



by Tammie McQuain



Mar/Apr 2016





It's an honor and a privilege to serve as the incoming Chapter President for the 2016-2017 year. We have a great group of Directors and Committee Chairs

who are excited and looking to get more involved and to make a positive impact in their roles.

The annual Leadership Retreat was held on Tuesday, March 22, 2016 at The Prado in Balboa Park. We had a great turnout and it was a fun-filled evening, which included a sports theme to help kick start the year.

I announced that this year's theme will be based around sports and our slogan is, "Sign with The Winning Team." This slogan is the name of our new Membership Campaign that Karen Lemmon will be chairing this year, which ties into the first initiative. We want to keep members engaged and keep the membership numbers up by bridging the gap between the current and new members while creating a fun and engaging environment. Throughout the year, our members can expect to see sports themed events and communications. We have also assigned athletic titles throughout the chapter roles. The Board of Directors are the Coaches. the Committee Chairs are the Referees, the Members are the Players, the Business Partners are the Sponsors, the Region 6 Directors are the Cheerleaders and the International Board of Directors are the Athletic Directors.

The second initiative is providing our Business Sponsors with more valuable time with our members. Without their support, our chapter would not be able to provide the great educational speakers and other networking events in addition to the help and support that they provide for us at our firms. As a board. we are constantly looking for new ways to continue the great partnership and provide value for their continued support. This year, we have added a new a la carte Business Partner event, which will provide some valuable time with our members in a social setting. This new event will be a baseball game held at Petco Park. The game is on August 24th where the Padres will play the Cubs.

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#### Got CLM?

If you are interested in becoming a CLM, you may want to consider joining a CLM Study Group, or checking out study materials from our library. Please contact our San Diego Chapter Librarian, Jennifer Becky for materials. For more information on eligibility and test dates, click here.

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"Physical fitness is not only one of the most important keys to a healthy body, it is the basis of dynamic and creative intellectual activity."

- John F. Kennedy



Two Business Partners, Ricoh USA and Nationwide Legal will sponsor this event. Please make sure to mark your calendars. You won't want to miss this event!

The third initiative is to standardize and promote the chapter website and social media accounts. We have created and linked all social media accounts to the chapter website to promote and heighten chapter awareness throughout the community. Our events can be shared with ease through email, sharing the links and through social media. Our education alerts are also tied to our website and social media accounts. We have been working with our in-kind sponsor, EPHost to convert all of our websites to one standard platform so that the Webmaster can be trained on one software and not multiple software platforms. In addition, we have created quick start guides with master login credentials for both the chapter website and social media accounts with step-by-step directions on editing and posting procedures.

The final initiative that I announced was regarding our CLM program. We have a new committee that is eager and ready to get a monthly study group together for those that are interested in getting the CLM designation. In addition to the monthly study group meetings, the committee will be updating the chapter library with books, timelines, sample exams, exam dates, and more. Stay tuned for more information.

We have a lot of great events and meetings scheduled in April. Please make sure to mark your calendars. On Tuesday, April 12<sup>th</sup>, we have the annual Leadership Retreat that will be held at Morton's Steakhouse downtown from 12:00 p.m. – 5:00 p.m. Everyone is invited to attend this board meeting. Our membership meeting will be held at The Westgate on April 19<sup>th</sup> and the topic will be on Wellness. We are also having our Spring Social on Thursday, April 28<sup>th</sup> at the Courtyard Marriott. Please check the website for details on these upcoming events.

In closing, I'd like to leave you with a few of my favorite sports quotes. TEAM stands for, Together Everyone Achieves More; Out hustle, out work, out think, out play, out last; Winners in life don't always win, they just don't give up; Whatever it takes; I will never quit.

Our Chapter is the winning team and I and your board and committee chairs are committed and excited for another great year.



The ALA Job Bank is a great place to post for talented managers and staff!

For more information and to submit job postings, please contact:

SHAILA SCHAIBLE (619) 595-4317 schaible@higgslaw.com

Or visit the San Diego ALA website to see what's new!

http://www.sandiegoala.org/jobs

Take advantage of the resources at **SANDIEGOALA.ORG**, and stay Connected with ALA!















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\*Exclusively Legal has rebranded to Eastridge Workforce Solutions









#### Gain more from your membership and get involved in 2016!

#### **Dear Chapter Members:**

Do you want more out of your membership? Would you like to network with like minds? How many times have you been faced with an issue where "no one else understands" and you could use a group of peers to consult?

Then take the opportunity to get involved in the SD Chapter in whatever capacity you are comfortable:

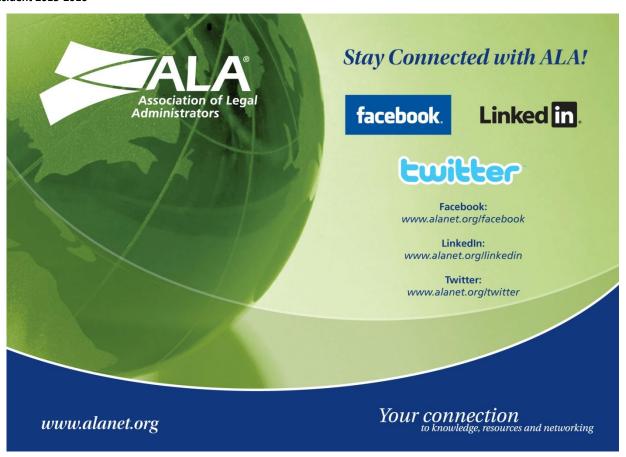
- Are you good behind a camera? Consider taking photos at our meetings and events, or share the fun with another member.
- Do you thrive on community involvement? Look into our Community Connections efforts, Couture for a Cause and Project LEAP, our program for high school students.
- Maybe you have great ideas for increasing membership in the Chapter? Join the Membership Committee and help lead our Peer Connections program.
- Are you organized and task oriented? We need help with CLM materials, Bylaws/Ethics, Historian tasks, as well as the Salary Survey.

The 2016 – 2017 Chapter term starts on April 1, 2016, but planning is paramount. I would love to see more of you involved. I have included a brief description of each committee, and the ALA Membership Handbook has a more detailed one, or just ask me or another current Board member.

Let's work together to make our Chapter the best it can be! Please complete the information below and return it to me at rushworth@higgslaw.com, or give me a call at 619-595-4393.

All my best,

Anna Rushworth
Past President 2015-2016









#### Gain more from your membership and get involved in 2016!

Name	Firm:
Phone No	Email
I'm interested in volu	nteering for the following committee(s) (you are not beholden to all you select):
Chapter Audit -	perform audit of Chapter finances once a term.
Chapter Library	/ CLM Materials – maintain materials to loan to members; organize CLM study program
Bar / Profession	nal Association Liaison – Chapter's connection to other legal organizations.
Bylaws / Ethics	<ul> <li>maintain and update Chapter Bylaws, as necessary.</li> </ul>
Communication "Month-at-a-G	ns – provide efficient and effective communication to Chapter members, including the Blance."
	<b>nnections / Project LEAP</b> – charitable Chapter efforts; Couture for a Cause; work with ools to create programs promoting opportunities in the legal profession.
Diversity Comm	nittee – plan annual diversity presentation; promote diversity within the Chapter.
Education – wo	rk with President Elect on planning Chapter education activities/speakers.
Handbook – ma	intain and update membership handbook.
Historian – mair	ntain Chapter memorabilia.
Invitations – dea	sign and create options for invitations for BP luncheon, MP luncheon, Leadership Dinner, apter events.
Legal Resource	Fair – Chapter annual Business Partner resource fair in February.
_	<b>linator / Hospitality</b> – assist Meetings Chair to coordinate Chapter meetings. VP's; maintain name badges; and/or welcome attendees.
Membership – t	eam up with the Vice President/Membership Chair to bring in new members and maintair pership.
The Mandate (C	hapter Newsletter) – with Editor-in-Chief produce bi-monthly newsletter.
Photographer -	photograph Chapter meetings, events, and other functions.
Public and Med	ia Relations – represent the Chapter in publicizing and promoting events.
Salary Survey -	implement annual Chapter salary survey.
Academic Scho	larship – selection process to promote and award an academic scholarship to `two dents.
Social Media –	assist Social Media Chair in promoting Chapter LinkedIn, Facebook, and Twitter pages.
	er Relations – work with Director of BP Relations in promoting, managing and endor relations.
I'd like to help a	nother way:







### Blurring The Line Between Yours and Mine: Best Practices for Bring Your Own Device Policies By Michael Elkon

Let's face it: bring-your-own-device (BYOD) situations are here to stay. With the ubiquity of employees

having and using smartphones and tablets - devices that have more capacity and processing power than desktop computers from not so long ago - it was inevitable that employees would eventually start to use their own devices in a work capacity. This new reality presents benefits for employers, as their employees can now be productive away from the office and be responsive to work situations as they arise. Additionally, there are cost savings that can be achieved when an employer is no longer responsible for supplying devices to its employees.

The situation also benefits employees, as they often derive personal satisfaction from being able to link up their own preferred devices to the work system, creating a little node of personalization in an environment that they do not otherwise control. Surveys reflect that a significant percentage of job seekers will view a prospective employer more favorably if it has an IT system that supports the seekers' personal devices. But if employers do not manage BYOD scenarios proactively, then they present risks in addition to rewards. To state the obvious, when your company's information is being sent, received, and stored over a device that you do not own, then the specter of data loss is present. This risk can come from an employee who intends to hurt the company by taking information and either using it on behalf of a competitor, or simply disclosing it to cause embarrassment. It can also come from an employee who inadvertently retains or loses it. Either way, the employer that thinks through BYOD issues in advance and charts out rational, balanced policies before issues arise is going to place itself ahead of the game. Here are some best practices for BYOD situations:

#### **Have Technology In Place To Protect Your Information**

Take the typical employee's smartphone. Some employers require that the employee use an employer-

issued email application like Good Technology. Other employers require that their employees download an application that allows the employer to shut down or access a device in certain circumstances. Some employers take the simple step of requiring that employees activate passcode protection on their devices, a policy that costs nothing because just about every device contains this option.

Regardless which of these options an employer chooses, it is the most basic step in dealing with BYOD situations. You need to acknowledge and deal with the fact that if your information is going to migrate to your employees' personal devices, then those devices need protection measures in place to ensure that the information is not lost or stolen.

#### Think Through Your Key Information and Take Steps to Protect It

Some information is simply too important to permit it to migrate to an employee's personal device. Even with one of the data-security fixes in place, an employer might worry about information that remains on the device after the end of the individual's employment or that an employee will leave the device unattended for a moment and allow a third party to see sensitive information on the screen.

It's important to ask yourself three questions. First, what information would be most useful to its competitors if an employee left with it? Second, what information would be most embarrassing if it were leaked to the general public? Third, if asked on a witness stand "how many measures do you take to ensure that the company's most valuable, sensitive information remains private?" what would you or your Human Resources manager say in response? It's valuable to put yourself through this sort of self-critical analysis in many scenarios; but it is specifically important in addressing BYOD situations.

Make Clear That Employees Cannot Misuse the Computer System





With the increased use of the federal Computer Fraud and Abuse Act and analogous state computer-protection statutes, employers are learning the importance of putting employees on written notice as to what they are not authorized to do on the company computer system. This includes both taking files from the system (such as by emailing files out as attachments or saving them to thumb drives) and deleting files prior to departure. The key to unlocking the power of federal and state computer-protection laws is showing that the employees were on notice that they were not authorized to perform certain acts on the system. This general rule extends to BYOD policies. Put your employees on notice as to what they can and cannot do with respect to company information on their devices.

Just as it is helpful to think through confidential information issues in advance, it is also worthwhile to spend some time addressing common employee misconduct or negligence scenarios involving data security on personal devices and then covering them with written policies. A policy laying out general rules and then covering specific scenarios in an "including, but not limited to" string (a construction much beloved by lawyers) is ideal.

#### Pay for the Employee's Cell Phone

In the grand scheme of things, it is penny wise and pound foolish to have key employees pay for their own cell phone plans. If a company owns and maintains the account, then it can: a) terminate the account when an employee leaves so customers cannot reach out to him or her; b) determine whom the employee has been contacting in the final weeks with the company by reviewing call and text logs; and c) stop the employee from walking out with a de facto customer list on the phone. Thus, while employees might choose to use their own devices at work, you can still control the account

and thus still be in command of the information on a device.

#### **Employ Tight Exit Procedures for Departing Employees**

Perhaps the number one issue with the BYOD phenomenon is that when employees use their own devices, they end up with a large quantity of employer information on those devices. Whether intentionally or inadvertently, when those employees resign or are fired, they leave with a treasure trove of information. That information can be used to compete. It can be used to stir up issues with the employees who remain. It can be disclosed on social media or to reporters.

Therefore, it is critical to create and follow established exit procedures, so that when an employee leaves, you can show that you did everything in your power to get the company's information back. These procedures will never be foolproof against employees who choose to keep information on their devices, but at a minimum, it will help put you in a position to show that you took all reasonable steps to maintain the confidentiality of its key information.

The issue of protecting against data loss resulting from employees using their personal devices for work is a classic example of the maxim that an ounce of prevention is worth a pound of cure. Relatively small expenditures of time and money on the front end can deter an employee from exploiting key information on a personal device; can protect against that same employee accidentally losing information to a third party; and can position the company to recover the information if it is indeed lost. The critical first step is to acknowledge the reality of employees using their own devices and to plan accordingly.

For more information contact the author at MElkon@laborlawyers.com or 404.231.1400

#### TIPS TO STAY FIT WHILE YOU WORK



- 1. Stand Up: Those who remain sedentary at work lose the opportunity to lose hundreds if not thousands of calories per day. So stand up when you're on the phone, get a standing desk, or just go take a walk!
- 2. Send your documents to the printer furthest from your desk.
- 3. Drink water. Then drink more. Upping your daily water intake will give you more energy and make you feel less sluggish.











#### ASSOCIATION OF LEGAL ADMINISTRATORS SAN DIEGO CHAPTER

Tuesday, April 19, 2016 Membership Meeting

11:45 am – 1:15 pm Registration and Program

#### Science of Maximizing Office Productivity & Health

- · See how breathing, sitting, eating, and stressing impacts the body and brain of your law firm
- Determine how exercise enhances learning and memory
- Understand how incorrect breathing can lead to fatigue, pain, and stress
- · Identify what sitting does to the muscles, spine, and organs
- Describe nutrition and hydration's role in energy, focus, and mood
- Examine concepts for building long-lasting habits

PRESENTER: Lance Breger is an Executive Wellness Coach and the founder of Infinity Wellness Partners, a comprehensive corporate wellness company that prepares law professionals for the most productive and healthy work life through four areas of onsite/online training: ergonomics, mind/body, nutrition and fitness. Take a dive into the science behind wellness to see just how breathing, sitting, eating, and stressing impacts the body and brain of your law firm. Learn how to maximize your team's creativity, energy, and focus through simple yet infrequently used workday wellness strategies. Lance Breger will serve as your personal guide in a hands-on exploration of the most effective and efficient techniques that can help you and your staff reach full potential.

Location: The Westgate Hotel, Riviera Room, 3rd Floor, 1055 2<sup>nd</sup> Avenue, San Diego, CA 92101

Hosted parking for members only. Please walk to save on Chapter costs

RSVP: Kathy Culver at kculver@ssvwlaw.com RSVP due by Thursday, April 14th by 12:00 p.m.

\*Please note that late cancellations will result in a \$50 fee.

Meeting Sponsor



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### MEMBERSHIP REPORT MARCH 2016 By Shaila Schaible

### **MEMBERSHIP NEWS**

#### New Members

#### **Prospective Members Cont.**

Scott Stewart Controller Klinedinst, PC

**Bridget J. Maisis**Office Manager
Schweitzer Law Group

**Linda A. Coxen** Office Manager Dept. of Justice

Current National Members: 119 Current Chapter Members: 111



Know someone who should be a member of ALA? Refer them to Shaila and earn points toward great prizes!

For more information and to participate in the program, please contact:

SHAILA SCHAIBLE

(619) 236-1551 schaible@higgslaw.com

Or visit the San Diego ALA website to see what's new!

http://www.sandiegoala.org/









Enriching education sessions
Peer networking
Keep up with legal trends
Professional growth
Business Partner connections
New friends & FUN!



#### Awaken your spirit of Aloha and join us for an exciting year ahead!

Earn Aloha Points by attending events and referring new members.

Every point is worth one ticket that will be entered into several drawings for fabulous prizes on the following dates:

TWO Fall Conference Scholarships w/stipend – drawing on 7/21/15
Aloha Points will accumulate from April 1 to June 30 (must be present to win)

Tablet and other prizes – drawing at the Holiday Luncheon, 12/8/15
Aloha Points will accumulate from April 1 to November 30 (don't have to be present)

ACTIVITIES TO EARN POINTS	ALOHA POINTS EARNED
Renew Your Membership	2
Join as a New Member	3
Refer a New Member	3
Attend a Regular Monthly Membership Meeting	1
Attend a Monthly Board Meeting	2
Attend the Diversity Meeting	2
Attend the Annual Conference	3
Attend Cocktails and Connections	3
Attend the Business Partner Appreciation Luncheon	2
Attend Couture for a Cause Event	2
Attend the Managing Partner Luncheon	1
Bring your Managing Partner to MP Luncheon	1
Attend a Chapter Social	1
Sign up with the Peer Connection Program	2
Attend the Business of Law Conference in the Fall	3
Volunteer on a Committee	2
Participate in the 5K Run	2

Printing compliments of D4 Discovery





### ALA SAN DIEGO 2015/2016 CALENDAR

APRIL 10 LEADERSHIP RETREAT

Courtyard by Marriott, downtown

APRIL 21 LEADERSHIP DINNER

The Prado in Balboa Park

**MAY 12 MEMBERSHIP MEETING** 

The Westgate Hotel Sponsored by First Legal Network

MAY 17-20 ALA NATIONAL CONFERENCE

Nashville, TN

JUNE 18 DIVERSITY EVENT

The Westgate Hotel Sponsored by UPS

JULY 21 **MEMBERSHIP MEETING** 

The Westgate Hotel Sponsored by Legal Staff

JULY 30 **COCKTAILS & CONNECTIONS** 

**Location TBD** 

**AUGUST 18** MEMBERSHIP MEETING

The Westgate Hotel Sponsored by Nationwide

**AUGUST 27 NEW MEMBER SOCIAL** 

Morton's Restaurant Sponsored by Morton's

SEPT 15 **BUSINESS PARTNER APPRECIATION LUNCHEON** 

The Doubletree Mission Valley

SEPT 24 **COUTURE FOR A CAUSE** 

San Diego Hall of Champions

**OCTOBER 20** MANAGING PARTNER LUNCHEON

Morton's Restaurant downtown

OCTOBER 22-24 **BUSINESS OF LAW CONFERENCE** 

Las Vegas, NV

**NOVEMBER 17** MEMBERSHIP MEETING

The Westin Gaslamp Sponsored by Peterson Reporting

**DECEMBER 8** HOLIDAY LUNCHEON

The West gate Hote Sponsored by Exclusively Legal

**JANUARY 12** MEMBERSHIP MEETING

The Westgate Hotel Sponsored by Robert Half Legal

**FEBRUARY 9** LABOR LAW UPDATE / LEGAL RESOURCE FAIR **Sheraton Mission Valley** 

MARCH 22 LEADERSHIP DINNER

The Prado in Balboa Park

4/10/15; 5/5/15; 6/9/15; 7/14/15; 8/11/15; 9/8/15; 10/13/15; 11/10/15; 1/5/16; 2/2/16; 3/8/16. **BOARD MEETINGS** 

**Locations TBD** 

Printing compliments of D4 Discovery



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# ASSOCIATION OF LEGAL ADMINISTRATORS SAN DIEGO CHAPTER

### **SAVE THE DATES**

**Upcoming Monthly Membership Meetings** 

RSVP: Kathy Culver at <a href="mailto:kculver@ssvwlaw.com">kculver@ssvwlaw.com</a>

#### **March 2016**

March 22 Annual Leadership Dinner

Time: 5:00 to 7:00 p.m. Location: The Prado Annual Leadership Dinner

#### **April 2016**

April 12 Annual Leadership Retreat

Sign with the Winning Team

**Time:** 12:15 – Lunch; 1:15 Warm Ups; 12:30 Coaches Meeting; 2:00 Scouting Report and Game Plan; 4:00 – 5:00 Cocktails and Networking Reception

Location: Morton's Steak House

April 19 April Membership Meeting

Science of Maximizing Office Productivity & Health Speaker: Lance Breger, Executive Wellness Coach

Time: 11:45 - 12:00 p.m. - Registration; 12:00 - 1:15 Program

Location: The Westgate Hotel, Riviera Room 3<sup>rd</sup> Floor

April 28 Spring Member Social

**Time:** 5:00 – 7:00 p.m.

Location: The Courtyard Marriott Downtown San Diego – Billiards Room







# **BOARD & MEMBERSHIP**

ANNUAL LEADERSHIP RETREAT . . . APRIL 12, 2016 SIGN WITH THE WINNING TEAM 12:15 – 5:00 MORTON'S STEAK HOUSE

APRIL MEMBERSHIP MEETING . . . APRIL 19, 2016 SCIENCE OF MAXIMIZING OFFICE PRODUCTIVITY AND HEALTH 12:00 – 1:15 THE WESTGATE HOTEL – RIVIERA ROOM

SPRING MEMBER SOCIAL . . . APRIL 28, 2016 5:00 – 7:00 THE COURTYARD MARRIOTT DOWNTOWN SAN DIEGO

# A SPECIAL THANKS TO OUR BUSINESS PARTNERS!























### Please congratulate our

### 2016/2017 BOARD OF DIRECTORS!

President	Tammie McQuain	619/819-2433
President Elect - Education Chair	Shaila Schaible	619/236-1551
Vice President - Membership Chair	Karen Lemmon	619/255-6450
Treasurer	Cynthia Barron	619/241-4814
Secretary	Stephen Williamson	858/451-9390
Director - Business Partner Relations	Wendy Connor	619/525-1300
Director - Bank Statement Auditor	Carrie Merzbacher	619/942-2897
Director at Large	Katya Adams	858/535-1511
Past President	Anna Rushworth	619/236-1551





#### And our

### 2016/2017 COMMITTEE CHAIRS/MEMBERS





Retirement plan administrative and recordkeeping services provided by ONEAMERICA RETIREMENT SERVICES LLC a ONEAMERICA' company









CANON BUSINESS PROCESS SERVICES, INC.



Academic Scholarship Chair	Carrie Merzbacher	858/942-2897
Business Partner Relation Chair	Wendy Connor	619/525-1300
Bylaws/Historian Chair	Patti Groff	619/233-4777
Chapter Audit Chair	Liz Whitten	619/238-1811
Chapter Awards/LRF/Prof. Association Liaison	Anna Rushworth	619/236-1551
Chapter Library/CLM Materials Chair	Jennifer Beckey	619/765-6613
Communications Chair (MyEmma/MAAG)	Carol McCabe	619/209-3000
Community Connections Chair (C4C)	Henry Angelino	619/696-1410
	Angela Landeros	619/699-8338
	Tammie McQuain	619/819-2433
	Monica Menzer	619/233-1155
Diversity Chair	Michael Steiner	619/488-8824
Education Chair	Tammie McQuain	619/819-2433
Employment Job Bank	Shaila Schaible	619/236-1551
Meeting Coordinator	Monica Menzer	619/233-1155
Hospitality Chair	Stephanie Villa	619/241-2541
	Lauren Bloodworth	619/744-0864
	Wendy Connor	619/525-1300
Invitations Chair	Wendy Connor	619/525-1300
Membership Chair	Karen Lemmon	619/255-6450
Peer Connections Chair	Karen Lemmon	619/255-6450
Newsletter Editor	Stephen Williamson	858/451-9390
RSVP's	Kathy Culver	619/239-7200
Project LEAP Chair	Ginger Boss	619/234-1776
Media and Public Relations Chair	Carol McCabe	619/209-3000
Salary Survey Chair	Shaila Schaible	858/755-8500
Social Media/Photographer	Cirilia Walker	858/345-5079
WebMaster	Matt Chaffee	619/232-0441
5K 4 Kids Chair	Stephen Williamson	858/451-9390
	Carol McCabe	619/209-3000
	Wendy Connor	619/525-1300















SAN DIEGO DOWNTOWN







# NEW BUSINESS PARTNER DIRECTORY!

2016/2017 BUSINESS PARTNER SPONSORS
THANKS FOR YOUR SUPPORT!

Please check the Chapter's Business Partner Directory *first* when you're shopping for a product or service for your firm. Not only are our Business Partners committed to delivering the highest quality products and services, they are also committed to furthering the goals of ALA San Diego by providing the funding we need for the outstanding educational and networking events and scholarship opportunities we value as members.

Please download the new <u>Business Partner</u> <u>Directory.</u>













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SAN DIEGO CHAPTER

A Chapter of the Association of Legal Administrators



