.m.</p>	<p><i>Emotional Intelligence EQ</i> Allison Brown, GPHR</p> <p>Intelligence is your ability to learn, and it’s the same throughout your life. Emotional intelligence, on the other hand, is a flexible set of skills that can be acquired and improved with practice.</p> <p>Objectives:</p> <ul style="list-style-type: none"> • Understand the link between emotional intelligence and effective leadership • Practice self-awareness and intentional thinking • Complete EQ self-assessments and create a customized development plan • 	<p>Huckleberry Room</p>
<p>4:00 p.m.</p>	<p><i>Closing Remarks</i> Elise Brickner-Schulz Retreat Chair</p>	<p>Huckleberry Room</p>



About Our Speakers



Allison Brown, GPHR

As principal consultant of Knowledge Evolve LLC, Allison Brown, brings her entrepreneurial spirit balanced with practical experience; in order to provide opportunities that are fun, innovative and productive. This is the second year we'll be having her as a speaker at the ALA conference. Allison shares in the thought leadership community through speaking at conferences and engaging the community. Knowledge Evolve LLC specializes in leadership and employee development, emotional intelligence, change management, coaching, onboarding and career planning.



April Campbell

April Campbell has been a member of ALA since 2005, during which time she has held roles as a small firm administrator, legal staff supervisor, pro bono manager and operations manager. Before joining the legal management realm, she worked as an attorney and judicial clerk. Her leadership roles in ALA include many roles within the Puget Sound Chapter, including President, and at the Association level, including Region 5 Representative, Region 5 Director and now President-Elect. She contributes much of her professional and personal growth to her leadership experiences in ALA.



Lisa Sterritt

Lisa Sterritt's career spans 30 years in professional services firms in a variety of sizes and industries and includes direct experience in the areas of legal secretary/assistant, paralegal, management and leadership. She currently oversees all human resource functions at Lane Powell. This includes aligning the Firm's strategic vision with its talent management goals and objectives; staff recruiting, hiring and retention, performance evaluations and salary administration; benefits administration; training and development; legal compliance; development and implementation of policies and procedures; and employee relations.

Lisa graduated from Regis University (B.S., magna cum laude, Human Resources and Finance) and has also completed the Impact Leadership and Management Training, and holds an International Assignment Management Certification

She is a Regional Representative for the International Association of Legal Administrators (ALA) as well as the immediate Past-President of the Puget Sound Chapter of ALA. Her community involvement includes: Legal Voice Board President (2017-2018) and Volunteer for various organizations including YouthCare, ROOTs, Salvation Army, Recovery Café, among others.



Dana Labow Trevers

Dana Trevers has enjoyed more than 30 years as a legal administrator. Dana joined the Association of Legal Administrators ("ALA") in 1980. An active member in the local chapter of ALA, Dana has served on the Extended Board as the Chairperson of the Membership Committee, the Large/Branch Office Section, the Speakers Committee, the Project SELF Committee, and the Business Partner Committee. In conjunction with the local Bar Foundation, Project SELF employs high school seniors from the local school district as interns in law firms and, through that process, introduces the students to the many career opportunities that the legal industry has to offer.

Dana's articles related to the legal industry have been published in the State Bar's Bottomline and the OCALA Newsletter. She has also given numerous presentations to business associations on legal management topics including management challenges, finance, retainer agreements, technology, and disaster preparedness, planning & recovery.

The Resort At The Mountain

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The Resort at The Mountain is located less than a mile from Highway 26 and 15 minutes from the Mt. Hood ski areas. In the heart of Oregon high country, tucked among the lush evergreen forests and rugged mountains of the Willamette Valley, The Resort at The Mountain is "Mt. Hood's Premier Resort Destination." Surrounded by pristine landscapes, with spectacular views in every direction.

