



COLLEGE
OF LAW PRACTICE
MANAGEMENT

2014
ANNUAL REPORT

Accomplishments of the College in 2014



Class of 2014: At its 20th anniversary celebration, the College of Law Practice Management welcomed 31 new Fellows. Our most recent inductees are: John Alber, Rita Alli, Felicity Badcock, Wendy Bernero, Liam Brown, Kevin Colangelo, Char Coulbert, Stuart Dodds, Andrew Elowitz, Virginia Essandoh, Carol Schiro Greenwald, Patricia Groff, Jeanne Hammerstrom, Nick Jarrett-Kerr, Despina Kartson, Natalie Kelly, Courtney Kennaday, Dennis Kennedy, Carole Levitt, Steven Martin, Scott Rechtschaffen, Verna Myers, Sharon Nelson, Jean O'Grady, Taswell Papier, Andrew Perlman, Robin Rolfe, Mark Rosch, Jeff Rovner, Douglas Simpson and Teresa Walker.

InnovAction Awards: For the tenth year, the InnovAction Awards recognized outstanding innovation in the delivery of legal services, demonstrating to the legal community what can happen when passionate professionals, with big ideas and strong convictions, resolve to create effective change. There were two winners selected from twenty entries in 2014, Legal Talent Lab for "OnRamp Fellowship" and Higgs & Sons Solicitors for "Achieving Cultural Transformation." Thanks go to our InnovAction chair, Tim Corcoran, and award judges, Tom Clay, Ida Abbott, Patrick Lamb, Merrilyn Astin Tarlton and Tony Williams. All contributed their time and energies to help the College recognize and applaud winning innovations in law practice management.

2014 Futures Conference: The 2014 conference set another record for being the most attended annual conference to date. A combination of 125 Fellows and law practice management professionals from around the world attended this two-day conference in Boston, Massachusetts. Following a unique TED-style format, there were six presentations that challenged attendees to discuss the most pressing issues facing the legal industry today. Other presentations included a session on the Legal Services Corporation and a panel discussion featuring Suffolk Law School students. Wrapping up the last day was an intense Shark Tank competition where facilitated groups pitched the development of a unique product or program. Overall, the conference was filled with spirited and fulfilling discussions. A special thank you to our co-chairs Lisa Damon, Deborah McMurray and Susan Duncan, and to Andy Perlman and Alison Tejada from Suffolk University. Well done!



Legal Services Corporation (LSC): In 2014, several College Fellows participated in site visits to LSC grantee programs. Andy Adkins went on a visit to Rhode Island Legal Services and conducted a technology assessment, Bill Cobb provided management strategies and advice when he was on site at Legal Services of Northern Virginia, Patricia Lane worked with the Northwest Justice Project in relation to their management needs, and Ed Poll worked with Central California Legal Services on management matters. In addition, Carol Phillips continues to work with the Executive Director of Community Legal Aid in Central Ohio. Martha Minnow, Vice-Chair of the Legal Services Corporation, recognized these Fellows along with our immediate Past-President, Ron Staudt, for his leadership in working to close the justice gap (see Ms. Minnow's letter [at this link](#)).

20-Year Reflections

Delivered by Charter Fellow Chuck Coulter at the October 2014 Annual Induction Dinner



It was an honor to be a charter fellow of the College, but it was also humbling to be working with some of the early giants of LPM – Fran Musselman, J. Harris Morgan, Roberta Ramo, Jimmy Brill. I’m sorry that **Lowell Rothschild** is not able to be with us here in Boston, since forming the College was really his brainchild – based on his experience with the College of Bankruptcy Lawyers.

The **first mission** of the College was – and still is – to recognize those who have made significant contributions to the field of law practice management for over ten years. The real **genius** of the College was and continues to be the inclusion of the wide range of participants in law practice management – legal secretaries, paralegals, administrators, professors, recruiters, consultants, and even lawyers. No other organization has this breadth of membership.

So, many were inducted, but many were seldom seen again. Thus, the College faced the question of what this **incredible amalgamation** of dedicated, talented practice management folks could offer for the benefit of the legal profession and its clients. Annual meetings were wonderful get-to-gathers of old friends who had fought together in the practice management trenches. The **Fellowship** Maggie mentioned this afternoon. And the tales were, and continue to be, many.

But educational programs had to compete with the multiple CLE providers who were much better at it. So, what besides the great fellowship would draw the Fellows to an annual meeting, entice them to continue as dues-paying Fellows, and what else could/should the College do with all its talent? There was the rub.

And we wrestled with those questions for quite a while.

Then Lowell Rothschild said, “**You know, we ought to reward those who innovate!**” And the InnovAction Awards were born, and the College had found a niche.

And Ed Flitton said, “**Why don’t we meet at law schools and involve some students?**”

And Ron Staudt has parlayed his work with **Legal Services Corporation** into a program in which Fellows assist Legal Aid offices in working better and faster and serving their clients more effectively – an outstanding mission and a truly noble effort that I hope will continue to grow.

These **Futures Conferences** are intriguing, inspirational, and present global views of the legal profession and the sea changes that are affecting its future that most of us in our day-to-day practices do not see otherwise. So the College seems to have found **another niche**. Though I have trouble getting any CLE credit in Iowa.

At this 20th Anniversary, it’s most gratifying to witness the College grow, both in numbers and in missions. So, to try to answer Sylvia’s question from this afternoon, the Purpose of the College is still, **first, to honor those who have labored in Practice Management**. What other Purposes it can serve, with volunteers and a part-time staff, will be defined by what **we, the Fellows, decide to it can do**.

And, just perhaps, its greatest missions still lie before us.

Perspectives From our Founders

The Founders

Following is a roster of the charter members of the "College of Law Practice Management."

Small-firm lawyers will find themselves represented by such members as solo lawyer James E. Brill of Houston and J. Harris Morgan of a three-lawyer firm in Greenville, Texas.

Trustees and Officers:

President:

Richard C. Reed, Altman Weil Pensa, Bellevue, Wash.

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Francis H. Musselman, Hammond, N.Y.

Treasurer:

Lowell E. Rothschild, Mensch, Clark & Rothschild, P.C., Tucson, Ariz.

Secretary:

Austin G. Anderson, Institute on Law Firm Management, Ann Arbor, Mich.

Trustees:

James E. Brill, James E. Brill, P.C., Houston

Charles R. Coulter, Stanley, Lande & Hunter, Muscatine, Iowa

Kathleen Fisher, Morrison & Foerster, San Francisco

J. Harris Morgan, Morgan, Gotcher & Robinson, Greenville, Texas

Carol F. Phillips, Sidley & Austin, Los Angeles

Roberta Cooper Ramo, Modrall, Sperling, Roehl, Harris and Sisk, P.A. Albuquerque, N.M.

Nancy J. Siegel, Morrison & Foerster, San Francisco

Samuel S. Smith, Ruden, Barnett, McCloskey, Smith, Schuster & Russell, P.A., Miami

Warren L. Tomlinson, Holland & Hart, Denver

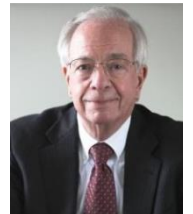
Robert P. Wilkins, Nelson, Mullins, Riley & Scarborough, Lexington, S.C.

Richard A. Williams, Mitchell, Williams, Selig & Tucker, Little Rock, Ark.

"I was impressed with the generosity of the people who wanted to share their knowledge with others." **Carol Phillips**



"The real genius of the College was and continues to be the inclusion of the wide range of participants in law practice management – legal secretaries, paralegals, administrators, professors, recruiters, lawyers and consultants. No other organization has this breadth of membership." **Chuck Coulter**



"There is not a more productive use of your time than to be surrounded by and learning and sharing with other imaginative people." **Jimmy Brill**



"The programs, outreach and public programs have been all that we contemplated and more." **Lowell Rothschild**



Financial Report

2014/2015 Board of Trustees

| Revenue | 2014 | 2013 |
|--|------------------|------------------|
| Membership Dues | \$30,000 | \$30,285 |
| Sponsorships | \$13,500 | \$17,500 |
| Conference Registrations | \$54,495 | \$48,915 |
| Induction Fees | \$15,190 | \$10,000 |
| Sustaining Fellows | \$5,110 | \$4,680 |
| InnovAction Entry Fees | \$2,587 | \$2,587 |
| Other Income | \$301.28 | \$0 |
| Total Revenue | \$121,183 | \$113,947 |
| Expenses | 2014 | 2013 |
| Admin Fees | \$28,875 | \$28,000 |
| Admin Expenses | \$19,143 | \$13,978 |
| Futures Conference/ Induction/ InnovAction | \$60,732 | \$60,114 |
| Total Expenses | \$108,750 | \$102,092 |
| Net Income | \$12,433 | \$11,855 |

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