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How Engagement and Wellness Can Reduce Firm Costs

by Amber Tee, Anna Liu, and Julie Van Leeuwen, HR Assistants at Arlyn Recruiting

Many candidates who have stepped through our doors have expressed stress and disengagement as their top reasons when it comes to leaving an organization. Whilst most firms see going paperless or adopting the newest software as a go-to method for cost reduction, indirect costs, such as employee turnover, absenteeism, and lack of productivity, often goes unaccounted.

Lack of employee engagement can have adverse effects on your bottom line. According to the *Harvard Business Review*, disengaged workers have 37% higher absenteeism and will commit 60% more errors than the engaged employee. Disengaged employees are said to feel a sense of disconnect from their responsibilities, and are more likely to either not show up to work, or show up but be mentally checked out. Most importantly, disengaged employees have a higher likelihood of resigning.

It is every organization's nightmare when an employee decides to resign, and with such a high demand for individuals with specific skill sets in a tight market, hiring managers may struggle to fill the gaps, or have to pay more in salary than initially expected. The Society for Human Resource Management Studies has predicted that on average, an employer will need to spend approximately six to nine months of a former employee's salary when re-initiating the hiring and training process. Moreover, there is negative impact on the rest of your staff, as turnover rates tend to decrease

team morale and hurt a company's overall productivity.

So, how do you retain your talent and ensure less turnover? Research conducted by the World Health Organization has shown that companies that promote and value workplace health have higher "rates of employee retention" and are amongst "the most successful and competitive," around the world. The Corporate Leadership Council also found that employees are 87% less likely to leave their organization when work is engaging. As HR professionals, we believe that the key to reducing costs and driving productivity lies in the health of the employee. In order to do so, firms must shift the focus from a traditional workplace model to an employee-centred approach; one that utilizes engagement and wellness initiatives. It is the mental and physical health of your employees that can prove to be one of the largest contributors in increasing your bottom-line.

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Who We Are

The BCLMA, founded in 1972, is a non-profit organization with 170 Firm Representatives and 350 Affiliates across BC. It is the BCLMA's goal to provide educational and networking opportunities, to enhance skills as legal administrators and managers, and to provide professional and personal benefits to its registrants.

Member Services

The BCLMA provides opportunities to network with other law firm administrators and managers at annual Spring and Winter socials, and monthly subsection meetings. We host an annual Managing Partners Event, and a large conference every other year.

Newsletter Services

Topics is a public newsletter. Contact the Editorial Committee to provide comments on articles, to offer suggestions for articles in future issues, or to augment the circulation list. We welcome your feedback! Please send comments to membership@bclma.org.

Submissions

If you have an article or story idea you would like to submit, please email Sunita March at smarch@cfmlawyers.ca. Please note that our prescribed article length is 1000 words. All submissions will be subject to review by the editorial board.

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HOW WELLNESS CAN LEAD TO ENGAGED EMPLOYEES

In recent years, the “Wellness Movement” has gained traction in the Human Resources sphere, catching the attention of HR Managers in a multitude of fields, industries and organizations. The value of implementing a workplace wellness program not only benefits the health of the individual employee, but also assists in the overall success and efficiency of an organization.

THE IMPORTANCE OF WELLNESS

Individuals spend most of their waking time at work, thus workplace environments play a critical role in the maintenance of an employee’s overall health. Wellness programs have been proven to reduce the amount of sick days taken, decrease employee stress levels, reduce turnover, and increase resiliency and overall productivity.

Research reflects that 70% of Canadian employees are concerned about the psychological health and safety of their workplace. This is a valid concern as, according to the Mental Health Commission, approximately 30% of short and long-term disability claims in Canada are attributed to mental

health problems. In tangible terms, mental health problems that result in absenteeism, presenteeism, and turnovers cost Canadian employers over \$6 billion in lost productivity each year. These numbers showcase the serious effects mental health problems can have on both the employee and the organization. More often than not, wellness programs are sidelined or devalued because they take time away from regular duties; however, loss of productivity is costing the average Canadian organization up to \$10 million each year. To counteract this, firms must start prioritizing the physical and mental wellbeing of their employees.

HOW TO MAKE IT HAPPEN?

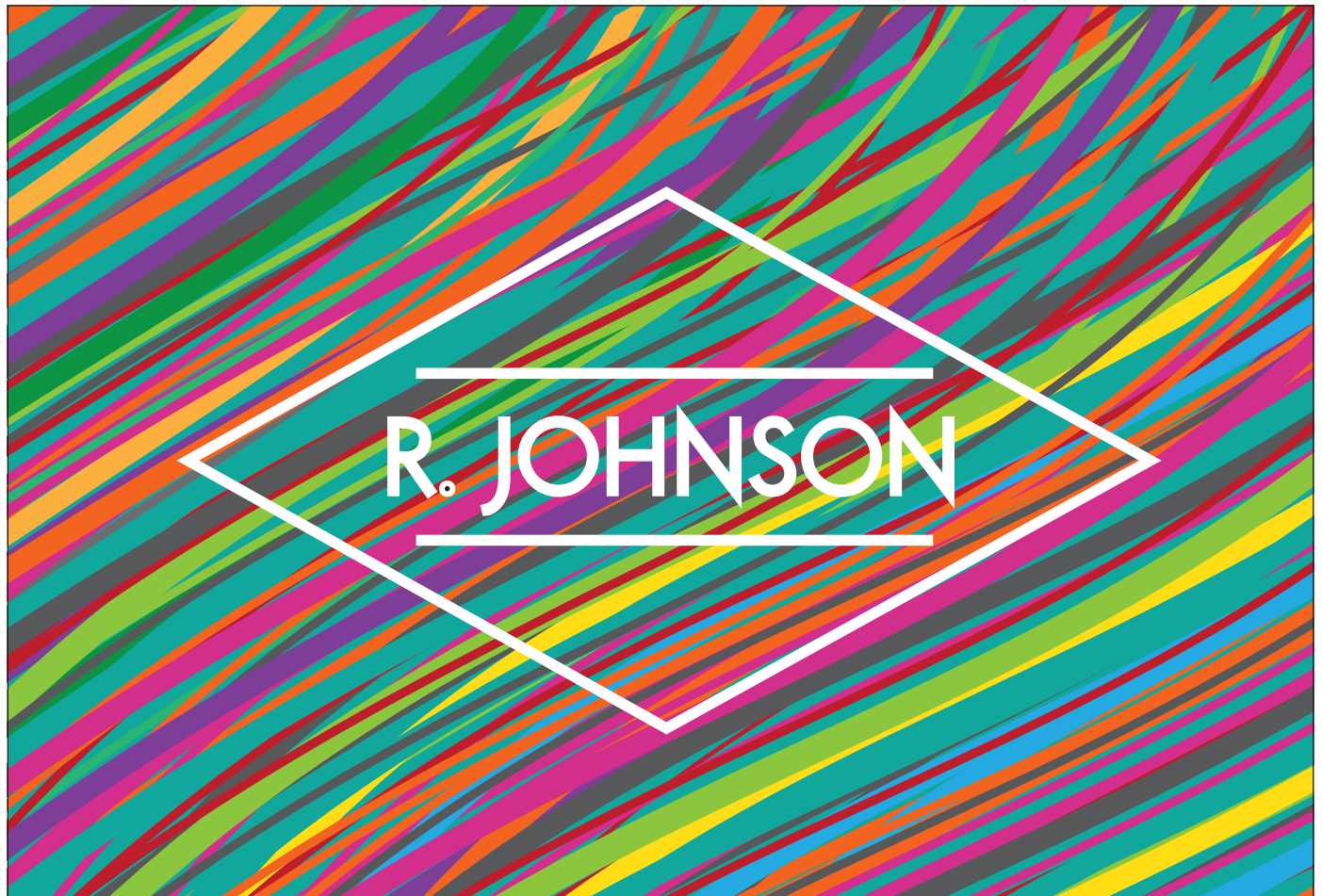
When people feel valued, respected and satisfied in their jobs, they are more likely to be productive and engaged in their work. Wellness programs are not “one-size fits all” solutions however, and must be properly researched and tailored to an organization’s specific needs. These programs need to be viewed as a long-term commitment to achieving measurable results. The most important factors when introducing a wellness program into your organization is to gain employee input, and elicit buy-in from management.

The general outline to follow when implementing a wellness plan can be simplified into the following steps:

1. Establish a budget with management (i.e. marketing and incentives)
2. Compile employee data through surveys and small group interviews
3. Obtain support from management; identify the strategic goals and objectives set out by employee responses
4. Develop initiatives and rewards
5. Roll out the wellness program (slowly!)
6. Finally, evaluate and adapt!

Obtaining support from management is a huge determinant of any program’s success. When employees see that managers are taking part in wellness initiatives, it validates the program’s importance. If managers demonstrate the value of taking time out of their schedules to maintain their health, then their employees will be more likely to follow suit.

When implemented correctly, there is an overwhelming amount of evidence that money invested in wellness initiatives is returned many times over. After following a structured guide on how to properly develop



a wellness plan, it is important to continuously review and adjust according to your organization's changing needs. Taking the time to implement a well-tailored wellness program will help your organization stay competitive and appealing in this market. It shows both your prospective and present employees that you value their mental and physical wellbeing. Invest in your employees, and they will invest in you.

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Amber, Anna and Julie are HR Assistants at Arlyn Recruiting, sharing the same passion for creating organizational environments that promote both mental and physical wellbeing. Each with diverse backgrounds and experiences, they aim to share their unique perspectives with the legal community. For more information regarding mental health initiatives, career coaching or employee engagement techniques, contact our certified Career Coach, Diane Cronk, CPHR and Masters in Counselling, at info@arlynrecruiting.com.





LAW FIRM TRANSFORMATION

BCLMA Conference & Market Place | April 19 - 20, 2018
Vancouver Convention Centre East | #bclma2018 | info@bclma.org

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BCLMA President's Report Presented by Lorraine Burchynsky @ AGM March 1st, 2018

by Leslie Green, BCLMA President

It is hard to believe another year has passed since Lorraine presented the last President's report. It has been a productive year for the Board. In her address, Lorraine thanked our 2017 Board members for their dedication and volunteer time over the past 12 months: Cindy Hildebrandt, Elizabeth Jackson, Leslie Green, Leslie Morgan, Rob Walls and Yvette Whitson.

As you know, three Board positions came vacant this year: Elizabeth Jackson ended her three-year term and ran for a second term. Both Cindy Hildebrandt and Leslie Morgan retired from the Board after each concluding two three-year terms. On behalf of the Board and the members, we thank them both for their time, expertise and dedication to BCLMA.

A special thank you to Angela Zarowny for continuing to volunteer her time as our Treasurer.

A special note of appreciation to Jane Kennedy, our Administrator, who is so wonderful to work with, does a great job organizing our events, is the go-to person for our subsection chairs, and acts as the Board's right hand.

We have four very active Committees:

- The Social Media Committee, led by Margaret Cividino of Miller Thomson, is continuing to do great work keeping our members and business partners informed of Association goings-on through Twitter, Instagram and LinkedIn. They were kept very busy promoting the 2018 Conference.
- The 2018 Conference Committee, chaired by Leslie Green, took place last month. The theme was **Law Firms in Transition – Plan, Engage, Communicate**. The venue changed to the Convention Centre East in downtown Vancouver and we made a slight change of the date to April 19 – 20 to hopefully attract more of our finance members.
- The Topics Committee, headed by Sunita March, is doing an excellent job bringing

us interesting articles and very informative issues. In the future, we are looking to change to a digital format.

- Nancy Sartene takes care of our Surveys Committee, which provides eight separate surveys to our firm members. It is clear this service adds value for our member firms as we continue to see an increase in participation in the surveys. In 2017, we added the small and medium-size firm Administrator Salary Survey in electronic format.

As you know, we have nine Subsections, each with a Chair and a Co-Chair. All subsections are working hard to coordinate interesting, informative and educational events for their members. The Learning & Development subsection (formerly Trainers) has become active again and the Technology subsection changed its name to the "IT Subsection" to better reflect the broad scope of its members' work and interests.

We hosted two Association members' events again this past year: the Summer Social in June at Bridges and our Winter Social at the Terminal City Club. Both gatherings were

successful and provided a wonderful opportunity to network with fellow members and BCLMA business partners.

In May 2017, the BCLMA hosted a business partners' appreciation bowling event at Commodore Lanes. It had been three years since we last hosted such an event and our business partners showed up in force to take advantage of this additional opportunity to interact with us.

Every two years, the Board participates in a "tri-meeting" with TLOMA and ALA. In 2017, Jane and Lorraine attended this meeting in Chicago. Our three organizations learn a great deal from each other regarding membership processes, professional development, business partners' experiences, and many other aspects of our operations.

The Fall educational event was held on October 4th with Ellie Krug speaking on "Gray Thinking". This event was lively and stimulating and helped those present to think in different terms about how to understand and celebrate the infinite variety of our own and others' uniqueness, and to break down

barriers so we can truly know the individual behind the label.

We were pleased to have Eric Seeger as our speaker at the Managing Partners' luncheon in November. Eric spoke on "Law Firms in Transition, 2017 / Trends in the Profession," based on Altman Weil's 2017 Law Firms in Transition Survey. It was packed full of interesting insights and was well received by the attendees.

We continue to be financially healthy, which is a good place to be. This has enabled us to:

- Maintain our membership fees at existing levels;
- Eliminate the fee for affiliate members who sign-up for multiple subsections;
- Attract high calibre speakers for our events;
- Host a business partners' event;
- Sponsor a speaker event on Communication Styles at MJB Law in Kamloops for our interior members;
- Utilize audio/visual aids for some of our educational events; and
- Hire a facilitator to jump start us with our strategic plan.

The extra financial reserves will also help us to bring our strategic plan to fruition.

This brings us to our **Strategic Plan** (refer to infographic on the next page)

Shortly after last year's AGM, BCLMA embarked on a strategic planning process as a means of establishing our organizational direction for the future. The Board of Directors engaged a strategic planning facilitator to help navigate this process. She assisted us to both envision and articulate what the future could look like, and then helped us to develop a sound strategy for BCLMA's continued success.

The process was both fulsome and collaborative. It included an environmental review: analyzing our Member Value Survey, and interviewing our subsection chairs and business partners. Following which, we identified our strengths and areas of opportunities.

MEMBER SNAPSHOTS



SUSANNE THOLL

How long have you been a BCLMA member?

5 years.

Where do you work?

Lakes, Whyte LLP in North Vancouver.

Where did you vacation last?

Toronto.

Where were you raised?

North Vancouver.

Have you lived abroad?

The island of Fyn in Denmark for 1 year.

Favourite wine under \$20?

Bodacious Shiraz.

Favourite lunch spot?

Anyplace with my boyfriend although I am usually at my desk!

Favourite restaurant?

Woon Lee Inn.

Favourite or most recent movie?

Pride and Prejudice.

What's a must-read book?

Longbourn by Jo Baker - the servants perspective to *Pride and Prejudice* by Jane Austen.

What do you most enjoy about working in the legal industry?

Never boring!

Something surprising about you?

I love horses.

How do spend your spare time?

Spend time with my boyfriend and my children.

Favourite BC day trip?

Hiking in the local mountains.

What movie describes your life?

The Many Lives of Susanne Tholl.



The BCLMA Board of Directors is very excited to announce our 3-Year Strategic Plan.

We love the results and we hope you do, too.

Our Vision

Elevating leaders in the business of law.

Our Mission

An educational networking community providing thought leadership and opportunities for information exchange.

Strategic Themes



Embracing Technology

Offer members a range of online and recorded webinars – provide the best available learning platforms.

Upgrade website to be interactive, membership-focused, providing province wide community of knowledge sharing.



Offering Quality Education

Develop, implement and evaluate curriculum-based educational programming.

Provide a set schedule of educational programming designed for subsections.



Marketing for Growth

Increase awareness of BCLMA's value with current and new members.

Target and engage new regions around the province.



Enhancing the Organizational Foundation

Strengthen our leadership and governance team to advance the organization.

WELCOME & KUDOS

The Board then spent a day and a half developing a three-year plan for BCLMA. The process has been demanding, and exhilarating, all at the same time. We are proud of the results and we hope you are, too. It is important to us that our members feel the strategic plan reflects the direction you want for BCLMA.

We now have a vision and a mission statement that more accurately reflect our future goals.

OUR VISION

Elevating leaders in the business of law.

OUR MISSION

An educational networking community providing thought leadership and opportunities for information exchange.

We have identified four strategic themes, each with specific goals. These goals will enhance what we are already doing and will help the board focus on future priorities.

1. EMBRACING TECHNOLOGY

Introduce a new online platform that will offer our membership a range of online services and educational opportunities. This platform will be membership-focused and offer a province wide community of knowledge-sharing, including both live streaming and archived video of select presentations.

2. OFFERING QUALITY EDUCATION

Develop, implement and evaluate curriculum-based educational programming. Provide a set schedule of educational programming designed for subsections, which would assist our Chairs, especially new Chairs.

3. MARKETING FOR GROWTH

Increase awareness of BCLMA's value to current and new members. Target and engage new regions around the province.

4. ENHANCING THE ORGANIZATIONAL FOUNDATION

Strengthen our leadership and governance team to advance the organization.

Our strategic plan is both ambitious and achievable. We are excited about the possibilities and opportunities that it presents. It is a living document, and one that we will use to guide our efforts and evaluate our success.

Your Board is committed to helping our members achieve the highest level of

New Member Firms and their Representative

Kelly Banah, **Greiner Law Corporation**, Burnaby
Ash Nair, **Lonsdale Law**, North Vancouver
Florence Cecil, **Rosberg Sawatzky LLP**, Langley
Willa Zimmerman, **Spraggs & Co**, Coquitlam
Richard Swadden, **Swadden & Company Law Corporation**, Vancouver
Julie Guevarra, **Tapper Cuddy LLP**, Winnipeg
Jaz Basran, **TDS Lawyers LLP**, Surrey

New Representatives for Existing Member Firms

Nazlin Rahmatulla, **Drysdale Bacon McStravick LLP**, Coquitlam
Nav Gill, **Embarkation Law Corporation**, Vancouver
Belinda Diaz, **Grant Kovacs Norell**, Vancouver
Lisa Hetherington, **Hira Rowan LLP**, Vancouver
Jan Whyte, **Kazlaw Injury Lawyers**, Vancouver
Laurie Smith, **Kuhn LLP**, Abbotsford
Laura Raposo, **Labour Right Law Office**, Coquitlam
Anna DiBella, **McEwan Partners**, Vancouver
Dulcie Jones, **Rosenberg Kosakoski LLP**, Vancouver
Marcela Thorneycroft, **Wishart Brain & Spine Law**, Vancouver

NEW AFFILIATES

Kate McLaughlin, **Alexander Holburn Beaudin & Lang LLP**, Vancouver
Dominika Brunel, **Borden Ladner Gervais LLP**, Vancouver
Francis Szlachcic, **Borden Ladner Gervais LLP**, Vancouver
Frederic Cadrin, **Borden Ladner Gervais LLP**, Vancouver
Tiej Dapp, **Clark Wilson LLP**, Vancouver
Andrea Rayment, **Clark Wilson LLP**, Vancouver
Ramona McLean, **Clark Wilson LLP**, Vancouver
Cheryll Januszewski, **Ecojustice**, Vancouver
Carol Moser, **Edwards Kenny & Bray LLP**, Vancouver
Christine Drag, **Kahn Zack Ehrlich Lithwick LLP**, Richmond
Kuljit Hayre, **Kane Shannon Weiler LLP**, Surrey
Kris Doerksen, **Lawson Lundell LLP**, Vancouver
Seeta Prasad, **Lindsay Kenney LLP**, Vancouver
Brooke Jewell, **McQuarrie LLP**, Surrey
Barbara Blouin, **McQuarrie LLP**, Surrey
Renu Brar, **McQuarrie LLP**, Surrey
Tracy McBride, **Miller Thomson LLP**, Vancouver
Paula Bifano, **Nixon Wenger LLP**, Vernon
Catharine Rae, **Norton Rose Fulbright Canada LLP**, Vancouver
Erica Nath, **Smart & Biggar LLP**, Vancouver
Lily Chu, **Stevens Virgin Law Corporation**, Vancouver

Firm Name Change

Rosenberg Kosakoski LLP (formerly Rosenberg Law), Vancouver

Retired

Ann Johnston, Human Resources Director,
Norton Rose Fulbright LLP, Vancouver
See words of wisdom from Ann on the following page

WELCOME & KUDOS

professionalism in law firm administration. We believe that this aim can be fulfilled by focusing on our strategic objectives over the next three years.

As a final note, we would like to thank all members who put their name forward for the three vacant director positions for 2018. We are truly fortunate to have so many members ready, willing and able to step forward and participate in the operations of the BCLMA. The results of the election are:

- Elizabeth Jackson is elected to a second term
- Margaret Cividino and Lisa Rennie are each elected for three-year terms

The Board of Directors for 2018 will consist of:

- Leslie Green, President
- Lorraine Burchynsky, Past President
- Rob Walls, Business Partner Liaison
- Yvette Whitson, Secretary
- Elizabeth Jackson
- Margaret Cividino
- Lisa Rennie

There are many ways you can contribute to the success of the BCLMA. We encourage you to volunteer for one of our four Committees, put your name forward for a chair or co-chair position in a subsection, or run for a seat on the Board of Directors in the 2019 election. The BCLMA is made stronger by the active participation of its members.

We look forward to seeing you all at the 2018 Conference and our many other functions over the coming year.



After 30 years working in the world of Legal Management, Ann Johnston, former BCLMA President 2001 – 2002, is retiring.

Ann's journey in legal started at Lyall McKercher Hanna which merged with Russell DuMoulin shortly after. For the past 19 years, Ann has been at Bull Housser Tupper, now Norton Rose Fulbright LLP. She has been a member of BCLMA (formerly VALA) for an illustrious 30 years and many of us have fond memories of socializing with Ann at conferences and summer/winter events.

Ann's words of wisdom to NEW BCLMA HR affiliates:

"No matter what industry you are in, it's important to remember the word *human* when conducting yourself on a daily basis in your job. It is easy to get thrown off that path, but we must always get back on it. We deal with human beings, and in our roles we can have great power over their quality of life. Whether they get a job, whether they get to keep the job, how much money they make, whether they are treated with respect or unkindly, etc. These are vital aspects of their lives that we have much control over and I believe we have a duty as HR professionals to be mindful of this always and not to abuse this power or treat it cavalierly. Be humane. Be compassionate. Be mindful. It is so easy yet I'm sorry to say that not all HR professionals approach their responsibilities in this way, despite the numerous tangible and intangible benefits of doing so."

While Ann is looking forward to new journeys in life and focusing on her health, what she'll miss the most about the legal community are the people. "I have made so many wonderful, supportive, fun friends through ALA, VALA, BCLMA, and I know that there are many I will keep in touch with in retirement."

Ready to jet set, Ann is very much looking forward to travelling as much as possible. She is immediately heading to the south of France and then on to Italy for six weeks.

When Ann announced her retirement she sent this message out to everyone at her office:

"For those of you who will ask me, 'What will you do with your time when you retire?' I will say that I have no worries on that front. People, things, places, and crazy adventures have a weird and wonderful way of finding me, and I know I will never be bored. I will leave you with this fine quote:

*with Freedom,
Books,
Flowers,
and the Moon,
who could not be Happy*

— Oscar Wilde"



Don't Have a Financial Plan? You're Not Alone!

by Dawn Marchand, VP Marketing, CBIA/Lawyers Financial

A global study conducted by the Financial Planning Standards Council (FPSC) in 2015 found that 69 percent of Canadians don't have a comprehensive financial plan. Why is this important? Well, research by CIRANO in Quebec (2012) found that households that use a financial advisor and develop a plan accumulate considerably more wealth than those who do not, and this wealth increases over time. After four years, the invested assets of households working with an advisor were 1.9 times greater than those who did not.

A sound financial plan will help you both build and protect wealth. As a member of the legal community, you have exclusive access to a suite of insurance and investment products only available to lawyers and their families, as well as employees of law firms and their families. The Canadian Bar Insurance Association (CBIA) was founded almost 40 years ago as a not-for-profit corporation to provide the legal community with access to high quality financial solutions at the very best rates.

So, what does all of this mean to you as a member of BCLMA? It means that it's time you knew about the benefits and savings available to you and your family. Let's look at just a few of the financial products you should be considering.

TERM LIFE INSURANCE

Purchasing life insurance could be the most important step you take to protect your family's future. Term life insurance is also a smart

alternative to mortgage insurance – more flexible and almost always much less costly.

CRITICAL ILLNESS INSURANCE

Two in five Canadians will develop cancer in their lifetime but on the positive side, 60 percent are expected to survive*. If this happens to you, focusing on your recovery and managing your day-to-day costs, while you cope with unexpected out-of-pocket expenses, becomes your biggest priority. If you are diagnosed with, and survive, any one of the covered conditions, the full amount of your benefit becomes available to you in the form of a tax-free, lump sum payment. The money is yours to spend as you see fit. *Canadian Cancer Society, 2016

TRAVEL INSURANCE

Whether you travel out of province or out of the country, you should be aware that Provincial Health Care plans provide limited medical protection. A serious injury or illness while outside of Canada can cost you tens of thousands of dollars in emergency medical

care. Luckily, this is one of the most easily avoidable risks – by ensuring you have adequate travel insurance.

INVESTMENT PROGRAM

When choosing an investment program, you should pay particular attention to the investment management fees. Low fees are important to the growth in your portfolio over time. As a rule of thumb, a one percent decrease in investment fees will result in a 20 percent increase in your assets by the time you retire ... that's significant!

DON'T GO IT ALONE!

As a member of the legal community, you have access to dedicated financial advisors who can review your needs and determine which solutions will best help you build and protect wealth.

Lawyers Financial products and plans are sponsored by The Canadian Bar Insurance Association (CBIA). Lawyers Financial is a trade mark of CBIA.



Dawn Marchand is the Vice President Marketing at Lawyers Financial, a brand of CBIA representing a comprehensive suite of investment and insurance solutions available exclusively to the legal community.

Visit www.lawyersfinancial.ca to learn more and see the full range of financial solutions provided through Lawyers Financial.

LAW FIRM TRANSFORMATION



2018 BCLMA Conference

The 2018 BCLMA conference, Law Firm Transformation: Engage, Communicate, Plan, started off with a fun-filled reception on Thursday, April 19th at the Vancouver Convention Centre East. A new venue for the conference, the Vancouver Convention Centre saw a new record of attendance with 122 delegates attending, including 13 from out-of-town. Attendees agreed that the change in venue allowed more members to attend, and many of them used this opportunity to get away for a short re-charge at the swanky Pan Pacific Hotel.

For the pucky and parched, there was a huge assortment of scrumptious apples and beverages. Delegates were greeted at the door with the offer of a glass of wine or a special cocktail called *The Transformer*. Everyone had an opportunity to mingle and catch up, as well as a chance to meet the representatives from the evening event's generous sponsors: RICOH, Arlyn Recruiting, Shaw Sabey, and Metrix (part of the Axis Insurance Group), and Worldox.

Back by popular demand, the Instagram Scavenger Hunt contest kicked off, with a team of social media conference volunteers

to help anyone with questions about the contest or conference.

The *Shark Tank* themed activity proved to be hilarious and entertaining. Everyone broke into groups to brainstorm and come up with a product made out of various items: plungers, beaded necklaces, foam noodles, pie tins, etc. The item had to be free-standing with one moving part that would make everyday life easier. Each group then had to present its product to a panel of judges - this was hilarious. The products were so imaginative: the Royal Flush, a bulls**t flusher; a monthly subscription to hallway games; an LTO, a

leader team office board to help relieve stress, just to name a few. Prizes were awarded to the team with the highest score.

At the end of the evening, everyone received a lovely 100% cotton swag bag courtesy of DLO to use for the conference. The bag was filled with thoughtful goodies like a full-zip writing portfolio embossed with the BCLMA logo, pens, a web cam cover, computer screen and keyboard cleaner, a lens cloth, chocolate to keep energized, lip balm, a BCLMA monogrammed mini toiletry case, mints, Kleenex, and Post-It notes.

Friday morning started off with a huge buffet breakfast, then off to the first session with Michelle Ray as the presenter. Michelle spoke on taking the lead, embracing change, and inspiring others. She is a very engaging speaker and had many examples of how to manage situations and events that are outside of our control. She explained how the fast-paced and ever-changing environment that we find ourselves in is the core reason behind resistance to change. She broke down

LAW FIRM TRANSFORMATION

the steps to eliminate unnecessary complication, and how to focus on what is in our control. She encouraged attendees to:

- Be transparent.
- Be collaborative.
- Maintain credibility – perception: what we believe, as opposed to what we see.
- Remember that acknowledgement is not agreeing but listening.
- See that F.E.A.R., False Evidence Appearing Real, keeps us from embracing change.
- At the end of the day, embrace change and be a relationship creator.

After a short break, Pamela Hollington came on stage and gave a quick and dirty lesson on how to run a smooth and organized project utilizing project management structures. She covered the key concepts of project management: how to establish the project scope, organizing the work, planning a budget and timeline, identifying potential problems, risk management, and tracking and monitoring the work. Participants did a team project at each of the tables utilizing these concepts, and had a chance to ask questions.

Then, it was off to a buffet lunch to scope out what was new at the Market Place Tradeshow. The tradeshow passports made it easy to visit each of the 30+ tradeshow vendors and to obtain the necessary sticker to enter in the prize draws, at the end of the day. Then, there was more swag from each of the vendors. People needed an extra bag for all their swag!

A few days before the conference, all delegates were asked to complete the TypeCoach On-Line Verifier to uncover their personality, and to bring the results to the conference for the last session of the day. This in itself was a great communicating tool – all of the delegates were comparing and talking about what kind of personalities they had. Each delegate received access to a confidential TypeCoach account which will provide a lifetime access to coaching and videos.

Suzanne Ricard-Greenway was our final presenter. She explained how we all wired differently, yet adopt the same method of communication when it comes to communicating change in our firms. Understanding the different types of temperaments in



BCLMA Conference attendees taking their chances in the Shark Den!

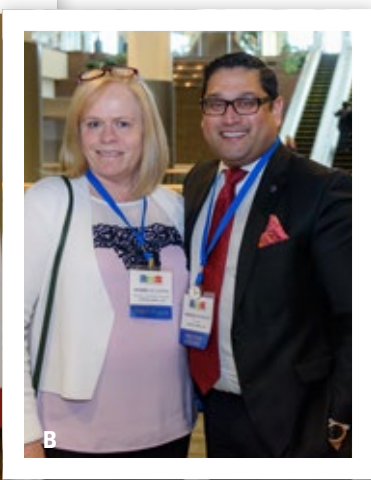
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each personality would help recognize what triggers resistance and the need to communicate differently to obtain a positive result. Suzanne shared her best practices, challenges, insights, and life experiences on how to communicate change for each of the different personality types and temperaments. This was an eye-opener, allowing listeners to find out how each personality processes information so differently.

Afterward, attendees headed back to the Market Place for some more socializing with the vendors and the drawing of the generous prizes. Just to list a few, there were wine baskets, spa gift certificates, cooking classes, restaurant gift certificates, and gardening tools donated by the Market Place Participants. A big thank you goes out to Heritage Office Furnishings for donating a Steelcase High Performance task chair, and to the Legal Freelance Centre for donating a shopping spree at Pacific Centre and a Spa Day at the Fairmont Pacific Rim as draw prizes.

Finally, the evening wrapped up with an awesome buffet dinner. Everyone who was asked, especially the first time attendees, all thought it was so well organized, the speakers were great, of course the food was phenomenal, and yes, they all look forward to the next one!

Many thanks to all the members of the Conference Committee for all their hard work in putting together such an awesome event!



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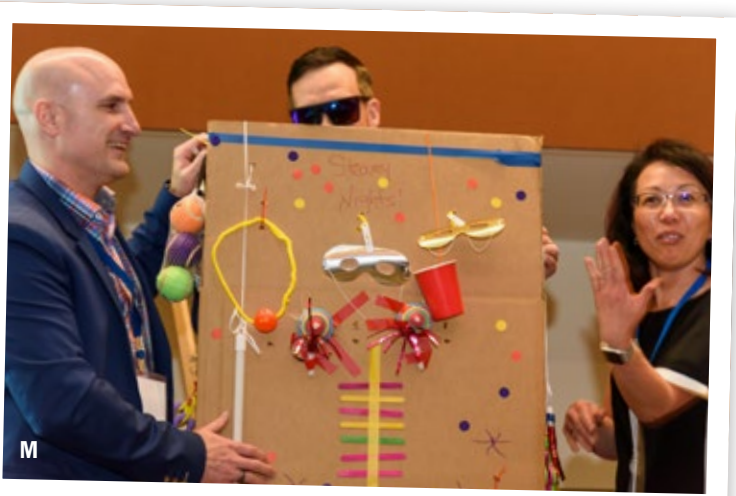


J

G. Engaged at the 2018 Conference!

H. BCLMA out of town members – representing Kamloops, Kelowna, Vernon and Toronto

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Thank you to all of the delegates and our generous sponsors!

The conference included the kick-off event, “Shark Den”, breakfast, lunch, three sessions, a market place, reception and dinner. A good time was had by all socializing, learning, networking, and engaging with vendors.

A big shout out to those who volunteered many hours of their time meeting, planning the conference, securing speakers, organizing the team-building event, the Instagram contest, coordinating the market place, assisting the vendors and arranging the final dinner event.

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How can a law firm ensure the security of its data? 10 security measures your law firm should consider

by Brian Mauch, BCom LLB. This article was originally published in Issue 156 of Verdict, by Trial Lawyers Association of BC

To paraphrase one of my favourite quotes about computer security, to be truly secure a computer would need to be: 1. disconnected from the internet; 2. disconnected from any network; 3. powered off and unplugged; 4. cast in a block of concrete; and 5. sealed in a lead-lined room with armed guards. However, to describe such a computer as extremely inconvenient to use would be an understatement.

In the computer world, levels of security exist on a spectrum. One end of the spectrum represents a high level of security, and the other end of the spectrum represents a high level of convenience. It is impossible to have both high security and convenience because they each exist at the expense of the other. Put simply, a computer system that is convenient to use will have a low level of security and a highly secure system will be very inconvenient to use.

That said, modern businesses need to use computers, and law firms are no exception. In fact, law firms rely on computers more than many other types of businesses: to facilitate communication, record-keeping, scheduling, and the collection and analysis of data. One of the highest professional obligations on a lawyer is to safeguard their clients'

confidential data. So how does a law firm do this, knowing that computers are inherently difficult to secure?

The key is for each firm to decide where they need to fall on the security/convenience spectrum, and to take reasonable precautions to meet that standard. Unfortunately, most law societies do not provide these standards because they take the approach that they are regulating lawyers, not technology. It is up to lawyers to do their due diligence to understand the risks involved and take reasonable actions. Some types of firms are at higher risk than others due to the type of law practiced, the type of data available, and the complexity of their network.

Fortunately, there are many security measures that law firms can utilize to

safeguard their network and data. However, none of these security measures are 100% effective. If there were a single security measure that was 100% effective, everyone would use it and there would not be such a thing as hackers, viruses or data breaches.

My firm's recommendation to its clients is to use a multi-layered approach to security, utilizing multiple best-in-class tools and best practices. Even if each measure or best practice has a 95% effectiveness (meaning that it is 5% ineffective), the combination of ten best practices each with a 95% effectiveness should yield something approaching (but never quite guaranteeing) 100% effectiveness. Think of using ten different strainers on a glass of orange juice – there probably will not be any pulp left over when you are done.

Here are 9 different "strainers" that law firms should consider:

1. ENDPOINT ANTIVIRUS PROTECTION

This is the security measure that most people are familiar with. It is the antivirus software that we install on our workstations and servers, and will one day install on our phones, cars, and connected homes.

Endpoint antivirus software identifies and blocks malicious code using a list of known virus signatures, and tries to identify new threats using heuristics. This software needs to be updated on a regular basis to account for newly identified threats and is susceptible to new threats that have not yet been identified and blocked. As with all of the measures listed below, antivirus software needs to be monitored and acted upon by your IT team, so that it is not up to your staff to self-report that they clicked on a link they should not have – the natural instinct is to surreptitiously close an antivirus warning and hope that nobody noticed.

2. HARDWARE FIREWALL

This is a device that sits between your firm's internet connection and internal network. Good (i.e. expensive) firewalls inspect every packet of data that enters and exits your internal network and block packets that contain malicious code. Similar to antivirus software, firewalls are only as good as their latest update and are susceptible to new threats.

3. SECURE INTERNET GATEWAY

This is a new type of security measure that complements a hardware firewall by

scanning all outbound requests from your firm's network and blocks any connections destined for a rapidly evolving list of known malicious sites on the internet. This security measure is particularly effective against ransomware because most ransomware variants quietly enter a network like a Trojan horse and then reach out to the internet to let the bad guys in.

4. EMAIL ANTISPAM

It may surprise you to know that an estimated 60% of all sent emails are actually spam. With that much spam coming in, it would be detrimental to productivity for users to have to sort out themselves the real emails from spam. Many people incorrectly assume that antispam software should be easy to use and maintain and have a 100% effective rate. However, teaching a computer how to identify spam email using heuristics is akin to artificial intelligence because spammers are constantly working to find ways around spam filters. It has become a long-running battle of attrition – some months the spammers are winning and some months the anti-spammers are winning. The only truly effective anti-spam measure would be to pay a reasonably intelligent person to read and filter all of your

email for you, which would be inconvenient, expensive, and impinge on your privacy. We instead rely on anti-spam software, despite its less than 100% effectiveness.

5. TWO-FACTOR AUTHENTICATION

Remote access means accessing your data from outside your office, which removes the necessity to physically be in your office. Remote access is a mixed blessing because, while it is very convenient for you to access your data remotely, it also means that someone else can too. We typically protect our data using the time-honoured custom of having a username (which refers to you and can easily be guessed by someone else) and a password (which in theory only you know... and everyone else who reads that sticky tab on your monitor). Two-factor authentication introduces a second "factor" when logging into your computer. In addition to something you know (i.e. your password), logging in also requires something you have, such as a randomly-generated code texted to your phone, or a fob with a rotating set of random numbers.

6. PASSWORD POLICIES

Many users never want to change their password because it was hard enough to

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remember it in the first place. In fact, they use the same password for all of the online services we all use on a regular basis. This system of convenience breaks down when eBay, Target, Dropbox, etc. are hacked, and the hackers publish all of the username/password combinations they uncovered just for kicks. Other hackers then take a few minutes to research where these users work, figure out what type of remote access system they have, and try to log in using the username/password they found. The good news is that most hackers do not care too much about the confidential client data they will find on the network of a typical law firm but sometimes they do (e.g. the Panama Papers). However, the hackers know that the lawyers care about the confidential client data so they encrypt it with ransomware and will happily accept bitcoins in exchange for unencrypting it. To combat this, passwords need to be unique, complex, and changed on a regular basis.

7. MOBILE DEVICE PASSCODES

Law firms will sometimes go to great extents to secure their office computers and remote access but forget about the supercomputers in their lawyers' pockets that contain the entirety of humankind's knowledge... not to mention also containing confidential client data and the ability to impersonate a lawyer by sending and receiving email as that lawyer. Smartphones have become indispensable tools of the trade for lawyers, and you would assume that they would all use alphanumeric passcodes or thumbprints to keep those devices locked at all times, but you would be wrong because that would be inconvenient. Complex passcodes (i.e. not "1212") with more than 4 digits need to be in place and phones need to automatically lock after a few minutes of sitting idle. If a phone is lost, stolen, or simply left in the back of taxi, law firms need to have the ability to remotely wipe that phone and all of the data on it. Fortunately, all of these measures can easily be enforced on a modern network.

8. SCREEN LOCKS FOR DESKTOPS/LAPTOPS

This precaution has more to do with physical security, which can sometimes be an issue in a law firm. Many users walk away from their computers for meetings, lunch, and to go home at the end of the day, leaving their computer logged in and accessible by anyone who sits down at it. However, law firms do not typically know every person who is in their office on evenings and weekends. Landlords

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provide cleaning and maintenance staff and they need to access the office at odd hours. If the wrong person were to walk into a typical law firm outside business hours, it would be very easy to steal data, infect a network with ransomware, or send and receive emails masquerading as a lawyer. Even if you told everyone to save their data, close all their programs and restart their computer at the end of every day, someone would forget, or they would be expecting to come back to the office later but changed plans and ended up going home instead. Best practice is to enforce that an idle computer locks with a screen saver after a short length of time and would require the password to unlock it. Our office has a 20-minute idle lock in place and to encourage our users to manually lock the computer every time they step away we use "social engineering". Upon encountering an unattended, unlocked computer, someone may sit down and send out a company-wide email stating "I love you guys, donuts are on me tomorrow." This usually only needs to happen once per user.

9. BACKUP

A reliable backup is the last line of defense for your data. A backup copy of your data

will not help you if embarrassing emails have been published on the web but it will help you if all your data has been encrypted by ransomware and some Russian teenager is demanding bitcoins to unencrypt it. A combination of onsite and offsite backup is necessary. An onsite backup will allow you to quickly restore files or emails, but it will not help you if your office has suffered a fire, flood or theft and the computers are unrecoverable. In that case, your data would also need to be backed up offsite in order to recreate your law practice.

CONCLUSION

There are more strainers available, if someone wants to try to catch every last bit of pulp. Email encryption, retina scanners, and other security measures may one day be commonplace but few law firms have felt the need to swing that far on the spectrum towards security and away from convenience. As with most things, there are diminishing returns when it comes to increasing computer security to the nth degree. Implementing the preceding list of nine security measures will have a significant impact on improving your firm's security. Some of them will be inconvenient and some of them will be costly. Even

if you had them all, your firm could still get hacked, but if you have these measures in place, the hackers will probably quickly move on to other unprotected targets because the lowest hanging fruit gets picked first.

The tenth important security measure is to think of security as a fluid and evolving topic and not be fooled into thinking it can be addressed once and for all. New threats will evolve over time and new security measures will be developed. The cost of some measures may go down and we may find ways to make them less inconvenient. Law firms should review their security needs on an ongoing basis and be prepared to adapt to changes in the security landscape because the potential cost of a breach could be significant.



Brian Mauch is the founder and CEO of BMC Networks, a Vancouver-based outsourced IT provider that specializes in law firms. Brian obtained both law and commerce degrees from the University of British Columbia, and then combined his education with his passion for computers to form BMC Networks in 1997. Brian focuses on strategic planning and advice for BMC's clients.

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Recruiting 101: Social Media Checks

by Preston Parsons, Associate at Overholt Law

Hiring a new employee is an important step for any firm. It takes time and firm resources. You want to get the right candidate and you know that the more information you can gather on your pool of candidates, the more likely you are to find the right, lasting fit.

A common background check completed by prospective employers these days is a review of the information posted on prospective candidates' social media channels. Your firm may already conduct them. If you do, or if you are thinking about adding them to your recruiting function, this article provides some key considerations, tips and reminders to help you complete them in a manner that satisfies your legal obligations to the candidates at the same time.

PRIVACY OBLIGATIONS

The first consideration is your firm's privacy law obligations pursuant to the Personal Information Protection Act, SBC 2003, c 63 ["PIPA"]. Employers are restricted by PIPA regarding the collection, use and disclosure of a prospective employee's personal information to information that is necessary to fulfill a reasonable purpose. A breakdown of the components to this is useful.

Searching a candidate's social media online and reviewing it constitutes "collection" of personal information about the individual for the "use" of making hiring decisions. This is true even if that information is publicly available. Please note that section 35 of PIPA has record retention requirements and so you are required to keep a record of all of the information you collected that directly affects candidates for at least one year. To keep records of what you view on social media channels, screenshots or printouts may be best.

It is important to determine whether a candidate's social media content has any relevance to the position you are hiring for. This will help you define the purpose of the search and decide whether it is reasonable to do so. A useful question to ask yourself is whether you want to conduct the social media check simply out of curiosity, or

because it would reveal information necessary for you to determine the suitability of the candidate for the role. For instance, if you are hiring for a lawyer, a marketing position with the firm or a manager of student programs, it is more reasonable to conclude that the candidate's social media would reflect publicly on the firm and be seen by clients or prospective clients. In that sense, those candidates' social media content has a reasonable bearing on their role. In contrast, the social media content of a prospective administrative assistant or a switchboard operator is unlikely to be deemed a reasonable collection of information.

Another important consideration when conducting social media checks is your obligation to exercise due diligence to ascertain the accuracy of the information you collect. Often social media profiles contain outdated information and information posted by third parties that the candidate may not realize or appreciate. Collecting outdated or false information could at best mean that you do not inform yourself of the candidates' real abilities and skillsets, and at worst, cause you to pass by a candidate that may have been in fact a good one to consider. As a reminder,

it is unlikely to be reasonable to ask for a prospective candidate's social media password so that you can review the profile in full as if you were the individual.

To conclude the privacy considerations, I note that it is best practice to inform the prospective candidate that the firm would like to review their social media content and request their consent to do so. Consent permeates privacy law in many areas and while PIPA has enumerated instances of implied consent, obtaining express consent is better. Not only does obtaining express consent in all instances ensure your firm is covered, but it is also a transparent practice which most prospective candidates will appreciate. They may even use the prompt as an opportunity to review their social media content and update it, eliminating outdated information and improving its present day accuracy for you.

HUMAN RIGHTS

The other serious area to consider is human rights issues that can arise when reviewing a prospective candidate's social media. Social media checks can reveal a broad range of information, much of which is not relevant

to the role the individual is hired for. As a result, it can be difficult to surgically excise only the information that is reasonably necessary for the role and you risk uncovering information about the candidate that touches on prohibited grounds of discrimination under the Human Rights Code, RSBC 1996, c 210 [the "Code"].

Section 13 of the Code prohibits discrimination in employment – including during the hiring process – with respect to the following prohibited grounds: race, colour, ancestry, place of origin, political belief, religion, marital status, family status, physical or mental disability, sex, sexual orientation, gender identity or expression, age of that person or because that person has been convicted of a criminal or summary conviction offence that is unrelated to the role. Checking a prospective candidate's social media may well reveal information on many of these grounds and if the candidate is not hired following the social media check, they may try to make the argument that the reason was because of information collected which touches on a prohibited ground. Remember as well that human rights protections extend not only to membership in a class of persons with one of

the prohibited grounds in common, but also to perceived membership.

CONCLUSION

Social media background checks can provide a firm with important information about a prospective candidate, but collecting that information comes with important obligations and pitfalls. Minding the information outlined here will help you consider whether conducting them is necessary to assist you in filling that particular role with your company, and remind you of the laws that apply when you do.



Preston Parsons is an associate lawyer at Overholt Law, practicing in the areas of employment and labour relations, human rights and privacy law. Overholt Law is a boutique employment and labour relations firm located in downtown Vancouver, British Columbia. For more information regarding Overholt Law, please visit www.overholtlawyers.com.



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How Multipurpose Offices are Effective for Innovative Law Firms

by Dan Boram

The office and its culture is being re-imagined with new school methodologies and ways of thinking. This transition is largely thanks to the gargantuan millennial demographic, who are colonizing the world's offices with new ideas, perceptions, and expectations for the working environment. The status quo of the world's office industries can hum and haw all they like about change - but the truth is - it's not only good for people, it's good for business.

Transforming a traditional office space into an environment that attracts and retains millennial top talent, accommodates organizational growth, and utilizes employee feedback to elevate productivity, functionality, and efficiency are just a few examples of how multipurpose offices are effective choices for innovative law firms. In this article, we'll break down the major contributing factors that help transition stagnant offices into more flexible workspaces that are poised and ready to adapt to anything the world can throw at them.

DOES MORE SPACE HELP MAKE OFFICES MORE FLEXIBLE?

Feeling cramped or unproductive in an existing office space can usher in a sinking feeling, and transforming the office you've

got can be a daunting, time-consuming task that can have adverse effects on those using the space while design and construction work is underway.

However, more and more law firms are considering that it isn't more space they need to attract new talent and boost productivity - it's the flexibility and functionality of existing spaces that can be changed that they need. Under this umbrella of thought, there's no need to lease new office space, or make a move to a new, larger office. Nor is there any reason to invest in a full redesign. Instead, a smarter multipurpose office solution that makes flexibility its focal point can address many of the issues surrounding more space.

INTERIOR DESIGN

One of the first steps in creating a

multipurpose office space for your law firm is to address issues pertaining to interior design. All office environments are carefully crafted creations - nothing should ever be left unexplored, or ignored. For an office to be thoughtfully and intentionally designed from the inside out, every member of the team must be involved to contribute design ideas and identify pain points.

This critical stage is meant to uncover and expose inefficiencies in the existing office space as it stands, allowing interior design to play a major role in transforming the firm's space into an innovative and flexible multipurpose workspace using two key pillars of thought:

- space planning
- the right furnishings

SPACE PLANNING

Space planning is defined as methodologies of design that distribute space and office layouts in ways that allow teams to work in multiple different capacities. One space may be dedicated to collaborative groups, while others provide space for private tasks and introspection. Finally, space planning allows for the rearrangement of office space so that new adaptable spaces can be created and

altered, thus giving the people in the office the ability to customize their environment and maximize efficiency, workflow, communication, and departmental supervision.

As organizations grow, the way they use space will inevitably change, and strategic utilization of space will help keep the firm one step ahead of growth.

Some things to consider can include:

- **Planning in advance:** Hire an interior designer or design-build firm who understands your office dynamic and the goals of your law firm. They will quickly interpret a way to balance company vision with departmental needs, space usage, and project for future growth.
- **Room to Grow:** The goal of the majority of law firms is to grow. This means there will be a need for more employees, and of course, space to house these new employees. Space planning allows a firm to better use its existing space to optimize functionality, therefore increasing size and profitability without increasing the capital required to house additional staff. When employee numbers

go up, space planning enables a boost to revenue by resisting a physical expansion.

- **Creation of zones:** Technology and employee dynamics play a huge role in deciding how to divide and utilize office space. Some teams operate most effectively with constant collaboration, while others enjoy a more traditional working environment. The creation of special rooms for activities such as client interactions, contract discussions, and hiring interviews can prove effective, while open spaces for team collaboration are typically key aspects of inspiring creativity and problem-solving.
- **Remote Officing:** Cloud computing and file sharing technologies mean that more and more firms are choosing to allow for a remote work policy within the organization. Remote working arrangements not only reduce the pressures of space confinements, but also increase the cost effectiveness of current layouts.

FURNITURE

The selection of furniture is essential to the success of a multipurpose office. Furnishings need to address ergonomics, comfort, and

affordability as much as they need to fit the bill in terms of developing a dynamic sense of character that's going to help retain and attract top millennial law talent. Some of the most meaningful employee engagement stems directly from the comfort of available office chairs, or the eclecticism of the space's interior design.

Furniture also needs to encourage an open company culture, enhance the likelihood of collaboration, and optimize available space within the office.

COLLABORATION & COMMUNITY

Finally, innovative law offices encourage employees to come together to not only solve work-related issues and cases, but also to inspire a strong sense of community that unifies employees and helps stimulate meaningful connections.

This means including a community table of sorts in a multipurpose office, where employees can interact and exchange ideas and knowledge. Space planning dictates that community long tables and collaborative community spaces require access to power, excellent lighting and acoustics, and

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are well positioned around office foot traffic so they feel as though they're more private and comfortable.

Multipurpose law offices do more than simply maximize organizational affordability and efficiency, and reduce costs related to expansion and possible construction. They stimulate and encourage innovation through connectivity and community.

Millennial law talent crave connection, not only to their careers, but to the people that make their office a great place to spend their time. Offices are the crux of the working experience and need to be more than simply a place to earn a paycheck.



Dan has many years of experience in Vancouver's commercial design-build construction community earning a reputation for "looking out for the client's interest first". Like AURA's Mission Statement, Dan sets out to understand each client's vision and expectation in view of successfully bringing it to a reality.



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MEMBER SNAPSHOTS



MIKE BRUNER

How long have you been a BCLMA member?

Coming up on 2 years.

Where do you work?

Boughton Law.

Where did you vacation last?

Woodinville, WA. We have 3 kids under 4. We don't go far, also they have wine.

Where were you raised?

Toronto, born and raised. Ya, I'm that guy.

Have you lived abroad?

Does moving to BC count? If so, yes. Since 2008.

Favourite wine under \$20?

Mission Hill Five Vineyards Pinot Noir.

Favourite lunch spot?

Canibal Café on Granville before it closed (which was good for my health in the long run). These days, anywhere that's not Joeys or Cactus Club!

Favourite or most recent movie?

Cars 3...again, many children under 4.

Favourite restaurant?

Anywhere that's not Joeys or Cactus Club. Literally.

What's a must-read book?

The right answer - *Remaking Law Firms: Why & How*. The real answer - *The Cat in the Hat #kids*.

What do you most enjoy about working in the legal industry?

Lawyers. They're the best.

Something surprising about you?

That I am from Toronto...it's hard to tell.

How do you spend your spare time?

Imagining creative ways to trick lawyers into accidentally loving BD.

Favourite BC day trip?

The wineries in and around South Surrey-Langley. Kids can run around relatively unsupervised. Again, ya, I'm that guy.

What movie describes your life?

And Now for Something Completely Different.



Strategic Planning and the Law Firm: Useful Tool or Time-waster?

by Alison Brewin, Non-Profit Management Consultant

In my work with non-profits and charities, I support organizations of all shapes and sizes, from ones with small, virtually non-existent budgets, to quasi-public institutions that put thousands of dollars aside every year for strategic thinking and discussion. I have learned in my eight years of consulting that all of them benefit from a strategic planning process and a good strategic plan.

What of companies like law firms? You would be hard pressed to find a business advisor who doesn't recommend engaging in some long-term thinking, though there has been some debate about its usefulness (see for example 'The Death of Strategic Planning' *Forbes Magazine*, March 24th, 2014 or 'The Strategic Plan is Dead. Long live Strategy.' *SSIR*, Jan 10th, 2013). Both of these articles describe the impact of the economic downturn of 2008/09 when companies woke up to the fact that their strategic plans couldn't - and more importantly didn't - predict that event. Nor have old-fashioned approaches managed to navigate the remarkable technology transformations of the past two decades.

I counter these concerns with this: it is the very mercurial nature of the current

environment we all work in that requires strategic thinking and planning. How else can a small company like a law firm navigate the chaos? Here are the five top reasons to engage in a robust strategic planning process at your law firm:

1. FINANCIAL DECISION-MAKING

Partners and senior managers can make decisions, especially in troubled times, about how to focus financial resources by focusing them toward long-term goals.

2. CONFLICT RESOLUTION

When two (or more) partners disagree about an opportunity or challenge facing the firm, the Plan can help clarify which path to take. One partner wants to take over the neighbouring office but the other wants to invest

in technology? What does the Plan tell you about whether physical or virtual growth is most useful right now?

3. HUMAN RESOURCES

If the Plan has identified growth as a long-term goal, then the firm may need to invest early in infrastructure before simply bringing in more articling students or junior lawyers. The Plan will help decision-makers decide who to hire - new lawyers with interests in family law or a more experienced lawyer who brings clients with them? Or perhaps the firm should consider more paralegals?

4. ENGAGEMENT

The Plan helps everyone in the organization talk about the future with a common and enthusiastic message that attracts external interest. This kind of positive excitement will provide the firm with both a reputation as a great place to work and confidence among potential clients.

5. SHORT-TERM PLANNING

This is a key value-add for administrators and operations managers at law firms: a

good Plan will allow others in the firm to plan their year, month, even their day with confidence and clarity. What can I do this year to help the firm achieve its goals? What can I do today to advance our goals?

What is involved in making a strategic plan clear and understandable? Some strategic planning facilitators use a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats), but I find that approach challenging for most organizations. Thinking about 'weaknesses' is demoralizing and creates a sense of blame. And most people, in my experience, have a lot of trouble identifying 'threats' as distinct from 'opportunities'. Instead, I utilize a version of 'SOAR' – Strengths, opportunities, aspirations and results. SOAR asks:

- A. What you are good at?
- B. What are the opportunities you aren't accessing that may arise?
- C. What do you want to be?
- D. What are the tangible results that will show that you have achieved those aspirations?

And what is a good process? It involves five steps:

1. SCANNING THE ENVIRONMENT

What is happening around the firm that may have an impact? Are there changes in public policy, technology or practice rules that may affect us? What are the economic trends in the province/community that may benefit or challenge the firm?

2. ANALYZING STRENGTHS

What is the firm currently good at that might help navigate those things? What do we do well that we can stand upon to reach for and become an even better firm?

3. ANALYZING CHALLENGES:

What are current challenges that may make it hard for the firm? Where are we not performing well that may get in the way of our taking up new opportunities? Of improving or growing?

4. DEFINING SUCCESS:

What should this firm be three to five years from now? What do we think success looks like at the end of that time frame?

5. EXPLORING THE 'HOW':

How will we get there? Break it down into six month or one year parts. Spend time as a

team outlining what needs to change now, six months from now, one or two years from now, to achieve that success. Consider the risks in making those changes and how you will mitigate them should they occur.

Once those pieces are worked out and the Plan is defined, then the firm must communicate that Plan internally and externally. The process will have an impact on your firm by itself because it will provide a sense of mutually understood vision and – in a subliminal kind of way – impact present day decisions. But the final stage of communicating is important to make this tool a living, breathing support to the firm. Prepare a simple one-page infographic for everyone to pin to their bulletin board or make their desktop, and ensure each team has a longer version (but not too long) to incorporate into their own operations. The longer version should offer some explanation of the goals. It should be written in a way that defines the plan for anyone, whether they were present when the goals were identified or not.

Hand it out to new staff members and post the infographic on your external facing website. Talk about it at partner and senior

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staff meetings. Let it form the agenda of firm retreats and gatherings.

And get on with the work of running a law firm. When you gather to go through a strategic planning process three to five years later, you will be able to celebrate success or, if success didn't occur in all areas, be able to explain without rancour why you did not. But chances are there will be a lot to celebrate!



Alison Brewin graduated with a law degree from the University of Victoria in 1991 and was called to the Bar in 1992. She then embarked on a career in non-profit management, opened a toy store on Commercial Drive, and spent 12 years leading West Coast LEAF. In 2011 she began a practice as a non-profit management consultant, supporting organizations throughout BC with planning, evaluation, governance and interim management support. For more, see www.alisonbrewin.com



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How can we help your business today?



Social Media: Risk/Reward to your Enterprise

by Randy Lines, Chief Technical Officer for 3Si Risk Strategies Inc.

The Internet has complicated security and Social Media has compounded this fact. You don't need an expensive consultant to tell you that. Internet security breaches have touched all of us.

In the past, many of us - stereotypically, the older types - have declared we are immune to any problems because we are off the social media grid. This claim is simply not true. We can't have zero presence or "surface area". The Internet knows us. We pay taxes, drive cars, shop, have credit cards, have a bank account, have a phone. And even if we don't, then our spouse, best friend or children do and we are tethered to them by pictures, job references, baseball teams and other means.

Also, in the past, many of us - stereotypically, the younger types - have said "yes" to virtually everything the Internet and Social Media have to offer. As a result, they don't get lost, can keep up with friends, have ready access to documents wherever they are and they can tell you who won the 1923 World Series (New York Yankees, in case

you were wondering) with a simple voice query to Siri.

This is all fun and games until it isn't. Suddenly, a Facebook page or Twitter account is hijacked and the best possible outcome is that nothing is lost but credibility.

Surface area refers to your exposure on the Internet. Have a web site? Surface area. Facebook account? Surface area. Smart phone with multiple apps? More surface area. Do you use Internet Explorer, Firefox, Chrome? You guessed it - surface area.

The amount of problems that Social Media and the Internet create for you are relative to your "surface area". The amount of business advantage and the efficiency of your operation are ALSO relative to your surface area. It is cool and creepy how the very

act of being in a car dealership on Sunday results in car ads on your search results on Monday.

How can a person or business maximize potential from the Internet while minimizing bad outcomes?

What has stayed constant through the tumultuous advances in technology is RISK. RISK is exposure to a loss. RISK is always at the intersection of Assets, Threats and Vulnerabilities.

To eliminate RISK is easy. If you have no Assets there is nothing to lose and no Risk. Same for Threats. If you don't have a bad person wanting to take your Assets, no problem. Same for Vulnerabilities. If you have no weakness, a Threat can't get to your Asset.

In the past, assets were physical entities such as cash or cars. Threats were persons who had to get physically close to your asset in order to take it. Minimizing vulnerabilities was as easy as putting more

physical barriers between the threat and the asset. Safety deposit boxes, for example, let people place items in a locked box that was then locked in a secure vault. Risk management was a matter of considering the value of the asset with respect to the cost of storing it in a bank.

The Internet has not changed security fundamentals.

It did, however, change the nature of risk. Assets are still assets, however non-material assets are becoming much more common. Non-material assets include things like passwords, personal details and credit card account details. Non-material assets such as these are not always under your control. Credit card numbers and financial transactions can take place anywhere in the world on most retail Internet sites. Personal information assets such as location data, shopping and web browsing habits may be bought, sold and/or auctioned without the owner having any idea that it's happened.

Threats have also changed. A person no



longer needs to be physically close to an asset in order to gain access. Any asset that has passed through the Internet is likely accessible to anyone with a computer, Internet access and a credential or knowledge of compromise. The fact is that threats can arise from competitors and/or organized criminal groups from all over the world.

And finally, vulnerabilities have changed. Perhaps the biggest change in vulnerability is that you may be unaware of when your assets have been taken! A password that was

compromised a year ago may currently be used to copy all of your company's proprietary information.

Reducing risk generally comes with a cost in time and money. A vault costs more than a locked room but it is only as useful as the vigilance of the owner. In the same manner, it is so easy to establish a quick 1234 password rather than *Rl5FQ35&^,jHgCC followed by a text verification code.

RECOGNIZE YOUR ASSETS AND KNOW WHERE THEY MIGHT BE.

Recognize that your assets include much more than physical items. Passwords and confidential information are as valuable as gold in many cases.

Minimize the amount of assets you take from others such as clients or staff. If you don't need to know their SIN or middle name, don't take it.

Minimize the amount of assets you provide to others. If you don't need to provide your middle name to a social media account, then don't.

MEMBER SNAPSHOTS



JOHANNA MILLS

How long have you been a BCLMA member?

Three years?

Where do you work?

Watson Goepel LLP.

Where did you vacation last?

Harrison Hot Springs – love that retro charm!

Where were you raised?

I am a native Vancouverite – West siiiide.

Have you lived abroad?

In London England, in my very early 20s, for 6 months. I was an au pair.

Favourite wine under \$20?

Painted Turtle Pinot Noir – Cheap and cheerful!

Favourite lunch spot?

Arturo's Food Truck on Cordova at Howe – Everything is delicious!

Favourite restaurant?

La Buca – a hidden neighbourhood gem!

Favourite or most recent movie?

Re-watching the 80s classics with my kids. Last one was *Sleepless in Seattle* – a hit!

What's a must-read book?

I love Marian Keyes – Perfect vacation reading with that Irish humour!

What do you most enjoy about working in the legal industry?

Working with smart people, and the diversity of the job.

Something surprising about you?

I am an open book. To know me is to know me.

How do you spend your spare time?

Cry in the shower? Take a coffee to the beach with a good friend.

Favourite BC day trip?

Spanish Banks or Lighthouse Park.

What movie describes your life?

Wonder Woman of course ;P

Question the requirement to provide any of your assets or information to anyone. It is fair to ask and understand why they need your data and how they will protect it.

Take heed of the constant drone of security professionals begging, pleading and insisting that you use good internet practices.

Recognize the value that the Internet brings to your business. This lets you balance mitigation costs.

KNOW YOUR THREATS AND HOW THEY MAY BE FORMED

The Internet can also be used to discover your adversaries. An open source analyst can assist with uncovering potential threats before they attack your assets. Typically, this should be outside of a companies' social media team. Intelligence analysis for security threats is so much more than social media monitoring.

Your threats may be the same threats as those of your competitors. Consider mutual aid agreements. An expensive security consultant or analyst might be a better

investment if shared by two companies. Many threats are "industry based" so industry based solutions are more appropriate.

Hire IT expertise in-house and ensure they are up to date.

MINIMIZE YOUR VULNERABILITIES

Get technical advice from a Cyber Security Professional.

Take that advice! But only after you are comfortable with your risk level. Remember, the consultant is there to inform you of your risk but it is your job to own it. It is completely fair to ask questions until you understand. Keep in mind, consultants are very aware of current threats but you will have the best knowledge of your assets.

Recognize that there is a cost in both time and money for Internet security. Align the expense of this with your risk tolerance and then build this culture into your organization. Let your staff know that by taking extra time for a login, they are helping to make the company more valuable.

Don't give in to a "There is nothing we can do because everyone is hacked" mindset. There is a lot that can be done and criminals look for the easiest targets first.



Randy Lines is the Chief Technical Officer for 3Si Risk Strategies Inc. He currently provides Physical Threat Risk assessments to companies and Government agencies. Prior to 3Si, Randy spent 24 years in the RCMP, the majority on his career working with technical intrusion technologies.

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