



CALSS

Colorado Association
of
Legal Support Staff

SOTA/DeNovo

State of the Association and DeNovo

Your News Bulletin for
Colorado Association of Legal Support Staff
2009-2010, Volume 4

April/May, 2010

**COMING UP: May 14 and 15—Third Board Meeting and CLE in Silverthorne—
registration materials enclosed
April 15—Deadline for Applications for the Duran Scholarship—also
enclosed**

Message from the President

Signs of Spring are coming to life all over Colorado. It is a time of renewal, refreshment and growth. The air is filled with the sounds of chirping birds that were quiet all winter long. It is as if they are saying, "Arise and awake!" The Colorado Association of Legal Support Staff gives us opportunities for growth and learning to keep our careers awake and refreshed.



Please plan on joining CALSS in Silverthorne on May 14-15, at the Third Board Meeting and Educational Conference at LaQuinta Inn and Suites. The Executive Committee has planned some fun and exciting seminars for you, which start at 1:00 on Friday, May 14. The Board Meeting and Educational Conference is at no cost to members for the seminars. Registration information has been emailed to you and is available at www.calss.org.

Ginny Schermerhorn
CALSS President

President Elect's Report

Mark Donovan,
President-Elect and Editor

Is Spring a busy season or what? We are so excited to welcome everyone and our guests to springtime in the Rockies and our Third Board Meeting and CLE on **May 14 and 15** at La Quinta Inn and Suites in beautiful Silverthorne. Our first speaker is James Crane from Doc 1Solutions. James is an attorney by training and practice and will be helping us to be more effective communicators by email as well as "Educating Clients about their E-Discovery Requirements". Both topics are cutting edge and certainly worth our time.

Our second speaker is Mr. Doug Rollo, National Director of Records Management for Document Technologies, Inc. of Atlanta. Mr. Rollo is addressing creating a records retention policy in a legal environment.

A huge highlight of the Third Board Meeting is the Gwendolyn Duran Nature Walk, registrations for which are enclosed in this newsletter. The Duran Scholarship is a great way of giving forward and supporting the next generation of legal support staff. **The deadline for applications is April 15** and application forms are also enclosed. Please promote this wonderful opportunity to friends and colleagues.

Registration forms are also enclosed for the Third Board Meeting and CLE. Huge thanks to: President, Ginny Schermerhorn, for arranging for Mr. Crane to speak; Vice President, Sherry McWethy for arranging for Mr. Rollo's presentation, and CLE Chair, Jodi Morse, for arranging for CLE credits for us.

One last change to highlight is the change in our title to include *DeNovo*. *DeNovo* is our more formal bimonthly publication which has not been published so far this year without a Bulletin Chair. At the second board meeting it was decided to temporarily include it with *SOTA*. Please forward any articles you would like to see published AND/OR forward your grammar questions to me at MED@H-L-MLaw.com and I will forward the grammar questions to our expert.

As always, thank you so much for your support and for keeping our wonderful organization alive and strong.

CALL FOR NOMINATIONS

Joyce Beach, Certified PLS
Nominations Chair

Spring has finally arrived and Summer is just around the corner. Time waits for no one and neither does the process of beginning to select our leadership for the next fiscal year.

President Elect Mark Donovan has already began tapping shoulders to fill committee chairs for the coming year and the nominations committee is now actively soliciting officer nominations for 2010-2011. The positions to be filled are President Elect, Vice President, Secretary and Treasurer.

The offices of President Elect and Treasurer are unique in that they require a two-year commitment. President Elect serves in this position for the first year and then succeeds to office of President for the following year; Treasurer is a two-year term primarily to minimize the time and expense of establishing a checking account, ordering checks and obtaining a position bond.

The duties of each of these offices are fully set forth on the CALSS website (CALSS.org) under the Members Only tab, Member Forms, Committees -Nominations. You will also find a Nominations Form and Acceptance Form that need to be completed and returned to this committee by July 1, 2010. I know that we have many capable and talented members in CALSS. Please do not be shy about expressing your interest in serving as a CALSS officer or even nominating yourself. Just let Ginny Lee, Sherill Mullins or me know of your interest and we will take care of the rest.

The nomination committee is available to answer any questions you may have about serving as a state officer. Within the next several months, we will try to visit with many of you to explore your interest in this endeavor and/or obtain names of potential candidates.

From the Scholarship Committee

Pauli Ingwersen,
Scholarship Chair

CALSS established the Gwendolyn S. Duran Memorial Scholarship Fund in 1999 to support students in need, pursuing a higher education degree. Based on eligibility criteria, one \$1,000 scholarship is awarded annually to a student (and/or CALSS member) who demonstrates a financial need and enrolls in a legal program (such as secretary, court reporter, legal assistant, paralegal, or pre-law concentration).

The 2010 scholarship guidelines and application are included with this issue of SOTA. You are encouraged to disseminate the eligibility criteria and application as appropriate, and if you have any questions or need more information, please contact me or visit the CALSS website.

We have received several applications which are currently being evaluated.

The next Annual Nature Trek will take place on Saturday, May 15, 2010. Please see the Entry Form on the next page included with this issue for more information and to sign-up.



Message from Larimer Weld County Association of Legal Support Staff

Vivian Acott,
State Representative

LWALSS holds meetings monthly on the third Tuesday of each month. Our Chapter alternates between evening and lunch time meetings and chapter meetings are held at various locations.

A Report From the Mile High Chapter

Cathy Hansen
Mile High ALSS Representative

Monthly Meetings:

- April 12, 2010 – “Intellectual Property: How it Affects You,” presented by Mollybeth “Molly” Kocialski, Senior Attorney, Qwest Corporation. Molly’s presentation will discuss some current headline cases.
- May 10, 2010 – Tentatively scheduled is the Denver Police Gang Unit Leader (he may be in trial at that time, so this may change.)
- June 14, 2010 – “Medical Marijuana in the Workplace,” presented by Chuck Passaglia.

All CALSS members and their guests are welcome to attend the MHALSS monthly dinner meetings held the second Tuesday of every month at the Lakewood Elks Club, 1455 Newland Street, Lakewood, CO. Cost is \$17 for members; \$20 for non-member guests. Contact Janet Price at 720-879-3376 to make reservations.

CLE & Coffee: MHALSS is currently working on a CLE & Coffee to be held at Park Place Auditorium, 111 Emerson Street, Denver. Tentative cost for the two seminars is \$30.00. (Parking is available on the street only but, since this is a residential area, carpooling is encouraged).

- Friday, June 18, 8:30 a.m. – 12:30 p.m.
- Seminar 1: “Medical Marijuana in the Workplace,” presented by Chuck Passaglia.
- Seminar 2: “Issues Involving the Unauthorized Practice of Law,” presented by James Coyle, Deputy Regulation Counsel, Colorado Supreme Court Office of Attorney Regulation

CALL or EMAIL CATHY FOR MORE INFORMATION:

Cathy Hansen, PLS, State Representative
303-965-8088; cathy.hansen@qwest.com (office)

GWENDOLYN S. DURAN MEMORIAL SCHOLARSHIP FUND Annual Nature Walk

hosted by the Colorado Association of Legal Support Staff



Saturday, May 15, 2010
Silverthorne, Colorado

Cost: \$20.00 Early registration
\$25.00 Walk day & all registrations
submitted after May 10, 2010

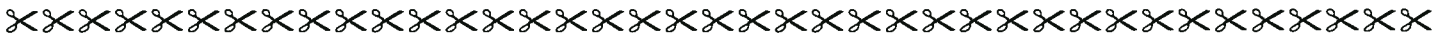
7:00 a.m. Walk Day Registration
7:30 a.m. Walk Begins

For more information, contact
Pauli Ingwersen at (719) 475-6487
or Lisa Ritter at (970) 482-9770



- ✓ Course: Paved or gravel trails/sidewalks/roads
- ✓ Pre-registration Deadline: May 10, 2010
- ✓ Mail-in Registration: Lisa Ritter, c/o Liggett, Smith & Johnson, P.C., 425 Mulberry St., Suite 112, Fort Collins, CO 80521
- ✓ Packet Pick-up: Upon check-in at CALSS seminars on Friday, May 14, or just before the Trek
- ✓ Make checks payable: CALSS Scholarship Fund
- ✓ Entry fee includes: Bottled water/juice, healthy snacks, chocolate, and fun surprises!☺

Proceeds to Benefit the Gwendolyn S. Duran Memorial Scholarship Fund



ENTRY FORM Pre-Registration Deadline May 10, 2010

Name (please print) _____

Address _____ City/State/Zip _____

Telephone _____ Email: _____

Signature _____ Date _____



**GWENDOLYN S. DURAN
MEMORIAL SCHOLARSHIP FUND
SCHOLARSHIP APPLICATION**

The Colorado Association of Legal Support Staff (CALSS) established the Gwendolyn S. Duran Memorial Scholarship in 1999 to support students in need, pursuing a higher education degree. Based on eligibility criteria, one \$1,000 scholarship will be awarded annually.

The Award is for twelve (12) consecutive calendar months, covers tuition, books and fees, and is paid on a semester basis or as agreed upon by Recipient and CALSS.

In the event the Recipient withdraws from his/her legal courses/program during the term of the scholarship award, CALSS will determine the continuance of the Award and determine if Recipient must refund any unused portion of the Award.

APPLICATION FORM

Applications will be accepted from December 1 through April 15 of each school year. Decisions on the award will be made at the end of April, and the applicant will be notified after May 15. If you meet the eligibility criteria below, please submit a completed application to:

Pauli Ingwersen
CALSS Scholarship Chairman
c/o Holland & Hart LLP
90 South Cascade Avenue, Suite 1000
Colorado Springs, CO 80903
(719) 475-6487
email: pingwersen@hollandhart.com
www.calss.org

We must receive the completed application and accompanying documentation **postmarked on or before the deadline of April 15**. Incomplete applications will NOT be reviewed.

ELIGIBILITY: You are eligible to apply for a CALSS scholarship if you satisfy the following criteria:

- You have declared the legal field as your major or are enrolled in a legal program, such as secretary, court reporter, legal assistant, paralegal, or pre-law concentration.
- You are a full time student.
- You can demonstrate financial need



CALSS SCHOLARSHIP APPLICATION
(Please type or print neatly)

Name _____
First MI Last

Permanent Address: _____
Street Address

_____ City State Zip

_____ Telephone Email address

Financial Information:

- Check: _____ I have applied for federal or state student financial aid
 _____ I intend to apply for federal or student financial aid
 _____ I do not intend to apply for federal or student financial aid
 _____ I have student financial aid but still have a need

Required Attachments (Must be Typed):

Application and the following required documents are due **April 15:**

- Copy of high school transcript or transcript of last four years' grades if presently enrolled in a school of higher education.
- One letter of recommendation signed by student's teacher or counselor outlining the student's leadership activities and/or community participation.
- One letter of recommendation signed by employer, teacher friend or other character reference.
- Autobiographical statement/resume including schools attended, employment, school activities (honors, clubs, etc.), family background, brief discussion of financial need, interests and/or hobbies.

INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED

Send completed applications and required attachments to:

Pauli Ingwersen
CALSS Scholarship Chairman
c/o Holland & Hart LLP
90 South Cascade Avenue, Suite 1000
Colorado Springs, CO 80903
pingwersen@hollandhart.com
www.calss.org



CALSS

Colorado Association
of
Legal Support Staff
www.CALSS.org

Third Board Meeting & Educational Conference

May 14, 15, 2010
La Quinta Inn and Suites
Silverthorne, Colorado

Hosted by the CALSS Executive Committee

Friday, May 14, 2010	
12:00 – 1:00 p.m.	Registration
1:00 p.m. – 3:00 p.m.	Seminar 1: James Crane, Esq. E-Mail Etiquette and Educating Clients About E-Discovery *
3:00 p.m. – 3:30 p.m.	Break
3:30 p.m. – 5:00 p.m.	Seminar 2: Doug Rollo Creating a Records Retention Policy in a Legal Environment **
Saturday, May 15, 2010	
7:30 a.m. – 8:00 a.m.	Nature Walk (See attached registration form)
7:30 a.m. – 9:00 a.m.	Registration
6:00 a.m. – 9:00 a.m.	Breakfast – complimentary
9:00 a.m. – 11:00 a.m.	Third Board Meeting

* 2 CLE Credits

** 1.5 CLE Credits

HOTEL RESERVATION DEADLINE: April 23, 2010

Hotel: La Quinta Inn & Suites, 560 Silverthorne Lane, Silverthorne, Colorado. The rate is \$59 (single to quad). The telephone number is: 970-468-6200 (direct) or 800-434-5548. Fax: 970-468-7829. Reference "CALSS Conference, May 14, 15, 2010." From I-70, take Exit 201 to Highway 9 North. Turn right at the stoplight at Rainbow Drive, then immediately right onto Tanglewood Lane. Turn right on Ptarmigan Trail, following the road up the hill to La Quinta on the left.

REGISTRATION DEADLINE: April 30, 2010

REGISTRATION: There is no registration fee for CALSS members attending the seminars and/or meeting. The registration fee for nonmembers is \$40 for the seminars and no charge for the meeting.

Members: Please mail, fax or e-mail your registration form to Cathy Vlasak, PLS.

Nonmembers, please mail your registration form with check payable to the **Colorado Association of Legal Support Staff** to *Cathy Vlasak, PLS.*

Mail: 415 South Howes, #609N, Fort Collins, CO 80521

Fax: 970-498-7430

E-mail: (cathy@hshh.com)

If you have any questions, please contact Cathy at 970-498-7435; or cathy@hshh.com.

✂ -----

Name: _____

ALS _____ PLS _____ CLA _____

Address _____

Other designation (please specify _____)

Phone: (W) _____ (Home/Cell) _____

Email: _____

I plan to attend (please check all that apply):

Nature Walk: (Complete attached registration form.)

Seminar 1: E-Mail Etiquette & E-Discovery

Seminar 2: Records Retention for Law Firms

Board Meeting

SEMINARS

James Crane, Esq. E-Mail Etiquette and Educating Clients About E-Discovery

James Crane was appointed as CEO of Doc1 Solutions, L.L.C., in May of 2009. He is a Colorado licensed attorney with a background in serving corporate legal departments as a consultant regarding complex litigation and the integration of technology into the legal and business process. Prior to joining Doc1, Mr. Crane was a practicing attorney, author and speaker with extensive experience in litigation, electronic discovery practice, pre-litigation preparedness and corporate compliance. In his practice, James has defended corporate clients in a variety of complex matters, including multi-jurisdictional class actions, mergers and acquisitions, intellectual property litigation, and internal corporate and government agency regulatory investigations. His areas of expertise and emphasis include antitrust, telecommunications, construction, employment, trademark infringement, ERISA, insurance and securities.



Additionally, Mr. Crane has consulted with Fortune 500 corporate legal departments to ensure compliance with Federal and state discovery rules, specifically those related to electronically store information. He also provides educational presentations to law firms and corporate legal departments regarding case law developments, the challenges associated with managing electronically stored information, and the integration of technology and processes to meet litigation needs. In his writings, he examines issues relating to serving corporate clients, electronic discovery developments, efficient use of technology and the proactive approach to litigation.

Mr. Crane obtained his Juris Doctor from the University of Alabama School of Law following a B.S. in International Relations and Political Science from the University of California at Santa Barbara. He is licensed in Colorado and admitted to practice in the U.S. District Court of Colorado and the U.S. Tenth Circuit Court of Appeals. He is an active member of the Class Actions & Derivative Suits and Corporate Counsel Committees of the American Bar Association, and the Colorado Bar Association.

Doug Rollo Creating a Records Retention Policy in a Legal Environment

Doug Rollo is the National Director of Records Management for Document Technologies, Inc., based in Atlanta, Georgia. He has over 28 years of industry experience, primarily in the Legal, Corporate and Government environments. Doug has significant experience in writing and implementing records retention policies, records software and programs. He has spoken at ALA and ARMA meetings and conferences on Records Retention and other records topics. He has also been successful in coordinating corporate moves. Doug works with firms to build quality records management programs.

ANNUAL MEETING UPDATE

By Ann Salek,

2010 Annual Meeting Chair

As I reported at the Second Board Meeting in February, there are changes afoot at the hotel which has been booked for the CALSS Fourteenth Annual Meeting and Educational Conference. The Radisson Denver Stapleton Plaza is now a Holiday Inn. The staff at the hotel is setting up a link just for CALSS for lodging room reservations. The link should be operational well before our registration forms go out in July. The hotel's link will provide all the information you need to make your room reservations.

The main focus at the present time is on booking our guest speakers, but there is a lot of work ahead. As always, member volunteers are needed to work on preparations for the event. Please contact me at asalek@klmtaxlaw.com if you want to know what volunteer opportunities are available, and to sign up!

I am looking forward to the Annual Meeting and hope you are, too.

Ann Salek, Paralegal
Trust and Estate Administration Department
Katz, Look & Moison, P.C.
1120 Lincoln Street, Suite 1100
Telephone: 303-832-1900 Ext. 114
Fax: 303-863-0412
E-mail: asalek@klmtaxlaw.com

AN INVITATION AN INVITATION AN INVITATION AN INVITATION AN INV
The Rocky Mountain Paralegal Association will be holding its 2010 Annual Dinner Meeting on Thursday, May 13, 2010 at the University Club, 1673 Sherman Street, Denver. The members of RMPA extend an invitation to all members of Colorado Association of Legal Support Staff to join them and guest speaker Colorado Court of Appeals Justice Richard Gabriel for an evening of celebration and recognition of the paralegal profession as well as the installation of the 2010-2011 RMPA Board of Directors. The event starts with a social hour at 5:30 p.m.; dinner will start at 7:00 p.m. More information to follow about the event.

Happy Birthday to Our April and May Birthdays

Renie Shovlin	April 10	Janet Boughton	May 8
Karen Towner	April 11	Jane Sprague	May 14
Teresa Stenwall	April 23	Paul Cartensen	May 26
Kate Miller	April 27	Cheryl Pulju	May 30



#4: Time Management: Right Work/Right Time/Right Way

"The habit of completing your tasks, finishing what you start, is an essential part of character building." –Brian Tracy

Review

The last several months you have been working on anticipating big tasks and delegating the "stuff" while working at a steady pace on those important and not urgent tasks, keeping your written goals in sight (you've reached several already, haven't you) and clean out your work area for that fresh start every morning. Isn't it amazing how new habits, once you keep doing them, become old hat? The conventional wisdom, by the way, is that if you do something consistently for three weeks steadily, it becomes habit. Let's work on some new things to build into your habits.

New:

There are three major time management strategies combined in this article—each as powerful as the next. Don't worry about which one to start with; just pick your favorite and go for it.

Brian Tracy in Time Power explains: "A hallmark behavior of successful salespeople, executives and entrepreneurs is that they do one thing at a time." (p. 117). Doing one thing at a time gives you tremendous focus and energy, adds clarity to what you are doing and yields tremendous satisfaction when you complete the task, or the part of the task you determined to do that particular day. I know (believe me) that the phone rings, attorneys need things, colleagues ask for help and the

office can be an incredibly busy place. But, the better you get at doing one thing at a time, the more satisfied you will become.

How do you do this? Strategy number two is a great help: schedule your day into 60-90 minute blocks and put your major tasks into those blocks. These can be:

doing that major reshuffling of a major client's files; drafting correspondence explaining the details of the opposing counsel's motion; efilng the pieces needed to open the conservatorship with the Court; paying the firm's bills for the month; drafting the opposing motion for your supervisor's review; organizing the motions for the upcoming trial—whatever the task is, give it a solid block of time, then schedule your day around those major tasks so that the smaller pieces fit more easily. Scheduling your day like this allows you to do the right work, at the right time. What do I mean by the right time?

You do NOT want me doing your detailed estate accounting trying to track the myriad accounts you opened and closed over the past 6 years at 4:30 at night. I'm one of those creepy morning people we all loathe who bounce out of bed and 5:15AM and have most of our major work done for the day by 10:30 or 11:00AM. That's when my brain is fresh and can handle details. That's when I can get in early to the office and avoid disruptions. That's when I really focus. By 4:30 or 5:00 PM I'm really better at organizing for the next day than doing the efilng of 20 detailed exhibits to the Court. I can promise you, that is best held until the next morning.

Tip:

So, do one thing at a time, at the time you do those kinds of things best, using scheduled blocks of 60-90 minutes so that you have ample time to do a great job.

"You can improve your ability to concentrate on any task by using positive affirmations. Whatever commands you repeat to yourself are eventually accepted by your subconscious mind. Your subconscious then motivates and drives you to behave in a way consistent with that command." –Brian Tracy

**Mark Donovan,
President-Elect**