COLUMBUS CHAPTER NEWS

July 2017

PRESIDENT’S MESSAGE

I hope everyone had a wonderful Independence Day holiday. Some may say that July 4th marks the time when summer is halfway over, but for us optimists it means it’s only just begun. We have plenty of time for fun with friends and family, and to enjoy those summer festivals.

Thank you to the members and Business Partners for attending our wine and painting event on June 20. We had a great time sipping wine, networking and creating our individual works of art. Brushes up to Jeff Williams for using the medium of guacamole in his painting. Very creative!

Continued on Page 2

MORE THAN TALENT

Client demands are causing firms to visit new models for recruiting.
By Mary Kate Sheridan, Writer, Editor and Attorney
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www.alanet.org.

Legal service providers need more than legal expertise to succeed in today’s client-driven market. With clients demanding greater efficiency, competitive pricing and stellar service, law firms are under increased pressure to recruit and train more multifaceted employees.

Among the skills critical for the 21st-century legal professional are technological competence, business savvy, emotional intelligence, communication, relationship building and project management. But traditional recruiting and training methods may not be structured enough to cultivate a successful talent base.

Continued on Page 10

SPECIAL POINTS OF INTEREST

- July Chapter Meeting—July 18—12:00 pm at Barnes & Thornburg—Performance Appraisals as Tools for Success, Sally Voyles, Speaker
- August Chapter Meeting—August 15—12:00 pm at Isaac Wiles—Conducting Effective Workplace Investigations/How to Address Claims, Mat Parker, Fisher Phillips, Speaker
“Brushes up to Jeff Williams for using the medium of guacamole in his painting.”

**PRESIDENT’S MESSAGE, CONTINUED FROM PAGE 1**

Our July chapter meeting topic will be “Performance Appraisals: Tools for Success.” This has been one of our more requested suggestions as it is a key responsibility in all of our jobs. Kelly Atkinson will host the meeting at Barnes and Thornburg. We look forward to seeing you there.

Now is a great time to start thinking about regional and specialty conferences. The East Regional Conference will take place in Nashville, October 12-14. I urge you to take advantage of this opportunity to visit the wonderful “Music City” this fall to enjoy the sights and interact with your peers. I am certainly looking forward to it. On a related note, ALA leadership understands that conferences can be difficult to attend due to company budgets. The Board is currently considering ways to offer additional scholarships so members can benefit from this type of educational and networking opportunity. We definitely want to hear if you are interested in attending a conference.

Best wishes to everyone. Enjoy the many days of the summer ahead!

--Lisa

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**EDITORIAL POLICY**

The Columbus Chapter News is published monthly for the education and benefit of legal administrators. It is not published for the purpose of rendering legal, accounting, or other professional services or advice. Nothing contained in this newsletter should be construed as legal, accounting, or other professional services or advice. Reprint of articles contained in this newsletter requires the written permission of the Editor of the Columbus Chapter News.

**ALA MISSION STATEMENT**

The Association of Legal Administrators’ (ALA) mission is to promote and enhance the competence and professionalism of all members of the management team; improve the quality of management in law firms and other legal services organizations; and represent professional legal management and managers to the legal community and to the community at large.

**COLUMBUS CHAPTER, ALA MISSION STATEMENT**

The Columbus Chapter, Association of Legal Administrators, provides educational and networking opportunities to administrators with varied legal backgrounds in the Central Ohio area. We are committed to increasing awareness and building relationships, upholding the integrity of our profession, giving back to our community, contributing to the ongoing training of our membership, and supporting one another in our chosen careers.

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**2017 COLUMBUS CHAPTER COMPENSATION AND BENEFITS SURVEY**

We encourage all member firms to participate in the confidential annual survey this year. Once again, we’ve purchased the software license from the Houston Chapter. We feel this survey is a valuable tool for the entire Chapter when sufficient data is collected. Those benefits to you include online ease of access and completion, confidentiality, minimal time required in gathering data and helpful reports to assist in your budget preparations.

There is no cost to our member firms that participate in the survey. This year, we are reaching out to non-Member firms in the Columbus region to participate for a nominal fee. You will receive detailed instructions about completing the survey by email in the next week. Questions? Don’t hesitate to contact Karen Scurlock at kscurlck@calfee.com.
The Columbus Chapter, Association of Legal Administrators, appreciates the support of our Business Partners. Business Partners are Vital to Our Success. Visit our Business Partner page on the Columbus Chapter website: www.alacolumbus.org
“In today’s employment market, there are an abundance of talented candidates, but vetting them takes a significant amount of time. Dawson does a great job of expediting that process, getting you the best candidates, and cutting your time from posting date to starting date in half.”

Jill Snitcher McQuain, Esq
Executive Director
Columbus Bar Association

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- Office and Administrative Assistants
- Paralegals
- Marketing
- Communications
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- Accounting, and more

Endorsed for staffing by Columbus Bar Association
### UPCOMING EVENTS

#### July 2017

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**18—Tuesday—12:00 pm**  
**Chapter Luncheon Meeting**  
Barnes & Thornburg  
Performance Appraisals as Tools for Success  
Sallie Voyles, Speaker

**27—Thursday—12:00 pm**  
**Chapter Board Meeting**  
Hahn Loeser & Parks

**ALA Webinars:**  
**6—Thursday—3:00 pm**  
A Profession on Notice: The Ethical and Liability Case for Why Law Firms Must Get Serious About Substance Abuse

**19—Wednesday—3:00 pm**  
Better Self-Management Through Type

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**August 2017**

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**3-5**  
**ALA Large Firm Principal Administrators Retreat**  
Boston, MA

**15—Tuesday—12:00 pm**  
**Chapter Luncheon Meeting**  
Isaac Wiles  
Conducting Effective Workplace Investigations/How to Address Complaints  
Mat Parker, Fisher Phillips, Speaker

**22—Tuesday—12:00 pm**  
**Chapter Board Meeting**  
Hahn Loeser & Parks

**ALA Webinars:**  
**3—Thursday—3:00 pm**  
Mindful Mentoring

**16—Wednesday—3:00 pm**  
Attorney and Matter Profitability

**22—Tuesday—3:00 pm**  
eMod Patent Center Update

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**September 2017**

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**7-9**  
**ALA Regional Legal Management Conference—West (Regions 4, 5, 6)**  
Las Vegas, NV

**26—Tuesday**  
**Chapter Board Meeting**  
Hahn Loeser & Parks

**28—Thursday**  
**Columbus Chapter Member/Business Partner Golf Outing**  
The Golf Club of Dublin

**ALA Webinars:**  
**7—Thursday—3:00 pm**  
Finding the Balance Between Technology and Real Estate

**20—Wednesday—3:00 pm**  
The Mindful Law Office: Strategies For Reducing Attorney Stress and Improving Productivity

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Visit the ALA web site for eLearning Course details, [http://www.alanet.org/calendar](http://www.alanet.org/calendar)

ALA is offering 32 webinars this year, hosted by Abila, that include two monthly webinars on general topics and two specialty webinars. If you would like to host a webinar, and at least five chapter members attend, the Columbus Chapter will pay for the webinar. Please contact Lisa Justus at ljustus@hahnlaw.com if interested.
TOP 10 REASONS TO COME TO THE CHAPTER’S MEMBER/BUSINESS PARTNER GOLF OUTING

10. You get out of the office for an afternoon!
9. You can buy do-overs and help raise money for charity! How awesome is that!
8. You can wear golf shoes, tennis shoes or sandals – just not high heels.
7. You might win a door prize!
6. No attorneys or staff for five hours!
5. An opportunity to thank the business partners who support our chapter!

3. You get to drive a golf cart all afternoon!
2. Great food, great drinks, great company!

and the number one reason why you should come to the Chapter’s golf outing is …

1. You don’t have to golf. You don’t have to like golf. You don’t have to understand golf. You don’t even have to get out of the cart. It’s all for fun!
EVERYONE NEEDS TO RELAX!
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What is your current job title and major responsibilities?
Assistant Officer Administrator at Mac Murray & Shuster llp.

Give us an example of a time when you said to yourself, “Is this really in my job description?”
I think this happens all too often, but is part of what keeps the work interesting each day!

What did you want to be when you grew up?
Attorney.

If you could plan the perfect day, what would it look like?
Something involving the outdoors and spending it with my two dogs and fiancé.

What is the best thing that has ever happened to you?
Too tough to pick just one.

What was your first job?
Interning at the law firm I work at now.

Who or what had the greatest impact on your life?
My wonderful and supporting parents.

What is your favorite activity (besides work, of course)?
Yoga and working out.

What would you do if you had more free time?
Spend it with family and friends.

If you weren’t working in law firm administration, what career would you have chosen?
Entrepreneur of some sort.
NEED A GUIDE TO THE TOP?

OUR COMPREHENSIVE PRACTICE ANALYSIS GETS YOU THERE.

A comprehensive look at the people, process and technology at your firm is vital to ensuring your business is operating at its full potential. You can’t reach the top if you don’t know what obstacles you are facing or without a plan to overcome them. Through surveys and time spent onsite with your team, we uncover what is holding you back. Issues list, solution recommendations and execution plans provide the guidance your firm needs to reach the top and empowers your team to climb with you!

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SHIFTING PRIORITIES POST-RECESSION
The economic decline accompanying the Great Recession spurred both law firms and their clients to rethink the costs of legal services.

Since the recession, law firm clients have had lower budgets for outside counsel. Clients became less inclined to hire law firms, and since then the market has seen a continuing trend of lower or stagnant expenditure on legal services.

“There was an economic crisis in 2008 and 2009, and it caused everyone in America—including law firm clients—to ask, ‘Do I want to pay for that?’” says David Sanders, Chief Talent Officer at Faegre Baker Daniels. The recession prompted clients to rethink how they operated, consider whether they could accomplish certain tasks themselves and question whether they were gaining value from firms’ work, he says.

Not surprisingly, law firms have tried to distinguish themselves from other firms, assessing how they can offer competitive pricing and value to clients.

CRITICAL SKILLS FOR MODERN LAWYERING
With client demands changing the legal talent landscape, the need for multifaceted attorneys has become essential. An exceptional pedigree is no longer enough—firms are increasingly seeking candidates with interpersonal, business and technology skills to increase effectiveness and efficiency.

QUICK HIT 1
An exceptional pedigree is no longer enough—firms are increasingly seeking candidates with interpersonal, business and technology skills to increase effectiveness and efficiency.

“What is being asked of the modern lawyer is really more than what was asked of them before,” says Terri Mottershead, Principal of Mottershead Consulting.

Amani Smathers, Associate Legal Solutions Architect with SeyfarthLean Consulting, describes this phenomenon as T-shaped lawyering. A T-shaped lawyer combines his or her legal expertise with knowledge spanning different disciplines.

“The whole idea of the T-shaped lawyer is you still need the deep legal expertise, but in order to be successful, you need shallow expertise in other areas to allow you to collaborate or have a better practice,” says Smathers.

Some firms have found that experience, first and foremost, breeds attorneys with these sought-after skills.

“What we’ve seen over the past couple of years is a continuing growing trend in law firms looking for candidates who have four, five years of experience,” says Charles Volkert, Executive Director of Robert Half Legal. These attorneys not only have the ability to jump right in, but also may possess the people skills, business acumen and ability to deal directly with clients that are all increasingly important for the new world of lawyering, says Volkert.

But firms have also looked beyond recruiting to their own training, focusing on developing desired skills in-house.

“Ten years ago, the focus on training was really on substantive skills,” says Carolyn Older Bortner, Director of Lawyer Development at Orrick Herrington & Sutcliffe LLP. “The move has really been to skills training in the area of leadership, developing client relationships and strong communication skills.”

Industry experts have identified the following as crucial for meeting the demands of modern legal services: technological adeptness, business understanding, emotional intelligence, communication, ability to forge relationships and project management.

QUICK HIT 2
Technological efficiency saves money for firms’ clients, which is essential in this competitive market. This idea is not limited to high-level technological skills, and it applies to all staff.
TECHNOLOGY
Technology has become essential in everyday life, and it is no surprise that this trend has carried into the legal practice. In fact, Thompson Reuters’ Midsize Law Firm Survey found that 84 percent of respondents adopted new technology to enhance efficiency.

“This is a growing demand that I don’t see slowing any time in the near term, or ever,” says Volkert. “[Technology is] one of the areas that we continue to see in high demand. Firms desire attorneys that are tech savvy, understand software, and are highly skilled in e-discovery, among other skills, says Volkert.

Technological efficiency saves money for firms’ clients, which is essential in this competitive market. This idea is not limited to high-level technological skills, and it applies to all staff. Technological proficiency is essential in everyday work, such as editing documents and preparing filings. Understanding how to navigate one’s computer system and word processing programs, as well as organizing email alone, can greatly enhance efficiency.

E-discovery is another critical area for today’s attorneys. Since e-discovery is such a large part of today’s practice, attorneys and management staff should be familiar with accepted and emerging discovery practices—such as strategic keyword searching and predictive coding — and the repercussions of these processes on the legal industry. Taking that a step further, attorneys also must be aware of how issues like metadata and native files affect the e-discovery process.

Attorneys should not only understand what metadata encompasses, but also be able to recognize its dangers and how to address potential issues. And that goes beyond a casual computer user’s ken.

Attorneys can also benefit from mastering skills like social media and cloud computing for interacting with clients. But if they use such technologies without first gaining expertise with them, they risk running afoul of ethics rules or placing their clients’ confidentiality at risk.

Lacking technological proficiency may actually be viewed as an ethics violation. Comment 8 to ABA’s Model Rule 1.1 indicates that attorneys must “keep abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology, engage in continuing study and education and comply with all continuing legal education requirements to which the lawyer is subject.” Potential violations may lurk anywhere, from electronic document vulnerability to improper document format to poor organization.

Attorneys should strive to educate themselves regarding technological issues or seek the assistance of technology experts within their firms, who should already be familiar with these issues.

Technological expertise doesn’t only help law firms avoid pitfalls; it can also set them apart from competitors.

“There’s a question of what do you actually need and what do you need to be competitive” says Smathers. Firms have an opportunity to excel and provide enhanced services to their clients if attorneys and staff develop specific technological expertise.

BUSINESS ACUMEN
Having a business background is a major asset in today’s legal industry. Business and financial knowledge are useful tools in providing clients with appropriate counsel to reach their objectives.

QUICK HIT 3
Lacking technological proficiency may actually be viewed as an ethics violation.
More than ever, clients desire attorneys with such skills. More than one-quarter of chief legal officers surveyed in Altman Weil’s 2015 Chief Legal Officer Survey indicated they would like law firms to place greater emphasis on understanding the business.

“I think it’s important to understand the context in which law firms operate,” says Mottershead. “It also helps enormously when working with clients. You need to understand their business and know it very well.”

Many attorneys and firms recognize the need for business literacy in legal practice. In a 2013 Harvard Law School survey of attorneys practicing at large law firms, 72 percent of respondents indicated that their firms provided business-methods training. Further respondents rated accounting and financial reporting, as well as corporate finance, as particularly valuable law school courses to prepare future attorneys.

While most law schools have not abandoned their traditional coursework to a more business-focused approach, many have begun to offer practical business workshops and “boot camps.” For example, Brooklyn Law School works with Deloitte Financial Advisory Services to provide a business boot camp, focusing on topics like accounting and reading financial statements. Similarly, Cornell offers a three-day weekend course called “Business Concepts for Lawyers.” And last year, Harvard Law began offering students access to Harvard Business School’s business fundamentals program, HBX credential of Readiness, which is an 11-week program focused on business analytics, economics and financial accounting.

EMOTIONAL INTELLIGENCE

Also critical is taking time to understand other people, especially clients. According to Jordan Furlong, Principal at Edge International, emotional intelligence encompasses a range of attributes, including empathizing and sympathizing with others, listening to others, and listening and hearing the client—not just the client’s problem.

“Leadership or other development programs relating to emotional intelligence can have a huge impact,” says Sanders, who explains that while attorneys may be intellectually brilliant, they may not be successful if they cannot relate to juries or to their adversaries in negotiations.

Emotional intelligence is particularly important when it comes to client relationships. “I think lawyers today need to be commercially savvy, and they need to understand issues [from] their clients’ perspectives,” says Bortner.

QUICK HIT 4

With firms increasingly outsourcing and delegating portions of their work, project management skills have become key in delivering efficient legal services to clients.

COMMUNICATION AND RELATIONSHIP BUILDING

While soft are not new to the legal practice, there is an increased focus on developing them. These skills include deflecting difficult questions and remarks, collaborating, and building strong relationships.

It is critical that attorneys learn how to effectively communicate directly with clients, even at the junior level. And in terms of relationship building, attorneys should go a step further and focus on their clients’ experiences.

Much more than just relationship building and much more than being responsive ... much more than having a business sense ... [you must focus] on how our client is experiencing the service that you’re delivering from start to finish,” says Mottershead. That means focusing on the customer service side of lawyering just as much as the legal work itself.

PROJECT MANAGEMENT

With firms increasingly outsourcing and delegating portions of their work, project management skills have become key in delivering efficient legal services to clients. In fact, according to Altman Weil Inc.’s 2015 Chief Legal Officer Survey, 40 percent of respondents would like outside counsel to offer more effective project management.

Many firms appear to be cognizant of this. Altman Weil Inc.’s 2015 Law firm in Transition Survey found that 43.8 percent of respondents are implementing project management training to increase efficiency of legal service delivery.

“I think [project management] becomes more and more critical as legal services have been unbundled and managed by people outside the firm,” says Mottershead. “The ability to manage a project is more than the work before you.”

QUICK HIT 5

With clients demanding more multifaceted lawyering, firms are under increased pressure to offer a skilled legal team.

Continued on page 14
SPECIALTY CONFERENCES

One location ... three areas of interest!

Palmer House Hilton, Chicago

ALA’s fall conference schedule includes three co-located specialty events for human resources, finance and intellectual property experts.

October 5–6
Intellectual Property Conference for Legal Professionals

October 5–7
Finance and Law Practice Management Conference for Legal Professionals

October 5–7
Human Resources Conference for Legal Professionals

REGISTER NOW
alanet.org/events
INCORPORATING MODERN SKILLS INTO YOUR FIRM

With clients demanding more multifaceted lawyering, firms are under increased pressure to offer a skilled legal team. But, according to Furlong, many firms do not have mechanisms in place to attract such talent.

“The spirit is willing,” he says. “The process may still be weak, but I do think there is a recognition—perhaps a dim one—that we probably shouldn’t be looking for the same attributes we used to.”

But a dim recognition will not suffice as firms strive to remain competitive and service-oriented. Determining whether individuals have certain skills, or creating programs to train on those skills is not an easy task. Firms must implement competency-based hiring and training methods to find and cultivate talent with the above core skills.

The standard law firm recruiting model—casual one-on-one interviews and a lunch interview—is lacking when it comes to discovering and assessing a person’s skill set. Firms require more structure and defined purpose to determine whether candidates possess technological abilities, a business background, emotional intelligence, relevant soft skills, project management abilities and any other skills firms may deem critical to boosting efficiency and client service.

Thus, a firm should implement a structured interview scheme focused on competencies and actual skill assessments, such as writing assignments.

Through competency-based recruiting—which is popular among Fortune 500 companies and implemented by employers around the world—firms can delineate the characteristics they seek and implement standard behavioral questions to assess whether candidates possess these traits. Candidates are all evaluated based on the same criteria, which allows firms to compare candidates while also minimizing the possibility of bias.

A successful competency-based recruiting process is not an easy fix. It takes careful planning and dedication to execute. As part of this preparation, firms should train interviewers on the structured interview process, making them valuable in evaluating candidates’ future performance. Firms should also consider ways to customize the structured interview process to make it most effective for their goals. For example, some firms have gone beyond the typical one-on-one interviews and implemented panel interviews and off-site group retreats.

Firms may also consider assessing applicants’ skills through structured activities, such as writing tests or group projects with other interviewees.

LOOKING AHEAD

Since the Great Recession, law firm clients have become more focused on price and value, driving firms to seek better methods of delivering legal counsel. This landscape requires attorneys to have core skills that promote efficiency and client service, including technological abilities, business understanding, emotional intelligence, communication, relationship building and project management. To cultivate these skills within their firms, law firms should employ competency-based recruiting and development methods to inject specific criteria and expectations in their talent management processes.

ABOUT THE AUTHOR

Mary Kate Sheridan is a writer and attorney with a JD from Columbia Law School and a BA in writing from Mary Washington College. She is currently pursuing her MFA in Creative Writing at The New School.
**Monthly Chapter Meeting**

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<td>Performance Appraisals as Tools for Success</td>
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<td>Speaker:</td>
<td>Sallie Voyles, Speaker</td>
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RSVP to Jason Womack, jwomack@slk-law.com by July 12

**Community Service**

**Save the Dates**

- **Wednesday, July 12**
  - Dinner Service at RONALD MCDONALD HOUSE
- **Tuesday, October 3**
  - Dinner Service at the YWCA FAMILY CENTER
2017-18 Columbus Chapter Board

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Photos from Paint Night with our Business Partners
## Chapter Meeting/Event Dates

*Times and Dates are subject to change*

<table>
<thead>
<tr>
<th>Date</th>
<th>Meeting Type/Speaker/Topic</th>
<th>Venue</th>
</tr>
</thead>
</table>
| 18—July    | **Chapter Luncheon Meeting**  
*Performance Appraisals as Tools for Success*  
*Sallie Voyles, Speaker* | Barnes & Thornburg  
41 S. High Street |
| 15—August  | **Chapter Luncheon Meeting**  
*Conducting Effective Workplace Investigations/How to Address Complaints*  
*Mat Parker, Fisher Phillips, Speaker* | Isaac Wiles  
One Miranova |
| 28—September | **Member/Business Partner Golf Outing** | Golf Club of Dublin |
| 24—October | **Chapter Half-Day Educational Seminar** | Location TBD |
| 14—November | **Chapter Luncheon Meeting**  
*Medical Marijuana in the Workplace*  
*Joëlle Khouzam, Bricker & Eckler, Speaker* | Hahn Loeser  
65 E. State Street |
| 19—December | **Chapter Holiday Luncheon** | Location TBD |

Please note that chapter meetings are generally held on the third Tuesday of the month (exception will be February for Partners’ Luncheon). Please mark your calendar accordingly.

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### LETTERS TO THE EDITOR

We value your comments/suggestions and even your submissions. After all, this is your Newsletter! If you would like to write a Letter to the Editor, make a suggestion that would enhance the newsletter, or would be willing to write an article for the newsletter (either about a committee event or an educational topic that would be of interest to our members), please e-mail Cindy Wesney, Newsletter Editor at: cwesney@bricker.com. Your input would be greatly appreciated!
Columbus Chapter Member Change Form

If any of your information changes, please complete this form in its entirety and e-mail or fax to:
Cynthia L. Wesney, Newsletter Editor, Bricker & Eckler LLP, cwesney@bricker.com
and
Karen Scurlock, Vice President of Membership, Calfee Halter & Griswold, kscurlock@calfee.com

Name: __________________________________________________________________________
Title: __________________________________________________________________________
Firm: __________________________________________________________________________
Address: __________________________________________________________________________
City, State, Zip: ___________________________________________________________________
Telephone Number: __________________________ Facsimile: __________________________
E-mail: __________________________________________________________________________
Number of Attorneys: __________________________________________________________________
MEMBER/BUSINESS PARTNER GOLF OUTING

NAME: _____________________________________________

FIRM/COMPANY: _____________________________________________

E-MAIL: _____________________________________________

WILL YOU BE A TEAM CAPTAIN? ______ Yes ______ No

Level of Play: _____ Expert _____ Good _____ Okay _____ Do I have to get out of the Cart?

RSVP to Rob Sander by email at rsander@isaacwiles.com no later than September 13, 2017

EVENT SIGN-UP—GOLF CLUB OF DUBLIN

<table>
<thead>
<tr>
<th>SIGN UP FOR:</th>
<th>TIME</th>
<th>EVENT</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>11:30 am</td>
<td>Registration, box lunch and hit range balls</td>
</tr>
<tr>
<td></td>
<td>1:00 pm</td>
<td>Golf—Shotgun Start Begins</td>
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<tr>
<td></td>
<td>Approx. 5:00 pm</td>
<td>Cocktails</td>
</tr>
<tr>
<td></td>
<td>6:00 pm</td>
<td>Heavy hors d’oeuvres and presentation of trophies</td>
</tr>
</tbody>
</table>

Please join us at the 19th hole even if you are not golfing!

Questions? Contact a committee Chair: Laura Carpenter, lcarpenter@protectingohio.com;
Rob Sander, rsander@isaacwiles.com; or Lori Muetzel, lori.muetzel@thompsonhine.com