



# OC-ALA's Waves

Fall 2017



Diamond Business Partners



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## President's Message

*Terry Vickrey, CLM*  
OC-ALA Chapter President 2017-2018

Welcome to OC-ALA's 2017 Fall Edition of *Waves*! Please click below to connect to our President's Message video.



## Emerald Business Partners



*Celebrating 40 Years of Providing Exceptional IT Support and Solutions!*



Platinum Business Partners



## The Value of Business Partner Relationships

One of the most valuable benefits of OC-ALA membership is the opportunity to establish relationships with experts in the various areas of goods and services required for the operation and management of today's successful law firms and law-related organizations. Within the OC-ALA chapter and the greater ALA organization such experts are referred to as Business Partners. OC-ALA members and Business Partners form business relationships over time. During that time, both sides of the relationship get to know the other with respect to the particular needs of individual law firms or law-related organizations and the particular resources of Business Partners.

The value of Business Partner relationships is displayed in the high level of service and commitment offered by Business Partners to OC-ALA members and their firms. An example of such service and commitment is the time involved for an insurance-specialty Business Partner to educate an OC-ALA member on the various intricacies involved in evaluating Lawyers Professional Liability (LPL) insurance policies. With such education, an OC-ALA member can understand the often minute differences between policies offered by competing carriers and can then make well-informed decisions on behalf of their firms. Another example of the value of Business Partner relationships is when it comes time to obtain or renew a real estate lease. Having a relationship with a broker that is familiar with a particular firm can save time by allowing a targeted approach based on the broker's knowledge of the firm. An established relationship with a Business Partner allows OC-ALA members the opportunity of having "someone to call" when a need is urgent or otherwise requires special attention. Business Partner relationships established and maintained over time offer tremendous extra value to OC-ALA members.

Below are specific examples of Business Partner relationships value delivered to various OC-ALA members:

- A Business Partner picked up furniture at one member's office and moved it to a second member's office. Simultaneously, the Business Partner picked up furniture from a third member's office and delivered it to the second member's office, all without skipping a beat or missing a deadline. It would be difficult to imagine a non-Business Partner handling such a project so seamlessly and so cost-efficiently.
- The same Business Partner saved the day for a different OC-ALA member by giving the member an opportunity to look at unwanted furniture at another firm after sending photos and descriptions of the furniture to her (it turned out to be exactly what her firm wanted) and then picking up and delivering the replacement furniture to her, and taking the unwanted furniture to the dump, at no cost.

- A Business Partner called an OC-ALA member to say "Hi" and catch up. The member had just been informed that a new partner would be arriving at her firm and would need a new secretary to be hired. The member asked the search firm for a secretary with a particular skill set. Coincidentally, the search firm had just interviewed a candidate with the needed skill set. Interviews were set and a placement was made. If the Business Partner hadn't called or if the member hadn't taken the call, the member would have spent a lot more time trying to find the right candidate.
- An OC-ALA member was called on by her firm to set up a new office in another state, from scratch with little advance notice. The member called on the Business Partners affiliated with the ALA chapter of her new office and succeeded in setting up the new office practically overnight thanks to the assistance offered via the established relationships with the local ALA chapter Business Partners.

These are only a few examples of the resources available to OC-ALA members from OC-ALA Business Partners. Opportunities to get to know Business Partners and listen to how they can help, immediately or in the future, are opportunities to establish relationships that could be lifesavers down the road.

\* \* \*

# Law Firm Leaders Holiday Luncheon 2017



OC-ALA Members, invite your law firm  
leaders and join us for this year's  
**Law Firm Leaders  
Holiday Luncheon**



*Special Guest Speaker*

**Freddie Ravel**

Grammy Nominated Performer  
Legendary Pianist and Business Visionary

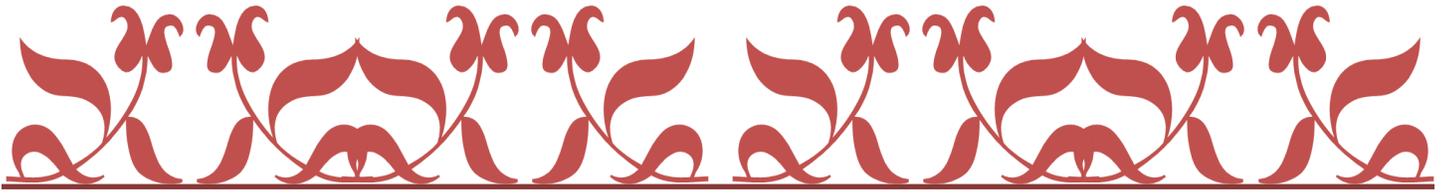


**Tuesday, December 5, 2017**

**11:30 AM - 1:30 PM**

**Center Club, Costa Mesa**

[Register now](#), seating is limited.



A Chapter of the Association of Legal Administrators

## *Business Partner Appreciation Mixer*

*Wednesday, November 15, 2017*

*at 5:30 in the evening*

Join us for another great event full of fun, food and a big **THANK YOU** to our Business Partners who support OC-ALA throughout the year.

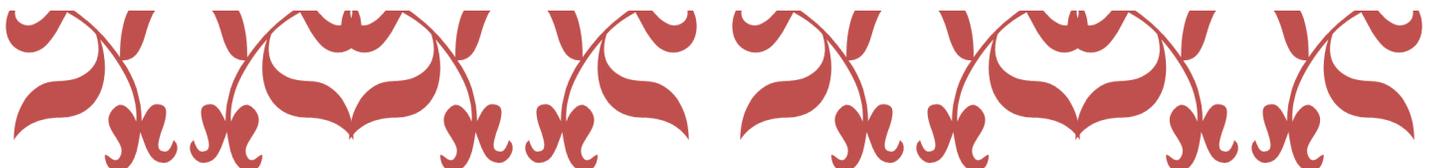
### **BISTANGO ~ Patio**

19100 Von Karman Avenue  
Irvine, CA 92612



[Click here to sign up today through the website.](#)

Last day to register is Friday, November 10, 2017.





**Regional Legal Management Conference**  
West Regions 4, 5, 6  
September 7 - 9, 2017 · Las Vegas, Nevada

★ ★ **Scholarship Winner** ★ ★

Dear OC-ALA Board and Members:

I want to thank you for the amazing opportunity to attend the Regional Legal Management Conference held in Las Vegas on September 7-9, 2017. I was awarded this scholarship which was based on earned points for my attendance at OC-ALA events as well as being a part of the Executive Board. I had a great time at the conference!

First, I must say the dedication of the speakers and some of the members who were from Texas and still managed to make the conference, was nothing less than humbling. The opening speaker had great things to say about being honest, hardworking and most importantly doing it all with integrity. As he said "integrity is most important when you're alone." So true. If we are lacking it when no one is looking, we are lacking it all together.

I was also especially impressed with the very outgoing, very fast speaking, Michael Cohen. He literally had our heads spinning with how much great information he provided on both employee handbook laws and handling employee issues including FMLA and ADA. Time to update those handbooks! He would be a great ACES speaker...hint hint.

With my current remodel in my office, I used the networking and business partner exhibits to target those who sold office furnishings and could assist with my journey of going "paper less." The business partners had great ideas to share, some very cool and resourceful new innovations and overall a wonderful energy among them. As an added bonus, I won a \$50 Amazon gift card from Corodata.

For those members on the fence about attending conferences, they should just do it! I attended my first conference two years ago and now I find myself planning my calendar around them. As the faces become more and more familiar, I am finding I get more out the conference by comparing notes with other administrators.

Again, thank you for the opportunity! Next up, 2018 annual conference in Maryland!

Laurali M. Kobal  
Firm Administrator  
CALLAHAN & BLAINE

Regional Legal Management Conference  
West Regions 4, 5, 6  
September 7 - 9, 2017 · Las Vegas, Nevada

★ ★ Scholarship Winner ★ ★



Thank you to the Chapter and our Business Partners for the scholarship to the West Regional Conference. Before I begin my comments about the Conference, I want to encourage our newer members to consider attending a Regional, Specialty or Annual Conference. It is a wonderful opportunity to obtain education in many areas of law office management. However, of equal importance is the opportunity to meet and get to know your fellow OC-ALA Chapter members and to network with fellow Administrators from all over the country as well as internationally. These relationships will benefit you greatly as you face challenges that are sure to arise. Knowing someone on a more personal level makes that phone call asking for help with a difficult situation easier and more comfortable.

Conferences also provide an opportunity to meet with our supportive Business Partners to discuss current and future Firm needs, discover new technologies to help us work more effectively and to get answers to questions that allow us to be better informed regarding programs and tools we already have in our Firms.

The conference got off to a great start with David Thomas speaking on *Leadership's Indispensable Ingredient*. The focus was personal and professional integrity and its importance. He discussed some of the conflicts we face in acting with integrity, how acting with integrity can sometimes be costly but how important it is to maintain our integrity. His key insight – “Do the right thing because it is the right thing to do.” The concepts were thought-provoking and guided me in self-examination.

My favorite session of the conference was presented by Dean Savoca on the *Eight Attributes of Successful Leaders*. He encouraged us to:

1. Take 100% Responsibility – don't make excuses - which can result in empowerment and Trust;
2. Have a Clear Vision which can result in focus and motivation;
3. Demonstrate Balance which can result in increased energy;
4. Focus on Strengths – know your strengths and those of your team which will result in fulfillment and performance;
5. Do Action Planning which can make us more proactive rather than reactive giving us more freedom;
6. Embrace Courage – take risks and adapt – which will result in growth;
7. Build a Successful Team which will increase efficiency; and
8. Appreciate – practice gratitude, focus outside ourselves which will result in increased happiness.

Thank you again to the Chapter and Business Partners for the opportunity to attend the Regional Conference.

Kathie Jones, CLM  
Administrator  
C.B. JACKSON LAW, APC

# The Annual Chapter Education Summit

is coming to the  
Irvine Airport  
**Hilton**

February 9, 2018

Featured Speakers

**Jennifer McClure**  
Leadership



**Susana Rinderle**  
Diversity



**Doug Wade**  
Employment Law



**ACES**  
at the Irvine Airport Hilton  
February 9, 2018



**Orange County**

*A Chapter of the Association of Legal Administrators*



## 2017 Compensation & Benefits Survey 2017 Large Firm Key Staff Compensation Survey

<http://alanet.org/compsurvey>

**\*\* Now Available! \*\***

As law firm staffing becomes even more competitive, legal professionals need current market intelligence to attract top talent:

- Associate Attorney and Summer Associate positions added
- More staff positions, including specialists for eDiscovery, Privacy and Cybersecurity
- Comparative Salary and Benefits Nationally and Locally with extensive local detail
- Staffing Ratios and Office Best Practices
- Firm Size
- Easy prior-year comparison if you purchase the 2016 report

## To Compare to Last Year, Order the 2016 Report:

### Order Last Year's Final 2016 Report:

Member participant: \$299  
Member nonparticipant: \$399  
Nonmember participant: \$549  
Nonmember nonparticipant: \$759

### Order Last Year's 2016 Bundle

*(Includes Large Firm Key Staff Compensation Survey):*

Member participant: \$449  
Member nonparticipant: \$549  
Nonmember participant: \$689  
Nonmember nonparticipant: \$869

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## Business Partner Spotlight



### THE TRUSTED ADVISOR: FOR LAW FIRMS

As technology and the way we practice law continues to shift, the legal industry remains one of the most information-dependent sectors. While pragmatically addressing your firms' growing technology needs can present a challenge, it's also the best way for your firms to stay on top of your information, manage it intelligently, and protect your clients.

We help thousands of law firms across the nation to leverage technology. Our clients take advantage of best practices gained through a dedicated focus on a law firm's workflows through legal specific services, applications, processes and hardware solutions. The skills and technology expertise shared and deployed within our customer base allows our clients to simply focus on the practice of law.

### ENABLING TECHNOLOGY: SO YOU CAN FOCUS ON THE PRACTICE OF LAW

All Covered is the leading U.S. Legal Technology Solutions Integrator and services provider based on a client centric culture, unparalleled sense of urgency, extensive knowledge of the industry and a best in class service & solutions portfolio.

We help firms design and manage a secure IT infrastructure while leveraging and enabling technology to allow them competitive differentiation with the ability to focus on their core competencies. We have been successfully assisting firms for decades in selecting, implementing and optimizing technology.

### KEY MEMBERS: OF KONICA MINOLTA'S LEGAL TEAM



**Hayden Greene**, studied Business Accounting at the University of Kansas and has been with KonicaMinolta for two and a half years. By strategically aligning people, processes and technology; Hayden has helped legal firms of all kinds successfully reduce costs, improve processes & productivity, remove operational burdens, and transition to new technologies.

(714) 688-7769    hgreene@kmbs.konicaminolta.us

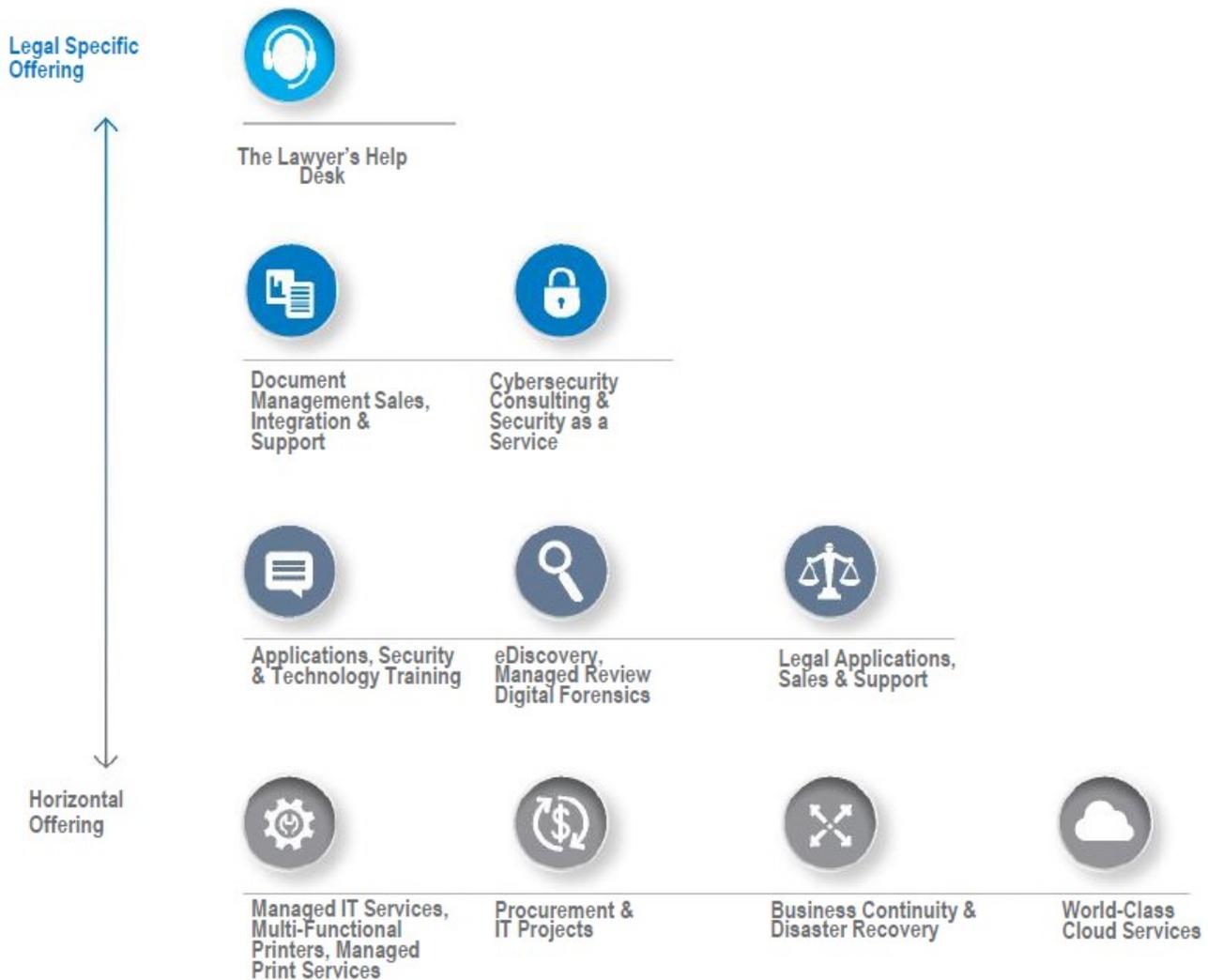


**Scott Svehlak**, MBA is a Technology Consultant with over 30 years of professional experience focusing on supporting law firms with technology solutions and services. Employed by Konica Minolta in the All Covered IT Services – Legal Vertical, Scott brings a wealth of knowledge and business experience to the legal marketplace helping Administrators bring security and efficiencies to their stakeholders with best in class technology solutions.

(949) 973-1317    ssvehlak@allcovered.com

## MORE THAN MSP: LEGALINTEGRATOR

Running a law firm in today's world requires the utmost attention to detail, timing, prioritization, economics, and firm management. It's important to view your internal IT infrastructure the same way: numerous moving parts that must work in tandem. As a legal integrator, All Covered enables firms with an end-to-end portfolio containing secure & stable technology services that allow legal departments to focus on core competencies.



Konica Minolta Business Solutions U.S.A., Inc. is reshaping and revolutionizing the Workplace of the Future™ ([www.reshapework.com](http://www.reshapework.com)). With our comprehensive portfolio, we deliver solutions to leverage mobility, cloud services, and optimize business processes with workflow automation. Our All Covered IT Services division offers a range of IT strategy, support, and network security solutions across all types of businesses. Konica Minolta has been recognized as the #1 Brand for Customer Loyalty in the MFP Office Copier Market by Brand Keys for 10 consecutive years and is proud to be ranked on the Forbes 2017 America's Best Employers list. Konica Minolta, Inc. has been named to the Dow Jones Sustainability World Index for five years in a row. We partner with our customers to give shape to ideas and work to bring value to our society.



## OC-ALA Administrator Spotlight

### Debi Sanders

Debi Sanders is the Office Manager at Schilling Law Group, P.C. She is responsible for the firm's recordkeeping, billing, and the firm's day-to-day operations while continuing to provide secretarial support to five attorneys.

Debi started her legal career in the '80s. Dorsey Windhorst, located in Minneapolis, MN, was looking for secretaries with good secretarial skills and provided training to become a legal secretary. Debi applied and got the job. A year and a half later, Debi moved back to California and got a job with Latham & Watkins. Debi has been Office Manager at Schilling Law Group for two years.

Debi believes her position has provided her with an incredible opportunity for growth. It is always interesting and she gets to work with a great group of women. Debi enjoys all aspects of her position, challenging or otherwise, and feels very fortunate to have been given this opportunity.

Many of Debi's current responsibilities are new to her. Her greatest challenge is finding the time to get better educated in each area of her job. Every day brings new challenges. Debi feels she is extremely fortunate that whatever obstacles may be present in any given day, the support from the attorneys she works with helps to see her through. She also receives great support from outside vendors who are willing to impart their vast knowledge in the areas of which she is less experienced.

Debi's family moved from Illinois to California when she was four years old. The family settled in Huntington Beach, where she grew up. Her father was an engineer and her mother stayed home and had the more difficult job of raising four kids. Debi says her mother was an amazing mom and woman, and later in life was her best friend. Her father had an incredible work ethic, which provided a great example for her in life. Both of her parents have passed, but their values and the family traditions they established live on in each of their children.

Debi believes there is something to admire in everyone she meets and that there is something to learn from each one. However, there are three people at the top of her list. First, is Debi's husband. He is the most honest, caring, decent, non-judgmental person she knows. Because of him, she is truly a better person. Second, Debi admires her mother. Her mother always taught her to believe in herself even when others didn't. Third, is Debi's sister. She has risen above many challenges in her life and has come out on top. Her strength and perseverance is an inspiration to Debi.

Debi loves to spend time with her husband, two dogs and cat. She likes working out and gardening. Her hobbies include refinishing furniture, painting, and anything that is creative.

\* \* \*



## **ALA Legal Marketplace**

<http://legalmarketplace.alanet.org/>

*Your Connection to Knowledge, Resources, and Networking*

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### ***SEARCH AND FIND*** - YOUR NEXT BUSINESS PARTNER

- ALA Exhibitor 2016
- ALA Exhibitor 2017
- Business Operations & Management
- Facilities
- Finance & Accounting
- Human Resources & Employee Benefits
- Intellectual Property
- Marketing & Business Development
- Practice Management
- Technology
- VIPs Directory



## **OC-ALA Administrator Spotlight**

### **“Cindy” Jia Liu Caruso**

Cindy Jia Liu Caruso is the Legal Administrator at Smith & Silbar, LLP. She has been an office/legal administrator for three years and was previously a legal assistant for six years.

Cindy started as a part-time legal assistant in Irvine during college and enjoyed supporting the attorneys and being part of a cohesive team. It wasn't until she met her husband, an attorney, that she started getting more interested in law and furthering her career in administration and human resources.

Cindy likes that every day brings new challenges.

Cindy was born in China and raised in the mid-west. She was recently married in February. She and her husband have three dogs -- two of them are senior rescues.

Cindy enjoys spending time with her family, baking and cooking.

Welcome to OC-ALA! We're here to support you!

\* \* \*

## **Large Firm Principal Administrators Retreat**

**August 2-4, 2018**  
**Hotel Del Coronado**  
**San Diego, California**

The Large Firm Principal Administrators Retreat is the place where leaders from law firms of 100 or more attorneys come together to learn best practices and gain actionable insights that they can immediately leverage to master the challenges facing large firms today.

You will draw from the experiences of high-caliber participants to gain new insights for addressing changes in the business of law. Case examples and discussions with other accomplished law firm executives will be used to present theory, conceptual knowledge and real-world application. This combination provides an unparalleled learning experience in a comfortable, open environment.

# Thank You to our Business Partners

for sponsoring our September Networking Event

**Sushi Rolling and Sake at Ten Asian Bistro**



# September Networking Event Sushi Rolling & Sake





## ALA Career Center / Job Bank Overview

The ALA Job Bank is an online job bank that connects law firms, corporations, governmental agencies and similar professional service organizations and recruiters with prospective candidates for non-lawyer positions. The job bank service offers two convenient ways to link employers and recruiters to potential employees:

<u>Employers</u>	<u>Job Seekers</u>
Employers and eligible recruiters can advertise position openings and search through online resumes to find qualified candidates.	Legal management professionals and legal support staff can post their resumes online in either a public or confidential manner. Job seekers also have the ability to search through job advertisements placed by employers.

The ALA Job Bank accepts and posts ads for legal management and administrative positions, as well as support staff positions such as legal secretaries, legal assistants, paralegals, law clerks and other non-lawyer positions. Job advertisements are also available for positions in professional service organizations (such as consulting and accounting firms) that require skills similar to those of a legal administrator or functional specialist. ALA accepts ads from individual employers and eligible recruiters, but is not currently posting ads for lawyers, or for management positions in service industries and retail settings.

**To Learn More Go To:** <https://my.alanet.org/careers/current.asp>



## *Thank you!*

Music is magic. As Tom Petty once said, *“Music is probably the only real magic I have encountered in my life. There's not some trick involved with it. It's pure and it's real. It moves, it heals, it communicates and does all these incredible things.”* Well, what a magical night we had at the House of Blues for our *Night of Harmony: Making a Notable Difference* event. We did make a difference. You could see the joy in the faces of the children and their parents. Now they can all say they played at the House of Blues! That experience will provide a lifetime of therapeutic memories for these wonderful children. Simply amazing.

I wanted to take the time to thank each and every one of you who supported our 2017 OC-ALA Community Connection event by sponsoring, attending, or donating to the cause. We needed your help to make it successful and you came through. The children at Orange County Children’s Therapeutic Arts Center and Acoustic for A Change will be forever grateful for our positive impact on their lives. The children’s performances were wonderful. The OC-ALA band had a great time preparing and performing for the cause and FlashPants entertained us to the very last second. An incredible night of music and caring.

The real gift is in the giving and I thank you from the bottom of my heart for your generosity. The charities received a lot of promotion in the legal community and perhaps some of you will find it in your heart to sponsor a kid at OCCTAC or donate a musical instrument to Acoustic For A Change to continue the mission of giving underprivileged kids instruments and a musical education. When people pull together and bring their talents, they can produce something bigger than themselves, something more pleasing than the sum of their individual parts. They find Harmony and get in tune with the world around them. We can all be proud of having accomplished that.

Please find the attached links to photos from the event. FlashPants provided some “selfie” photos on their site and Lisa Baker of Lisa Renee Photography provided the Chapter many photos to remember the night. View their galleries to download and print your own special memories of the night. Thanks again and remember that life without music would "B" flat.



Terry Vickrey, CLM  
OC-ALA President 2017-2018

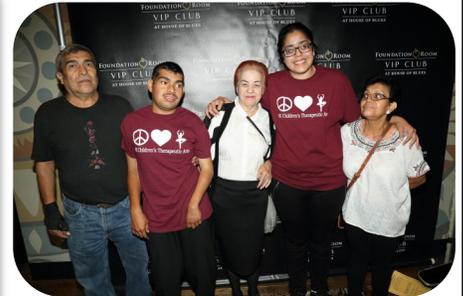
[FlashPants 'selfies' Photos](#)

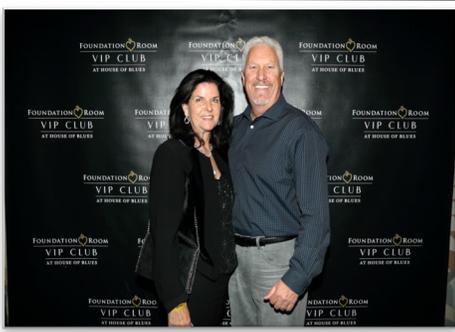
[Lisa Renee Photography](#)

# Community Connect Event 2017

## *A Night of Harmony: Making A Notable Difference*

OC-ALA Supporting Acoustic for a Change &  
Orange County Children's Therapeutic ARTS Center





## Silver Business Partners

ADAMS & MARTIN  
Group



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# Confronting Addiction in the Law Firm

A recent study reveals the extent of substance abuse and mental health concerns within the legal profession. Here's what you can do about it.



**LINK CHRISTIN, JD, MA**  
LADC Executive Director,  
Legal Professionals Program  
Caron Treatment Centers

In 2016, *The Journal of Addiction Medicine* published a groundbreaking study by Hazelden Betty Ford and the American Bar Association Commission on Lawyer Assistance Programs: "The Prevalence of Substance Use and Other Mental Health Concerns Among American Attorneys." Although it has been commonly presumed that the legal profession had a heightened rate of these problems as compared to the general public and other professions, nobody expected the numbers — reported by only active, practicing attorneys — to rise to the level that they did. It has now been clearly revealed as a full-blown crisis that cannot be ignored. We will detail the findings of the study and its potential consequences, while providing insight into the disease of addiction itself and how it presents itself in a law firm setting. Further, it will provide strategies and tools for handling both present-day concerns as well as suggestions for prevention of these problems and a necessary shift in law firm culture, from accountants and consultants themselves.

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## THE STUDY EXPLAINED

Although it's been commonly accepted knowledge for decades that attorneys have a high rate of alcoholism, little data and research had been generated since the 1990s. The research conducted at that time was limited in scope, but it did conclude that lawyers had approximately twice the rate of alcoholism and at least three times the rate of depression than the general population. The authors of those findings called for additional research about the extent of alcoholism and depression among practicing U.S. attorneys; however, until now, none had been forthcoming.<sup>1</sup>

In 2014, Hazelden Betty Ford (HBF) and the American Bar Association (ABA) Commission on Lawyer Assistance Programs funded and initiated an evidence-based study to ascertain rates of substance abuse and other mental health concerns among attorneys, the prevalence of these concerns among licensed attorneys, their utilization of treatment services, and what barriers existed between them and the services they may need. The study was published in *The Journal of Addiction Medicine* in the January/February 2016 issue.<sup>2</sup>

A total of 12,825 licensed, employed attorneys from 19 states returned a number of questionnaires specific to alcohol use, drug abuse, depression, anxiety and stress. All of them completed the Alcohol Use Disorders Identification Test (AUDIT). The first three questions of that test are objective questions that concern how much and how often an individual drinks. The remaining seven questions are more subjective and address whether the individual has failed — as a result of drinking — to meet individual expectations, caused any injury, had periods of drinking more than intended, has needed a drink in the morning to function, has failed to remember a specific drinking episode, has felt guilty about drinking, or had friends or family express concern about alcohol use. Based on the answers to the first three questions alone, an astounding 36.4 percent of the responding attorneys could be characterized as hazardous

drinkers — more than 3.5 out of every 10. In a similar test given to doctors, only 15 percent who answered the first three questions were characterized in such a manner.

When all 10 questions are considered, 20.6 percent of all the attorneys were still determined to be problem, potentially dependent drinkers. Significantly, this compares to a rate of 11.8 percent for a broad, highly educated workforce screened with the same measure.

Not enough attorneys responded to the drug-use questionnaire to permit any scientific conclusions in that respect. However, this is meaningful because the anecdotal knowledge of the profession underscores systemic use of opioids, sedatives and stimulants, often in conjunction with alcohol. These either constitute separate instances of addicted impairment or, when used with alcohol, dangerous and medically counter-indicated use.

Attorneys were found to have a greatly heightened rate of depression (26 percent) — about four times the national average — and high rates of stress (23 percent) and anxiety (19 percent). It is also interesting to note that 46 percent of all the responding lawyers reported that they had experienced significant depression issues at some point in their careers. Likewise, 61 percent revealed experiencing high levels of anxiety at some career juncture.

Other findings were equally provocative. The study concluded that younger age predicted higher frequencies of drinking and quantities consumed. Attorneys in their first 10 years of practice experience the highest level of problematic use, as do attorneys under the age of 30. Law firms — along with bar associations — have the highest level of use; within a firm, the junior associates have the highest, followed by senior associates, junior partners and then senior partners.

Of the responders who acknowledged problematic alcoholic use, more than 40 percent indicated that such use began either prior to or during law school.

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## THE CONSEQUENCES

*The Journal of Addiction Medicine* study concluded that “although the consequences of attorney impairment may seem less direct or urgent than the threat posed by impaired physicians, they are nonetheless profound and far-reaching. As a licensed profession that influences all aspects of society, economy, and government, levels of impairment among attorneys are of great importance...”

In respect to the anticipated readers of this article, the consequences are exponential in terms of actual and potential damage. Clients approach law firm personnel with problems that can be life-or-death (capital defense). And others can certainly feel that way when related to business, estates, families, custody, health, finances, physical safety, civil rights, employment and property. And lawyers are paid by clients for their clear and robust judgment — the first attribute to desert an impaired attorney.

Although the damage lawyers may do is not as visceral as an impaired doctor botching a surgery or a pilot crashing a plane, it is nonetheless life-altering for most, if not all, of their clients.

And the law firm itself is at risk the moment one of its lawyers or staff perform services while impaired. Client relationships and trust are jeopardized. There is an enhanced potential for malpractice. The team or practice group of which that individual is a member is compromised. Productivity and quality of work decreases rapidly. Ethical issues are raised and rules of professional conduct often breached. The investment in that employee is potentially lost.

The loss in productivity due to alcoholism alone — in law offices as well as the floors of industrial plants — is calculated to be in the billions of dollars.<sup>3</sup>

Up to this point, law firms have typically not proactively addressed this issue. Unlike doctors and pilots, who are provided a structured and

lengthy path back to work, lawyers are often discarded when their addiction issues become unacceptable. They may be terminated, bought out, make a lateral move to another firm or even die. But unless the lawyer is a key rainmaker in the firm, it is rare that an attorney will admit their disease and be provided a secure path to return to the firm.

Attorneys routinely hide their addiction or mental health issues — often for decades — rather than admit and treat a problem. There is still a stigma in this field about these conditions, and often one does not know what is really going on with the partner next door.

The most profound impact of this study is that it reveals why attorneys will not ask for help and treat their conditions, while highlighting the actual numbers of lawyers hiding, in pain and isolation, behind the curtain. The two common barriers to treatment reported by the respondents were 1) not wanting others to find out they needed help, and 2) concerns regarding privacy and confidentiality.

In addition, employees of law firms are competitive, concerned for their reputations, and used to being the problem-solvers. They do not want to show weakness, and they tend to have strong egos. Add this to the overall “normalized” drinking culture of law firms — from client dinners to retreats to bar events — and a toxic breeding ground emerges.

## UNDERSTANDING ADDICTION

In order to understand the study and the behavior of impaired peers in a law firm, it is essential to know what addiction is and how it is typically manifested in that environment. An understanding of this misunderstood disease is also critical to make necessary changes in firm culture and to appropriately confront the attendant stigma, behaviors and dangers.

Addition is a primary, chronic and progressive disease of the brain’s reward, motivation, memory and related circuitry. It causes

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compulsive alcohol or drug-seeking and use, despite harmful consequences to the addict and those in proximity. Over time, the brain continues to change, and self-control and the ability to resist substances is further eroded. Genetics and biology are now understood to account for at least 50 percent of the cause, with factors such as environment, development and mental health playing additional roles.<sup>4</sup>

Although addiction is a chronic disease in a class with others such as cancer, diabetes and hypertension, its symptoms manifest as behavioral in contrast to the more objective symptoms of those other conditions (often identified through blood work, X-rays, biopsies, etc.). The behaviors associated with addiction also tend to be negative and antisocial, further complicating not only the diagnosis but the perception of peers. It is not uncommon for both the addict and his or her family and friends to moralize when these symptoms appear, and feel frustration and contempt due to a perceived “lack of willpower” or a loss of moral direction.

The brain of the addict is often referred to as having been “hijacked,”<sup>5</sup> and the result is often systematic denial of any problem by the addict and the creation of a “private logic” telling the addict that everything is fine. Often this presents with addicts comparing themselves to others at a more advanced stage and believing they are not a “real addict,” or blaming their drinking on other factors, such as: “You would drink too if...”

A simple example is a cancer diagnosis. People are told by the doctor what the test results were, begin treatment, and have the support of family, friends and perhaps even a CaringBridge. In contrast, alcoholics who finally begin treatment (if they even do) have often angered their family, employer and friends, and are virtually alone and isolated. During a speech, I once asked all 200 patients at Hazelden Betty Ford if any of them had a CaringBridge for their condition. The audience was silent.

Addiction cannot be cured, but it can be successfully treated, typically with the assistance of professional help or support organizations.<sup>6</sup> Clinical resources can range from residential treatment to outpatient groups and sober houses. Support groups can include abstinence-based programs such as Alcoholics Anonymous, less spiritually based organizations, and harm-reduction frameworks. When alcoholics accept treatment, they are said to be in recovery — the process of change through which an individual achieves abstinence and improved health, wellness and quality of life. As with other chronic diseases, it is essential to receive help and support from others, make fundamental lifestyle changes and alter many core values.

The first year of recovery is the most demanding for the addict. Often, he or she must make accommodations in career or life in order to make recovery the first priority. This is why the treatment of the disease and the return to work — or the continuation of work while now sober — is often key to building a foundation of sustained recovery.

Alcoholics are told that in their first year of abstinence their recovery must come first, above anything else. Relapse during that year is not uncommon, but it does not indicate that things are hopeless. Rather, it is a message that the addict must get back on track with treatment and recovery resources. The same is true with all chronic diseases, where only 50 to 60 percent of patients typically comply fully with their treatment protocol.<sup>7</sup>

If the law firm can support its employee in recovery, the benefits can be breathtaking. Not only will the employee no longer be performing at a diminished and erratic rate, but also they can become better than ever. It is likely that this employee’s attention and judgment has been compromised for some time, and it can be exhilarating for both the impaired individual as well as the firm to heal cognitively and physically and return to the level of competence for which they were hired.

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## THE ALCOHOLIC IN THE LAW FIRM

This study tells us about the stark reality of impairment and mental health discord behind the closed doors of our law offices. But as discussed earlier, the attorney or staff member will often conceal or deny any problem, even in the face of overwhelming evidence to the contrary. How can you identify somebody at your firm (including yourself) with a problem? And what does a “high-functioning” alcoholic look like? Why are they often invisible to their colleagues?

Numerous warning signs are consistent with an impaired employee who has a drinking problem. Before listing many of these typical signs, a word of caution: Many of these can be due to reasons besides a substance use issue. They can be due to mental health issues, situational life matters (divorce, money problems, family situation), physical challenges and various other reasons. It is important not to “diagnose” any particular situation, but to help yourself or another by addressing the matter openly, and then, if appropriate, seeking expert consultation or assessment.

The goal is simply for you and your coworkers to be healthy and productive and to provide (or access) support to help treat the temporary or chronic condition. The key is that further consequences and damage — to all concerned — do not occur, and that the individual can begin to get better and heal. If you or the individual refuse to be treated accordingly, then at least the law firm has assisted to the extent possible. Decisions can then be made as to the current and anticipated job performance.

Some specific possible warning signs of a drinking problem at the firm:

1. Isolation
2. Change in regular patterns
3. Disappearing at unexpected times

4. Lots of excuses for unexplained issues
5. Change in physical appearance
6. Significant weight gain or loss
7. Red eyes
8. Lots of breath mints or mouthwash
9. Becoming defensive when not appropriate
10. Change in behavior — advent of fast talking, loud talking, loud laughter, extended periods of silence
11. Mood swings
12. Lateness
13. Decrease in productivity
14. Confused thinking
15. Forgetfulness
16. Being tired all the time
17. Looking tired
18. Extended breaks, lunches
19. Leaving early, working from home
20. Strained relationships with coworkers
21. Increased irritation
22. Borrowing money
23. Unplanned “emergencies”
24. Missed deadlines
25. Unsteady gait
26. Strange breath; smell of alcohol or something different
27. Lack of concentration
28. Misses work on Mondays or leaves early on Fridays
29. Avoids interactions

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30. Door that was always open is now always closed

31. Inappropriate episodes of sweating

32. Unexplained bruises, injuries

But what if the addicted staff member is a high-functioning alcoholic and does not change routine or behavior? Up to 50 percent of all alcoholics are described in this manner,<sup>8</sup> and lawyers and those in a law firm are especially skilled at concealing and manipulating the reality of their lives. Those individuals are adept at hiding their addiction and presenting as fully functional people for up to decades, while secretly engaging in addictive behavior.

In fact, lawyers in particular will hold onto their careers for dear life because often it is how they identify themselves — addiction often takes away family, friends and health before the surrender of the career.

Because the disease is progressive, “hiding” it is not sustainable. Often the worst consequences and damage are suffered at this moment. Further, by that point, the individual has often reached a pinnacle of authority and autonomy that permits even greater isolation and less accountability — and enhanced danger to all involved, including the law firm.

I have gathered together a list of certain traits of a high-functioning alcoholic that may be helpful in viewing yourself or others at the firm:

- Does not appear as prototypical stereotype
- Has very high tolerance and seldom, if ever, appears intoxicated
- Drinks expensive wines or liquors
- Shows up for work, has a family, fulfills obligations
- Does not drink more than others at public functions but privately drinks to excess — often before and after such functions

- Still looks terrific
- Overachiever in most areas and uses this skill set to sell others that there is not a problem
- Often very successful
- Able to compartmentalize easily
- Has tried to quit (privately) on numerous occasions, but has never succeeded
- Has not had a driving under the influence (DUI) infraction, been arrested, exhibited inappropriate behavior, engaged in any public display or shown significant obvious physical infirmity
- Often can work alone without accountability to others
- Blends into a firm culture of drinking and a “work hard, play hard” mentality
- Always finishes a drink
- Secretly craves and obsesses over use and next drinking opportunity, but does not verbalize this to others

Once again, this is not an invitation to play Sherlock Holmes, but rather to gain some insight into how this powerful brain disease can transform the best of us into strangers. We try to hide the disease because we are more afraid of the stigma than we are of the disease itself (and its eventual fatal progression). This, of course, is not logical, but explains both the mystery and power of addiction.

## HOW TO CONFRONT ADDICTION IN A LAW FIRM

What do you do if you believe a colleague is impaired to the point where the work product and behavior are negatively affected? This person may not even drink at work or during the day, but it is clear to you that their drinking (or drug use) has compromised their

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professional performance.

If there is not a crisis, you may wish to approach the individual in a relaxed and compassionate manner and express concern, or ask questions. Based on the response, you can consider the next step. Remember, you are not diagnosing — only trying to ascertain if the behavior is temporary and being appropriately treated, or, if more serious, that resources can be accessed to address the issue.

Your law firm might consider putting a series of protocols into place that make it safe and comfortable for you or the impaired individual to confront the situation and receive expert assistance. The firm may wish to consult ahead of time with any variety of experts: human resources, the employee assistance program (EAP), interventionists, treatment centers, recovery coaches, addictionologists, detoxification facilities, therapists or other counsel. Ethical rules and responsibilities may come into play, and counsel should be consulted.

The only thing you can do wrong is to do nothing at all. Ignoring the situation only permits the individual's disease to worsen and assures far more damage to the individual, the family, the law firm, the client and your professional standing.

This is an entirely different matter than detecting an issue with a friend or relative: in this case, you are the professional peer of the impaired person, with fiduciary duties to your firm and client and ethical obligations to your profession. On a personal note, this is your colleague, often your friend, and whether your firm is 6 employees or 600, a member of your team.

A couple of other observations: First, do not enable or hide anything in order to assist the impaired individual in covering up any matter. This is likely an ethical violation, and it is certainly a clinical misstep. Alcoholics will only get worse if their behavior is enabled (there are

hundreds of books about this codependency). Second, do not gossip about situations such as these. As a member of law firms for more than 20 years, I am not naïve about the steady flow of juicy gossip in any firm. However, this is truly a matter of life and death, and there can be unintended consequences of such gossip that are unpredictable.

Finally, if there is an actual crisis in the workplace with the impaired lawyer or staff member — in the office, in court or with a client while under the influence — it is helpful to have a basic emergency template to guide the firm in how to proceed. The same is true for fire or weather or health emergencies, and should be in place for these types of matters. A few suggestions as to content:

- Get the employee to a safe and secure place.
- Have at least two people present.
- Make sure the individual is mentally, physically and psychologically safe — utilize professionals at this point who are part of this protocol.
- Know who to involve and notify at this point and to whom to release any information about this event.
- Make sure confidentiality remains paramount.
- Document everything.
- Have a plan for what to do if the individual will not cooperate and leaves.
- Create at least a short-term strategy with the assistance of necessary experts.
- Safety is essential for all concerned — do not permit the individual to drive home.
- Suspend the employee with pay if appropriate.

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## BUILDING A CULTURE OF PREVENTION, WELLNESS AND SUPPORT

The staggering numbers in this study, which suggest that as many as 500,000 practicing lawyers are problem drinkers and close to 400,000 suffer from depression, will not be decreased with a tweak here or there. And the study does not even include those employees and staff of law firms subjected to many of the same stresses and demands. Many of the qualities that reward today's attorney — a competitive spirit, high self-esteem, emotional detachment, an analytical skill set, high verbal skills, a win-at-all-costs mentality — are precisely the same ones that block the road to recovery.

What is required is a seismic shift in culture. More than just a refusal to toss the sick aside, we need a realization that it is in the best interests of the law firm to promote and sustain a culture of wellness and balance.

Much of the corporate world has come to this realization. Working hours of employees have been limited. Access to company emails on weekends has been denied. Company cafeterias have become nutritionally balanced. Gyms have been built, and yoga classes offered. Seminars on health topics have been provided, and incentives for good health have been offered. Working from home has been restricted. Additional leave has been created. Sabbaticals have been implemented. Counseling services have been supplemented. These corporations (and their insurers) have recognized that a lack of balance results in both physical and mental states that impair employees and often shorten their tenure.

By way of example, here some initial suggestions on how law firms might begin this process:

- Invest in resources and services to enhance the wellness of all employees.

- Provide speakers and materials about balance and wellness.
- Educate all personnel about stress, anxiety, depression, opioids, sedatives, alcohol, burnout and addiction and tools with which to confront or prevent problems in connection with them (with CLE credits).
- Host nonalcoholic professional events and gatherings.
- Create a retreat that focuses on learning balance, relaxation, stress-reduction, meditation, team-building and breathing techniques.
- Partner on healthy initiatives with your HR department, Employee Assistance Program (EAP), health care and malpractice providers, state lawyers' assistance program and other industry experts.
- Lower the minimum billable hours requirement and set a maximum.
- Create specific policies that permit employees to seek help for addiction or mental health issues without concern for their job security.
- Provide a back-to-work plan and path for any employee who has received help for such a problem and is treating that condition. The plan can include monitoring and accountability so that all parties can be assured there is no danger to the client or the firm, and specific conditions can be set in the event of a relapse by that employee or a failure to improve job performance.
- Use this model as a recruiting tool for law students and other lawyers and staff.

The profession itself has much it can do, and that is a topic for another day. However, within the law firm itself, change can begin. Today thousands of productive law firm employees are treating chronic illnesses and mental health conditions and are assets to their firms and

clients. It is the hundreds of thousands of attorneys and others who are working with untreated addiction or mental health issues who suffer daily and pose untenable risks to others.

Certainly the best minds in our country — our most talented problem-solvers — can crack the stigma that prevents them from asking for help while at the same time building a business model that sustains productivity and personal satisfaction.

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## ABOUT THE AUTHOR

**Link Christin, JD, MA, LADC**, is the first Executive Director of the Legal Professionals Program at Caron Treatment Centers. He is currently launching and managing this national program, which will provide pre-entry, residential, and post-residential educational and clinical services to lawyers, judges, law students, and paralegals admitted to Caron. Part of these services will include coordination with law firms, disciplinary boards, licensing and admission agencies, and state lawyer assistance programs (when agreed to by the patient). Most recently he served as the Chief Executive Officer of Heightened Performance LLC, a behavioral health consulting firm serving the legal community. After decades of practice as a trial attorney Christin obtained his master's degree in Addiction Counseling and founded and directed the Legal Professionals Program at Hazelden Betty Ford.

lchristin@caron.org 610-743-6562

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OC-ALA is proud to welcome and acknowledge its newest members. We're honored to have you as part of the Chapter and look forward to working with you.

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e: cliu@smithsilbar.com

### **Debi Sanders**

Office Manager  
*Schilling Law Group, P.C.*  
1100 Newport Center Drive  
Suite 250  
Newport Beach, CA 92660  
p: (949) 760-6120  
e: debi.sanders@schillinglawgroup.com

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100 Spectrum Center Drive, Suite 800  
Irvine, CA 92618  
p: (949) 450-4426  
e: ann@ncbs.biz

# Happy Anniversary - 4th Quarter 2017

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<i>September</i>	Patricia Yeckel, EA	33 years
	Sharon Tamani	22 years
	Stacy Morrison, CLM	18 years
	Trudy Levindofske	10 years
	Wendy Rice-Isaacs, CLM	5 years
	Lisa Waligorski, CLM	2 years
	Brandi Lopez	2 years
	Patricia Grenner	2 years

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<i>October</i>	Shawn Derfer	22 years
	Sheri Clifton, CLM	22 years
	Shannon Barker	11 years
	Karen A. Kubani	9 years
	Renee Duran	6 years
	Elsa Robinson	6 years
	Michael Shuff	4 years
	Joanne Mahaffey	4 years
	Christine Wilbur	2 years
	Kelly Hess	2 years

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<i>November</i>	Marilyn Hodges	38 years
	Rich Boden	38 years
	Lavon DeGraw	38 years
	Margaret Lovig	38 years
	Marilyn Philipp, CLM	34 years
	Shannon Avery	28 years
	Janet Rossman	26 years
	Janel Ozar, SPHR, PHRca	16 years
	Connie Jedrzejewski	13 years
	Janet Proudfoot, CLM	13 years
	Janelle McPoland, CLM	11 years
	Kathryn Joy Uy	6 years

# OC-ALA's Calendar of Events

[www.OrangeCountyALA.org](http://www.OrangeCountyALA.org)

Thursday, November 9, 2017 | [Board Meeting](#), Irvine

Wednesday, November 15, 2017 | [Business Partner Appreciation Event](#) at Bistango, Irvine

Thursday, November 23, 2017 | *Happy Thanksgiving*



Tuesday, December 5, 2017 | [Law Firm Leaders Holiday Luncheon](#), Center Club, Costa Mesa

Thursday, December 14, 2017 | [Executive Board Holiday Luncheon](#), Details TBA



*Happy Holidays*

• **Upcoming Events 2018** •



Thursday, January 11, 2018 | [Board Meeting](#), Irvine

Tuesday, January 16, 2018 | [New Business Partner Orientation](#), Newport Beach

Wednesday, January 24, 2018 | [General Meeting](#), Santa Ana

Friday, February 9, 2018 | [ACES](#), Hilton Irvine Airport

To register for an event, click on the link. To view the calendar in its entirety, [click here](#).

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