

COLUMBUS CHAPTER NEWS

March 2026

President's Message



Columbus Chapter President
Julie Bryan

Nobody Sees The Weight Each Person Carries

Here is what I know to be true after this year. Every single person reading this right now is carrying something that the person sitting next to them at a meeting has absolutely no idea about. You walk in put together, prepared, and professional, and nobody in that room can see the thing you managed before you got there, the conversation that wrecked you, the decision

that kept you up at night, or the version of yourself you are still trying to figure out.

This year taught me that in a way I will not forget. I stepped into this role in April while simultaneously navigating a significant shift in my own career responsibilities, including travel that made ordinary weeks feel like a marathon. There were moments I handled well and moments I did not. There was friction I wish had gone differently, and times I reacted when I should have paused. I am naming that plainly because you deserve honesty. There were days I genuinely did not know who was at the controls, and I think a lot of you know exactly what that feels like.

We all do it. We tuck the hard stuff away, we straighten up, and we walk through the door. And I just want to say that this chapter sees that. I see that. Whatever you carried into this year, whether anyone knew about it or not, you showed up and that is not nothing. That is actually everything.



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UPCOMING EVENTS:

18—March (Wednesday) 11:45am-1:00pm Transformational Leadership
Bailey Cavalieri

When experienced staff leave, they take with them their best practices. Here's how to prevent it.

The Great Resignation brought on by COVID-19 and new expectations of work-life balance have drawn greater attention to a persistent problem for legal entities and business owners: how to maintain institutional knowledge in the face of record turnover.

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ALA MISSION STATEMENT

ALA is the premier professional association connecting leaders and managers within the legal industry. We provide extensive professional development, collaborative peer communities, strategic operational solutions, and business partner connections empowering our members to lead the business of law.

COLUMBUS CHAPTER, ALA MISSION STATEMENT

The mission of the Columbus Chapter Association of Legal Administrators is to provide a local forum of professional and educational enrichment to improve the quality of management in law firms and other legal services organizations. Our chapter is committed to fostering a diverse and inclusive professional environment where we value and strive to develop our members of all backgrounds and experiences. We firmly believe that having varied perspectives and collaboration among members generates more incisive and deeper insights that better serve our chapter and our increasingly diverse world. We are also committed to giving our time and talent to the community in order to achieve a prosperous society.



7 Steps to Secure Institutional Knowledge



Wendy McClellan
Founder
Structure for Success

When experienced staff leave, they take with them their best practices. Here's how to prevent it.

The Great Resignation brought on by COVID-19 and new expectations of work-life balance have drawn greater attention to a persistent problem for legal entities and business owners: how to maintain institutional knowledge in the face of record turnover.

An April 2022 report from Gartner notes that 73% of the Chief Executive Officers (CEOs) they surveyed expect a shortage of workers or skills to disrupt their business in 2023 — workers they will not be able to replace easily. These extended losses will not only continue to fracture workflow, but the resulting brain drain will wipe out generations of institutional knowledge. This challenge particularly affects smaller law firms, which may not have had the resources or scale for formal institutional knowledge retention.

Such knowledge, also called organizational memory, can be tangible — the documentation of procedures and training manuals, for example — or intangible — the practical wisdom of seasoned employees.

Retaining that tangible knowledge takes some work but is fairly straightforward: document processes and procedures and digitize them in an easily accessible format.

Preserving the intangible knowledge is trickier. When experienced employees leave, they take with them their best practices — their cheat sheets and processes, their key relationships inside and outside the company, and how things truly get done and who does them.

Build a Law Firm That Runs Smarter.



Leading a law firm shouldn't feel like constant triage.

If you're buried in manual processes, chasing down details, or relying on outdated systems that slow your team down, it's time to rethink how your firm runs.



**Better systems. Better habits.
Better results.**

Let's talk about what's next.



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The Columbus Chapter, Association of Legal Administrators, appreciates the support of our Business Partners. Business Partners are Vital to Our Success. Visit our Business Partner page on the Columbus Chapter website: <https://alacolumbus.org>.

CALENDAR OF EVENTS

March 2026

Sun	Mo	Tue	We	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

18-Wednesday—4:00pm

Monthly Chapter Meeting

Judy Bodenhamer, Transformational Leadership in Law Firms
March Madness Happy Hour after the meeting
Location—Bailey Cavalieri
10 W. Broad Street, Suite 2100

24—Tuesday—12:00pm

Board Retreat

TBD

ALA Events:

04—Wednesday—Small Firm Meetup

10—Tuesday—Member Idea Exchange

13 and 20—Friday—Essentials of Chapter Leadership

Join fellow chapter leaders for an engaging and informative two-day virtual training event hosted by the ALA Board of Directors. A must-attend event for those looking for the latest insights, best practices and management tips for ALA Chapters.

April 2026

Sun	Mo	Tue	We	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

29-Wednesday—11:45am

Monthly Chapter Meeting

Annual Managing Member Partner Lunch
Location—The Horizon Center
41 S. High Street
Generations in the workplace; remote work; competitive pay; community impact

28—Tuesday—12:00pm

Board Meeting

Location—TBD

ALA Events:

03—Friday—Spring CLM Application Deadline

12-15 Sunday—Wednesday

ALA's 2026 Annual Conference & Expo

May 2026

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

19—May—11:45am

Monthly Chapter Meeting

Zeina Boydoun, Esq/Affinity:
Teamwork During Change: Helping Your Team Stay Calm, Clear, and Connected
Location—TBD

26—Tuesday—12:00pm

Board Meeting

Location—TBD

ALA Events:

25—Monday—Memorial Day Office Closed



Spring Momentum Starts with the *Right Team*

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DEIA CORNER

“Diversity is a fact, but inclusion is a choice we make everyday. As leaders, we have to put out the message that we embrace, and not just tolerate, diversity.”

This quote by Nellie Borrero (Managing Director at Accenture) emphasizes that while workforce diversity exists automatically, true inclusion requires intentional, daily, and proactive effort from leaders to actively embrace, rather than merely tolerate, different perspectives. It highlights that inclusion is a conscious, active choice necessary for leveraging diversity.

- **Diversity is a Fact:** Acknowledges that differences in background, ethnicity, gender, and experiences exist within any organization.
- **Inclusion is a Choice:** Highlights that creating a welcoming environment where everyone feels valued and comfortable is an ongoing, conscious action, not automatic.
- **Embrace, Not Tolerate:** Calls for leaders to foster a culture of active belonging and equity rather than just coexistence.
- **Performance & Innovation:** Inclusive teams, as opposed to just diverse ones, outperform homogeneous teams by fostering better decision-making, higher loyalty, and increased innovation.

President's message, continued from page 1

To our Board this year, every single one of you showed up, did the work, and kept this chapter moving forward, and that kind of commitment does not go unnoticed or unappreciated. Thank you!

To our Business Partners, your support of this chapter is something we do not take for granted. You show up, you invest, and you make programming possible that simply would not happen otherwise. Thank you, sincerely, for believing in what we are building here.

We have some great things coming up that you do not want to miss! We are so excited to welcome **Judy Bodenhamer**, who will be presenting on ***Transformational Leadership: The Rise of the Next-Gen Legal Leader***. Judy speaks directly to the heart of what we navigate every single day and will give us real, practical tools to grow our leadership. This one is worth showing up for.

“The world needs who you were made to be, even on the days you are not sure who that is.”

-- Unknown

-Julie Bryan

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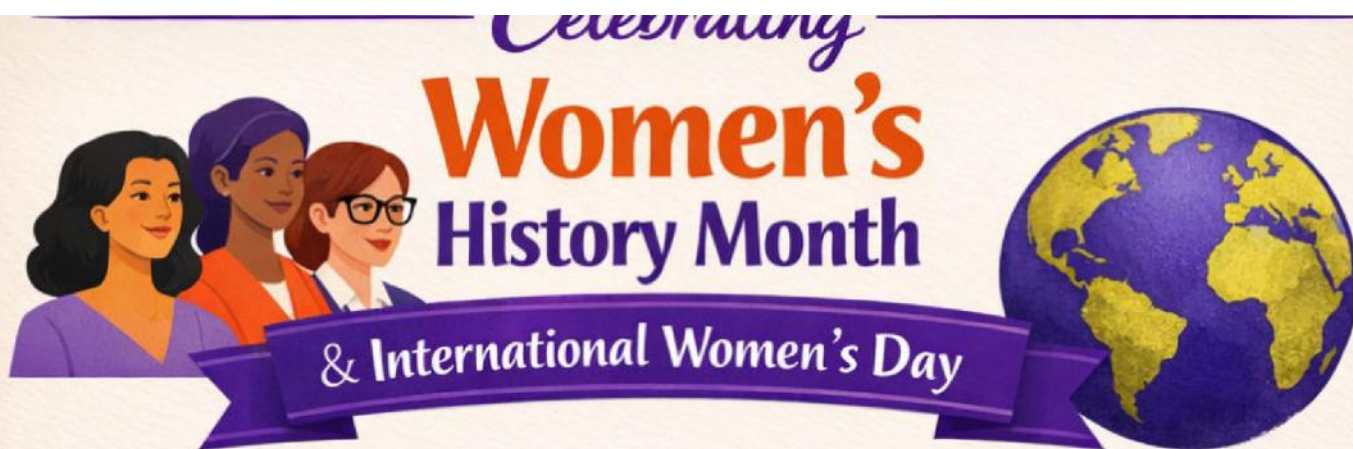
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Celebrating Women's History Month



& International Women's Day

— A Quick History —

Women's History Month

- Started as "Women's History Week" in Santa Rosa, CA in 1978
- Became Women's History Month nationwide in 1987



International Women's Day

- First National Woman's Day in 1909, New York
- First International Women's Day in 1911



• Honoring the Past, Inspiring the Future •

Celebrating the achievements and progress of women—
and reaffirming our commitment to equality every day.

CHAPTER MEETING RECAP

ALA Chapter Meeting Virtual

February 17, 2026

Topic: Strategic Solutions for Managing Rising Healthcare Costs

Attendees: Kelly Breckner, Dave Morgan, Julie Bryan, Beth Johnson, Debbie Durbin, Tracey Hopp, Katie Cooley, Katie Gregory, John Justus, Kelly Atkinson, Carter KS, Terri Jones, Laura Focht

Business Partner Sponsor: Kelly Cooley, Ricoh

Speaker: Chris Pagnotto of Benefit Administrators, 25 years' experience in employee benefits market, leading consultant on healthcare reform.

Rising Costs of Healthcare – What are the drivers of this?

Health care costs are projected to rise 9%–12% in 2026, making it harder than ever for employers to offer competitive benefits

80% of all FDA approvals in 2025 fell into the specialty category, such as injections for weight loss, diabetes, multiple sclerosis has skyrocketed

More targeted complex therapies for chronic and rare conditions

Cancer Care – diagnoses increasing among older adults and younger individuals

New Therapies using targeted drugs and personalized medicine, employees have better outcome but at cost of higher price tag to employer

Increase in cell and gene therapies for blood cancers and gene editing

Chronic Conditions

6-10 adults have at least one chronic condition such as heart disease, stroke, cancer, diabetes arthritis and obesity

Chronic conditions are the main driver of healthcare spending accounting for 90% of the nations \$4.9 trillion annual healthcare costs

Aging Population – longer life expectancy

Healthcare labor costs – labor remains single largest expense in healthcare, accounting for 56% of hospital expenses, per the American Hospital Association

Workforce shortages fueling wage inflation and increase in provider costs

Continued on page 11

CHAPTER MEETING RECAP—Continued

Emerging Carrier Solutions

United healthcare partnered with Surest

- Available for employers with two or more employee's co-pay only plan

- National united healthcare network

- No deductible in coinsurance

Anthem ERC partnered with Marathon Health

- Middle market employers with 51+ employees

MEWAs – Multiple Employer Welfare Arrangement – employers with 2 to 50 employees

- Self-funding – Employer self-fund to pay claims

- Claims are paid through a third-party administrator (TPA) or insurance carrier

- Lower fixed cost every month

- Cash flow benefit

- Remove carrier profit margin

- Plan control and flexibility

ICHRAS – Individual Coverage Health Reimbursement Account – Employer cannot sponsor a group health plan and employer will select a ICHRA Provider

- Employer provides employees with tax free funds earmarked for health insurance premiums

- Employee use funds to purchase their own ACA-compliant health insurance

- No participation requirements

- Stabilizes healthy risk and cost

- Employee choice

Medicare 101 -- Who is eligible

Age: 65 and older

Disability: under 65 and receiving social security disability insurance payments for more than 24 months

Illness: Any age with end-stage renal disease or ALS

Qualified residency: US citizen or permanent resident for five consecutive years.

Meeting adjourned

Member Spotlight

Meet Columbus Chapter Member

Dina Gay

Office Manager

Willis Spangler Starling

What is your current job title and major responsibilities?

Office Manager, Managing Vendors, Payroll Benefits, Property Management, IT and System Management... anything that gets passed onto me

Give us an example of a time when you said, "Is this really in my job description?"

Spending the Christmas Day night at the office because a sprinkler pipe burst due to the cold and I was squeegeeing ankle deep water out of the lobby with about 8 firefighters.



What did you want to be when you grew up?

An Art Teacher



If you could plan the perfect day what would it look like?

Spending the day with my family and everyone just enjoying the day with laughter and smiles

What is the best thing that has ever happened to you? *My Family*

What was your first job? *At 14 worked at Toys R Us*

Who or what had the greatest impact on your life?

Becoming an MOM and Caregiver to my Family

What is your favorite activity (besides work, of course!).

Spending time with family and friends, I love watching my boys do what they love Coaching hockey - Traveling and exploring new areas

What would you do if you had more free time?

Take time to enjoy the little things in life and appreciate things more

If you weren't working in law firm administration, what career would you have chosen?

I would have loved to have owned a Florist Shoppe



Is there anything else you would like us to know about you? *I have been married for almost 30 years, have 3 sons.*



Tons of fun was had during our Business Partner and Member Happy Hour to celebrate March Madness. Thank you to all who participated and we missed those who could not make it.





The accretion of employees' memories builds the organization's collective memory, enabling the business to function. Long-standing employees pass along this intangible wisdom informally, often by word-of-mouth. If best practices exist only in the employees' minds or scattered on sticky notes, the chain of knowledge is irretrievably broken when they leave, especially if the exodus is massive and sudden, as with the Great Resignation.

This loss costs companies money, time and efficiency.

Beyond retaining more of their critical employees, how can firms preserve institutional knowledge? By making it a priority and having a plan. That's why Holly Walters, Chief Operations Officer of Shapiro Law Team, implemented a firm-wide practice to safeguard information and keep their cases moving. "We want to ensure that everyone in our firm, from the receptionist to the managing attorney, knows what each team is responsible for."

MAKE PLANNING A PRIORITY

Workforce turnover is a natural, even necessary, aspect of a company's growth. Different phases of a firm's life cycle require different skillsets, and strategic turnover eliminates ineffectiveness and keeps the firm nimble and adaptable to market changes.

Turnover becomes a challenge, however, when it is no longer natural — when it comes as a tsunami rather than a predictable ebb and flow. In the face of such vast and unexpected change, organizations default to a reactive mode, patching the levees holding in their institutional knowledge with sandbags that will inevitably be washed away. Instead of throwing sandbags at the problem, companies should build better levees. By being proactive and strategic in combating institutional knowledge drain, organizations can minimize the risk of unprecedented workforce attrition and keep their companies from going sideways. How? By creating a culture of knowledge sharing and the systems to support it.

"Preserving the intangible knowledge is trickier. When experienced employees leave, they take with them their best practices—their cheat sheets and rules of thumb, their key relationships inside and outside the company, and how things truly get done and who does them."

This proactive strategy firm puts leaders back in control, and it won't take a complete restructuring of your current processes to do it. It merely requires a renewed dedication to making institutional knowledge just that — institutional rather than individual.

Let's explore seven methods to make that happen.

1. Identify, Prioritize and Educate

To preserve institutional knowledge, all employees must understand its importance. Create a company culture that values information sharing across the enterprise and has formal systems to support that sharing — information systems, data analytics, training systems. Avoid information silos and turf wars.

Then examine all levels of the business and identify the value and volume of existing institutional knowledge. Identify the key components and processes every team member should know, and prioritize what to capture and share. Think creatively. Do you only want to capture skill-based information or project management tools as well? Technology hacks or past strategic initiatives? Once you identify the knowledge you want to preserve, put those formal systems in place to do so.

2. Involve All Employees

Walters believes it is vital that all teams understand the important stages of any case from onboarding to settlement as well as knowing and completing the proper digital screens to keep the pipeline moving. In implementing their plan, the Shapiro management team worked with each of their teams to create checklists, training courses and desk manuals.

Continued on page 16

“The desk manuals, whether physical or online, are step-by-step guides for each team member and are set to be updated frequently,” Walters explains.

She not only shares these tools across teams but requires all new employees to cross-train with each team manager — new attorneys train with onboarding, new paralegals train with settlement and so on. Walters makes it clear that this is a management initiative and gives the leaders ownership of the process development and information gathering. Not only do these practices encourage knowledge sharing, but they make for higher-quality client service. When employees leave, the transition is fairly seamless.

3. Cross-Training and Transparency

The goal of cross-training is not to add to the employee’s workload but to expand their knowledge and engagement with the organization and create transparency about the demands and requirements of

“Start by asking your employees what resources they need. You’ll be amazed how many workers have their own cheat sheets already set up. Create a general location for these lists and encourage people to use them.”

different roles. Transparency results when everyone’s duties are no longer shrouded in mystery and the culture is based on performance and collaboration, not competition.

Make it a priority by incorporating it into the employee’s performance review. Create a quarterly goal with specific timelines, departments and partners; then have everyone discuss what they learned. Such conversations let you know how well the firm is adopting the information-sharing culture.

Walters notes when the firm implemented transparent cross-training, it saw less competition and greater collaboration among departments along with more

efficient knowledge sharing. Plus, it resulted in increased productivity.

4. Mentorship Initiatives

In any organization, mentors — veteran employees who help newbies learn the ropes — are often the ones passing down institutional knowledge. The problem is, most mentorships are ad hoc and informal. The answer: Make them formal. Create a program that pairs veteran staff with less-seasoned employees.

Harleigh Jones, a former Firm Administrator in Arizona, developed a training program that relied on veteran employees. “Having a mentor training system reduced barriers to the firm’s knowledge preservation as it became a natural training tool,” Jones explains. Veteran employees pass along what they know, eliminating the temptation to hoard information that wreaks havoc, especially on smaller firms.

For a mentorship program to succeed, it must be part of the job description, not an add-on. Make it a structured program. Create rewards and incentives for the mentors to do a good job, such as bonuses, extra planned time off (PTO) or recognition. Implant the value of mentorship in the DNA of every role.

5. Create a Learning Library

Encourage employees to build spreadsheets, folders and drives thick with lists of processes, contacts, providers, referral sources, white papers, articles, email chains, videos and so on. Encourage employees to update the information as a matter of course.

Start by asking your employees what resources they need. You’ll be amazed how many workers have their own cheat sheets already set up. Create a general location for these lists and encourage people to use them.

To curate and disseminate the firm’s institutional knowledge, establish the role of Knowledge Librarian as part of the training team. This is a critical function in the Information Age.

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6. Implement Succession Planning

Most firms have some version of succession planning at the C-level, but it is often overlooked at the employee level. At all levels, succession planning is an important strategy not only for replacing workers but also for passing on knowledge and skill sets.

Jones faced this challenge when she scheduled a three-week vacation. “I needed to know who could take over for me at any given moment. I began looking at their strengths and weaknesses and distributed my workload accordingly.” Implementing this strategy in a formal way enables more seamless coverage for PTO, internal promotions and turnover.

“When you need to change the water filter on your fridge, you look up a video. The same concept applies to institutional knowledge.”

When a worker is promoted, for example, give them the time to train their successor. They’ll be happy to share their tips, tricks and efficiencies to leave the role in better shape than they found it. Likewise, when an employee leaves the company altogether, have them train their replacement. Sometimes, for legal reasons, this isn’t possible. That’s why promoting a culture that requires an ongoing documentation of work processes and best practices is critical. If someone leaves the company today, their replacement should be able to review the documentation and get up and running by the end of the week.

7. Capture It with Video

When you need to change the water filter on your fridge, you look up a video. The same concept applies to institutional knowledge. Digitally archived written records are a valuable resource for retaining institutional knowledge, particularly in its tangible

forms. Video preserves intangible forms of knowledge more effectively than text because it allows for demonstration as well as explanation.

According to Forrester Research, 75% of employees would rather watch a video than read an email or manual. Recording key project discussions, strategy meetings and tutorials not only captures a team’s processes and agendas, it conveys the hidden context and nonverbal communication between the lines.

Firms can incorporate video technologies into many of the aforementioned methods. For example, as an element of succession planning, you can create an “Ask the Expert” forum in which retiring employees discuss their roles and best practices. Video records can also support cross-training initiatives without interrupting busy colleagues.

GROW OR WITHER — IT’S YOUR CHOICE

Like human memory, organizational memory can grow or wither. Creating a strategy for preserving institutional knowledge not only makes your business more resilient when employees move on, it strengthens your business’s long-term innovation and growth, leading to greater engagement and less turnover. By engaging your employees as active participants in developing and capturing institutional knowledge, you not only preserve and build that knowledge, you also encourage your employees to stick around.

About the Author

Wendy McClellan is the Founder of Structure for Success, an HR consulting firm working with businesses without an internal HR team to assist them with hiring and employee support services. Her forte is working with leaders who want to elevate their company’s profitability and efficiency. McClellan has been in leadership roles for over 30 years and has taken her corporate knowledge and turned it into a resource for small business owners.

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E-Letters to the Editor

We value your comments/suggestions and even your submissions. After all, this is your Newsletter! If you would like to write a Letter to the Editor, make a suggestion that would enhance the newsletter, or would be willing to write an article for the newsletter (either about a committee event or an educational topic that would be of interest to our members), please e-mail Laura Focht, Newsletter Editor at: lfocht@zhftaxlaw.com . Your input would be greatly appreciated!



MARCH

MEMBER ANNIVERSARIES

Jane Weldy—2 years

Committee Members Needed

We are always looking for great people who would like to serve on a committee. If you are interested in learning more about any of these positions, please reach out to any current board member. Joining a committee is often a great first step toward learning more about the chapter and someday joining the board.

Business partners are also eligible to serve on committees. If you are a business partner and would like more information about joining a committee, please contact Laura Focht.

COLUMBUS CHAPTER MEMBER CHANGE FORM

If any of your information changes, please e-mail the following information to:
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