

## PRESIDENT'S MESSAGE

By Stephen Williamson



Last month at our annual Leadership Retreat at Crowne Plaza Hotel, I asked the Board to come up with and share *why* they do something. It could have been anything: *why* they participate in a certain activity, *why* they belong to a certain group, *why* they made a certain life changing decision. The responses were all unique, and every one of them shed a new and meaningful insight into the people I'll be working with this year. When people share the reasons *why* they do something, they share their values. And, like people, successful organizations make clear *why* they do the things they do.

As President this year, there are a number of initiatives, both within the Board and Membership at large, I wish to forward with the hopes of leaving a beneficial impact to the Chapter for years to come.

The first of these being the digitalization of records, and archiving of documents. For years, taking over a Board position meant inheriting boxes of binders dating back 30 years.

It made the introduction to a position for new Board members daunting and awkward. Tradition matters, but like many of your Firms, so too shall we further our efforts in becoming a more sustainable organization.

We are also making a concerted effort to attract more Firms in North County into joining our organization. In doing so, we have begun hosting our meetings from a secondary location in Carmel Valley. We are in the early stages and still working out all the kinks but it is our hope that we will soon be able to be a more inclusive organization to those unable to travel downtown due to time constraints.

So why am I making these items initiatives? Because I greatly desire to give back to the organization that has done so much for me, as I may not be where I currently am without ALA. I want to revitalize our membership and get people excited to be involved.

I fully believe that this year will be a year of innovation, and would like to thank all of you for your trust and support. Please do not hesitate to reach out to me, or any of the Board Members, should you have any ideas or suggestions for the coming year.

## ISSUE XLVIII

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*"Innovation is change that unlocks new value."*

- Jamie Notter



**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:**

KATYA ADAMS  
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[kadams@watkinsfirm.com](mailto:kadams@watkinsfirm.com)

**Visit the San Diego ALA website to see what's new!**

<http://www.sandiegoala.org/archives/category/jobs>



## **Gain more from your membership and get involved in 2019!**

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.

Let's work together to make our Chapter the best it can be!

**STAY CONNECTED &  
Take advantage of the  
resources at  
[SANDIEGOALA.ORG](http://SANDIEGOALA.ORG), and  
stay Connected with ALA!**





## HOW LEASING ALIGNS FINANCE AND TECH NEEDS FOR YOUR FIRM

By **SCOTT MCFETTERS**

**Founder and President, CoreTech Leasing**

The top 3 concerns of Chief Legal Officers, according to the Association of Corporate Counsel, relate to firms' cybersecurity abilities and governance over their data. Technology adoption, not surprisingly, has become a central strategy firms are leveraging to meet client demands - but few of us were likely to forecast just how large the legal tech market would become in such a short period of time. Legal tech investment reached \$1 billion in 2018, as reported by AI legal tech startup, LawGeex.

But let's admit it—technology adoption hasn't been a bed of roses, let alone a cure-all. In this, legal is no different than any other vertical: Selecting and owning a technology are very different from its successful implementation and adoption to improve operations. That's why we see ILTA's 2018 Technology Survey listed Cybersecurity and technology updates as the second and third most recurrent concerns for firms.

As technology continues to become an imperative function for firms, security

concerns increase and data protection is essential. In the past three years, data breaches have become commonplace, and firms have had to up their games to protect client data. We have seen major global players like DLA Piper become a victim of a cyberattack that led to a complete shutdown of its digital operations. Firms are making drastic changes to ensure they are secure; this requires an operational transformation as well as a financial plan. For many firms the move to the cloud allows for increased security and reduced liability; according to the 2018 Enterprise Cloud Trends Report, organizations, including law firms are investing more in the cloud, with nearly every organization planning to increase enterprise spend in the areas of cloud and SaaS over the short and long term.

The changing landscape demands maximum flexibility and requires applying your resources in a smart and efficient manner. New tools, products and solutions are developed every day, creating a marketplace cluttered with options that cater to every business need. This is true as well for staple technology needs with which law firms need to equip their attorneys: laptops, desktops and tablets, etc. The obsolescence cycle for these key pieces of technology have shrunk well-below the rate of depreciation, while attorney demand has skyrocketed with the rise of mobile lawyering. Firms need to navigate technology, operations, security and finance astutely.

Leasing delivers that agility. Equipment leasing and financing is a strategic solution law firms can take advantage of in order to face the intricate challenges and embrace the countless opportunities and security benefits that technology offers.

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Let's delve deeper into some of these opportunities:

1. **Investment in top-of-line hardware** –

The purchase of technology such as desktops, laptops, tablets, printers, and servers is a massive commitment. As law firms look for operational efficiency, funds locked in depreciating assets do not appear favorably on the books. With an equipment lessor, firms only have to identify their needs and find the right options.

Equipment leasing, unlike purchase is not a capital expenditure and does not affect a firm's debt covenant. Even in the updated 2019 lease accounting tax law, leases will be categorized as non-debt, making this a rational option for law firms.

2. **Flexibility** – 2018 was the year of law firm mergers and acquisitions, with numbers exceeding historical averages with a total of 72 mergers; a 10% increase over 2017 as *The American Lawyer*. In such uncertain times, instead of securing equipment for teams that may not be with the firm 6 months from the date of purchase, firms can choose to lease equipment per their evolving needs. Leasing agreements can be drawn for the short as well as the long-term and are a great way to bring agility to a law firms' operations.

3. **Security** – In the era of enhanced cyberwarfare, firms are expected to offer the highest level of security for all the confidential data they hold. When new upgrades are released, a firm will need to protect itself and its clients with the most up-to-date versions of security

technology available, and therefore, firms may not want to purchase the technology or software outright. In this case, financing is an intelligent option, both financially and for security reasons.

So, from basic updated anti-virus software on your computers to sophisticated multi-factor login and anti-phishing enablement, the right leasing partner can fortify your firm to ensure the highest level of security.

Furthermore, a good equipment lessor should be able to:

- Offer the highest level of security to all the hardware offered by them
- Keep clients abreast of the latest updates
- Ensure no data loss while replacing or changing an older piece of equipment
- Properly dispose of obsolete hardware

4. **Cloud Migration** – Law firms have become more dynamic in the way they serve clients. It makes sense that they are increasingly leveraging the flexibility of cloud solutions for various aspects of their operations including document management (DMS), deal rooms, extranets, eDiscovery, litigation support, etc., and of course the rampant adoption of Microsoft Office 365. Moving to the cloud is a 2-3-year decision. During that time, it does not make sense to purchase your firm's hardware. Rather your firm should consider leasing to match the IT hardware expense to the asset's useful life.

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5. **Easy maintenance** – Once you sign a lease for your equipment, maintenance becomes the responsibility of the lessor. So instead of paying an in-house tech support team and bearing the cost of salaries and benefits, firms can ask for round-the-clock support from the lessor.
6. **Customized offering** – Hardware-software combinations that best suit different roles have led organizations to reject the notion of ‘one-size-fits-all’ in their technology choices. While Original Equipment Manufacturers (OEMs) these days offer corporate deals for firms with sizeable orders, a lessor can truly understand your firm’s requirements and build a custom package that offers variety and matches each roles’ unique needs.
7. **End of lease options** – At the end of lease period, leasing contracts offer firms a variety of options – from disposal to refinance along with system upgrades to outright purchases at a discounted price.
8. **100% financing options** – A zero down-payment structure with custom payment schedules can make a world of difference in a law firm’s accounting. Equipment lessors function on a vast pan-industry scale and can offer favorable deals to firms, that banks or corporations might not be able to.
9. **Inflation protection** – Equipment leases follow fixed monthly payments (in dollar amounts or in percentages) shielding law firms from currency fluctuations as well as market inflation.

## ABOUT SCOTT MCFETTERS

Scott McFetters is founder and President of [CoreTech Leasing](#), an independent technology and equipment lessor servicing over 100 of the nation’s most distinguished law firms. Scott speaks widely on best practices in technology and equipment finance; his articles have been published in *Legal Management*, *Legal IT Professionals*, *Forefront* and *Law Journal Newsletters’ Accounting & Financial Planning for Law Firms*. CoreTech proudly provides year over year sponsorships of key industry events such as ILTA, ALA Annual Conference, Thomson Reuter’s Elite, Aderant, the COO CFO Annual Forum in New York City.



## MEMBERSHIP NEWS

### MEMBERSHIP REPORT MAY/JUNE 2019

By Cynthia Barron,  
Vice-President/Membership Chair

Current National Members: 73

Current Chapter Members: 72

#### New Members

Elizabeth Carazolez  
Operations Manager  
Antonyan Miranda

Lauren Bonnes  
Administrative Supervisor  
Paul Hastings LLP

#### Prospective Members

Jennifer Sahn  
Office Manager  
Sheppard Mullin, North County Office

Christopher Neff  
Office Manager  
Shinnick & Ryan

Tina Drews  
Office Manager  
Wilson Sonsini

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

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



**CYNTHIA BARRON**

(619) 241-4814

[cbarron@fitzgeraldknaier.com](mailto:cbarron@fitzgeraldknaier.com)

**Visit the San Diego ALA website to see what's new!**

<http://www.sandiegoala.org/>

# BUSINESS PARTNER SPOTLIGHT

## SAN DIEGO EXPERTS *in Legal Recruiting*

A Roth Staffing Company  
**ADAMS & MARTIN**  
GROUP

### KRISTY CARBAJAL, VICE PRESIDENT



Kristy Carbajal is the Vice President of Adams & Martin Group and is based in San Diego. She has been with the company since August 2005 and is responsible for managing all operations, which includes a robust team of legal recruitment professionals in nine locations nationally. During her tenure with Adams & Martin Group, Kristy has served in recruitment, sales and management roles. Kristy holds a bachelor's degree from UCLA and worked as a paralegal for a San Diego firm. As a native San Diegan, she is greatly involved in the region's legal community.

### KATHY GERSHWIND, BRANCH MANAGER



Kathy has 16 years of staffing experience, the last seven focused in legal staffing in major west coast markets. Her career has allowed her to move down the west coast, starting in Seattle where she started her staffing career, then back to the SF Bay Area where she was born and raised, and now is settled in beautiful San Diego where she calls home. She was active with ALA in all three markets. Kathy is an avid dog lover and has two rescue dogs, a French and English Bulldog that keep her laughing.

### RAQUEL SMITH, BUSINESS SOLUTIONS MANAGER



Raquel's career in recruitment and sales spans 10 years. Since joining the team in July 2016, her focus is on building long-term relationships with clients and candidates to ensure the right culture fit. Raquel is a native San Diegan who grew up in the legal world (her father is an international attorney with his own firm) and graduated from San Diego State University. Raquel's zest for life has led her to travel the world – she has been to more than 15 different countries and is fluent in Spanish. She is also a member of the San Diego Legal Secretaries Association and is actively networked in the San Diego Paralegal Association and Association of Legal Administrators.

### MELISSA FREDERICKSON, BUSINESS SOLUTIONS MANAGER



Melissa is uniquely qualified as a legal recruiter as she has been an attorney for 20 years! Melissa graduated from USC Law School where she was on Law Review, and went on to work for a large law firm and then took an in-house role. She has hired and trained every type of role in the legal field, from receptionists to paralegals to attorneys. Melissa is a self-described "adrenaline junky" who rang in the new year by sky-diving! She loves spending time with her four children and her four dogs, working out, hiking outdoors, and cheering on the USC football team.

### KELSIE SAN DIEGO, BUSINESS SOLUTIONS MANAGER



Kelsie's experience as a legal staffing coordinator launched her career in legal staffing, where her close attention to detail and goal-oriented approach enables her to help others make important career decisions. Kelsie brings to her role six years of experience in the staffing industry, including positions in management where she hired and trained future leaders in the company, in addition to recruiting and account management for large corporate clients in the Greater San Diego market. Kelsie is proud to share the last name of the city where she was born and raised! In her free time, she enjoys spending time with her four-year-old Yorkie.

### MADISON NICOLAO, TALENT ACQUISITION SPECIALIST



Prior to joining the team, Madison graduated from Loyola University Maryland and moved to San Diego. A career in staffing was the perfect fit for Madison, as she truly excels in communication and establishing strong relationships. Her love for helping others drives her success in finding great legal talent and matching them with the right career opportunities. Originally from Princeton, New Jersey, Madison enjoys exploring the greater San Diego area, bike riding around Coronado, running in downtown, and trying new restaurants.

### About Adams & Martin Group

Adams & Martin Group is a values-driven, full-service legal staffing firm that has proudly served the staffing needs of law firms and legal departments in greater San Diego since 2013. Our local team – including our Vice President

– lives and works right here in the San Diego community, with strong ties to the area's professional organizations. With our company headquartered in Southern California and two additional offices in the region, we know this unique labor market inside and out.



*"We love to create remarkable experiences... every person, every time."*

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# BOARD & COMMITTEE CHAIRS

## We welcome our 2019/2020 BOARD OF DIRECTORS!

Stephen Williamson, President  
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Linda Quindt, CLM - Past President  
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Phone: 858-737-3100



**Our New 2019/2020 Board of Directors**





**Thank you to our 2018/2019 Board of Directors**

## **Our new 2019/2020 Committee Chairs**

Academic Scholarship	Monica Menzer
Bylaws/Historian	Patti Groff
Business Partner Relations	Lauren Bloodworth
Chapter Audit	Lani Zerr
Communications/MAAG	Jamie Vidovich
Comm. Svc/Couture for a Cause	Lauren Bloodworth
Diversity	Marina Field
Education	Katya Adams
Employment Job Bank	Katya Adams
Hospitality/RSVPs/Badges	Kristin DeGroot
Legal Resource Fair/Professional Association Liaison	Karen Lemmon
Meetings Coordinator	Monica Menzer
Mandate Newsletter Editor	Monica Reisner
Media and Public Relations	Carol McCabe
Membership	Cynthia Barron
Nominating Committee	Karen Lemmon
Peer Connections	Cynthia Barron
Photographer	Linda Quindt
Presidents' Award	Karen Lemmon
Salary Survey	Jamie Vidovich
Social Media	Libby Worden
Spirit of San Diego Award	Karen Lemmon
Webmaster	Beverly Driscoll



ASSOCIATION OF LEGAL ADMINISTRATORS  
SAN DIEGO CHAPTER

## **SAVE THE DATES**

Upcoming Monthly Membership Meetings  
RSVP: Kristin DeGroot at [kdegroot@wingertlaw.com](mailto:kdegroot@wingertlaw.com)

**BOARD MEETING...May 14, 2019**  
12:00 – 1:30

**MAY MEMBERSHIP MEETING. . . MAY 21, 2019**  
11:45 -1:15 - DOUBLETREE MISSION VALLEY

**BOARD MEETING...June 11, 2019**  
12:00 – 1:30

**ANNUAL DIVERSITY EVENT. . . JUNE 18, 2019**  
TIME TBD - DOUBLETREE MISSION VALLEY

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### **DIVERSITY & INCLUSION**

The ALA has a committee that can assist members develop and implement diversity and inclusion (D&I) initiatives for their offices. The committee can also come out and speak on any D&I topic. Here's a link to the D & I section of ALA's website: <https://www.alanet.org/about/diversity>

**Is your firm or Chapter ready to start or recharge a diversity initiative?**

Check your scorecard on this link:

<https://www.alanet.org/about/diversity/scorecard-for-law-office-administrators>

## A SPECIAL THANKS TO OUR BUSINESS PARTNERS

Click [HERE](#) for the 2019 Business Partner Directory

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### Silver Sand Castle



### Bronze Boogie Board





# THE MANDATE



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HUGHES  
MARINO



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## HEALTH & WELLNESS

SPRING HAS SPRUNG! I like to think of the changing of the seasons as a wonderful time to rejuvenate certain areas, including your closet and possessions, diet and refrigerator/freezer/pantry, and adopt new wellness practices to bring in the new season. Here's some of my favorite ways to welcome warmer weather and spring:

### 1. SPRING CLEAN – EVERYTHING

Spring cleaning is cathartic: it's an incredible way to look at clothes, possessions, donate, get rid of old and expired food products lurking in your refrigerator/ pantry/and freezer, go through things that don't serve you and make your space feel squeaky clean again.

### 2. SHOP SEASONAL AND FILL YOUR FRIDGE WITH GOODNESS!

Spring has some of the very best seasonal produce, in my opinion. Say hii to detoxifying spring greens (like dandelion greens, lettuce, and arugula), strawberries and rhubarb, fresh herbs, carrots, spring onions, asparagus, artichokes, and so much more.

### 3. GO OUTDOORS!

Spring also means longer, sunnier days, so go get a boost of vitamin D from the sun with some golf, bocce ball, backyard yoga, gardening, sunny walks at the coast, or hiking with your friends.

Don't let these long beautiful days slip by – stop and smell the super bloom!

The Mandate E-Newsletter questions?  
Interested in advertising?  
Want to contribute an article?

Please contact:  
Monica Reisner, Editor  
[mreisner@daleyheft.com](mailto:mreisner@daleyheft.com)

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## Editor's Corner

**A Banyan Tree near Kolkata, India is bigger than the average Walmart.**

**The 250-year-old Great Banyan tree has aerial roots that cover 3.5 square acres of land, which equals roughly 156,000 square feet, or 14,400 square meters.**