

## Welcome

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By Karen Murphy, President  
(kmurphy@DSVlaw.com)

Do you believe 2011 is almost a memory?

ALA Indiana Chapter members kicked it up a notch this year with several initiatives:

- \* a new Business Partner Showcase format;
- \* the beginnings of the Shortridge FALA grant program;
- \* a much improved Business Partner Sponsorship program;
- \* the membership mentor program; and
- \* podcasts



We also had terrific turnouts and fun at our annual events such as the golf outing, community challenge weekend, and the Partner dinner. Many members received scholarships and some members attended National or Regional conference as first-timers. Some lucky dogs even get to travel to Hawaii next year for annual conference! We gained our second CLM member. We lost Mike, a dear long-time member, and we're going to miss a few who fell victim to these economic times or retired. We added six (6) new members to our ranks this year, many of whom have jumped in with both feet by taking active roles in the Chapter's leadership.

All of the above was possible due to the active participation of our Chapter members whether as members of the Board, committees, or volunteering their time for the Shortridge project, and our other Chapter events. Thank you to each and every one of you who gave your time and energy to our Chapter.

Watch out, 2012! The Indiana ALA Chapter is on a roll and ready to tackle new challenges.

Happy Holidays to One and All. See you January 10th for breakfast.

*Karen*

## Management Skills and Personal Characteristics Possessed by the 'Irreplaceable' Administrator

by Joel A. Rose

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Caught between the tensions of (1) delivering quality legal services in a timely manner at fees that clients are willing and able to pay, (2) rising costs of operating law offices, (3) acquiring and implementing expensive automated systems to enhance productivity of the lawyers and their support staffs, and (4) coping with the competitive shifts in the marketplace, lawyer management (managing partners and members of executive committees) in the more enlightened firms of all sizes and specialties have become sensitized to three facts of life about their roles in firm management. *First*, partners in most firms lack the desire and skills to manage effectively, efficiently and profitably. *Second*, they must devote more of their time, effort and energy to establish and implement policies and to communicate with other lawyers about issues and decisions to insure the firms' continued professional, economic, organizational success. *Third*, managing partners and members of executive committees recognize the value of employing professional law firm administrators to bring to their firms a higher level of acumen about financial analyses and management reporting, human resources management, technological and organizational skills to better manage their law firms as professional business organizations.

To the extent that administrators bring particular management insights and business training to law firms, what, then, are the personal characteristics and the professional skills that certain administrators possess, that other's don't, that make the former "almost" irreplaceable?

After discussing this question with numerous managing partners during the author's thirty-one years' experience as a management consultant to law offices, several inescapable conclusions which contribute to the long-term success of certain administrators are readily apparent. Managing partners are in complete agreement that the more successful administrators understand their role, authority and responsibility, vis a vis the partners' expectations. They understand the firm's current and evolving culture (or cultures), and are capable of integrating their behavior with it (them). The more successful administrators possess the capability of acclimating their management styles to complement and supplement the formal and informal organizational relationships between the partners, associates and support staffs about those issues which influence the substantive and business sides of their practices. Further, the more successful administrators possess those intuitive personal characteristics and learned professional/technical skills that enable them to perform their roles to satisfy the partners' objectives and expectations. This being said, an administrator's ability to successfully *implement* these conclusions, over an extended period of time, is as challenging as the most sophisticated legal problem a client may retain the firm to resolve.

An administrator's success with a given law firm will have a direct correlation to his or her level of acceptance by the partners, organizationally and personally. And this level of acceptance will vary over time, depending upon the firm's evolving leadership, financial position and changing client base. The firm's present and evolving culture will determine the value that the managing partner and members of executive committees place on their administrator. To the extent a firm is entrepreneurial in nature, and its partners display a sense of urgency when addressing client matters, the latter may expect their administrator to react in a

similar manner when dealing with firm priorities. An administrator whose personal style may be characterized by partners as "too laid back" (or "laid out," as described by one managing partner) may be inappropriate for that firm. Similarly, an administrator with a "Type A" personality may not succeed in a firm characterized by partners as "low key" or "more laid back than most."

In today's highly competitive practice environment, partners place a much higher value on those administrators who understand, and are able to relate to the firms' immediate and longer term priorities. Partners want their administrators to have the capacity to successfully synthesize the attorneys, support staffs, the firm's technology and facilities into a well organized and effectively and efficiently managed operation. They seek to retain those administrators who perceive the firm from a "partner's" perspective, not from an "employees' point of view." Partners value those administrators who are innovative and willing to question the status quo, so as to suggest alternative approaches, within their firm's culture, for enhancing productivity and profitability, on the substantive as well as the business sides of the practice. Partners value those administrators who are proactive and who network with administrators in other law firms, comparable in size and type to theirs and larger. Partners are anxious to learn about those newer methods that have/are being implemented in other progressively managed law firms which may improve management concepts, administrative and substantive procedures and enhance profitability.

Partners find it difficult to replace those administrators who have the appropriate balance of intelligence and common sense that enable the latter to communicate effectively with the former, and who can weigh the potential benefits to be derived by implementing policies and procedures which may affect the operations of the firm and its components, directly or indirectly, in relation to the tangible and intangible costs incurred by introducing these concepts.

The more effective administrators make a conscious effort to relieve partners of managing the numerous day to day administrative and planning activities which can consume significant amounts of lawyer time. Instinctively, they have a special sense about how and when to communicate with the managing partner and members of executive committees about those administrative, accounting, lawyer-support personnel policy issues, technology issues, facilities and strategic and marketing planning activities that should be brought to the partners' attention. Highly valued administrators provide managing partners with "early warning" signals about anticipated financial and cash flow problems resulting from billings and collections problems. They know how and when to recommend to managing partners and members of executive committees on the cost-effective staffing and utilization of the firm's administrative support departments, and interface with the lawyers and administrative personnel in a constructive manner. The more desirable administrators can resolve most administrative problems with minimal guidance from their managing partners or members of executive committees, and communicate the *results* of their work, rather than seeking advice about *how to do it*.

The author's management consulting firm has been retained by law firms across the country to recruit replacement administrators who have resigned to pursue other opportunities within and outside of the legal profession, and to replace administrators who have been terminated. By implementing appropriate recruiting techniques, over time, replacement administrators will contribute significantly to improving the firm's management processes. Regardless of how effectively partners believe their firms' are being managed, it is the author's opinion that a certain amount of change is beneficial for any organization. Hence, notwithstanding that partners would prefer not to have to replace an administrator, especially if the incumbent is perceived to be a gem, in the event of the departure of a highly valued administrator, there is little that partners can do but view the new recruiting experience philosophically, as an opportunity to upgrade the firm's management practices, consistent with its longer term needs and priorities.

## 2012-2013 ALA Board of Directors Announced

The Association's Nominating Committee met November 19 to select leaders for the open positions on ALA's 2012-13 Board of Directors with terms to begin at the 2012 Annual Conference. They are:

- Paul Farnsworth (Rochester, NY), President-Elect
- Cheryl Nelson, PHR (Minneapolis, MN), Region 3 Director
- Greg Madden (Tulsa, OK), Region 4 Director
- Teresa Walker (Nashville, TN), At-Large Director
- Toni Beasley (Austin, TX), At-Large Director

Also this fall, each of ALA's Regional Nominating Committees selected individuals to serve in the open Regional Officer positions for the 2012-13 year - and these appointments were ratified by ALA's Board on November 21. They include:

- Region 1: Gail Faherty, CLM (Hartford, CT) and Joann Winterle (Wilmington, DE)
- Region 2: Eric Hightower, CLM (Columbia, MD)
- **Region 3: Debbie Elsbury, CLM (Indianapolis, IN)** and Wendy Zimmerman (Toledo, OH)
- Region 4: Brenda Homan (Dallas, TX)
- Region 5: April Campbell (Seattle, WA) and Lorene Cowburn (Edmonton, AB)
- Region 6: Susan I. Bonner (San Francisco, CA) and Stacy Morrison, CLM (Newport Beach, CA)

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## Five Ways To Successfully Introduce A Health Savings Account-Based Health Plan

By Matt Kleymeyer



Health Savings Accounts (HSAs) were established into federal law in December 2003 as a part of the Medicare Prescription Drug Improvement and Modernization Act of 2003. When paired with a high deductible insurance plan with no first dollar cost sharing (i.e. copays), an HSA strategy can provide individuals and families with an effective way to save money on taxes and take control of their healthcare spending. For employers, an HSA strategy can provide a significant cost savings opportunity as insurance premiums for these plans are likely 20%-40% less than for a traditional health plan and firms likely cover a large share of this premium cost.

If your firm is looking to introduce an HSA strategy to employees this year or simply increase enrollment in its current HSA plan, below are five ways to achieve buy-in from employees as well as the maximum cost savings that this strategy offers.

### **Plan Early:**

Planning for a transition to an HSA strategy well in advance of your insurance renewal date will afford your firm more time to evaluate benefits advisors experienced in HSA education, assess potential insurance carriers and their HSA plan offerings, identify any regulatory roadblocks, and allow employees time to prepare for the plan change.

This fourth point may be the most important. For example, if an employee currently takes multiple maintenance drugs and knows that he/she will soon be moving to an HSA plan without prescription drug copays, the employee will have time to price shop those medications or ask his/her physician for a three month supply prior to enrolling in the new plan.

### **Select the Right Plan Design:**

Not all HSA plans are created equal. Some plans have what is called an “embedded deductible”, while others do not. If your group has many employees enrolled in employee + spouse, employee + child, or family coverage, it’s important to introduce an HSA plan with an embedded deductible as this feature offers greater out-of-pocket risk protection for employees in these coverage tiers.

### **Communicate Positively:**

When transitioning to an HSA plan, some employers state the reason for change is due to the poor economy, the cost pressures, or the need to save money. While these factors may all be true, it is not an effective way to build consensus with employees that the new plan is better than the old one. Instead, focus on the benefits of an HSA plan, such as how it will provide a fixed cap on all medical and prescription drug expenses, a tax free way to save for medical expenses, a pre-tax contribution from the employer, and a portable financial account that stays with an employee should he/she ever retire or leave the firm.

## Contribute to Employee Accounts

One of the greatest benefits of an HSA plan is that it offers firms an opportunity to give employees pre-tax money in the form of an employer account contribution. Unfortunately, some employers view an HSA contribution as an added cost. Instead, employers should view the contribution as money they gave to the insurance company last year in the form of insurance premiums, but this year are giving to their hard working employees.

## Provide Tools & Support

Buying health insurance is like any other purchasing decision we make as consumers: satisfaction in the decision depends upon how well we understand the products we buy as well as the enhanced benefits they provide. When rolling out an HSA plan, it's important to partner with a benefits advisor that can provide expert education so that employees understand how the new plan works and how it can best work to their advantage. Additional resources such as educational tools for spouses, prescription drug price shopping support and other fair market pricing tools will help employees best utilize the benefits of the new plan.

### *Author:*

Matt Kleymeyer is an Anchor Partner at Bernard Health, LLC, a health insurance advisory firm that specializes in Health Savings Account-based health plans and other innovative health plan strategies for individuals and employers across the country. Matt can be reached at [matt.kleymeyer@bernardhealth.com](mailto:matt.kleymeyer@bernardhealth.com) or 317-450-6324.

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## Getting to Know...Shawn Severns

In 2006, I graduated from Ball State University with a B.S. in Human Resources Management. I then spent the following summer prepping for the PHR exam, which I thankfully passed and was then hired by Mark Felty. I began my career as an HR Assistant here at Krieg DeVault, and at the time, I had no clue what I was getting in to. After a year and a half as the HR Assistant, I moved up to our Carmel office as the Office Manager until my most recent move that brought me back downtown to become the HR Manager.



Early on in my career, I was actively involved in SHRM but oftentimes could not relate to several of the problems that other members were facing. As most of us know, working in a law firm is "different," and the problems faced in other businesses are quite dissimilar. Since coming on board with ALA in 2010, I have found several benefits within the organization. Perhaps the largest advantage is having other individuals who have experienced many of the same issues that I come across on a daily basis and sharing their ideas and opinions openly. I hope to share as much insight as I have received from the ALA experience in the near future.



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**2012 Schedule**

**January 18, 2012**

Selling Blue Elephants:  
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**February 22, 2012**

Employee Handbooks  
For Law Firms – Careful, Careful! (HR)\*\*

**March 21, 2012**

The Art of Active Listening (CM)\*

**April 18, 2012**

The Role of Legal Administrators in  
Legal Project Management – Unprecedented  
Opportunities & Current Challenges (LI)\*

**May 16, 2012**

Safe Stress! (CM)\*

**June 20, 2012**

Technology Management:  
The Good, the Bad and the Ugly (IT)\*\*

**July 18, 2012**

Change Leadership: A Boot Camp to  
Drive Organizational Change (OD)\*\*

**August 15, 2012**

Records Management:  
The Bermuda Triangle (LI)\*

**September 19, 2012**

Of Foxes, Hedgehogs and  
Law Firm Profitability (FM)\*

**October 17, 2012**

Marketing on a Shoestring Budget (LI)\*

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# Capital concerns

Ensuring your firm has the financial resources it needs

By James Waggoner, CPA, Partner and Director, Professional Services Group of Greenwalt



Whether you're starting a new law firm or managing a long-established one, capital — how much you have and how much you need — is a constant consideration. A successful firm requires both working capital to fund daily operations and long-term capital to buy assets and make strategic investments. Unfortunately, determining your firm's capital needs and meeting them are two of the most difficult tasks you'll face as an administrator.

## One size doesn't fit all

Conventional wisdom says that law firms need capital to cover at least 12 months of operating expenses. That's not a bad place to start, but it fails to take into account many factors. For example, as some firms have learned the hard way over the past few years, severe economic downturns can last much longer than anyone expects.

What's more, every firm's needs are different. If, for example, you pay substantial out-of-pocket expenses on behalf of clients, your capital requirements will be greater than those of a firm that covers expenses through the use of retainers. Your billing and collections practices also may necessitate a smaller or larger capital

cushion, as will your strategic plans. Firms with aggressive growth objectives generally need greater capital resources than those pursuing slow and steady growth.

## Crunching the numbers

Established firms can get a rough estimate of their capital needs fairly easily. Just add your one-year operating budget to the cost of any major asset purchases and strategic growth initiatives (for example, making acquisitions or hiring new associates) planned for the coming year. Then make adjustments for unique situations, such as the need to pay out a senior partner who will soon retire.

Capital needs calculations are tricky for startup firms; you first must estimate how long it will be before you see positive cash flows. This period could last several months or a couple of years, depending on such factors as:

- Type of practice,
- Overhead costs,
- Billing frequency,
- Collection percentage, and
- Amount of revenue you reinvest in the firm.



Ensure you have the capital to cover all ordinary — and extraordinary — costs during the startup stage or your firm will fail before it ever has a shot at succeeding.

## Funding sources

Once you have a ballpark figure of your capital requirements, if you're short, you'll need to decide where you'll get the additional

## Is your firm undercapitalized?

Although it's not a hard and fast rule, law firms with less than a two-month reserve of capital are likely heading for financial trouble. Having so little cash on hand can hinder both daily operations and long-term growth plans. And undercapitalization means that everything from rising energy and health care costs to the loss of a major client could threaten your firm's future. Watch for warning signs such as:

- Increased borrowing on short-term bank loans,
- Aging accounts receivable, and
- Reduced partner distributions.

If you find these red flags, address them immediately. A financial advisor can help your firm create an action plan, which may include such remedies as increasing partners' capital contribution requirements.



funds. Typically, capital comes from a combination of bank debt, capital leases, undistributed earnings and partner contributions.

Due to the credit crunch, bank debt has become difficult for business borrowers to obtain. However, law firms most commonly borrow in the form of working capital lines of credit secured by accounts receivable and term loans secured by assets being purchased — which can be easier to get than other types of loans. Here, your firm's financial history, business plan and relationships with bankers will be critical.

Whether you can secure capital through bank borrowing — or through capital leases — will also depend on your firm's financial philosophy and appetite for risk. For example, are your partners comfortable borrowing against future collections? Do they mind financing office furniture and IT equipment with capital leases?

If not, they'll likely need to contribute more from their own pockets. Contributed capital includes cash paid in when partners join your firm, as well as additional cash they may be required to contribute periodically. Your partnership agreement

may require equal contributions from each partner or allow contributions to be determined based on the amount of income each earned in the previous year. If the current contribution method isn't covering your firm's capital needs, you may need to revisit this agreement.

*Capital needs calculations are tricky for startup firms; you first must estimate how long it will be before you see positive cash flows.*

### A moving target

Determining your capital needs and funding them is only the start. Firm growth, including adding new partners, practice groups and offices, and operational changes, such as adopting alternative billing arrangements, make it necessary to regularly review your capital target. So incorporate the task into your firm's annual budgeting process to keep your target current. ☐



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**August 24,**  
**2012**

## The CLM Experience

*By Lori Hutchens, CLM*



As I completed my college degree in May, I looked back through my 34 years of experience in the legal field and realized a good part of it had been spent not only working extremely hard for my firm, but appreciating the opportunities I had for professional development. I earned the Certified PLS designation in 1983, then passed the Certified Registered Paralegal exam in 1999, and then transitioned into legal management with my firm shortly thereafter. Sitting for the CLM this fall seemed like the crowning achievement for my career, especially since I had earned many CLE credits for the exam at the Boston Annual Conference in 2010 and was still somewhat in "study mode." Studying for the exam takes organization and discipline and is hard work, especially in those areas in which you may not work or your knowledge is limited. Luckily I felt I had a balanced start since I handle all managerial facets for our firm. The CLM Study Guide is a must along with a few of the resources the book mentions such as *Law Office Financial Management*. Knowing the percentages each facet of management will comprise on the exam is extremely helpful in planning your time. Set benchmarks with timetables and try to stay as close to them as possible. Attaining the CLM is one of the most rewarding accomplishments I have experienced, and I thank my family, colleagues and friends who supported me and were patient through the many hours I spent studying. If you are contemplating sitting for the exam, I encourage you to take the next step and submit your application. I know you will be successful and then can share in the resulting rewards!

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## **Email and the Cloud: Clarifying Risks and Rewards for Law Practices.**

By: Jennifer A. Ritman, President, Ritman & Associates, Inc., and Jeffrey Goens, Co-Founder & President, Dialawg, LLC

Many of us may believe that traditional email and everyday online file storage solutions are sufficient for our practices' correspondence—and sometimes we're right—when sending a quick note about where to meet for lunch, storing a flyer about jeans day, or sending an invitation to the next firm event, traditional email and storage are entirely appropriate. However, the moment the conversation turns to “substantive” legal matters, we may need to rethink this position. Understanding the risks and rewards requires clarifying the terms “cloud,” “regular/traditional email” and “encryption,” all of which we will address here, and can be further explored by reviewing the American Bar Association's Formal Ethics Opinion 11-459 (available at [www.abanet.org](http://www.abanet.org)), and the 2011 Standards published by the International Legal Technical Standards Organization (ILTSO), available at [www.iltso.org](http://www.iltso.org).

### **What is the “cloud?”**

The cloud is a simple concept: anytime you use electronic resources located outside of your office (e.g. via the Internet) to move, store, or otherwise work with data, you're “in the cloud.” This can include software-as-a-service (SAAS) applications available on the Web, including but not limited to online banking, social networking, and webmail applications. The “cloud” is therefore not new, but is conceptually almost as old as the Internet itself.

### **What is “traditional” email?**

By default, email is sent across the web in bits, known as “packets,” which move around third party computers on the Internet. However, sometimes these packets are reassembled in their entirety for re-delivery to the next email handler, meaning that the entire contents of the email are not only handled, but can also be copied, viewed, and stored in “plain text.” No matter how sophisticated your local data security practices (e.g. firewalls and data rooms) may be, the moment you send an email outside of your organization, the “message header” (the information that contains specific data on the sender, receiver, and date) and the “message body” (the text of the email plus any file attachments) are broken into “packets”—which leave your local network and wind their way across multiple computers (stopping at various email servers that re-aggregate the packets to attempt delivery), before they finally wind up reassembled at your intended receiver's inbox. These packets are distributed across the Internet in plain text, meaning they are readable in plain English by anyone who cares to intercept them. Worse yet, when these packets are re-aggregated at various email servers, the entire message is completely viewable, copyable, and storable, often without your knowledge or consent, usually for an indeterminable amount of time.

### **How is “encrypted” email different?**

Encryption “scrambles” the bits of the email message so as to prevent those third party email handlers on the Internet from intercepting a plain-text version of the email's contents. It is somewhat analogous to placing your client's correspondence in a privacy envelope before dropping it in the postal mail—you wouldn't send confidential information through the mail on the back of a postcard, and you shouldn't let sensitive data leave your computer without a secure envelope to protect it. Encryption can be utilized with data that is “in transit” between locations (this is the purpose of technology known as secure socket layer, or “SSL” and its cousin, TLS), or “at-rest” (whenever data is stored, using methods such as pretty-good-privacy, or “PGP” and advanced encryption standard, or “AES”). There are many different standards, platforms, and methods which can prevent third party access, but robust encryption is helpful in obscuring the data itself, especially in the event of interception.

**How can use of unencrypted email or file storage harm me and/or my client?**

In two ways. First, there is a growing possibility that offering traditional email as the only means of online communication with you will deter progressive, Internet-savvy clients from trusting your law firm to safeguard their important data. Second (and more frightening) is the possibility that your client's or business's most sensitive information—social security numbers, bank routing numbers, financial holdings, litigation strategies, (etc.)—could be compromised in an instant. If this happens as a result of online correspondence with you, the losses can be significant.

**What kind of liability could I incur for failure to adequately protect (or accidentally misdirect) client data?**

It depends on the type of data, the location of your practice (and your client), and the rights of any third parties to whom the data may belong or pertain. The possibilities are too numerous to cover here, and will be addressed in the January 10 ALA meeting in Indianapolis. But in short:

1. The unintentional waiver of attorney-client privilege could occur—especially in cases of misdirected email—since unlike with fax or postal mail where chances are good that an unintended recipient would simply tell you that you have the wrong number (or return your mailing or throw it out), email is more prone to anonymous interception which can be difficult to trace;
2. Tort and/or statutory liability could occur in a negligence suit by your client or interested third parties for failing to properly maintain the privacy of certain types of data (particularly given the rapid adoption of state and federal laws seeking to better regulate data privacy and breach notification standards); and
3. Professional liability for failing to adequately protect client data (especially where regarded as property) could occur, especially in light of the rapid adoption of new state and federal standards like the ABA's Formal Ethics Opinion 11-459 (articulating that a lawyer "sending or receiving substantive communications with a client via email or other electronic means ordinarily must warn the client about the risk of sending or receiving electronic communications using a computer or other device, or email account, where there is a significant risk that a third party may gain access.")

**Isn't eavesdropping on someone else's communication illegal?**

In many circumstances it is, under the Electronic Communications Privacy Act of 1986. But even if the sensitive information contained in an unencrypted email doesn't come into evidence as a result, damage could still be done either by a party who uses such knowledge (possibly in a discovery request) without revealing its source, or a nonparty in another context altogether. Unfortunately, it is relatively easy to gain access to unencrypted email without awareness by either the sender or receiver. And it could be your competitor looking for an edge, a hacker gathering information, a foreign entity, or any number of other would-be interceptors—the possibilities are endless.

**What should I ask myself before sending an unencrypted email to a client?**

*The basic question an attorney should contemplate before sending a traditional email is simply: would my recipient feel comfortable with this information on the back of a postcard?* If so, traditional email is certainly appropriate. If not, a more appropriate communication method may need to be considered. Bar opinions and pending legislation aside, attorneys should do what is best for their clients. We owe our clients an express ethical obligation under Model Rule 1.6 to "not reveal information relating to representation of a client unless a client consents after consultation, except for disclosures that are impliedly authorized in order to carry out the representation..."

Regardless of the question of whether we could unintentionally waive confidentiality, our clients' data is important—period. With the ever-increasing number of newsworthy security breaches, individual attorneys (and the profession as a whole) must not delay in securing the online transmission of sensitive client materials whenever possible.

### **What can I do to address these threats?**

Modern legal correspondence requires a simple, comprehensive solution for the protection of attorney-client data. The answer is clear—we would simply buckle up our data as it travels the information superhighway in the event of a collision with an unintended recipient—if not out of proactive dedication to the welfare of our clients, then out of concern for the consequences of failing to act when our competitors are increasingly doing so. Solutions are emerging, but one must be selective; a unified platform should be able to bring everything together under a single, encrypted umbrella offering in-transit and at-rest encryption to protect data from end-to-end as it travels between you and your client.

Further, firms should consider the types of risks associated with handling data on behalf of clients, employees, vendors, and others, and insure against loss of data belonging to these stakeholders appropriately. This should require belonging to these stakeholders appropriately. This should require understanding the nature of one's Lawyers' Professional Liability Insurance (LPLI) policy to ensure coverage in the event of the inadvertent disclosure of data in the course of representation, as well as understanding whether a supplemental data breach policy would be appropriate to cover loss of client or third party data while it is within the control of the law firm. In the same way everyone within the firm should be concerned about the loss of clients' paper documents, digital data should remain outside the reach of unauthorized third parties, and should be addressed clearly by the firm's insurance policies.

With a comprehensive data solution in place in your firm, along with adequate insurance coverage, you can spend less time worrying about your information technology and more time concerned about your clients' needs. After all, isn't that what the practice of law is really all about?



To  
**Joe Stein**  
of  
Taft /  
For winning the  
**ALA Holiday Lunch  
Scholarship**  
to  
**2012 ALA  
Annual Conference  
In Honolulu, Hawaii!**

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## Upcoming Events

**January 10, 2012: 8:00 A.M.—9:30 A.M. NOTE NEW TIME!**  
**Employment Law Update / ABA Opinion 460 Panel Discussion**

**February 14, 2012: 11:30 a.m.—1:00 P.M. STATE OF THE CHAPTER**  
**Shortridge Student Essay Contest Winners and Giveaways!!**

**March Business Partner Showcase & Education Session - Watch for Updates**

**April 22-26: ALA National Conference, Honolulu, HI**

**September 13-15: Regional 3 Conference 7 Expo, Minneapolis, MN**

**September 18: Partner Dinner, Woodstock Golf & Country Club**



## INDIANA ALA MENTOR PROGRAM

The purpose of the Indiana ALA (INALA) Mentor Program is to make new members feel welcome, educate them about all of the opportunities available, and get them immediately involved in INALA activities. Mentors will commit to a term of one year with a mentee.

The Membership Chair will notify the Membership Committee when a new member joins the Indiana Chapter. The Membership Chair will also assign one of the Membership Committee members to mentor the new member. Each new member will receive a mentor for the first year of his/her membership with INALA.

The mentor should follow these guidelines:

Immediately contact the new member, introduce yourself, explain that you will be his/her mentor for the first year of his/her membership and exchange contact information.

Inform new member of the date of the next chapter event and offer to go together and/or meet at the meeting.

Introduce the new member to the President and Membership Chair at the first chapter event possible. Introduce new member to other chapter members during networking time.

Sit with the new member at as many chapter events and meetings during the first year as possible.

Give some time to the new member to determine the new member's needs and interests, directing them to the appropriate ALA resources, such as chapter website and national website. Provide the new member with the INALA New Member Welcome Kit.

Educate the new member about the chapter activities that occur annually (i.e. partner dinner, community challenge weekend, business partner showcase, regional and annual conferences, golf outing). Explain the educational sessions offered at regular membership meetings.

Keep in touch with the new member during the year. Call and or email with the new member once every two or three weeks. Meet outside of chapter events one-on-one at least quarterly.

Complete Mentor Checklist as required and send to the Membership Chair for review. The Membership Chair will assist each mentor/mentee as needed, if the relationship is not progressing as expected. The Membership Chair reserves the right to reassign a mentor/mentee, as needed.

The Membership Committee will meet every other month to discuss the progress of the Mentor Program to determine if any additions/changes/deletions need to be made.

If for any reason a mentor cannot commit to a term of one year with a mentee, the Membership Chair must be informed immediately, so a replacement can be made.

*Interested in becoming a Mentor to new Indiana Chapter members? Contact Robin Burton at [rrburton@hallrender.com](mailto:rrburton@hallrender.com) for additional information.*