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Legal Innovation: What's the Current Buzz?

By Carla Swansburg, Vice President and General Manager (Canada & Latin America) @ Epiq

As we find ourselves well into the second year of COVID-induced remote work, it is a good time to reflect on recent trends in legal innovation. COVID has accelerated a number of changes, highlighted a few areas of concern, and potentially shifted the focus of the legal industry into a more pragmatic approach to using technology. Below are some of my personal views on the current trends in legal innovation in Canada.

COVID has accelerated the legal industry's shift to online collaboration tools and cloud-based platforms. Law was a notorious holdout on cloud deployments—not surprising given the level of risk-aversion in our profession. The sky did not fall—cloud platforms are typically highly secure, with some of the most sophisticated information security

teams and tools on the market. Further, the prevalence of remote work has highlighted how valuable cloud platforms are for collaboration. The legal market has seen a shift over the past few decades to a more client-centric approach, and a key part of this is seamless communication and collaboration among clients, lawyers and their respective teams.

COVID has also highlighted the need to shift to digital records—another area where law has lagged. Many outdated court systems across Canada have moved to online hearings and some versions of e-filing systems, although a few courts have indicated it is only temporary and they intend to revert to the old paper-based filing systems in due course. I hope that the profession will strenuously lobby to move to a more permanent electronic filing system given how much more efficient and accessible the process is. In a remote, online world, having digital access to files is a necessity.

The shift to collaboration platforms has raised other challenges, including with

cont. p.3



BC Legal Management Association

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Legal Innovation: What's the Current Buzz? P1

The pandemic helped to accelerate the adoption of technology within legal services. Here are some current trends and what can be expected.

Preventing Burnout P6

The risks of burnout are higher now than before the pandemic. As an employer, mitigating this risk while increasing firm morale will be the key to protecting some of your most important assets – your people.

What does your office space say? P9

People are set to return to the office, in varying levels, and will be paying attention to the state of your premises.

Directors' Report P15

Let's Not Miss the Opportunity to Build a Healthier Workplace Culture P16

How do you ensure the actions of your organization are aligned with your goals for a healthy workplace culture? Embrace this opportunity to send the right message.

Fireside Chats P19

Sitting down with former COOs of BC law firms to find out what it was like to retire during a pandemic, and what stands out to them from their long careers in their key position.

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Volunteer Opportunity!

The TOPICS Newsletter Committee is looking for volunteers to join us! We're a dynamic, fun group who are looking for a few members to help source thought-provoking articles that are relevant and beneficial to all subsections. We have three lunch hour planning meetings per year (currently remotely) in which we plan out each edition. No business writing skills are required, just your enthusiasm.

This is a great opportunity to both network and contribute to BCLMA and the legal community. If you are interested or have any questions please contact Committee Chair, Heather Orchison at general@bclma.org.

Who We Are

The BCLMA, founded in 1972 is a non-profit organization with 180 law firm members and 525 individual members across BC. The BCLMA's goal is to provide educational and networking opportunities, enhance skills as legal administrators and managers, and 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 general@bclma.org.

Submissions

If you have an article or story idea you would like to submit, please email Heather Orchison at general@bclma.org. Please note that our prescribed article length is 1000 words.

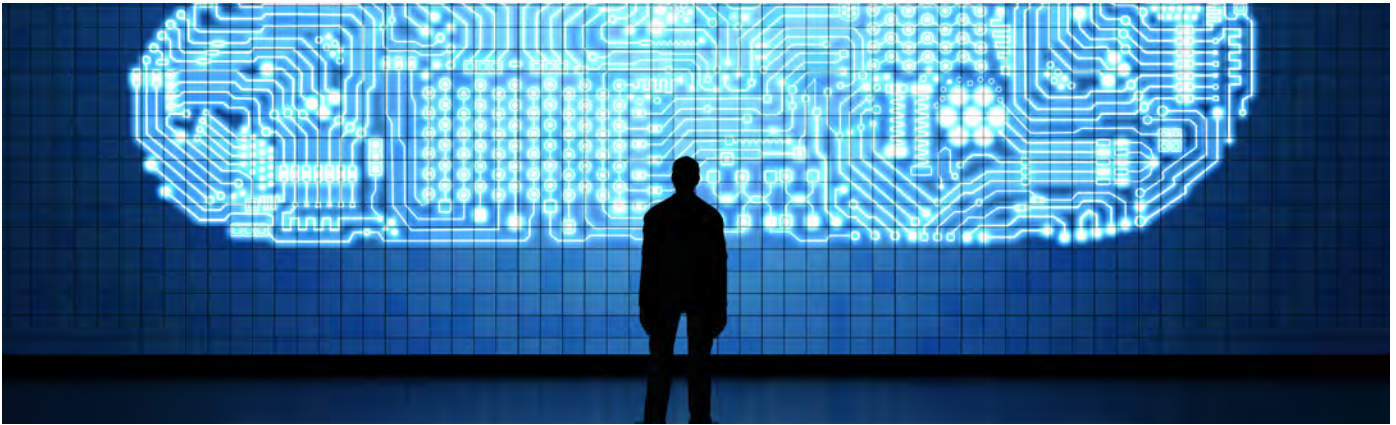
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records and information governance and e-Discovery. While the enterprise version of MS Teams, for example, has built-in records governance capabilities, often these platforms were deployed without ensuring those processes were well understood and activated. From a discovery perspective, records, like persistent in-meeting chats, are notoriously challenging to preserve, export and review. I expect we will continue to see the rise of tools allowing organizations to download, export and review this chat data in native conversational format.

Another trend COVID has accelerated is the heightened importance of knowledge and information management. We have seen a significant focus on ensuring the findability and “shareability” of information. People working on previously “unsexy” projects like document management and search were suddenly the heroes as lawyers needed to access files without being able to ask an assistant outside their office to find a file. The importance of maintaining files in a shared manner versus saving documents locally or in personal files became critical to the functioning of teams within law firms.

I am particularly happy to see what I call the “platformization” (a made up word!) of legal technologies and systems. Organizations like [Reynen Court](#) and BC-based [Clio](#) have created platforms where law firms can access a broad range of legal applications and tools, and in some instances share internal data across those platforms. These systems provide a kind of “app store for legal”, making it far easier to find and deploy legal technology. A related trend is the consolidation of legal technologies into more powerful combined systems. For example, in recent years the document management company iManage acquired RAVN (a powerful AI-based search tool)

and Closing Folders (a Canadian-founded transaction management platform). These consolidations provide a far better user experience, versus accessing a different platform and workspace for each of these functions. Other legal technology companies are similarly acquiring ancillary or complementary technologies for integration.

From a legal technology start-up perspective, we have seen some decline in the frenetic energy of the last 10 years. For a while, it seemed like every month brought a new Canadian-native legal tech star, such as Diligen, Kira, Closing Folders, Founded, BlueJay and others. Now, many of these tools have become broadly common, particularly in larger law firms. Most M&A practices use an AI-based diligence tool. I expect that document automation will be the next wave of market expansion, with many firms now ensuring they have viable document automation solutions as an integral part of appropriate practice areas. Additional focus seems to be shifting to workflow automation and efficiency tools for managing work such as docketing, conflicts, pricing and more.

E-Discovery has also seen significant developments in the use of cloud services and AI. This is not just in the established area of continuous active learning for document review purposes, but we have also seen the launch of “portable” AI models. Clients can now work with vendors to create customized proprietary AI models that enhance analytics for frequently used topics. E-Discovery providers also continue to make progress on new and emerging data types like geolocation information, instant messaging/chats, and even biometric data ranging from facial recognition and fingerprints through gait and voice recognition.

One final note that bears mention is the trend of legal regulators toward providing “regulatory sandboxes” for legal innovation. In the US, Utah is a recent example, where the regulator has launched a trial program to allow alternative business models that let non-lawyers own and operate legal services businesses. In Canada, regulatory sandboxes have focused more on legal technologies. British Columbia launched its program in Fall 2020 and in April 2021 the Law Society of Ontario announced a regulatory sandbox to allow direct-to-consumer legal technologies to operate under the supervision of the LSO. These moves hopefully signal a trend toward a more open market, allowing more options for the historically underserved legal market and to consumers of legal services.

Legal services will continue to evolve, along with an increase in application of technology to those services. Some degree of technical knowledge is increasingly necessary for a successful law practice. Law schools are recognizing this, with a number of programs offering legal technology and innovation programs as part of their core offerings. Lawyers will no longer be able to claim technological incompetence and will need to embrace the changes ahead of us along with those that have already arrived.



Carla leads Epiq’s business and operations in Canada and is leading the development of the business and operations in Latin America. She also supports the Law Firm Vertical, focused on strategies for better opportunities and engagement with global law firm clients. In her prior role, Carla was the Chief Innovation Officer for a large national law firm. Previous to that, she was a commercial litigator in private practice and then led the litigation team at one of Canada’s largest banks.

WELCOME & KUDOS

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Preventing Burnout

by Preston Parsons, Associate, Overholt Law

One of the remarkable features of the COVID-19 pandemic has been the uneven impact on many sectors of the economy. Within the legal sector, some practice areas saw significant slumps for months in 2020, while others soared. For the practice areas that soared, many lawyers and firm staff were required to work longer hours than normal, often while juggling many new stressors at work and at home.

There is a real risk that members of your firm who worked throughout the pandemic—or worked harder during the pandemic—may suffer burnout. This presents both short and long-term risks to the firm, including decreased work quality and increased risk of errors, missed deadlines, sick leaves, and disability claims. At its worst, it may cost you a previously well-performing member of the firm.

In a 2012 study conducted by Ipsos Reid for the Canadian Bar Association¹, “stress/burnout” were identified by 58% of survey respondents as an issue they personally confront while 48% of

survey respondents said that they are personally confronted with anxiety.

Our American counterparts presented similar data. In an American Lawyer Media Survey published in February 2020, 64% of survey respondents reported feeling that they have anxiety.² These were worrisome statistics about the state of a large portion of our profession, and they were all compiled before the onset of the past “unprecedented” 16 months. It seems safe to say that the pandemic has not helped most people’s mental health, and that the risks of burnout are higher now than before the pandemic.

KNOWING THIS:

1. Check-in with each other: short of the employer’s “duty to inquire” where the employer becomes aware of a disability affecting a worker’s performance, it is recommended to check in with colleagues, even if it just creates space for discussion. Going for a 10-minute walk to stretch your legs and grab a coffee with a colleague may help them to know that they are not alone, and that their firm sees them and cares. It may even get them some exercise that they have denied themselves as they work away at their desk.

2. Encourage time-off: a mental break from the demands of constantly being “on” for clients is necessary from time-to-time, even if it is a “staycation” instead of a flight to a glamorous destination. Employees who have not had a break and have worked even harder throughout the pandemic

¹ https://www.cba.org/CBAMediaLibrary/cba_na/PDFs/CBA%20Wellness%20PDFs/FINAL-Report-on-Survey-of-Lawyers-on-Wellness-Issues.pdf

² <https://www.law.com/2020/02/19/by-the-numbers-the-state-of-mental-health-in-the-legal-industry/>

should be particularly encouraged to take time off to recharge, and the firm should make space for them to do so.

3. Ensure that staff, including young lawyers, are aware of resources: it can be especially difficult for junior staff and young lawyers to find their voice to speak up when struggling with mental health issues. They may feel that raising the issues will cost them their advancement in the firm. For that reason, outlining resources in a place where everyone can access them on their own time, in private, is helpful.

4. Promote training on Resiliency and Trauma Informed Practice: resiliency training is either missing entirely from, or not adequately addressed in law schools and BC's Professional Legal Training Course. It shows, in my view, in the statistics. Promoting training on Resiliency and Trauma Informed Practice has the potential to pay big dividends by equipping members of your firm with concrete personal and professional skills so that they can better manage the stresses of the job. Many places have offered free online webinars on these topics since the onset of the pandemic and directing members of your firm to these courses may be the olive branch they need to begin building the skillsets that will not only keep them afloat but allow them to thrive.

These steps should not only help mitigate internal risks but increase firm morale and collaboration. It is good for business, and people smart. When our firms' ultimate assets are the people who serve our clients each day, it behooves us to take care of them.



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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Call for Submissions

Do you have an idea for an article that you think would benefit BCLMA members? Are you itching to put pen to paper (or more likely fingers to keyboard) or do you have an article that you have already written that you'd like to share? We are always looking for submissions!

If you have an article or story idea you would like to submit, please email Heather Orchison at general@bclma.org. 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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What does your office space say?

By Ernie Gauvreau, Honorary Member BCLMA and Trevor Johnston, Priority Projects Limited

Over the years, one thing that has become increasingly important to employees is the physical location of where they work. Whether it's the office culture, office morale, or office energy, there is one constant and that is the physical workplace. To that end, many organizations have made significant investments in the initial design and build out of their premises to ensure they reflect their brand and culture. This investment can often be in the hundreds of dollars per square foot.

Notwithstanding the recent shift to working from home, many firms are starting to recognize the longer-term negative consequences on the social connectivity of the organization. Those same organizations are starting to formulate plans to return

their workforces to the office under various arrangements. Most firms rely heavily on their premises to enhance office culture, morale, and energy, all of which contribute to the success of the business and all who work there.

Maintaining that initial vision for those premises requires ongoing investment. Within a firm, people will have varying degrees of awareness about the state of their work surroundings. Some will be bothered by a ding in a wall and others would not notice if the ceiling were falling. However, across the board, research demonstrates that a well-maintained office environment is integral to employee productivity, behaviour, and well-being.¹

Keeping a clean, well-maintained space over the long term requires a plan that is most effective when broken down

¹ Kamarulzaman, N. et al (2011). An Overview of the Influence of Physical Office Environments towards Employees. <https://www.sciencedirect.com/science/article/pii/S1877705811029730>

into small, predictable tasks that get checked off throughout the year. Designate one individual to be accountable for administering the maintenance plan. Start by dedicating a certain time of year to do a thorough walk-through of your space with professionals and identify areas to refresh. These may include painting in high-traffic areas, regular scheduled carpet cleaning, upholstery cleaning throughout, but in particular in client areas, and replacing lightbulbs when needed.

As people return to the office, there will also be a heightened awareness of not just what they see, but the air quality around them. In many situations, the landlord is responsible for maintenance of the building HVAC. Work closely with your landlord to understand what they are doing to ensure the highest air quality possible, part of which is how often the air filters are changed. To understand more about HVAC systems, become familiar with the MERV rating system and make sure your firm is satisfied with the filtration being used. Tenants are often responsible for HVAC services in their IT rooms. The servers housed in those rooms

are the lifeblood of most organizations yet are often forgotten. Make sure to schedule regular maintenance of your IT server HVAC to ensure the long-term viability and security of the valuable equipment and data stored in the server room.

Establishing an annual budget for facilities maintenance is an investment that pays dividends. Amortizing those costs over the term of your lease is prudent and essential. Office appliances (i.e., fridges, dishwashers, microwaves) are heavily used in most office environments. Replacing those may occur at frequencies unheard of in the home setting. You can expect to replace some of these as often as every two to three years, depending on usage.

Consider establishing an ongoing relationship with a trusted local contractor who is familiar with tenant improvements and can advise your firm on the best approach to optimizing your premises. The contractor will know when and how to schedule those important services and help the firm take a proactive approach to a well-maintained and welcoming physical workplace.



Ernie Gauvreau worked in Legal Administration for 38 years. He started his career in Edmonton and Calgary and then moved to Vancouver in 1992 to join Ratcliff & Company. He moved onto Richards, Buell Sutton in 1999. Ernie joined Gowling WLG in 2005 and after 15 years retired in 2020. Ernie was a long-term supporter of BCLMA (formerly VALA) and a member for 28 years, holding the positions of Director and President during some of that time.



Trevor Johnston, ASct, LEED® AP is a partner with Priority Projects Limited and 18-year Construction Manager. Building, renovating, and maintaining Legal and Corporate offices almost exclusively in Vancouver's downtown core. Trained originally at the British Columbia Institute of Technology, refining, and learning as the office and construction environment has changed over the years.

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MEMBER SNAPSHOTS



JADE MASSIE

How long have you been a member of BCLMA?

1.5 years

Where do you work?

Singleton Reynolds

Where was the last place you visited on vacation?

Las Vegas!

Where were you born? Grow up?

Moose Jaw, Saskatchewan

Have you ever lived abroad? If yes, where and for how long?

Does the US count? Kidding...

Recommend a wine — red or white — for under \$20 a bottle

Apothic California Red

Favourite BC day trip location

Whistler

Favourite place to have lunch during the work week

Black + Blue Patio

Favourite restaurant

Hy's Steakhouse

One thing that not many people would know about you

I have an amazing record collection

Favourite or most recent movie you've seen

The Aftermath

What are you currently reading or what would you recommend as a must read?

The Paris Hours

In my spare time, I like to.....

Beach days, bike the seawall

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

The people and fun office culture

If you could pick a movie title to describe your life, what would it be?

Clueless

SOUNDING BOARD

YOUR BCLMA. YOUR NEWS.

With BC's Restart plan ramping up, hope is on the horizon. Good news is around every corner, and we can't wait to get back to whatever normal will mean again. It seems crazy to think that the next time we all meet, we will actually be face-to-face again! Watch for notifications about our well-being events and our winter social coming soon.

We welcomed three new members to our Board at our AGM in April: Keith Cassidy (Borden Ladner Gervais LLP), Sandra Lowe (Jenkins Marzban Logan LLP), and Kirsten Whitley (McMillan LLP).

KEITH CASSIDY

Keith is the Office Services & Facilities Manager at Borden Ladner Gervais LLP. He's looking forward to learning from and working with the other Board members.

SANDRA LOWE

Sandra is currently the COO of Jenkins Marzban Logan LLP and has held numerous management positions in the legal field. Prior to her transition to law, Sandra was the manager of news and station business operations at Global Television.

KIRSTEN WHITLEY

Kirsten has been a BCLMA member since 2011 and is currently working as the Human Resources Manager at McMillan LLP. Kirsten brings a variety of experience to her new role on the board.

We are very happy to have them join us as we begin the next phase in our strategic planning process. We have re-engaged Vantage Point and have come up with a new plan that continues the great work our previous board started. After revisiting and refreshing our Vision and Mission, the Board settled on three areas of focus for our next plan: Organizational Sustainability, Membership and Engagement, and Enhanced Technology.

Speaking of Enhanced technology, as mentioned at our AGM, we have terminated our contract with our previous website vendor and have begun the process of working with someone new. We are pleased to be engaged with New Media Syndicate, with whom the association has a long-standing history as our website maintenance and conference site developer. We are hopeful that by the end of 2021 we will have a new website to share with you all. We will provide updates as they become available.

Subsection chairs continue to provide speakers and sessions for our members. Our Facilities group recently wrapped up the Disbursement survey, and there are several other interesting events posted to the calendar to take us into the Fall. We also just had our "Survey Says" virtual summer social, which was a resounding hit. Our Managing Partners' event is scheduled for November 3rd, and we are pleased to have Ken Peacock return to talk about BC's

bclma

2021 Strategic Plan

VISION

A dynamic community of legal support professionals.

MISSION

The BCLMA provides professional development, support, information exchange, and networking opportunities for legal support professionals.



Organizational Sustainability

To maintain stability in finances, governance, operations, and services by proactively responding to the needs of the organization and its members.

Membership & Engagement



To continue to develop our brand, membership, sponsorship, volunteerism, and overall engagement across BC.



Enhanced Technology

Seamless and modernized technology that facilitates easy participation and creates connection for our membership including a consistent virtual platform and a robust website.

economy. With everything we have been through these past months, this is sure to be an informative event.

Our conference committee, under the dutiful direction of Margaret Cividino, is hard at work finalizing the agenda and speakers which should be available by late summer. It is already shaping up to be a great event! Stay tuned for more information and the launch of the conference website. As this will be BCLMA's 50th Anniversary, we are working on making the 2022 conference the best one yet!

As always, we are grateful to you – our membership – our volunteers, and our sponsors. Thank you to all of you for standing by us and we are so excited to see what comes next. Have a fantastic summer!

The BCLMA Board



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BCLMA SUMMER SOCIAL 2021

BCLMA successfully held its first virtual Summer Social on June 3rd.



Sixty members including sponsors logged onto Zoom and had a great time playing “Survey Says”, the uncensored version of Family Feud. Our thanks to JAM Sport & Social Club www.workplayjam.com/ for hosting this inaugural event. Online emcees and hosts Cassidy and Vanessa were terrific and kept us engaged throughout!

We warmed up with some trivia questions before breaking into our highly competitive and good-natured teams. Lorin Birnie from Miller Thomson LLP was victorious as she chose the correct answer to the final question: What was the original cream filling of the Twinkie? Banana cream!

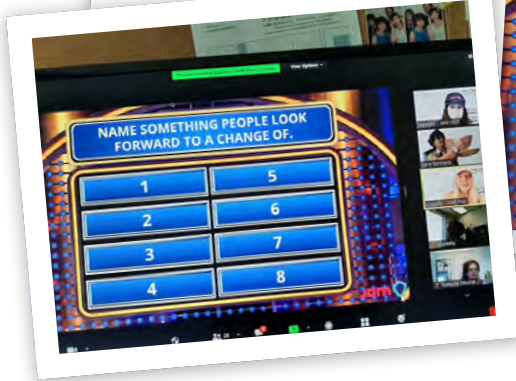
There were many lively debates over survey answers that should or shouldn’t qualify. Some bribery in the form of doled out compliments helped teams gain a few points too.

Teams listed in winning order:

- BCLMA Bandits
- BMC Bosses
- Tikit Titans
- Summer Social Super Stars
- Forge Free Fighters
- Hub Hot Shots
- Shaw Sabey / Metrix Maniacs
- Ricoh Rebels

Winning team members received a Door Dash e-gift card and our generous sponsors donated amazing gift cards to Amazon, Cactus Club, Gourmet Warehouse, Cineplex, as well as some Apple AirPods and an iPad!

Congratulations to all our winners! And a shout out to everyone who joined us online!



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DIRECTORS' REPORT

presented by Naomi Anderson, President, at the BCLMA AGM

In 2020 we delayed our AGM to September but this year we returned to our regularly scheduled spring AGM. This coincides with our conference timelines and our goal of holding next year's AGM at our 2022 conference. More on that a little bit later.

I'd like to thank our Board for their outstanding contribution of time and hard work to our association. To Elizabeth Jackson, Lisa Rennie, Margaret Cividino, Rubyna Jinnah, Dorothy Cheung and Alexa Kingsmith, thank you all very much. I also want to say a special thank you to Lorraine Burchynsky who stayed on as our Past President, which was a new role our Board voted on last year. This amazing group of professionals inspire me every day with their thoughtfulness, intelligence, and drive. We are all very lucky to have them at the helm.

As always, we could not function or even be the BCLMA without the help of our Administrator, Jane Kennedy, and Administrative Assistant, Heather Orchison. We are incredibly lucky to have you both. We thank you and appreciate you more than words can say.

We have three Directors departing the Board in 2021. Elizabeth Jackson, Lisa Rennie, and Margaret Cividino are stepping away from the Board after three-year terms. Elizabeth and Lorraine have been working on our Board governance, an important pillar of our previous strategic plan. With their guidance, we have solidified our procedures and bylaws and I thank them for their dedication and perseverance. Lorraine has also spent these last few months working with our survey committee to recruit a new vendor for our economic survey. Lisa Rennie has acted as Secretary this past year, as well as previously contributing to our Marketing pillar. Her thoughtful ideas and strategic thinking were a huge asset to our Board. Margaret will step down after spending her last term working on the Marketing and Education pillars. Margaret's

background and training made her a perfect fit for this role, and it's truly helped us plot a path forward. We thank all these amazing women for their time and contribution to the Board, and you will all be missed.

However, we have not quite seen the last of Margaret, who heads our 2022 conference committee. She and her team

Most excitingly, this conference falls on BCLMA's 50th anniversary as an association! We will have much to celebrate together. Stay tuned for upcoming conference details, which will be available on our social media platforms and the conference website closer to the date.

are now confirming speakers, themes, schedules, vendors, and just about anything else you can think of when it comes to planning a huge, and what I am sure will be, successful event. The intention is for our 2022 conference to be a hybrid event, with our traditional in-person tradeshow and meals. Most excitingly, this conference falls on BCLMA's 50th anniversary as an association! We will have much to celebrate together. Stay tuned for upcoming conference details, which will be available on our social media platforms and the conference website closer to the date.

The Board would also like to thank our committees and subsection chairs for their dedication during this tumultuous year. Despite all the change we've seen, they've remained steadfast in their contribution to the association, and we thank them all very much. We are always looking for volunteers so please reach out if you are interested in learning more about potential opportunities.

Our sponsors have also stood by us and we are happy to report that we filled most of our sponsorship spots for 2021. We have also had a steady supply of advertising in TOPICS, which is always a great way for business partners to become involved.

One of the most exciting things that happened in 2020 was the wrapping up of our previous strategic plan and embarking on a new one. We have engaged Vantage Point again to help us with this work and are off to a great start. We are working on revising our mission and vision statements to better reflect the work and momentum the association has taken in the last three years, and we are excited to share this with you in the coming months. Our previous plan, which focused on Education, Technology, Marketing, and enhancing our organizational foundation, has been instrumental in helping us achieve many goals for the association. We must be engaged with quality educational

speakers and will continue this as part of our next plan. Our commitment to the association for an interactive and high-quality website is still top of mind and we will work toward completing that soon. We have revamped our social media plan and continue to look for ways to engage with our membership, including games, contests – with PRIZES! – and more. Finally, our governance is well documented and stronger than ever. The work in these pillars is never done, but the way we approach them shifts as we complete goals, and we are very excited to see what comes next.

Finally, we extend warm thanks to our members who continue to stand by us and engage with us year after year. We do this for you, our industry and we appreciate you very much. We look forward to what the next year will hold for us all! Thank you.

bclma



Let's Not Miss the Opportunity to Build a Healthier Workplace Culture

by Megan McAllister, BBA, CPHR, Executive HR Consultant,
Megan McAllister Human Resources Consulting

The average return on investment (ROI) from investing in mental health programs is \$1.62 – \$2.18¹ for every dollar spent. That is an exceptional ROI! The annual economic cost of poor mental health in the workplace in Canada is \$50 billion. The annual indirect cost related to lost productivity is \$6 billion. The business case for more investment in mental health programs is clear and significant.

Then there is the ethical argument. It's been a really tough year (understatement much?). The pandemic has amplified some very real and significant issues people were already facing – wavering mental health and feelings of workplace burnout. COVID-19 has threatened people's fundamental human needs of safety and security,

blurred the lines between life and work, and created additional duties at work and at home - it all adds up to people struggling. The results of this prolonged period of stress will be felt far into the future.

For both business and ethical reasons, it's time to get much more intentional about

creating healthier workplace cultures. More than words on a wall or a commitment statement, organizations need to align the actions and behaviours in their business to truly create a culture of well-being. Let's remember that top talent has choice and wants to work somewhere they feel valued, and can see themselves being happy, healthy, and fulfilled. People care about this whole view of life more than ever. And many people are watching how their workplace chooses to respond to the challenges of this point in time. There is an opportunity to send a strong message, in one direction or another.

So, what does it mean to be a workplace that truly integrates well-being into its culture? Acknowledging mental health awareness weeks and providing baseline benefits such as an EFAP (Employee & Family Assistance Program) are a wonderful start. However, we need a more strategic approach that integrates well-being into how we run our business. Particularly

SAVE THE DATE

BCLMA Educational Presentation

Ignite Your Leadership with the Power of Presence

Guest Speaker: Diane Ross

Date: Thursday, October 7, 2021

Time :11:45 am – 1:30 pm

Location: Terminal City Club

Managing Partners Event

Current Trends in BC's Economy

Guest Speaker: Ken Peacock, Chief Economist & Vice

President Business Council of BC

Date: Wednesday, November 3, 2021

Time: 11:45 am – 1:30 pm

Location: Terminal City Club

BCLMA Annual Winter Social – RECEPTION

Date: Thursday, November 18, 2021

Time: 5:15 pm – 9:00 pm

Location: Sutton Place Hotel

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within the legal environment, with the pressures and client demands, we must be prepared to make some changes to the “standard operating procedures.” Here are some ideas for how to get started:

- Investment in leadership training – “It all starts at the top.” We know this. And a recent study by Deloitte showed that leadership training is one of the areas that gives organizations the greatest ROI when it comes to mental health programs. Offering training to leaders on the importance of creating psychological safety in their teams is one of the most powerful things a firm can do to ensure that people are having a good experience at work and are comfortable coming forward with the reality of their experience. There are lots of great mental health awareness courses directed at leaders. Early intervention means people get the help they need when they need it. Good for people and good for business.
- Check your environment for burnout – workplace burnout is a big issue, with up to 67%² people reporting that they feel it “sometimes” or “often.” Look around –the signs are often clear that someone is at or near burnout. Of course, law firms have a need to meet client demands and yes, there will always be peaks in work. But burnout refers to *chronic*

More than words on a wall or a commitment statement, organizations need to align the actions and behaviours in their business to truly create a culture of well-being.

workplace stress – never getting a break from stress. Is this the reality of your people? Are they intentionally choosing this pace, or do they feel they need to keep it to be viewed as a contributing member of the team? Know that people may not be coming forward to tell you if they are feeling burnout (reference earlier point on psychological safety). Check in on your people and consider whether you have your staffing levels right, at all levels, so that work can be capably completed and on time, without burning people out. Reflect on how your firm can integrate a “rest ethic” that is as strong as your “work ethic” so that people get breaks from those inevitable peak times. And be careful of the message that is sent when people are rewarded for “doing more with less.”

- Think beyond written policy - consider your organizational programs and “unwritten norms” through a mental

health lens. Are they aligned and do they send the right message? For instance, if you offer numerous vacation days, but people never feel they can take the time off, what does that communicate about supporting work/life balance? Have people been treated with respect and dignity if they need to access a medical leave? Are they given choice about what is communicated and how they engage when they are off? Is your firm referring to “medically supported” leaves or “stress leaves”? Know that all of this sends a message.

- Refresh your benefits program and provide proactive supports – can you be more innovative in your benefits offering? Many firms offer supports for when people are in crisis (disability, EFAP, and psychological support). This is important but needs to be supplemented with proactive supports, resources and training for people to manage their well-being. People are struggling with everything that has happened over the last year and the magnitude of change. Provide the tools to help them manage – consider conversations on boundaries, connecting to purpose and values, building resiliency and stress reduction techniques. A great tool to offer is wellness technology, such as a subscription to CheckingIn, a mood

¹ <https://www2.deloitte.com/ca/en/pages/about-deloitte/articles/mental-health-roi.html>

² <https://www.gallup.com/workplace/237059/employee-burnout-part-main-causes.aspx>

tracking app. Your organization will also get confidential aggregated data about how your people are doing – that is amazing insight to have.

More than ever, firms need to show that they “get it”, that they are part of the solution in creating workplaces that are more supportive of the well-being of their people. The business case is clear. Top talent expects more from employers. It’s also the right thing to do. Never waste the opportunity a crisis presents to make necessary changes.



Megan provides senior HR consulting, coaching and leadership services to busy management and executive teams, human resources departments, and business owners on a part-time or as needed basis.

She also provides speaking and facilitations on topics related to creating healthy workplace culture, including mental health awareness, building personal resiliency, and cultivating psychological safety in workplaces. Megan firmly believes that employee engagement and well-being lead to superior results for businesses. Her mission is to create a ripple effect of better workplaces and happier, healthier people.

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Fireside Chats

By Derrick Li with thanks to Jay Cathcart and Leslie Morgan for their contributions to this article

I started my role as COO of Lawson Lundell LLP in January of 2020. I cannot count how many times I heard the phrase “what a time to start a new job in a new industry during a pandemic.”

Recently, I started thinking about what it would have been like to retire during the pandemic. I had an opportunity to catch up with four newly retired BC law firm COOs with a combined 100 + years of legal experience to discuss this very topic and more. Today’s guests are Jay Cathcart and Leslie Morgan. – **Derrick Li**

FIRESIDE CHAT WITH **JAY CATHCART**, FORMER COO OF FARRIS LLP

What was it like going from a very busy day to day role as COO of Farris and to retirement? What have you been up to since retiring?

Our plans were obviously impacted by COVID which meant I spent time cancelling all the trips that we had planned and rescheduling and rescheduling again. I’m surprised a little bit that you go from 100 mph working and then you

start doing other things whether it be projects around the house or golfing more. I have missed the connections and seeing people at work, but I have not missed the day-to-day stresses of work with constant deadlines. As far as the stress of work and not having to deal with the day-to-day stresses, that has not been a difficult step back.

Where did you spend most of your time as COO?

There was a lot to the COO role. This could include anything from negotiating leases, banking, insurance, benefits programs, upgrading computer systems, and various HR and staffing issues. Surprisingly, a lesser focus was on the accounting department. It was really a varied role and involved doing so much more than pure finance. Another big part was dealing with the various Partner issues including onboarding, billing, receivables, and various personal and tax matters.

Based on your experience what makes a good COO and what is the value proposition of the COO role?

The COO is really a critical position. My objective was to do the job as well as the lawyers do their job for their clients. If I’m achieving that same level or better then I’m doing what I’m supposed to be doing and meeting their needs. That was always the way I approached it.

What are some of the top accomplishments you are most proud of when looking back at your legal career?

I would say overseeing the Farris premises project and overseeing construction and the build out, along with the other changes we made to systems at that time. I am also proud of the relationships that were built throughout the years with lawyers, staff, suppliers, landlords, bankers, and other law firm administrators. But looking back, I think I'm most proud of the strong management teams I formed at each firm, and how several of those individuals moved on and advanced their careers within the legal environment.

In your experience what are ways that the COO contributes to revenue and profitability growth?

The monitoring process was critical to ensure lawyers kept on top of all financial aspects of their practice. Every few months I would focus on the billing of WIP with the Partners. Other months I would focus on receivables and working with the Partners on their collection efforts. These efforts helped with the revenue and the collection of it. And at all times the COO must be in control of expenses and know where they are going.

What is something you wished you knew earlier in your career as COO that you learned later in your career?

Interestingly it is more about relationships, particularly with suppliers, vendors, bankers, leasing agents and BCLMA members, as well as lawyers, students, and staff in your firm. Nurturing those relationships adds to your personal growth and helps expand your knowledge in multiple areas.

You were COO first at Alexander Holburn before moving to Farris. How would you compare the two roles in terms of similarities and challenges?

The roles were very similar in terms of responsibilities. At Alexander Holburn though, I was leading and driving a lot of the agenda and presentations to the Partners and discussions. I sat at the head of the table beside the Managing Partner and I would do a lot of drafting the agenda and presenting. Most of the meetings I was running. At Farris that was more the Managing Partner's role. I remember I said something at my first Partners meeting at Farris and a senior Partner came up to me after and teased me a bit and said you actually spoke at the Partners meeting. It was just a different

way of running the Partners meeting. There were more meetings at Alexander Holburn whereas Farris had less meetings and was more on an as needed basis.

How do you think your past Managing Partners would describe you? What was your brand or reputation you were going for?

They would say I had a good memory from an institutional knowledge perspective, whether it was about firm matters, lawyer matters, or even about firm clients. The Partners said that I had a significant impact on the firm, and that I would be greatly missed. Support staff felt a strong connection with me and worried who would take care of them and support them once I was gone. The Partners

would say they were losing someone they trusted and relied on, and who had good judgement. Lastly, that I was diplomatic, maintained confidences, and was responsive, whether to new or senior Partners or lawyers.

Once it is safe to do so what is on the top of your list in terms of vacation destinations?

Our hope is that in September we'll be able to head to Hawaii for three weeks, then in November head to Palm Desert for a month. Next year we're hoping we'll finally be able to take our twice cancelled trip to Europe to visit my brother-in-law and his wife in Spain. Fingers crossed we'll all be able to move about freely and safely in the near future!

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What have you been up to since retirement?

I retired from my COO role right at the start of the pandemic. In fact, my retirement party was scheduled for the week of the shut-down. It was cancelled! We had to postpone our post-retirement vacation plans. Instead, I continued to do project work for Harper Grey working with the accounting department as part of the 'go live' with the Elite 3E project. It was nice to be freed up from the busy COO role to be able to devote time to the project, mostly transitioning reporting to the new database so that users had the same reports for the new software.

What was your path to COO?

I was hired as the Controller at Harper Grey in 2005 and transitioned to the COO role in late 2007.

Many accountants would consider themselves introverts. What was it like to go from the Controller role to a broader leadership COO role that held responsibility for all support areas?

I call myself a situational extravert because I'm definitely more of an introvert, but you learn on the job how to be the extravert that you need to be. It was a learning

process and it took time. However, I had a good relationship with many different people in the firm and that helped a lot. The biggest difference was transitioning from working mainly with numbers to working mainly with people, which is not a natural fit for a lot of accountants.

Based on your experience what makes a good COO and what is the value proposition of the COO role?

Having a close and meaningful relationship with the different component parts of the firm is critical. Being the support for the Management Committee, the managers, the various committees, staff, allows people to feel that they are supported and that you have their backs so that they can focus on the work they what they need to. I viewed the COO role as being the go-to person for issues that don't resolve easily through other means. You're the linchpin.

Let's talk about your Elite 3E conversion experience. What are some of the top lessons you have learned along the way, especially from a change management perspective?

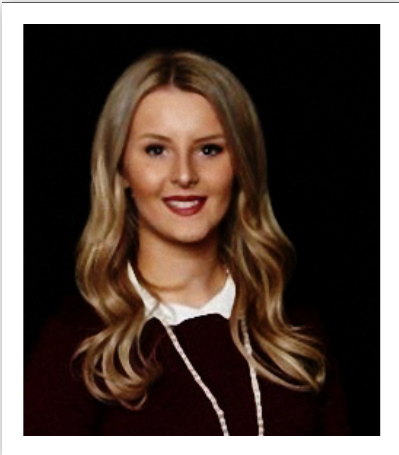
Having the legal assistants on board and feeling like their questions are answered. That the processes are intuitive and doable,

and giving them a lot of encouragement, is critical. They will be the guide for the lawyers. There will likely be a handful of lawyers who are more hands-on, and it is important to get them into pilot groups or decision-making groups. It is also important for the person assigned to manage the conversion data analysis on the firm end to really be on the ball. They need to understand what's going on because that's where a lot of projects fail. The change process involves a lot of process analysis, set up and testing, and the team must be all hands on deck for this part. Also, the software training for people in the firm must be digestible and close enough to when you are going live so they don't lose it all. One of the ways to help with the lead up is to have people on pilot testing groups so they get early exposure to training and then are super users when the software goes live. We tried to make the user experience on the reporting side similar to what the users were used to. This sense of familiarity is very helpful.

How do you think your past Managing Partners would describe you? What was your brand or reputation you were going for?

The Partners felt I was knowledgeable, hardworking, and kind. We never moved far

MEMBER SNAPSHOTS



KELSEA ELGERT

How long have you been a member of BCLMA?

5 years

Where do you work?

Zargar Lawyers + Business Strategists

Where was the last place you visited on vacation?

Las Vegas

Where were you born? Grow up?

Born in Kamloops, BC
Grew up in Logan Lake, BC and Wetaskiwin, AB

Have you ever lived abroad? If yes, where and for how long?

Unfortunately, no!

Recommend a wine - red or white - for under \$20 a bottle

Gray Monk - Pinot Gris

Favourite BC day trip location

My hometown! Logan Lake, BC

Favourite place to have lunch during the work week

At home with my dog, Piper 🐕

Favourite restaurant

All of them! I don't discriminate when it comes to food.

One thing that not many people would know about you

I can't stand touching or hearing the sound of Styrofoam (Styrophobia!)

Favourite or most recent movie you've seen

Molly's Game

What are you currently reading or what would you recommend as a must read?

Verity by Colleen Hoover

In my spare time, I like to.....

Play outdoor sports! Especially golf, softball, or spikeball.

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

Problem solving and taking on new challenges.

away from the idea the law firm is a family and not a business. Part of the culture is being kind and respectful to one another and I felt like I was the torchbearer for that.

Once it's safe to do so what is your top of list of vacation points?

There are many travel destinations we look forward to, starting with New Zealand, Maui, and France of course. Travelling to the UK with my 90-year-old mom is on our bucket list. Having worked for such a long time you never get enough time to travel. I am looking forward to spending a month or two instead of one or two weeks at a time.



Derrick Li serves as Lawson Lundell's Chief Operating Officer and is a member of the Executive Team. Derrick oversees the firm's business and operational functions including Finance, Business Analytics, IT, HR, BDM, Facilities & Office Services, Library Services and Corporate Records. Derrick's business acumen was developed through a career progression that has spanned a variety of roles including external auditor, management consultant, head of enterprise risk management, lean six sigma champion, Chief Internal Auditor, CFO and COO. In 2019, Derrick was recognized as one of Business in Vancouver's Forty Under 40 winners.

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MEMBER SNAPSHOTS



KIRSTEN WHITLEY

How long have you been a member of BCLMA?

10 years

Where do you work?

McMillan LLP

Where was the last place you visited on vacation?

Victoria, BC

Where were you born? Grow up?

Born in Vancouver, grew up in Chilliwack. As soon as I graduated high school I came running back to Vancouver!

Have you ever lived abroad? If yes, where and for how long?

No

Recommend a wine - red or white - for under \$20 a bottle

Grey Monk Riesling

Favourite BC day trip location

Squamish

Favourite place to have lunch during the work week

Most downtown Ramen restaurants

Favourite restaurant

Miku

One thing that not many people would know about you

Growing up, I wanted to be a stand-up comedian!

Favourite or most recent movie you've seen

Favourite - *The Green Mile*

What are you currently reading or what would you recommend as a must read?

The Haunting of Vancouver Island - currently reading - loving it!

In my spare time, I like to.....

Hike, kayak, watch Netflix with my husband (way more than I should)!

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

I love working on projects / collaborating with my National HR Team. I also love coaching and supporting staff/people managers and building those connections.

If you could pick a movie title to describe your life, what would it be?

Stuck on this one!

Red Snapper, Shrimp, and Watermelon Ceviche

By Lil' Deb's Oasis, Hudson, NY

Ingredients

6 ounces medium shrimp, peeled, deveined
Kosher salt
6 ounces highest-quality skinless red snapper fillet, cut into ½-inch pieces
1 jalapeño, very thinly sliced into rounds
¼ cup fresh orange juice
½ cup fresh lime juice, plus more for serving
½ small watermelon, cut into 1-inch cubes (about 2 cups)
½ small red onion, very thinly sliced
1 avocado, chopped
½ cup coarsely chopped cilantro

Chili oil and plantain chips or tortilla chips (for serving)

Step 1

Cook shrimp in a medium pot of boiling salted water until pink on the outside but just barely cooked on the inside, about 45 seconds. Transfer to an ice bath; drain and pat dry. Cut shrimp into ½" pieces and transfer to a large bowl. Add red snapper, jalapeño, orange juice, and ½ cup lime juice; toss to combine. Chill, tossing occasionally, at least 20 minutes or up to an hour.

Step 2

Add watermelon, onion, and avocado and toss to coat. Season with salt; toss in cilantro.

Step 3

Spoon ceviche into a large shallow bowl or divide among bowls. Drizzle with chili oil and more lime juice. Serve with chips alongside.

For more delicious details about this recipe visit [Red Snapper, Shrimp, and Watermelon Ceviche Recipe](#) | Bon Appétit (bonappetit.com)



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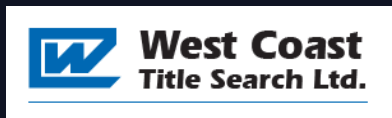
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Watermelon Martini

With thanks to A Couple Cooks

Ingredients:

½ cup chopped watermelon (or ¼ cup [watermelon juice](#))
2 large mint leaves
1 ounce (2 tablespoons) vodka
½ ounce (1 tablespoon) Cointreau
½ ounce (1 tablespoon) lime juice
1 teaspoon [simple syrup](#) (optional)
For the garnish: small watermelon wedge

The watermelon martini is easy to make. All you need is a cocktail shaker and a martini glass. Here are the steps:

- Add the watermelon and mint to a cocktail shaker. Muddle (gently mash) them with a cocktail muddler or wooden spoon to release the juices. (If you're using watermelon juice, simply muddle the mint first.)
- Add the vodka, Cointreau, lime juice and simple syrup. Fill with ice and shake until cold.
- Strain the drink into a cocktail glass. Garnish with a small watermelon wedge, if desired.

For more about this refreshing vodka cocktail, visit [Perfect Watermelon Martini - A Couple Cooks](#)



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