

# LEGAL MANAGEMENT

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How to blend strength and flexibility into your employee handbook.





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## LEGAL MANAGEMENT STAFF

### EDITOR-IN-CHIEF

Theresa Wojtalewicz  
*twojtalewicz@alanet.org*

### SENIOR MANAGING EDITOR

Valerie A. Danner  
*vdanner@alanet.org*

### ASSOCIATE EDITOR

Kate Raftery  
*kraftery@alanet.org*

### ADVERTISING OPPORTUNITIES

Robert Leighton  
*advertising@alanet.org*

### USER INTERFACE WEB DEVELOPER

Bert R. Saper  
*bsaper@alanet.org*

### GRAPHIC DESIGNER

Andrea Fitzpatrick  
*afitzpatrick@alanet.org*





**DEBRA L. ELSBURY, CLM**

2020–2021 ALA President  
Firm Administrator, Threlkeld  
Stevenson

“I challenge you to overcome prejudice by identifying your unconscious biases and rewiring your brains to welcome differences and think more inclusively.”

## A Time for Self-Reflection

**“Diversity is being invited to the party; inclusion is being asked to dance.”**

This incredible quote of Vernā Myers during a TEDTalk resonated with me. Vernā, a “recovering” attorney, has put into place a definition that separates two terms that are typically married to one another but actually very different. For those of you that do not connect with the dancing analogy, think of diversity as representation and inclusion as involvement. Diversity is a fact; inclusion is an act. Inclusion is not just an invitation to include others for short, celebratory moments but also for strategic ones. Society wants to talk the talk, but does it walk the walk? Do we as humans?

Last year, the Human Rights Campaign (HRC) tracked over 27 deaths due to fatal violence against transgender or gender nonconforming people in the United States. So far in 2020, HRC has recorded 16 persons killed by violent means (keep in mind many of these crimes often go unreported or underreported). Also, according to HRC, nearly 50% of LGBTQ employees remain in the closet and up to 30% continue to feel unwelcome at work. This identity struggle impacts their happiness, health and productivity, not to mention the negative impact on the broader organization’s talent retention and leadership development.

The fear of retaliation is real. The Equal Employment Opportunity Commission states that 75% of employees who spoke out against workplace mistreatment faced some form of retaliation. Transgender individuals have an unemployment rate three times higher than the national average — and that was before the pandemic hit.

The statistics are certainly hard to digest, but there is reason to celebrate. In June, the U.S. Supreme Court ruled that a landmark civil rights law protects gay and transgender workers from workplace discrimination. “An employer who fires an individual merely for being gay or transgender defies the law,” Justice Neil Gorsuch wrote for the majority 6–3 ruling.

Before this ruling, it was legal in more than half of the states in our country to fire workers for being gay, bisexual, or transgender. This decision extends workplace protections to millions of people across the nation — it is definitely something worth celebrating.

In this issue, you will find a feature article, "5 Ways to Make Your Law Firm More Inclusive for the Transgender Community." It addresses how we, as legal management professionals, can impact our firms, specifically with policies of inclusivity. It is our duty as leaders in the legal professional to set examples for those around us. Employees need to be able to speak freely, and they must be able to offer feedback regarding behaviors, practices and policies. Valuable input cannot happen if people do not feel it is a safe environment in which to speak up.

After reading the article, I challenge you to create a culture of strategic inclusive practices, policies and behaviors that allow all people to not only bring their fullest sense of self to work each day, but to lead out their very best contributions. I challenge you to overcome prejudice by identifying your unconscious biases and rewiring your brains to welcome differences and think more inclusively. I challenge you to interrupt bias on behalf of someone else.

Share with ALA what you have done. After all, your accomplishments are our accomplishments. Assist one another.

Rely on one another. Trust one another. The best work is yet to come. ALA is an inclusive place where all voices are heard. We all need to be an ally in this — advocating matters. In this time of self-reflection that many of us, it is a good day for a gut check. What are you doing, personally or professionally? What is your organization doing? What do your policies say? Look at everything through a new lens. A lens of someone who has not had the protections so many have taken for granted.

If you have had the pleasure of attending an ALA Annual Conference & Expo, one thing is apparent at the closing Gala — ALA loves to dance. To ALL of my ALA friends: we can no longer wait to ask colleagues to dance, we can no longer wait to be asked to dance. It is time to start dancing. Let's go change the world.

As always, it is my pleasure to serve with you and for you.

 [Debbie@threlkeld-legal.com](mailto:Debbie@threlkeld-legal.com)

# WHEREVER YOU ARE, ALA IS THERE WITH YOU



## ACCESS RESOURCES FOR ADAPTING TO THE NEW NORMAL:

### COVID-19 Pandemic

- Webinars from experts
- Facilitated discussions among members
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- Curated knowledge from around the web

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- Webinars with actionable advice
- Resources curated by the Committee of Diversity and Inclusion
- ALA Diversity Toolkit for chapters and firms

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**ALLAN CONGRAVE**  
Vice President of Sales, Integreon  
Business Enablement Services

“If law firms want to retain corporate business and stay in business, too, they must be willing to reinvent themselves by creating an updated vision for attorney support.”

## Creating a New Vision for Attorney Support at Law Firms

**Ever since lawyers have roamed the earth, there have been well-organized and highly attentive legal secretaries sitting directly outside their office doors. Each secretary was specifically assigned to support the lawyer in serving clients and performing administrative tasks. That is, until now. Both the law firm and this support model have changed.**

Today's lawyers may not even be present in the firm's office for extended periods of time — or ever — due to travel or the ability to work remotely. And from a practical perspective, the luxury and convenience of having a fully dedicated secretary is certainly not a given. Most lawyers must share legal secretaries (now called legal assistants or other titles — check out Jennifer Hill's white paper "The Changing Role of the Legal Secretary" at [alanet.org/whitepapers](http://alanet.org/whitepapers)) with several fellow attorneys, or do without them completely.

The role of the legal secretary continues to evolve as the job market shifts and law firms re-engineer how clients' work gets done. Operationally minded firms are embracing new technologies and resourcing models to realize crucial efficiencies and cost savings. The 1:1 lawyer-to-secretary/assistant ratio has been replaced at many firms by a leaner ratio of 6–7 lawyers per secretary. In the foreseeable future, this model is poised to double to 13 lawyers (or more) to 1 secretary, assistant or admin.

Legal assistants have become more like air traffic controllers, ensuring work is expediently funneled to the right departments and resources. Accomplishing this feat for multiple attorneys and their clients often involves a mixture of people, process and technology that requires specialized skills and training.

Some attorneys are bridging the gaps in legal support themselves, becoming more versatile, tech-savvy, and self-sufficient. However, firms need their lawyers to spend time on more high-value client-facing work, not generating documents. The legal work for corporate clients needs to get done and done well — but by whom if outside counsel lawyers and legal support professionals are pulled in too many directions?

## If upping internal staffing is not a viable option, there are two primary alternatives to consider: leveraging technology and outsourcing parts of the legal work.

### CLIENT EXPECTATIONS ARE GROWING

Clients have raised the proverbial bar for suppliers, including their law firms. Large corporations continue to hire legal operations professionals skilled at combining resources to produce streamlined results. Like their clients, outside counsel law firms are also investing in people and technology to realize the efficiencies and cost savings needed to ensure a well-run, profitable business. If law firms want to retain corporate business and stay in business, too, they must be willing to reinvent themselves by creating an updated vision for attorney support.

First, the law firm must be realistic about its capabilities and limitations. If the client's expectations increase but their bills don't (or perhaps even shrink), the law firm has no choice but to adjust its service delivery model. Although the client wants a vast network of resources capable of providing accurate responses around the clock, the firm cannot expect lawyers and legal support staff to regularly perform at that level with no room for breaks. If the law firm cannot adapt to meet the client's needs, the firm can expect to lose that client soon, or risk operating at a loss.

One option is for the law firm to hire more lawyers and legal support personnel to meet clients' 24/7 needs. However, this usually comes at a very high price that may not be covered by the firm's fees. If upping internal staffing is not a viable option, there are two primary alternatives to consider: leveraging technology and outsourcing parts of the legal work.

### INCREASE AUTOMATION FOR BETTER RESULTS

Technology can greatly assist with automating processes. Software and cloud-based practice management and document tools can streamline document production and facilitate collaboration. Law firm IT departments have become incredibly important as business enablers and even profit centers.

In addition, law firms are increasingly turning to outsourcing resources from global alternative legal service providers (ALSPs) to help support their lawyers and to offload some of the more repetitive, routine legal work. ALSPs are skilled at process engineering, and larger providers can staff trained legal support professionals in shifts to cover the full 24/7 schedule.

Though ALSPs are typically associated with litigation-related projects such as document review, their scope of work has

broadened in recent years. Some outsourcing firms have specialty skill sets such as legal research, patent illustration, transcription and dictation.

For law firms seeking to re-engineer their lawyer support approach, here are some key areas to consider:

- Objectively evaluate your current lawyer-to-secretary ratio. Is your current model providing adequate support to meet your lawyers' needs? Is it properly meeting your clients' needs?
- Is technology used effectively at the firm to speed operations and ensure quality? Do your lawyers and legal staff require more training to extract value from current software, or is new hardware or software required?
- Do your clients require after-hours support that your current staff and facility cannot accommodate? If so, can clients' expectations be managed to alleviate this, or do you need to supplement your legal staff with new hires, repurposing existing personnel or external resources?
- Are your legal secretaries doing tedious, repeatable tasks that could easily be completed by technology tools or outsourced teams? Would this free the secretaries up to do more project management, and would it boost morale by removing "busy work" from their days?
- Can you track realization of return on investment (ROI) for employees, technology tools and outside services? Having metrics can make decisions clearer and easier.
- Drawing upon your current stable of lawyers, legal support staff and installed tech, are you confident that you have all the resources you need to meet clients' needs? If not, what is missing and how can you obtain those resources at a cost-effective price?



Now is the time for law firm leadership to create a new internal vision for enhanced lawyer support that includes internal, external and technology resources.

Fortunately, this is not an impossible problem to solve. By leveraging knowledge of legal operations, suitable technology and the help of outsourced ALSP partners, both lawyers and legal assistants can be sufficiently supported so they can complete their legal work to the client's satisfaction. Law firm administrators are instrumental to prioritizing enhanced attorney support at the firm. Their leadership and willingness to invest in complementary resources can build a strong foundation to benefit the firm's own lawyers and legal staff, as well as its clients.

#### ABOUT THE AUTHOR

**Allan Congrave** is Vice President of Sales for Integreon Business Enablement Services, a practice group within Integreon, a trusted global provider of award-winning legal and business solutions to leading law firms, corporations and professional services firms

 [integreon.com](http://integreon.com)

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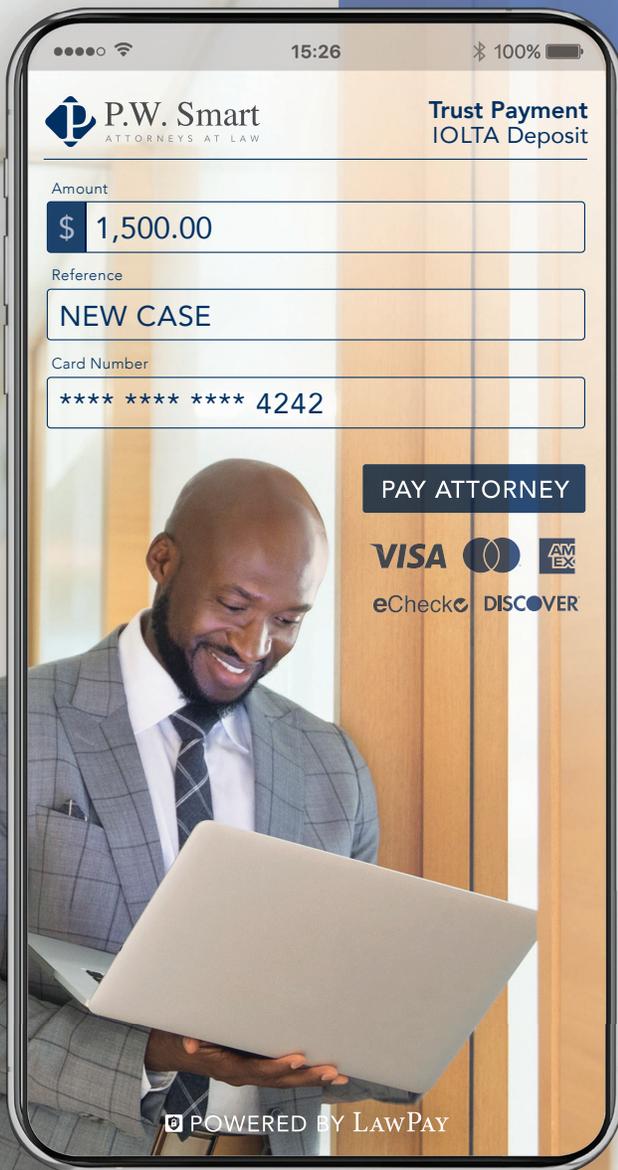
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# Returning to Work: How Telehealth Can Provide Peace of Mind

To say that the last few months have been a bit like riding on a roller coaster blindfolded might be something of an understatement. Due to the COVID-19 pandemic, almost overnight, a good portion of the workforce went from working in the office to working from home.

“ Available 24 hours a day, 365 days a year, virtual care is a convenient way for employers to provide their workforce with a benefit that connects them with health care experts who can respond to health care concerns and symptoms.”

While we may have struggled initially, we eventually found our work-from-home stride. However, as bans are lifted and the workforce starts to trickle back into the office, we find ourselves once again needing to evaluate previous office procedures in order to implement a return-to-work plan that accounts for both the physical and mental health of returning employees.

Whether your return-to-work plan is already in place or you are still working to refine your procedures, it is particularly important to remember that the return to the office will need to be assessed from a health care vantage:



What steps should employees take if they experience symptoms or have other health concerns?



What should employees do if they aren't feeling well but do not want to risk exposure by going to a doctor's office or emergency room?



What options are available to employees experiencing mental health challenges as a result of the pandemic or the return to work?

## EMBRACING VIRTUAL CARE

Available 24 hours a day, 365 days a year, virtual care is a convenient way for employers to provide their workforce with a benefit that connects them with health care experts who can respond to health care concerns and symptoms.

Implementing virtual care as a part of your return-to-work plan can help address the day-to-day health concerns of your employees and arm them with the ability to meet health care concerns head on. However, making virtual care a successful part of your plan requires more than simply investing in the benefit — embracing this benefit as an integral part of sustaining a healthy workforce requires action.

**1. Increase awareness.** While COVID-19 certainly increased overall awareness of virtual care, a recent J.D. Power pulse survey reported that 54% of consumers indicated that they were not sure whether they had access to a telehealth (virtual care) benefit. That number is a good reminder that while investing in a virtual care benefit for your employees is important, making sure your employees are aware that the benefit is available is paramount.

With that in mind, consider how you communicate with your employees and how you can integrate education about this benefit into your communications — promoting it is the key. Reach out to your broker or virtual care provider for materials to help elevate awareness of the benefit.

**2. Empower employees.** Part of the beauty of implementing a virtual care benefit is the ability to empower employees to take control of their health, both physical and mental. Day or night, virtual care allows an individual to get in contact with a health care professional who can respond to symptoms and provide guidance for next steps. Knowing that a doctor is just a phone call or online chat away allows an employee to take care of mild symptoms as they arise rather than waiting until those symptoms become serious problems.

In addition to physical concerns caused by COVID-19, nearly half (47%) of U.S. respondents reported to a recent Teladoc Health study that their mental health had been negatively impacted by the COVID-19 pandemic. While we've made great strides over the last few years in our cultural response to mental health treatment, some individuals still feel a stigma regarding mental health needs/visits. Unfortunately, this keeps them from reaching out and receiving needed help. Virtual care provides individuals another option for proactively and privately connecting with the help they need.

**3. Remove barriers.** Finally, as you embrace the benefits of virtual care for your employees, you may also want to consider eliminating hurdles such as copays and deductibles. When these barriers are removed from a virtual care plan, employees are more apt to utilize the benefit as they notice symptoms or as health care questions arise.

## TRAVERSING OUR NEW NORMAL

COVID-19 has left an indelible mark on this year and, at least for the foreseeable future, on the workplace. While there are hurdles we have yet to overcome, providing employees with effective and timely access to quality health care need not be one of them. As you put your return-to-work plan in place, consider how virtual care can enhance your workplace and provide the peace of mind needed to successfully traverse our new normal.

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### ABOUT THE AUTHOR

**Kirsi Johnson** has worked as a marketing and advertising professional in the insurance and financial services arena for the last 15 years with a focus on creating company awareness and specialized client educational material. She has been with GLJ Benefit Consultants (GLJBC) since its inception and has been instrumental in vetting and promoting GLJBC's family of ALA VIP business partners. Johnson has a bachelor's degree in communications from Brigham Young University, a master's in English from Northern Arizona University, and is Health & Life licensed.

 [kirsi@gjinsurance.com](mailto:kirsi@gjinsurance.com)

 [gljbenefitconsultants.com](http://gljbenefitconsultants.com)

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MARY KATE SHERIDAN  
Writer, Editor and Lawyer

“The workplace should never be a place of fear or inequality. Creating an inclusive environment is a critical step for law firms in ensuring that their transgender lawyers, support staff and clients feel welcome and supported.”

## 5 Ways to Make Your Law Firm More Inclusive for the Transgender Community

*Here's how to create a welcoming culture for LGBTQ employees.*

**Imagine if you had to hide part of yourself whenever you stepped foot in your law firm. Many transgender people face this reality every day.**

Indeed, 46% of LGBTQ workers remain closeted in the workplace, according to the Human Rights Campaign (HRC) Foundation report, *A Workplace Divided: Understanding the Climate for LGBTQ Workers Nationwide*.

“There are far more trans people out there than anybody knows,” says Ellen “Ellie” Krug — lawyer, Founder of Human Inspiration Works, LLC, and author of *Getting to Ellen: A Memoir About Love, Honesty and Gender Change*. “The reason that no one knows the real number is because people are afraid.”

In its study, *Injustice at Every Turn*, the National Center for Transgender Equality found that 90% of respondents faced harassment, mistreatment or discrimination in the workplace or hid their gender identity to prevent such treatment. Further, 1 out of 10 LGBTQ workers have exited a job that wasn't accepting of LGBTQ individuals, per the HRC Foundation's *A Workplace Divided*.

The workplace should never be a place of fear or inequality. And although the U.S. Supreme Court just ruled in June (see page 15) that employment discrimination protection extends to sexual orientation and gender identity, workplaces shouldn't stop there. Creating an inclusive environment is a critical step for law firms in ensuring that their transgender lawyers, support staff and clients feel welcome and supported, and also in bolstering their well-being. Here are five steps firms can take to shape a more inclusive environment for the transgender community.

## 1. PREPARE TO INVEST IN CHANGE.

The 2019 Vault/MCCA Law Firm Diversity survey found that 1.93% of law firm partners (equity and nonequity) and 4.01% of associates identify as LGBTQ. This survey also revealed openly LGBTQ people make up only 2.08% of members on firms' executive/management committees. Notably, transgender representation is just a portion of these already low numbers.

Increasing representation of transgender people within firms is an important step in creating a more inclusive environment, but to do so, firms must embrace change.

"The key is you actually have to create a culture that is going to sustain," says M. Dru Levasseur, Esq. — a transgender attorney who serves as Deputy Program Officer for the National LGBT Bar Association (including leading its LGBTQ+ inclusion coaching and consulting program, Lavender Law 365®). He formerly worked as the Transgender Rights Project Director for Lambda Legal. "The structural things firms can do have to be coupled with the idea that there has to be a culture shift inside," he says.

A firm should not only examine its policies and programming but also try to gauge how its transgender employees perceive the workplace. It should also understand any potential biases that exist among cisgender — that is, not transgender — employees at the firm. Firms may consider distributing an anonymous survey or hiring an outside consultant to explore these areas. Firms can also implement comprehensive outside tools like Lavender Law 365®, which helps pinpoint best practices for specific audiences in the firm, such as targeting implicit bias, uncovering inequities with firm policies and identifying trends.

Importantly, firms need to accept the challenges inherent in becoming more inclusive. "Know that there might be a learning curve around this, and try to think outside the box," says Levasseur, who recommends that firms connect with LGBTQ organizations to help develop best practices and navigate mistakes.

## 2. MAKE TRAINING PERSONAL.

There is no shortage of legal training opportunities, but when it comes to training on transgender inclusivity, the firm should have a formal program that incorporates transgender voices.

"If you bring in a trainer — which I highly recommend — bring in a transgender person," says Krug. "You need someone who will come in and make sure the firm understands transgender people are human like everyone else."

One useful training tool is to focus on commonalities. Commonalities establish the theme that transgender people are no different from and want the same things as everyone else, says Krug.

Krug also relies on human authenticity when she does trainings. As an exercise, she explores how people identify themselves and then challenges them to eliminate a certain aspect of their identity forever. This type of training helps people understand the idea of "choice" in relation to who you are and that transgender people do not, in fact, have a choice.

## 3. EVALUATE YOUR WORKPLACE POLICIES.

The way you shape your firm's policies will have a significant impact on how supported and comfortable transgender people feel at your firm. One useful source is the HRC Foundation's Transgender Inclusion in the Workplace: A Toolkit for Employers, which includes a detailed checklist to consult as you structure your policies and practices. Below are some areas to consider as you evaluate your firm policies.

- » **Antidiscrimination policy:** As the HRC Foundation's toolkit indicates, firms should include antidiscrimination policies in their handbooks that cover gender identity. "That sends the signal that 'we know transgender people exist,'" says Levasseur.
- » **Insurance benefits:** Firms should examine their insurance coverage to ensure it includes broad coverage for transgender people. "A lot of insurance companies still have what's called a transgender exclusion clause," says Levasseur. "Make sure your insurance plans don't have an exclusion clause."
- » **Transition policy:** A transition policy is another essential aspect of an inclusive environment. "Every firm should have in place in their HR manual that trans people are welcome — and nonbinary people as well — and have a protocol for what will take place if you need to transition or if the firm has hired someone who is in the process of transitioning," says Krug. It's important that firms allow for the transition policy to be flexible and personalized to each employee. The firm should also be proactive in offering support to the transitioning person. "Part of what I always recommend is you bring in someone who is transgender to assist HR and the person who is transitioning," says Krug.
- » **Restrooms:** Sometimes, seemingly small policies can go a long way with building inclusivity, such as signage on firm restrooms. "If you have a unisex bathroom, it's such an easy step to change the sign to say 'All Gender Restroom,'" says Levasseur.

» **Pronouns:** One action that can make a big difference is including a person’s preferred pronouns wherever that person’s name appears across the firm. In being proactive, the firm ensures that people are identified how they prefer without having to even request it. This practice also addresses two concerns from the ABA’s How to Be an Ally Program Toolkit: “Don’t try to guess someone’s pronoun” and “Don’t use the wrong pronoun — pronouns really matter.”

The firm shouldn’t stop at pronouns, however. Considering how you address others — especially groups — is critical. As the ABA’s How to Be an Ally Program Toolkit shares, always strive for inclusive, gender-neutral language (e.g., say “partner” instead of “wife” or “husband,” say “everyone” or “folks” rather than “ladies and gentleman” at events, etc.).

#### 4. HAVE A PRESENCE.

Firms that seek to be inclusive should not stand in the wings — outwardly showing your support for transgender people is invaluable. Krug suggests that firms support LGBTQ organizations and include photos on the firm’s website and in brochures. Also important is participating in industry surveys, such as the Corporate Equality Index.

#### 5. RESPECT THE INDIVIDUAL.

As a firm strives to become a more inclusive workplace, it must be wary of putting too much pressure on its transgender lawyers and support staff to assist.

“It’s wonderful firms want to be inclusive places, but they have to consider that’s not why that trans lawyer is there,” says Levasseur. “They are there at the law firm to do a job, and their job is not to be a face of diversity.”

As the ABA’s How to Be an Ally Program Toolkit states, “Do understand that an individual’s LGBT status is only a very small part of who they are.”

Firms may face some speedbumps along the way, but with a strong commitment to inclusivity — even if that means major changes — and thoughtful planning, firms can make major strides in creating a supportive environment for transgender employees and clients.

#### What Does *Bostock v. Clayton County* Mean for LGBTQ Inclusion?

On June 15, 2020, the Supreme Court of the United States ruled that Title VII extends to sexual orientation and gender identity. The *Bostock* decision may give the LGBTQ community more confidence about their rights in the workplace, but firms shouldn’t rely solely on the ruling and abandon their inclusion efforts. While this landmark decision was a big step forward for LGBTQ rights, it isn’t all-encompassing.

“I think [Justice Neil] Gorsuch was pretty careful to paint the opinion as a very narrow one,” says Ryan Thoreson, a Researcher in the LGBT rights program at Human Rights Watch. “He talks about hiring, employment and firing decisions and distances it from policies to do with dress code, bathroom or other policy decisions, though the opinion provides very strong support for plaintiffs who are bringing those cases.”

Firms should use this case as a call to action to be proactive and evaluate their policies. “I’ve been thinking about the case as an opportunity for employers to think about inclusion and how they can make their workplaces more inclusive,” says Thoreson. “That may mean that though the decision is framed as a narrow one, we should start thinking about ways to make our dress code more inclusive for employees or evaluate restroom policies, taking it as an invitation to rethink policy above and beyond the narrow confines of the opinion.”

It’s also important that firms use this opportunity to make clear their nondiscrimination policy. “One of the things LGBT advocates have been stressing over the years is the importance of having explicit policies that signal that sexual orientation and gender identity are protected categories,” says Thoreson, who notes the importance of clarifying firm policies so the burden isn’t put on employees to make an affirmative case or for members of the staff to use their best judgment. “For firms that don’t already have those protections, laying them out to signal to employers and employees that these are protected is an important step to take.”

#### ABOUT THE AUTHOR

**Mary Kate Sheridan** is a writer, editor and lawyer with a JD from Columbia Law School, an MFA in creative writing from The New School, and a BA in English from Mary Washington College. Previously, she worked as a litigator at a Vault 100 law firm.

 [mk@marykatesheridan.com](mailto:mk@marykatesheridan.com)

 [linkedin.com/in/mary-kate-sheridan-b73b211a](https://www.linkedin.com/in/mary-kate-sheridan-b73b211a)



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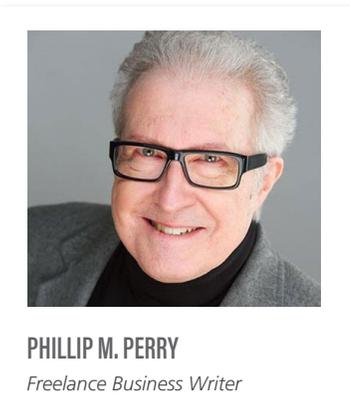
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**PHILLIP M. PERRY**  
*Freelance Business Writer*

“The same handbook that helps veteran workers understand a firm’s policies can also be valuable as a tool for recruiting the best people.”

## Balancing Act

*How to blend strength and flexibility into your employee handbook.*

**Genovese Joblove & Battista, P.A., operated for many years with the same employee handbook. Two years ago, though, the firm decided their traditional manual had become ineffective and it was time for a change.**

“We had been in the practice of adding addendums every year to the manual,” says Firm Administrator Paula J. Lawson, CLM. “Eventually we had added so many addendums — some of which seemed contradictory — that it became very difficult to explain or justify our policies to employees. When people began to interpret statements to mean different things, it became apparent that the handbook needed to be refreshed.”

Creating a handbook from scratch would require navigating a terrain shaped by several governmental levels of laws and regulations — a difficult task for a firm focused on Chapter 11 bankruptcy and commercial litigation. “Most administrators and HR folks are familiar with laws and regulations at the federal level and probably at the state level,” says Lawson. “But they may not be so aware of county and municipality laws that affect employment.”

Local laws and regulations can present an especially confusing patchwork, says Lawson. “We have three offices located in the cities of Miami, Fort Lauderdale and Tampa. Each county and city may have different regulations relating to employment. For example, they differ on their paid time off requirements for jury duty. Creating a handbook that is accurate and not misleading can be tricky in that environment.”

Given the challenge, the firm sought third-party assistance. “We hired an outside employment law firm do work on our manual to ensure it had everything required,” says Lawson. “They took our existing handbook and merged it as best they could into their ‘must-have’ outline. Then they highlighted areas where they felt we needed to give some input.

“Once we received the text back from the outside law firm, I added firm-related policies, such as how to take sick and maternity leave and how to request paid time off,” says Lawson. “One of the equity partners and I tightened up the manual’s language and then circulated it to the other six shareholders for any final comments and approvals.”

## MANAGE WELL

Law firms revising their own employee handbooks may sympathize with the challenges faced by Genovese Joblove & Battista. Even so, if the process of creating a new manual seems tedious and time-consuming, legal managers seem to value the result.

“I am a big proponent of the employee handbook,” says Renée S. Lane-Kunz, Partner and Chief Operating Officer at Shapiro Sher in Baltimore, Maryland. In her administrative role, Lane-Kunz was in charge of redoing the firm’s manual earlier this year. “In my opinion it can be a very powerful tool, not only for the employer to effectively communicate its policies and shed light on the firm’s culture and management style, but also for the employee to better understand what the firm expects and how to navigate difficult situations that may arise.”

The same handbook that helps veteran workers understand a firm’s policies can also be valuable as a tool for recruiting the best people. “Many times the ideal candidate has multiple offers, and a handbook can tip the balance in an employer’s favor by communicating the benefits of joining your team,” says Richard Avdoian, an employee development consultant in St. Louis.

Once aboard, the new employee will use the handbook for assistance in getting acclimatized. “The handbook communicates the firm’s mission, states expectations and outlines benefits,” says Avdoian. “And it sets the tone for a cooperative ‘we’ culture.”

## ESSENTIAL ITEMS

Most law firms are probably familiar with the many topics covered by the typical employee handbook. These include benefits, paid time off policies and procedures for determining pay and advancement. Some issues require special attention to obviate difficulties down the road, notes Bob Gregg, Co-Chair of the Employment Practice Law Group at Boardman & Clark LLC in Madison, Wisconsin. He points to two for special attention:

- **Email policy:** Even if employees are allowed to use personal devices for firm purposes, they should understand they have no right to privacy regarding emails. “The manual should state that the firm owns all emails that goes over the organization’s system, even personal ones,” says Gregg.

“Employees should not use the system for anything they do not want company management to see. They should also be informed that, even if they hit the delete key, the emails will be retained on the company hard drive or in the cloud.”

- **Privacy statement:** “The manual should include a statement of the firm’s right to inspect computers, desks and telephones,” advises Gregg. “Without it, the firm can be sued for invasion of privacy for looking through what it considered company property.”

Still other topics have particular importance to law firms. One is the importance of confidentiality.

“Staff members need to be made aware of the attorneys’ rules of professional conduct,” says Lane-Kunz. “Law firms may include a section regarding ‘moonlighting,’ for example, that requires management to be notified when staff members take additional jobs in order to prevent employees from accepting positions that may conflict with firm duties or which could negatively impact the firm’s professional reputation.”

The firm should also remember to include a paragraph that clearly and expressly states that under no circumstances does the handbook create a contract of employment, adds Lane-Kunz. “And in furtherance to protecting the ‘at-will’ employment relationship, the manual should also prohibit the use of probationary periods that may be interpreted to imply a contractual relationship with the employee following the probationary period.”

## REVISE REGULARLY

The handbook is not a “set it and forget it” affair. Federal, state and local laws affecting employment are undergoing constant change, as are a law firm’s internal dynamics. The manual must change in sympathy.

“Our firm tends to create a new employee manual every five years and to issue supplemental guidance in between,” says Jack Huddleston, Executive Director of Administration at Thomas Horstemeyer in Atlanta, Georgia. “I look at the manual annually to see if anything needs to be modified because of a change in the FLSA [Fair Labor Standards Act] or other law relating to employment.”

Some of the modifications relate directly to the nature of the firm’s focus on intellectual property law. “One change we made in our new handbook is a clarification of the bar rule that a legal assistant may not file electronic patents without a prior attorney review,” says Huddleston. “After all, if something goes awry, it is the attorney and not the legal assistant who is on the hook. In an extreme case, the attorney’s license might be at risk.”

“We also strengthened the language about confidentiality,” Huddleston adds. “A good part of the reason is the nature of our work, which concentrates on patents and inventions.”

Other firms report similar needs for interim changes. “One thing we added this year was two weeks of paid ‘bonding leave’ for a nonbirth spouse [or domestic partner],” says Lawson. “That term refers to someone who may have adopted a child or may be a member of a same-sex marriage. Our new manual also better explains our paid time off policy.”

## INTERIM UPDATES

If regular revisions of the employee manual serve a valid purpose, is a new handbook every few years sufficient to deal with modern society’s rapid rate of change? Most administrators seem to say no, and that’s where interim additions come in.

“Intermittently, we issue updates that reflect policy changes or new state-specific laws,” says Lane-Kunz. “For example, the recent passage of the Maryland Healthy Working Families Act broadened the sick leave currently available to certain employees. Also, Baltimore City passed an ordinance that employees need to provide lactation rooms.”

It’s critical to confirm that all staff members have been notified of the updates, says Lane-Kunz, who communicates them to staff members by email. “We keep copies of the correspondence to establish electronically that we sent the email messages, and sometimes we use return receipts to show that the messages were received,” she says. “We also create a page that we insert into the employee handbook until a completely revised version is published, and we post the changes on our employee communications board.”

The same need for communicative closure exists when the updates are consolidated into newly issued handbooks. “When a new employee handbook is issued, we have employees sign written receipts that they have read it and agree to abide by its policies,” says Lane-Kunz. “We keep those receipts in the personnel file. They can be useful if future disagreements arise.”

## STAY FLEXIBLE

Clear writing is the hallmark of good communication. And plain statements with plenty of detail can effectively reduce staff confusion about a firm’s policies. Unfortunately, restrictive language can also lock firms into operational straitjackets when confronted with real-world problems. As a result, the most effective employee handbooks walk a fine line between specificity and flexibility.

Clear writing is the hallmark of good communication. And plain statements with plenty of detail can effectively reduce staff confusion about a firm’s policies. Unfortunately, restrictive language can also lock firms into operational straitjackets when confronted with real-world problems.

“While a handbook cannot be so loosely written that it creates ambiguities, it also should not be so tightly written that it disallows some discretion on the part of the employer,” says Lane-Kunz. “There are often extenuating circumstances in employment scenarios. A law firm would want some flexibility, for example, in applying a progressive discipline policy.”

Careful editing can introduce that flexibility, notes Lane-Kunz. “A manual’s wording might say something like ‘your failure to correct these deficiencies may result (rather than shall result) in further disciplinary action.’”

No matter how careful the linguistic balance, law firms will on occasion need to bend the rules. “We look upon the handbook as a blueprint, but not a bible,” says Lawson. “A policy that might be good for most of the group will not apply to someone in a special situation. For example, a handbook might specify two start times — 8:30 [a.m.] and 9 [a.m.]. Well, maybe someone has a childcare issue and needs to come in at a different time. If it’s OK with the attorneys and it does not cause a huge business interruption, we can make an adjustment for that person.”



The handbook needs to be read by all of the staff attorneys and to go through multiple edits. That vetting can help ensure not only that the text will obviate problems down the road but that everyone will support the document's positions in real-life scenarios.

### GET BUY-IN

The handbook needs to be read by all of the staff attorneys and to go through multiple edits. That vetting can help ensure not only that the text will obviate problems down the road but that everyone will support the document's positions in real-life scenarios.

"One of the mistakes law firms and other employers make is to issue handbooks that are poorly written or vetted," says Lane-Kunz. "As a result the firm fails to follow its own published procedures. That may place the employer in a difficult legal position and often creates turmoil among employees when rules are applied inconsistently."

And even a handbook that is well-written and vetted requires management-level commitment.

"Management has to agree to abide by the document," says Lane-Kunz. "The worst-case scenario is an employer who provides a handbook but then manages its business on an ad hoc basis. If an employer chooses to manage that way, it is best to not have a manual at all."

### The Case of the First-Time Handbook

Smaller law firms that have never used employee handbooks may well face awkward situations when issuing one for the first time. Will employees feel they are being force fed a whole new slew of office regulations?

The secret is to take a positive spin, introducing the handbook as a new tool for enhancing the working environment. "I would introduce a new employee handbook as part of a morale-boosting celebration of the progress being made by the firm," says Richard Avdoian, an employee development consultant. He suggests distributing the handbook at a company luncheon, for example, using words such as these:

"Thanks to everyone in this room, we have grown to the point where we can further fine-tune our firm. We are now distributing an employee handbook. Most of you already know about our benefits, but perhaps you have forgotten some of them. This handbook includes all of them in one place and outlines the company's expectations for the future."

### ABOUT THE AUTHOR

**Phillip M. Perry** is an award-winning business journalist with over 20 years of experience under his belt. A three-time recipient of the American Bar Association's Edge Award for editorial achievement, Perry freelances out of his New York City office. His byline has appeared over 3,000 times in the nation's business press.

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PAULA TSURUTANI

Freelance Writer and Editor

“New lawyers comprise a major investment. In fact, firms spend an average of \$12,000 on recruiting and training attorneys, and large firms spend an average of \$62,000 a year.”

## Back to Basics

*There are some skills law graduates don't learn in school, but you can help fill the gaps.*

**According to an ABA report, more than 34,000 law students graduated in 2018 — most finding jobs in law firms. After spending several years in school, a considerable chunk of money and many hours studying and stressing, new hires face additional challenges when transitioning from law student to lawyer.**

Thinking about legal problems in a practical and strategic way is one such challenge.

“Many young attorneys focus just on the law — what the cases hold, what the statute says. But law isn't applied in a vacuum,” says M. Cabell Clay, a Member of the labor and employment group at Moore & Van Allen PLLC. “To provide effective counsel, you need to understand a client's business and its goals. That's as important as knowing the law.”

Being results-oriented is key. “Clients want quality legal work that helps accomplish their goals,” says David Luikart, Hiring Shareholder at Hill Ward Henderson. “And they can refuse to pay — or fire us — if we fall short. We get hired to deliver tangible results to clients, not great ideas or interesting theories.”

Law schools can help the transition by incorporating practical courses as part of their curriculum. For example, a law school course on accounting for lawyers would be invaluable.

“At a macro level, students need to be taught how businesses run and how their work impacts the businesses' clients,” says Corinne Cantwell Heggie, a Partner at the Wochner Law Firm.

That means knowing how to read and understand balance sheets, income statements, how businesses are valued, and measurements of growth and profitability, says Luikart. “Most of our clients are either businesses or businesspeople, and we need to understand their businesses to help them.”

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Learning basic business communications and email etiquette also is crucial. Younger lawyers are accustomed to communicating by email or text, and many rarely use the phone — some may even be uncomfortable in face-to-face interaction.

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Learning basic business communications and email etiquette also is crucial. Younger lawyers are accustomed to communicating by email or text, and many rarely use the phone — some may even be uncomfortable in face-to-face interaction.

“It’s critical that students learn how to appropriately correspond over email, internally and externally, in a manner that reflects service and professionalism to clients,” says Heggie. And doing so generates other career-enhancing benefits for new lawyers — it makes their superiors look good, can help generate more business and can help advance a new lawyer’s career.

## A WORTHWHILE PARTNERSHIP: LAW FIRMS AND LAW SCHOOLS

Partnering with law schools is one way firms can prepare students for the rigors of law firm life. “Firms should coordinate with their alumni associations and local bar associations to host practical seminars,” says John C. Trimble, a Senior Partner in the Indianapolis firm of Lewis Wagner, LLP. He suggests topics like how to be a good law firm associate; how to develop new business and what you should know now; and becoming a partner: the hows and whys.

One law school is working hard to help law students navigate the realities of private practice. At the University of Denver Sturm College of Law, students can take advantage of an externship program to gain practical experience and skills. Kristen Uhl Hulse, Assistant Professor of the Practice of Law, applies her background as a transactional attorney and law firm professional development leader in guiding students through law firm and corporate placements.

The school vets externship supervisors — often alumni — at law firms that range in size from solo to Am Law 100. These supervisors then work with students, providing hands-on learning opportunities, assessing and reviewing assignments, and offering feedback and evaluation. The program is similar to an apprenticeship and closely approximates the law firm experience, equipping students with practical skills and bringing their classroom learning into context, says Hulse.

Externships are a win-win: law students gain work experience, and law firms gain a source for new recruits. Hulse estimates that 20% of Sturm College of Law’s graduates find jobs through this program.

## LEARNING OUTSIDE OF LAW SCHOOL

Some of the most useful education happens outside of law school, and that can give law students a competitive edge. Business development, for example, is an essential law firm skill but rarely taught in law schools. Involvement with bar associations, student government and related extracurricular activities gives law students needed experience. Heggie notes that the Women’s Bar Association of Illinois, where she serves as Immediate Past President, offers law students free memberships and hires women law student externs.

Trimble says that many new lawyers are not strategic about their career or the need to build networks of business contacts in the community to help grow their practice.

“While in law school, students must get involved in the local bar association or the school bar association. These activities help build social intelligence and interpersonal skills — essential for building relationships and a book of business,” he says. Firms also can help new lawyers refine these skills by supporting bar association participation.

## TIPS FOR WOMEN AND DIVERSE NEW LAWYERS

Despite steady advances, new lawyers who are women and people of color still face obstacles, forcing them to be cognizant of their “otherness.”

“I’m not sure how many students realize that the number of women who rise to the equity partnership or C-suite level is still incredibly low,” says Nicole Little, a Partner at Fitch, Even, Tabin & Flannery LLP. “I am often the only woman in the courtroom. More than once I’ve been mistaken as the court reporter. It’s not always easy.”

Shannon M. Nessier, a Litigation Partner at Hanson Bridgett LLP, says that while you need to be prepared for microaggressions, it’s also important to know your value. “Clients want diverse

Some of the most useful education happens outside of law school, and that can give law students a competitive edge. Business development, for example, is an essential law firm skill but rarely taught in law schools.

outside counsel. Know that your firm capitalizes on your diversity in client pitches and RFPs. So lean in. Make it known that you know you have a value add. Do it in whatever way makes you most comfortable. But own it.”

And, just as important, says Little: “Remember that by pushing forward, and up, you’re creating a path that is making it easier for those following behind you. So lift as you climb.”

A formal or informal sponsorship program that helps navigate a firm’s culture — critical for all new lawyers — is especially important for those who are historically underrepresented.

“Sponsorship is not mentorship,” says Yusuf Zakir, Director of Diversity and Inclusion at Holland & Knight. “It’s a more involved, engaged and proactive relationship where the sponsor actively invests in the success of their protégé, facilitates their growth and development, and encourages the protégé to seek stretch and growth opportunities, including higher-profile and higher-risk work.”

He says for women and diverse new lawyers, a sponsor can be a great champion to help their protégé grow and ensure that any mistakes made are not unduly amplified. “After all, no person has been successful without failure or mistakes.”

## HOW LEGAL MANAGERS CAN HELP

New lawyers comprise a major investment. In fact, firms spend an average of \$12,000 on recruiting and training attorneys, and large firms spend an average of \$62,000 a year, according to a 2017 survey by Robert Half Legal. So it’s no surprise that firms want new hires to hit the ground running. Having a formal onboarding process that involves the entire administrative team is an essential first step.

“Administrators must play a role to ensure the most efficient lawyer training,” says Nessler. “If administrators help address the business aspects of the firm, the billing lawyers can focus more of their time and energy on the substantive side. When billing lawyers have sole responsibility for both business and substantive



training, two things can happen: the lawyer spends too much time training and not enough time on legal work or client service. Or the lawyer just dabbles at mentoring the new lawyer.”

In particular, new lawyers need to understand and respect the economics of their law firms — including their billing rates, paralegal rates and client research costs. “Understanding firm economics can help young lawyers develop other prudent skills — timely, accurate timekeeping, with clear descriptions that convey the value of the work performed,” says Clay.

During onboarding at Luikart’s firm, legal managers make a point of introducing new lawyers to the business side of the firm. “They learn how an assignment becomes a dollar — helping them understand billing, accounts receivable, how to collect without alienating a client, and when to fire a client.”

Firms also can take a step back and reassess the way they view new lawyers and how they approach training. Rather than focusing on a specific course or generational behavior, firms need to “look at the individuals they hire and what each one needs to thrive,” says Nessler. “If a firm doesn’t do that, they will never get the best out of their people.”

### ABOUT THE AUTHOR

**Paula Tsurutani** is a senior-level strategic communications writer and editor who works with organizations in the legal profession, the arts and higher education.

 ptsurutani@gmail.com

 linkedin.com/in/paulatsurutani



## What to Do When Clients Can't Pay

**The economy is in rough shape right now. More than 40 million Americans applied for unemployment during the pandemic, while 7.5 million small businesses around the country may close forever due to the crisis. The entire world will likely experience a long-lasting recession.**

While the legal industry is typically more recession-proof than others, it cut 64,000 jobs this past April, reduced employees' pay and gotten rid of summer associate programs in order to cope with the economic downturn.

It's not helping that clients may be unable to pay right now due to a loss of income. While you certainly don't want your law firm to go under, you do want to be empathetic to your clients' issues.

"Aside from the fact that it's morally responsible, clients will remember you for your compassion," says Caroline J. Fox, Principal Attorney at CJFox Law, PLLC. "They will trust you. They will come back to you and refer people to you. That ROI [return on investment] is priceless. In addition, we owe it to our profession and the bar to show that lawyers aren't all heartless 'sharks.'"

When dealing with clients who can't pay right now, here are some tactics to ensure your firm will survive while showing consideration for your clients at the same time.

### DIFFERENTIATE BETWEEN CLIENTS

How you handle clients who can't pay will depend on whether you're serving them one time or for the long term, says Elliott M. Portman, Managing Partner of Portman Law Group, P.C.

"In either case, it is best to keep a dialogue open and get voluntarily payments. With many businesses now reopening, the cash flow problems for them and their principals will resolve over time."

“They will trust you. They will come back to you and refer people to you. That ROI is priceless.”

## BE PROACTIVE IN REACHING OUT

If you anticipate that your clients are going to have trouble paying or will be late on their payments, then give them a courtesy call, says Andrew Taylor, Director of Net Lawman.

“Speak to them openly about their situation and see if a direct debit in incremental amounts can be set up to assist this.”

## SET UP A PAYMENT PLAN

Clients may be able to pay their bills, but not all at once. If this is the case, then have them agree to a payment plan.

Sharon Oberst DeFala, Managing Attorney at Law Offices Gary Oberst, PC, says she will allow clients to set the rate and amount of payment because they are more likely to pay what they have committed to than if she comes up with an amount.

“My engagement agreement includes interest on unpaid balances,” she says. “When a client sets up a payment plan with me, I agree to waive the interest in any month in which I receive timely payments as promised.”

## PUT FUTURE PROTECTIVE MEASURES INTO PLACE

Though you can’t go back in time with current clients, you can put protective measures in place for any future clients, especially if you take them on during this recession.

Oberst DeFala says that before she commences any work for a client, she collects a retainer amount. She’ll estimate the retainer slightly beyond what she expects the matter to cost with the understanding that she will return any unused portion at the end of the matter.

“At the end of each monthly billing cycle, I check if any clients are at or near the end of their retainers and I send them an individual email before they receive my bill letting them now that I will be requiring an additional retainer,” she says. “The invoice then serves as a reminder. Since COVID began, I have been offering clients the option of paying by monthly credit card with their permission to keep their credit card info on file.”

## GET CREATIVE

These are unprecedented times that nobody could have seen coming. In this moment, you’ll need to think outside the box in order to get through them.



Oberst DeFala says that when the courthouses started shuttering and merging, judges joined virtual bar association meetings and urged the attorneys to also act as commissioners of the court, meaning that they needed to help their own contacts and associates find ways to work around the crises and look to a stable law future.

“We were asked to be more creative and more resourceful than we have ever been before,” she says. “I took this admonition to mean not just in my work, but in my broader life as well. This is our opportunity to use our privilege of being attorneys and actively seek to give back in new and expanded ways at work, at home, online and in our neighborhoods and towns.”

### ABOUT THE AUTHOR

**Kylie Ora Lobell** is a freelance writer living in Los Angeles. She covers legal issues, blogs about content marketing, and reports on Jewish topics. She’s been published in *Tablet Magazine*, *NewsCred*, *The Jewish Journal of Los Angeles* and *CMO.com*.

 [kylieoralobell@gmail.com](mailto:kylieoralobell@gmail.com)

 [twitter.com/kylieoralobell](https://twitter.com/kylieoralobell)

 [linkedin.com/in/kylieoralobell](https://www.linkedin.com/in/kylieoralobell)



**RYAN B. BORMASTER**  
*Managing Attorney*  
*Bormaster Law*

## 3 Signs It's Time to Update Your Law Firm's Policies (And How You Should Do So)

**Running a successful law office requires more than knowledgeable attorneys. It requires that both support staff and attorneys operate with efficiency, consistency and professionalism. And your firm's process manual is the most important foundation of these principles.**

If there's one thing many attorneys seem loathe to admit, it's that their law office is, at the foundational level, not especially different from any other business. Just as passion and talent alone aren't enough to carry a start-up to success, legal expertise is not enough to run and manage a successful firm. Firms and legal departments also require a certain degree of business acumen and a host of support staff.

Ensuring these staff work together with your attorneys requires a set of established policies and procedures — and drafting them will likely fall to legal managers. But with these in place, your organization will operate like a well-oiled machine.

So what should these policies cover? The short answer is everything. This includes but is not limited to:

- Office staff training and onboarding
- Attorney hiring and onboarding
- Client relations, including communication channels and communication frequency
- Data storage and management
- IT policies and infrastructure
- Regulatory compliance processes
- Disaster relief and business continuity

“Ensuring these staff work together with your attorneys requires a set of established policies and procedures — and drafting them will likely fall to legal managers. But with these in place, your organization will operate like a well-oiled machine.”

In addition to covering every facet of managing your law office, these policies must be regularly revisited and updated. I'm not just talking about an annual or quarterly review, either — though I would advise both. I'm talking about certain changes to the legal market that demand adaptation.

We're going to discuss the three major signs that it's time to update your law firm's policies.

## 1. THERE'S BEEN A RECENT LEGISLATION CHANGE

In the technology industry, regulators and legal professionals have a reputation for being slow to adapt to change. Legislation frequently lags behind new technology as lawmakers puzzle out the best way to address its unique legal challenges. Yet change inevitably comes, and with far greater frequency than you might expect.

For instance, in January 2020, several changes to the Texas data breach statute came into effect. As reported by *The National Law Review*, these changes introduced a number of new requirements to the breach response process, including a requirement that law firms notify the Texas attorney general of a known breach. Last year also saw several proposed changes to pretrial practice in Texas.

If there is a major change in legislation, your policies must immediately be updated to reflect that. The good news is that you can take a light touch here. Think about the sections of your law firm's manual that are likeliest to be impacted by legislative changes — and modify those exclusively.

## 2. YOU HAVEN'T ACCOUNTED FOR NEW TECHNOLOGY

I've seen plenty of law firms that still exclusively use paper filing systems and keep in touch with clients entirely via email. This, in my eyes, is a potential problem. Technology is changing the legal industry just like any other, and the most successful law firms understand how to tap into that. Plus, chances are with COVID-19, your firm or department has been forced to embrace new forms of technology to enable employees to work from home. That is a signal to revisit your policies, too.

Endpoint management platforms that enable more widespread, secure use of mobile technology. File storage, management and editing platforms that allow attorneys to carry iPads instead of stacks of documents. Customer relationship management (CRM) platforms that allow law firms to respond more efficiently and effectively to clients than ever before. These are just a few examples of new technology that's changing the face of law — technology your firm should be prepared to use. To that end, I'd advise that you keep an open mind and an ear to the ground



about new and emerging technology in the legal sector. Your policies around technology should be both general and flexible enough that they can be easily adapted and adjusted to new developments without putting any sensitive legal data at risk.

## 3. THERE'S BEEN A CHANGE IN YOUR FIRM'S STRUCTURE

Has your firm branched out into a new specialty? Have you acquired a competing firm or brought a vendor in house to better serve your needs? Changes like this require quite possibly the most extensive updates to your policies.

The best way to address this one is via a brainstorming session. Sit down with all the major stakeholders involved in the structural change. Brainstorm what new policies and processes may be required and update them accordingly.

## EFFICIENCY. PRODUCTIVITY. PROFESSIONALISM.

A successful law firm requires more than legal knowledge alone. It requires a law office that runs smoothly, guided by established yet flexible policies and processes. Keep that in mind, and you should be just fine.

### ABOUT THE AUTHOR

**Ryan B. Bormaster** is the Managing Attorney at Bormaster Law. The law firm practices in a number of areas but specializes in 18-wheeler accidents and accidents with commercial vehicles, such as work trucks and catastrophic injuries of all kinds.

 [bormasterlaw.com](http://bormasterlaw.com)



CHRISTINA FLOYD AND  
KAREN LEASTMAN  
*First American Legal Finance*

# Improve Your Cash Position During Uncertainty Through a Cash Reimbursement

Amid periods of financial volatility like we find ourselves in now, many firms are looking to build their cash reserves and reposition their firm for the future. One strategy law firms have benefited from is utilizing a cash reimbursement for previously purchased equipment or soft costs to provide additional short-term liquidity.

In a cash reimbursement, the lessor reimburses the lessee for equipment or soft costs purchased within the past 6–12 months. Here are some of the most commonly reimbursed assets from law firms:



**Technology:** Computers, servers, data centers



**Office buildouts:** Furniture, fixtures and equipment (FF&E); construction and design fees



**Soft costs:** Software implementations and licensing

“Receiving a cash reimbursement ... allows the firm to build their cash reserves and ready their firm to react quickly and invest in their employees or manage partner distributions.”

Once the transaction is finalized, the lessee will receive a 100% reimbursement of the cost of the equipment included in the lease and lease payments begin. Lessors can work with the lessee to provide customize repayment terms, including step-up payments and deferred payments.



## WHAT IS NEEDED FOR A CASH REIMBURSEMENT?

The financial disclosure requirements for a cash reimbursement are generally the same as a traditional lease transaction. The lessor will require three years of audited financial statements and the most recent interim financial statements. The lessor will also require copies of the vendor invoices for the equipment and proof of payment. Equipment inspections may also be required.

## FIRM BENEFITS

Some law firms are experiencing or are preparing to see a shortage in cash as they wait on accounts payable. Receiving a cash reimbursement for recent technology or other capital investments allows the firm to build their cash reserves and ready their firm to react quickly and invest in their employees or manage partner distributions.

Considering your equipment as an additional source of liquidity is a quick and easy way to replenish your cash for 100% of a completed project's costs, enabling you to remain nimble and invest in your operations as needed.

Other advantages include:

- Improve short-term liquidity
- Preserve cash or other lines of credit
- Manage partner distributions
- Spread cost of asset over its useful life
- Strengthen balance sheet
- Take advantage of historically low rates

This year has taken quite a few unexpected turns. It's forced us all to respond quickly to things we couldn't have planned and budgeted for last year. Cash reimbursement is just another option you have at your disposal to help you get through it.

### ABOUT THE AUTHORS

**Christina Floyd** is a Certified Lease and Finance Professional (CLFP) and has almost a decade of equipment leasing knowledge and dedicated experience working with the legal industry. Additionally, she has successfully completed the Legal Management Finance Specialist Certificate Program through ALA. In her tenure, Floyd has been instrumental in growing First American's legal business to more than 200 firms.

 [Christina.floyd@faef.com](mailto:Christina.floyd@faef.com)

**Karen Leastman** has more than a decade of equipment leasing knowledge and dedicated experience working with the law firm industry. Since joining First American in 2003, she has been a key contributor in building First American's law firm division which now serves more than 200 law firms across the United States, including Am Law 100 and 200 firms. As a Certified Lease and Finance Professional (CLFP), Leastman is a leader in the equipment leasing industry.

 [Karen.leastman@faef.com](mailto:Karen.leastman@faef.com)





# No-Cost WEBCASTS from the Solutions Series



ALA relies on its business partners to share solutions for pressing issues and hot topics in the legal industry as they work closely with legal management professionals. In these free webcasts — available live and on-demand — they pass along an abundance of knowledge.

Watch now! [legalmarketplace.alanet.org/events](http://legalmarketplace.alanet.org/events)

# Anniversaries, Awards and Appointments

## Members on the Move »



**Sharlene Woods Hawkins**, a member of the Capital Chapter, is now Office Administrator at Proskauer Rose, LLP, in Washington, D.C.



**Mistie Hunt**, an independent member, is now Firm Administrator at Big Fire Law & Policy Group LLP in Bellevue, Nebraska.



**Sheila Knost**, a member of the Suncoast Chapter, is now Chief Financial Officer at Green Family Law, PA, in Orlando, Florida.



**Kristy Parker**, a member of the Dallas Chapter, is now Chief Administrative Officer at Ryan Law in Dallas, Texas.



**Katie A. Shaw, PHR**, a member of the Central Florida Chapter, is now Director of Human Resources at Rissman Barrett Hurt Donahue McLain & Mangan, PA, in Orlando, Florida.



**Debbie K. Snellen**, a member of the Kentucky Chapter, is now Legal Assistant at Vice Cox & Townsend PLLC in Louisville, Kentucky.



**Laura L. Waters**, a member of the Arizona Chapter, is now Office Administrator at Brownstein Hyatt Farber Schreck, LLP, in Santa Barbara, California.



**Scott A. Wendel**, an independent member, is now Firm Administrator at Burnetti, PA, in Lakeland, Florida.



**Alicia Wood**, a member of the Atlanta Chapter, is now Office Manager and Controller at Patel Burkhalter Law Group in Atlanta, Georgia.



## Sending Our Condolences

- David W. Jeffers, MBA, CFP, a member of the Philadelphia Chapter, passed away in May at the age of 63. He worked as Director of Administration for the firm of Curley, Hurtgen & Johnsrud LLP. Our thoughts are with his family, friends and colleagues.
- Former ALA member Martha McCollum Henck died in June at the age of 96. According to the *Gwinnett Daily Post*, she worked as a law firm administrator for major firms in New York and Atlanta from 1968 until 1994, and she served as Regional Vice President of ALA's Southeast Region and as President of the Atlanta Chapter. Following her retirement, she was spent over 20 years volunteering with the Gwinnett Medical Center (now Northside Hospital Gwinnett) Auxiliary, including as a member of the Board of Directors, President and Treasurer. Our sympathies are with her family and friends.

# What's Happening at Headquarters

There's always a lot going on at ALA headquarters in Chicago. Here's a snapshot of what's in store for the coming weeks.



## Update on Fall Conferences

After much consideration and feedback from members, ALA's Board of Directors has decided to postpone most of our regularly planned retreats and meetings for the rest of the year.

The Board did not make this decision lightly. ALA sent out a survey to members requesting feedback on the fall conferences. We wanted to gauge how people were feeling about traveling, if they could travel, and their willingness to attend in-person events. We thank you kindly for your participation, which helped inform the Board's decision.

We are excited to be able to share that work has already started to redesign the Intellectual Property Conference for Legal Management Professionals as a virtual education event for 2020. Details including education and registration information will be coming soon. Stay tuned for news and information on other virtual events to come later this year.

## View ALA Today: The Virtual Conference On-Demand

ALA Today: The Virtual Conference took place in late June, and it was a success! Now, anyone who registered for the conference — including those who couldn't attend live — can access on-demand video recordings and handouts for each of the education sessions.

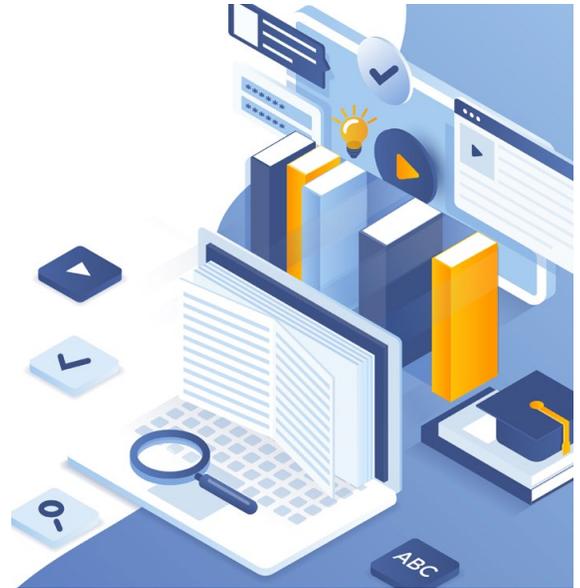
That's a total of 14 recorded sessions spanning the five functional knowledge areas and providing legal management professionals with the information they need now to efficiently and effectively run their workplace amid the COVID-19 pandemic and widespread social unrest.

For more information, visit [alanet.org/virtual-conference](http://alanet.org/virtual-conference).



## Recent ALA Program Enhancements

- » ALA's Legal Management Bookstore ([alanet.org/bookstore](http://alanet.org/bookstore)) has been redesigned to improve the browsing experience. Like the on-demand webinar page and the Legal Management Resource Hub before it, you can click on a logo for each of the five functional knowledge areas (plus the Summit Series) to be directed to the relevant books for that category. For instance, hit the CM logo and you'll find titles like *Getting to Yes: Negotiating Agreement Without Giving In*. Shoppers can also quickly access recent arrivals, ALA publications and Certified Legal Manager (CLM)<sup>®</sup> study resources.
- » ALA's webinar program has been revamped ([alanet.org/webinars](http://alanet.org/webinars))! Each webinar is now just \$29 for members and \$79 for nonmembers, helping you attend as much online education as you're interested in. Also, the content calendar has been adjusted to better enable ALA's professional development team to respond to hot topics in legal management and the overall industry.



## Diversity and Inclusion Resources

ALA's Committee on Diversity and Inclusion is committed to providing information and action items for legal managers individually and to their firms, organizations and chapters. Their library already included digital resources and educational presentations. But recently, in response to the police killings of George Floyd, Breonna Taylor and others, the committee joined with ALA headquarters to provide an open discussion forum for our community.

ALA and the committee have already hosted multiple virtual roundtables about the social unrest in America. View those recordings at [alanet.org/about/diversity/roundtables-and-webinars](http://alanet.org/about/diversity/roundtables-and-webinars). Check the website and the weekly *BOLD Bites* newsletter for information about new roundtables, whether they're about diversity and inclusion or COVID-19 issues.

A graphic showing a stack of books on a shelf, a computer mouse, and a hand cursor icon, all set against a teal and grey background.

## Browse the Digital Stacks

Don't go searching through Amazon – ALA Legal Management Bookstore gathers the best resources all in one place!

- » How-to technology guides
- » Future-looking titles
- » ALA publications like the Compensation and Benefits Survey
- » Best practices for marketing, accounting and more

[alanet.org/bookstore](http://alanet.org/bookstore)

The logo for the Association of Legal Administrators (ALA), featuring a stylized 'A' and the text 'ALA Association of Legal Administrators'.

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