



# Large Firm Principal Administrators **RETREAT**



**August 2–4, 2018**  
**Hotel del Coronado**  
**San Diego, California**

Join leaders from law firms of 100+ attorneys to get the inside look at legal department operations, improve your technology use and master the possibilities of positive leadership.

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

**The Large Firm Administrators Caucus and the Association of Legal Administrators would like to thank the following sponsors for their generous support:**



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**2018 Entertainment sponsor**





The Large Firm Principal Administrators Retreat is your opportunity to draw from the experiences of other high-caliber participants and gain insights into changes happening in the legal industry. Master the challenges facing you and your peers in the large firm environment. This event will feature top speakers, networking receptions, idea exchanges, dinners and optional activities like a golf outing and city tours. Join ALA in San Diego for this top-level event.



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# DAY 1

## FRIDAY, AUGUST 3

9–11 a.m.

### LI10: Legal Departments, Operations and Service Delivery Today and Tomorrow: The Inside View

In this session, the Corporate Legal Operations Consortium (CLOC)'s leadership will discuss how the increasing value general counsels (GCs) and their teams have delivered clients over the last 40 years has led to an evolution in the GC role — from risk manager to trusted adviser. GCs are now drivers of business strategy and corporate success. What was once the domain of big firm partners is now the domain of the GC and their in-house teams.

This transformation has led to significant changes across the industry, especially as GCs can't do it all alone. However, rather than looking to law firms as they once did, today sophisticated in-house teams led by their legal ops function drive service delivery. Law firms, legal services organizations (LSOs), technology providers and others offer resources to craft sophisticated, highly tailored coverage models.

With legal operations functions managing and directing hundreds of billions of dollars worth of spending under a mandate to run their departments like a business, a lot more change is on the horizon.

#### Learning Objectives:

- Identify the key business, legal and law practice management drivers at the heart of the ongoing evolution of the role of the GC.
- Discover insights to how process and technology are being used by legal ops function to ensure quality service delivery.
- Infer how GCs and legal ops teams are thinking about service delivery.

- Review how in-house teams look to use outsourcing to drive quality and efficiency.
- Recognize the influence of regulators and law schools on legal support models and for future service delivery.
- Examine how regulatory change/inaction will impact issues such as the unauthorized practice of law.

**Audience Statement:** This intermediate session assumes that participants have a working knowledge of law practice management, legal marketing and basic economic principles.

120 Minutes

**CLM® Credit:** CLM Application Credit for Functional Specialists: 2 hours in the subject area of Legal Industry/ Business Management (LI) toward the additional hours required of some Functional Specialists to fulfill the CLM application.

**CLM Recertification Credit:** 2 hours in the subject area of Legal Industry/ Business Management (LI)

**CPE Credit:** Participants will earn 2.4 CPE credits

**Field of Study:** Business Management & Organization — Nontechnical

**Prerequisites:** None

**Who Should Attend:** Administrators of large law firms.

**Advanced Preparation:** None

**Program Level:** Intermediate

**Delivery Method:** Group Live

On Friday, we will be joined by an esteemed panel of founding members from the leadership team of the Corporate Legal Operations Consortium (CLOC) whose broad mission is to promote industry collaboration among in-house legal operations professionals.



# DAY 1

FRIDAY, AUGUST 3

## Faculty:



### **Connie Brenton, JD, MBA**

As Chief of Staff and Senior Director of Legal Operations at NetApp Inc., Connie Brenton has leveraged her legal and

business background to create an innovative and best-in-class legal department that has been recognized internationally for its innovation in the areas of strategic vision, partner and financial management and building efficiencies.

Prior to NetApp, Brenton served as Senior Director, Deputy General Counsel at Sun Microsystems and then Managing Counsel at Oracle, where she also initiated the legal operations role.

Brenton has been active in developing and promoting the legal operations role throughout the business and legal communities. She is the Chief Executive Officer and Chairman of the Board of the Corporate Legal Operations Consortium (CLOC), the world's largest, fastest growing and most active group of legal operations professionals. She publishes on the topics of the changing legal ecosystem and legal operations and speaks internationally on the topic of "Running Legal Like a Business."

Brenton holds a JD, an MBA and a BA in Economics. She was selected as one of 100 Women of Influence in Silicon Valley for 2014 and was named one of the top 10 deputy general counsels in 2012.



### **Jeff Franke, JD, MBA**

Jeff Franke is a member of the Executive Team and Board of Directors of the Corporate Legal Operations Consortium (CLOC), a

nonprofit comprised of more than 650 global corporations. A founding member of CLOC, he serves as its General Counsel and Corporate Secretary and drives all content development for CLOC's Institutes. Prior to CLOC, Franke worked at Yahoo, Sun Microsystems and Oracle, and in private practice.

With more than 20 years of experience at major high-tech companies and in private practice, Franke's areas of expertise include law practice management, technology licensing, commercial transactions, commercial litigation, open source licensing, product and M&A technology due diligence, and legal operations.

He received his JD, MBA and BA from Santa Clara University.



### **Steve Harmon, JD**

Steve Harmon is a member of the Cisco Legal executive management team, where he manages the Legal Technology Solutions

(LTS), Global Export Trade (GET) teams, the global process for trademarks and corporate marketing, and the Global Center of Excellence — an industry-leading example of the use of "captive legal process outsourcing." The LTS team is chartered with developing and maintaining systems and process that support the efficiency and accuracy of legal functions at Cisco. These systems and processes include contract management, export compliance tools, regulatory compliance, legal knowledge management, web-based resources and file room operations. The GET team is responsible for expediting Cisco's worldwide trade by ensuring global compliance with global export rules and regulations.

Harmon is also a Co-Founder and Board member of the Corporate Legal Operations Consortium.

He holds a BS in Business Management (Information Systems emphasis) and a JD, both from Brigham Young University.





# DAY 1

FRIDAY, AUGUST 3

1:30–3 p.m.

## OM10: Innovate and Improve Service with the Use of Technology

As firms race to consider what innovation means to them and how it can impact their firm, many have already jumped in and leveraged technology in innovative ways. We'll cover some industry-wide trends and showcase several firms' own innovation initiatives, including practical use cases of artificial intelligence.

### Learning Objectives:

- Recognize what is happening in the market with innovation, artificial intelligence (AI) and other changes in technology.
- Identify what their peers are doing to apply innovation at their firms.
- Discuss practical examples and use cases of artificial intelligence.



### Faculty:

#### Thomas Baldwin

Over his more than 20-year career in the legal industry,

Thomas Baldwin has established himself as a globally recognized thought leader and expert in practice management and economics, information management, legal technology and knowledge management. During his career, he has held several C-level positions at leading Am Law 100 firms, including Cadwalader, Reed Smith and Sheppard Mullin. In 2016, he was inducted as a Fellow into the College of Law Practice Management and in 2013 was named to the *National Law Journal's* inaugural list of 50 Business of Law Trailblazers & Pioneers.

As a Partner at Fireman & Company, Baldwin specializes in building and leading teams aimed at improving firm efficiencies, profitability, attorney working practices and user experiences. His career success stems from a deep understanding of law firm financials and business practices, and then strategically aligning them with legal processes, attorney behaviors and best-of-breed legal technologies.

Baldwin has been a member of numerous industry boards including the Thomson Reuters Engage Advisory Board, Law Technology News Editorial Advisory Board, the LexisNexis Advisory Council and the Law.com Technology Advisory Board. He is regularly asked to present at and chair international and domestic conferences covering emerging trends in the legal industry.

Future

Innovation

Leadership

Technology

# DAY 2

SATURDAY, AUGUST 4

**8:30–10:45 a.m.**

## **CM20: Mastering the Possibilities of Positive Leadership**

Positive leadership is not a “Kumbaya” or “let’s all be happy” approach to business. It is the hard science of positive psychology and human behavior applied to business in a practical, useful way.

Today’s law firm business leaders work in an increasingly fast-paced, high-pressure environment with little time for reflection or carefully considered decisions. A positive leadership approach helps balance busyness, build resilience and create a fast path to goal achievement.

### **Learning Objectives:**

- Identify a strengths-based approach to building your leadership capabilities and capacity in your team.
- Recognize the benefits of simple interventions such as mindfulness and positive behavioral practices to help gain control of your work and your day.
- Discover enterprise-wise methodologies — such as appreciative inquiry — that tap into the positive core of individuals and organizations.

**Audience Statement:** This advanced session assumes participants have 10-plus years of work experience.

120 Minutes

**CLM Credit:** CLM Application Credit: Application Management Category: 2 hours in Organizational Development

**CLM Recertification Credit:** 2 hours in the subject area of Communications and Organizational Management (CM)

**CPE Credit:** Participants will earn 2.4 CPE credits

**Field of Study:** Communications

**Prerequisites:** None

**Who Should Attend:** Administrators of large law firms.

**Advanced Preparation:** None

**Program Level:** Advanced

**Delivery Method:** Group Live



### **Faculty:**

**Roberta LaPorte, MBA, MS**

Bobbie LaPorte is Founder of Bobbie LaPorte & Associates, a consulting firm providing leadership

and organizational development services to Fortune 500 organizations and promising start-ups.

LaPorte served in Chief Executive Officer, Chief Operating Officer and Chief Marketing Officer roles in several Fortune 50 companies, including IBM, GE and United Healthcare. She has an MBA from Harvard, and a master's degree in Positive Leadership and Strategy from IE Business School in Madrid.

A multiple Ironman triathlon finisher, she applies the sciences of positive psychology, behavioral fitness and the strategies of athletes to help executives excel in their careers. LaPorte is currently training for her seventh Ironman triathlon.



# SCHEDULE OF EVENTS

## THURSDAY, August 2

|                |   |
|----------------|---|
| 10 a.m.–5 p.m. | Registration  |
| 11 a.m.–6 p.m. |  Golf Outing at Steele Canyon — <b><i>Sponsored, in part, by LexisNexis*</i></b> |
| 1–4 p.m.       | Land and Sea Tour*  |
| 7–8 p.m.       | Welcome Reception — <b><i>Sponsored, in part, by LexisNexis</i></b>   |
| 8–10 p.m.      | Dinner — <b><i>Sponsored, in part, by LexisNexis</i></b>  |

\*Optional Event – see pages 10, 12–13

## FRIDAY, August 3

|                    |   |
|--------------------|---|
| 7:30 a.m.–5 p.m.   | Registration  |
| 7:30–8:15 a.m.     | Continental Breakfast   |
| 8:30–8:45 a.m.     | <b>Welcome and Introductions</b>  |
| 8:45–9 a.m.        | <b>ALA Insights</b><br>ALA President April L. Campbell, JD, <i>Director of Administration at McCullough Hill Leary, PS</i> , in Seattle, Washington, shares an overview of ALA plans. |
| 9–11 a.m.          | <b>Legal Departments, Operations and Service Delivery Today and Tomorrow: The Inside View</b> —<br>Connie Brenton, JD, MBA<br>Jeff Franke, JD, MBA<br>Steve Harmon, JD                |
| 11 a.m.–12:30 p.m. | <b>Idea Exchange — Legal Operations &amp; Pricing</b>   |
| 12:30–1:30 p.m.    | Lunch   |
| 1:30–3 p.m.        | <b>Innovate and Improve Service with the Use of Technology</b> — Thomas Baldwin   |
| 3–3:15 p.m.        | Break   |
| 3:15–4:45 p.m.     | <b>Idea Exchange — Law Firm Technologies</b>  |
| 6–7 p.m.           | Networking Reception — <b><i>Sponsored, in part, by IST</i></b>   |
| 7–9 p.m.           | Dinner — <b><i>Sponsored, in part, by Thomson Reuters</i></b>   |



# SCHEDULE OF EVENTS

## SATURDAY, August 4

|                      |   |
|----------------------|---|
| 7:30 a.m.–Noon       | Registration  |
| 8–8:30 a.m.          | Continental Breakfast   |
| 8:30 a.m.–10:45 a.m. | <b>Mastering the Possibilities of Positive Leadership –</b><br>Roberta LaPorte, MBA, MS                 |
| 10:45–11 a.m.        | <b>Closing Remarks</b><br>James J. Nichols, <i>Chair, 2018 LFA Retreat Education Planning Committee</i> |
| 11 a.m.–1 p.m.       | Lunch on your own   |
| 1–3:30 p.m.          | Point Loma Lighthouse & Cabrillo National Monument Tour*  |

\*Optional Event – see pages 10, 12–13

## REGISTRATION INFORMATION

**Eligibility Requirements:** Registration is limited to only the principal administrator of a law firm with 100 or more attorneys. Members who are retiring and have identified their successor may bring that person to the retreat and should indicate so when registering.

### REGISTRATION FEES AND DISCOUNTS

| ALA Member | Early Bird<br>\$1,299<br>(on or before June 28) | Regular<br>\$1,399<br>(June 29 – July 31) | On-site<br>\$1,499<br>(August 2–4) |
|------------|---|---|------------------------------------|
|------------|---|---|------------------------------------|

**Discount 1** – Retiring members whose successor registers and attends the retreat will receive a \$100 discount. (If not an ALA member, the successor will receive the ALA member price.)

**Discount 2** – LFA Caucus members who refer a caucus-eligible, non-ALA member who attends the retreat will receive a \$200 discount.

*Note: While we encourage you to bring as many caucus-eligible participants as possible, the total discount given cannot exceed \$200.*

| Retiring Member's Designated Successor | Early Bird<br>\$1,299<br>(on or before June 28) | Regular<br>\$1,399<br>(June 29 – July 31) | On-site<br>\$1,499<br>(August 2–4) |
|--|---|---|------------------------------------|
| Nonmember of ALA                       | Early Bird<br>\$1,599<br>(on or before June 28) | Regular<br>\$1,799<br>(June 29 – July 31) | On-site<br>\$1,899<br>(August 2–4) |

Regular and associate ALA members may register for the Large Firm Administrators Retreat at the member rates noted. Nonmember registration is restricted to individuals who are not currently members of ALA but do meet the eligibility requirements for ALA membership. Learn more about membership eligibility requirements at [alanet.org/membership/case/membership-eligibility](http://alanet.org/membership/case/membership-eligibility), or contact the ALA Membership Department at 847-267-1585.

Please register online at [alanet.org/lfaretreat](http://alanet.org/lfaretreat).

Your registration fee includes session attendance and materials; the reception and dinner on Thursday; continental breakfast, lunch, reception and dinner on Friday; continental breakfast on Saturday; and daily refreshment breaks. The optional activities of golf and city tours are additional costs.

# REGISTRATION INFORMATION

## SPOUSE/GUEST REGISTRATION

The purchase of a guest registration is restricted to guests of registrants only. A guest may not be someone eligible for membership in ALA or a business partner or a supplier who is not a sponsor.

The Spouse/Guest Package is \$469 and includes reception and dinner both on Thursday and Friday.

Guest events may also be purchased a la carte:

|                            |                   |
|----------------------------|-------------------|
| Thursday Reception         | \$79              |
| Thursday Dinner            | \$209             |
| Friday Reception           | \$79              |
| Friday Dinner              | \$209             |
| Golf                       | \$189 per player* |
| Land and Sea Tour          | \$129             |
| Point Loma Lighthouse Tour | \$60              |

*\*Registration for golf is on a first-come, first-served basis. The rate includes motor-coach transportation to and from the course, greens fees, range balls, valet bag services, one golf cart per foursome and tax. Club rental is separate. Steele Canyon does not rent golf shoes.*



### Cancellation Policy

All cancellations must be made in writing and submitted via email to [registration@alanet.org](mailto:registration@alanet.org). Cancellations received on or before July 5, 2018 are subject to a \$159 fee. No refunds will be provided for cancellations received July 6, 2018, or after.



### Substitution Policy

A substitute from the registrant's organization is permitted for a \$149 administrative fee. The substitute's registration fee will be adjusted if a nonmember replaces an ALA member. Please submit this request in writing via email to [registration@alanet.org](mailto:registration@alanet.org).



### Conference Photo/Video Policy

Registration (attendee and exhibitor) and payment for the conference gives consent that any pictures, video or audio recordings taken during ALA and ALA-related events can be used for conference coverage and future ALA promotional purposes. ALA is able to use your likeness without remuneration.



### Questions

If you have any questions about registration or ALA's administrative policies or if you require a complaint resolution, please email [registration@alanet.org](mailto:registration@alanet.org) or call 847-267-1252.

# HOTEL INFORMATION



## Hotel del Coronado

1500 Orange Ave.

Coronado, California 92118

Phone: 619-435-6611

Rate: \$309 + 11.56% tax, single or double



Situated on America's most beloved beach is a historic beachfront hotel in the city of Coronado, just across the San Diego Bay. Famous for its soaring red turrets and sprawling Victorian architecture, The Del is a rare iconic California landmark. This charming hotel blends its historic architecture with its modern California touches very well. It is located on the edge of the Pacific Ocean and along the white sand. The hotel is a short ride away from the San Diego International Airport.

Enjoy various activities on the beach during your stay. You can choose to create bonfires, relax poolside in a luxury cabana, catch a movie or participate in outdoor exercises. Savor the flavors of the California coast by indulging in the locally sourced ingredients created by the most renowned chefs.

The room rate of \$309 + \$18 resort fee and 11.56% tax, single or double, per night; includes in-room Wi-Fi.

### Hotel Reservation Information

Book online at [alanet.org/lfaretreat](http://alanet.org/lfaretreat) or call the Hotel del Coronado directly at 800-468-3533, identifying yourself as part of the Association of Legal Administrators.

Check-in: 4 p.m. • Checkout: Noon

Reservations must be made by July 9, 2018. All reservations must be guaranteed with a major credit card. Reservation requests received after the cutoff date will be accepted on a space/rate available basis.



# OPTIONAL ACTIVITIES



## Golf Outing to Steele Canyon Golf Course

THURSDAY, AUGUST 2

11 a.m.–6 p.m.

As a recipient of *Golf Digest's* prestigious "4-½ Star Award" and one of San Diego's finest golf clubs, Steele Canyon Golf Club has been nationally recognized as one of Southern California's best publicly accessible golf courses. The 27-hole championship golf course was designed by Gary Player, one of history's greatest golfers. He designed Steele Canyon with respect and appreciation of the terrain that provides a unique golf experience amid nature's beauty.

From the dramatic elevation changes of the Canyon nine to the subtle nuances of the Vineyard nine and the total seclusion of the Ranch nine, any combination will make for a wonderful day of golf. We invite you to come experience the golfing secret of San Diego County by playing a round at Steele Canyon Golf Club.

The motor coach will depart the hotel at 11 a.m. with a planned arrival at the course by noon. You'll enjoy a boxed lunch on the bus. Upon arrival, all clubs will be loaded onto golf carts by the valet. Your foursome will have time to get together and hit some practice range balls, and the shotgun will start at 1 p.m. with an estimated end time of 4:30 p.m. Once everyone finishes up and prizes are awarded, we'll get back onto the motor coach for a return to the hotel by 6 p.m.

\$189 per person includes motor-coach transportation to and from the course, greens fees, range balls, valet bag services, golf cart per foursome and tax. Club rental is an additional \$65, tax included. (Sorry, Steele Canyon does not rent golf shoes.)

“Many thanks to both the Education Committee and the Steering Committee for an awesome Retreat. Both Richard Mullender and Heidi Gardner were spellbinding speakers! The entire event was extremely well done, and it was so good to see everyone! Oh ... and that finance idea exchange really rocked! Thrilled our members from Brazil and Canada were able to attend, too.”

Teresa Walker  
Chief Operating Officer  
Waller Lansden Dortch & Davis, LLP  
Member Since 1993

# OPTIONAL ACTIVITIES



## San Diego Land and Sea Tour

**THURSDAY, AUGUST 2**  
**1–4 p.m.**

*Moderate activity level; comfortable walking shoes recommended*

This tour is the perfect way to see America's Finest City from both land and sea. By land, you will visit Old Town, the first commercial, political and social

center of San Diego for more than half a century; Balboa Park, one of the most beautiful, diversified and culturally enriching parks in North America; and San Diego's historic heart of downtown — the Gaslamp Quarter.

By sea, guests discover the sparkling side of San Diego while cruising one of the world's greatest natural harbors. Highlights may include the San Diego skyline, Coronado Bridge, Ballast Point where Cabrillo landed in 1542, the U.S. Naval Fleet, aircraft carriers and tuna boats.

This narrated tour of land and sea entertains guests with history, anecdotes and interesting information on one of America's finest cities.

\$129 per person includes the exclusive three-hour excursion, motor-coach transportation, a professional guide, taxes and gratuities.

## Point Loma Lighthouse and Cabrillo National Monument

**SATURDAY, AUGUST 4**  
**1–3:30 p.m.**

*Moderate activity level; comfortable walking shoes recommended*

Guests will be treated to a San Diego tradition — the original Point Loma Lighthouse. This lighthouse is a historic lighthouse located on the Point Loma peninsula at the mouth of San Diego Bay, just situated in the Cabrillo National Monument. After several years as operating as a lighthouse, it is now a local museum, showing San Diego's rich history.

Just steps away is the Cabrillo National Monument that commemorates the landing of Juan Rodriguez Cabrillo.



This event marked the first time a European expedition set foot on what later became the West Coast of the United States.

\$60 per person includes the exclusive two-hour excursion, motor-coach transportation, a professional guide, taxes and gratuities.



# TRAVEL INFORMATION



Receive up to 10 percent off your airfare at **delta.com** if you travel July 28 to August 9, 2018. Select Book Your Flight, click on Advanced Search and enter code **NMRFN** in the box on the Search Flights page. Reservations may also be made by calling Delta Meeting reservations at 800-328-1111 Monday through Friday, 7 a.m.–7 p.m. Central. A direct ticketing charge may apply for booking via phone.



If you are traveling July 30 to August 7, 2018, receive up to 10 percent off your airfare and an additional 3 percent discount, applicable only for published fares, on **united.com**. Enter your airport and date information and then click on “all search options” to enter **ZEN9102610** in the Offer Code box under Promotions and Certificates. Or call 800-426-1122 and use the same code (a \$25 service fee may apply when booking via phone).



Traveling on American? While they don't offer a discount, please enter Business Extra Number **822850** when making your reservations at **aa.com**. ALA will earn complimentary tickets for future business travel to help keep administrative costs down.

## AIRPORT SHUTTLE

SuperShuttle offers a discount on ground transportation between San Diego International Airport and ALA's official hotel, Hotel del Coronado. Book online at least 24 hours prior to your flight arrival time to secure the discount by going to **supershuttle.com**.

## TAXI

Taxi service between San Diego International Airport and Hotel del Coronado is \$30–\$35, not including gratuity.

## PARKING AT HOTEL DEL CORONADO

Valet parking (\$49 daily) and self-parking (\$39 daily) are both available.



“This was my first LFA Retreat and it was a great experience. I could not have asked for a more welcoming group of people. Thank you.”

David Bois  
Chief Operating Officer/  
Verrill Dana, LLP  
Member Since 1996

# LFA RETREAT COMMITTEES

## *LFA Caucus Steering Committee*

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