



Testimonials *Del Val Legal Expo 2023*

We were thrilled with the outcome of the event. The Expo was well organized and filled with positive energy. Not only did we come away with 38 promising leads, which we felt was a great return on our investment, but we were also able to showcase our innovative solutions to a wide range of legal professionals. We look forward to continuing to build relationships with those we met at the Delaware Valley Legal Expo and are excited to attend again next year.

- Rhone Carr, SVP, DocuVault

Meridian Bank was proud to be a sponsor and vendor at the vendor expo. This was one of the most well-run expos we have attended, including level of organization, ease of participation, venue and diversity of other vendors. The opportunity to interact with the attorneys and legal administrators from firms in five counties provided a wealth of conversations and future potential relationships. We look forward to participating in future events with the Independence Chapter of the Association of Legal Administrators. Thanks to the Expo team for making this such a worthwhile event.

- Kim Arnold, VP, Meridian Bank

KIT Conni!

In a recent interview with Amy Coral and Linda Andrews, Conni shared insights about her background and future plans.

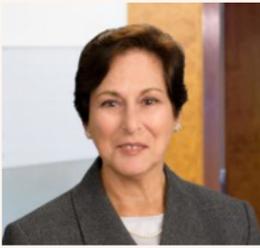


After dedicating over 25 years of her career to the legal field, our friend and colleague Conni Sota retired on December 31st.

Conni attended the University of Northern Colorado because of their strong rehabilitation program. After graduating, Conni worked at a ski resort outside of Vail before returning to her hometown, Camden NJ. She then went on to obtain her paralegal degree from Widener University. Joining Heckscher, Teilion, Terrill & Sager in 1997, she held various roles, including paralegal, administrative assistant, office manager, and accounting manager.

Conni was actively involved with the Association of Legal Administrators (ALA) and made significant contributions to the Independence Chapter, chairing the Bar Liaison Committee and serving as Chapter treasurer. She valued the sense of community within ALA, which provided opportunities to give back, share knowledge, and connect with like-minded individuals.

Conni, thank you for your commitment to the Chapter and your ALA colleagues. Our success is in part due to your hard work and contributions. We hope that you enjoy every minute of retirement. Keep in touch!



In Loving Memory - Joan Wean

It is with deepest regret that we share the news that our long-time member, friend, and colleague, Joan Wean, passed away on Thursday, July 27, 2023. She had been ill for a short time, and her passing came as a shock to everyone. **The Independence Chapter will not be the same without her, and words cannot express how much she will be missed.**

For some of you that are newer to our Chapter from the days of the pandemic, you may not have had the opportunity to meet Joan at any of our events, so I want to take a moment to tell you just how special she was, and why.

From her earliest days as a member of the Independence Chapter, Joan was involved in our leadership. She served as President from 1997 to 1998, had been instrumental in the organization and execution of our Legal Expo every year since 1996, chaired our Membership Committee for many years, hosted our monthly brown bag meetings in Montgomery County, and organized many of our dinners and happy hours. As the Chapter's biggest cheerleader, she took care of ordering shirts and sweatshirts so we all "looked the part" when attending events at the National level. For years, she wrote the "Meet the New Member" article for our Chapter Newsletters and reached out to new members to warmly greet them and welcome them to the Chapter. In 2005, Joan was honored with the ALA's prestigious Volunteer of the Year Award. **Her role was huge, and her mark, indelible.**

Joan was dedicated to ALA, and to our members. As a role model to us all, Joan was instrumental in helping many begin their careers in the legal field, helping them to be their best. She was always a phone call away for those of us who needed her sage advice. And, of course, as a wine connoisseur, we could always rely on her to pick the perfect wine for any and every chapter occasion.

She was a good friend to many, and she will be very deeply missed- indeed, she is irreplaceable.

Joan, may you rest in peace.

Joanne DiFrancesco
Independence Chapter President

Educational Event: August 9, 2023 | 12pm to 1pm

Adopting and Implementing Inclusive Hiring Practices

Presented by Angela Taylor | Chief Diversity Officer | Cipriani & Werner P.C.

Creating an inclusive work environment and culture starts long before you hire.



During this presentation, we will explore effective recruitment practices and methods intended to help in creating an inclusive workforce. We will touch upon hiring messaging, unconscious bias, the role that it plays in the hiring process and how to identify and interrupt it.

Each stage of the hiring process will be highlighted, from talent sourcing to hiring and onboarding and will focus to provide insight and guidance as well as identify key strategies that research has shown, when adopted and implemented are effective in helping to create an inclusive hiring process.

[Sign up for the event here.](#)

Delaware Valley Legal Expo 2023



Sarah G. O'Steen
Chief Operating Officer
King, Spry, Herman,
Freund & Faul LLC

This year's Legal Expo was my first and I have to say that I am very pleased I attended.

After the recommendation of both my Lexis Nexis representative and ALA associates, I decided to attend with my Technology Coordinator. We were not sure what to expect but we knew we wanted to meet as many technology vendors as possible (we met with every single one). The ability to have so many vendors under one roof and be able to meet with them, even briefly, was invaluable. We all receive so many sales emails, cold-calls in person and via phone that it is hard to weed out the ones you are actually interested in. The Expo allowed us to visit with the vendors we chose and gave us the ability to have a quick face-to-face conversation.

While my tech coordinator and I set out to meet with technology vendors, we also met with other vendors that we didn't anticipate. These have already proven to be great resources from employment agencies to transcription services. Of course, we also had to stop by and say hello to our current vendors, Lexis Nexis and Graffen.

Overall we had a great experience, we achieved our goal of gaining access to legal technology vendors and have already begun the process of interviewing the different organizations. We will definitely be in attendance at the next expo, although next time we will plan accordingly so we can attend the networking event after the expo.



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Back to School Drive

Donations accepted through August 4th!

by Amy Coral | Troutman Pepper Office Administrator

For many years, our chapter members and several of our business partners have collected new school supplies for children who could not otherwise afford them.

The Board of Directors of the Independence Chapter of the Association of Legal Administrators once again agreed to support the Back to School Supply Drive in 2023! We are asking our member law firms as well as our Business Partners if they will continue to support our efforts to collect supplies.

The items we collect are donated to the Crime Victims' Center of Chester County ("CVC"), who then distributes them to their clients and other social services agencies in the area.

The CVC is grateful that we continue to support their clients. We are proud to partner again with the Franklin Mint Credit Union. They are going to focus on collecting back packs and draw string bags. The CVC has asked us to focus on the other supplies. The CVC does not need 3-ring binders, pencils, pens, or highlighters. So, think notebooks, composition books, pocket folders, filler paper, markers, rulers, scissors (left and right hand), glue sticks, all the other things a student may need.

To make shopping easy we've set up an Amazon wish list:



In addition to school supplies, we also collect monetary donations (checks made payable to the Crime Victims' Center of Chester County) and gift cards (Wal-Mart, Target, Visa, etc.) These are used by the social workers to buy calculators, school shoes, jackets, pay for field trips, and items otherwise needed but not donated.

Our goal is to have all of the donations collected by August 4th so that the CVC can distribute to their clients at an open house they plan to hold on Saturday, August 12th.

There are several options for getting your donations to us:

1. If you use the Amazon list, Amazon will deliver directly to the CVC at 135-137 West Market Street, West Chester, PA 19382. (Select Christine Zaccarelli's Gift Registry Address.)
2. They can be dropped off to Amy Coral at the offices of Troutman Pepper – 899 Cassatt Rd, Berwyn, PA.
3. You can drop them off at the Crime Victims office which is located at: 135-137 West Market Street, West Chester, PA.

Thank you in advance for your participation!

How to Ask, and Answer, Questions about Your Security Posture



by By Kshitij Kathuria | Afinity Chief Information Security Officer

Top of mind for most organizations in 2021 has been cybersecurity. This isn't surprising given two concurrent trends: the rise in high-profile ransomware attacks and the continuation of work-from-home models that were necessitated by the pandemic. Cybercriminals have increasingly used third-party vendors as entry-points to access the sensitive data of both large and small organizations, leading law firm clients to question their

law firm partners about their security posture. In turn, law firms are seeking similar answers regarding security from their technology vendors.

The bulk of these questions seem to dive straight into specifics about the tools and technology used or the specifics behind policies. While both lines of questioning will reveal important elements of a security posture, neither touch on the most important element.

The question asked most infrequently is the most important—*what are the underlying guiding principles that define your approach to security?*

Tools and technologies leveraged today might be different than those employed in the future as the landscape evolves. Information security policies will shift with the

July Educational Event Linkedin for Law Firms



High Swartz LLP Marketing Director, Tom Gabor recently spoke about the value of LinkedIn as a marketing tool for your firm. A solid firm LinkedIn profile can provide extreme value in terms of search, visibility, recruitment, and business development.

Think LinkedIn is just a social media site? If you take into account that 58 Million companies and 930 million people use it, all looking to be found, it's safe to say that LinkedIn is the world's largest business search engine AND professional networking tool.

[View the transcript of the event here.](#)

needs of an organization as it expands or contracts. Security principles will not change—they are the bedrock for your security posture and guide all decisions being made to secure your environment and mitigate risk. Security principles do far more to increase an organization's security than any specific product or policy taken individually.

Start with Principles

When asking your technology vendors questions regarding their security posture, and answering questions from current and potential clients regarding your own, security principles provide context into how seriously an organization takes security. Some organizations will simply talk through the tools they use, while others will showcase how their security principles permeate not just their technology, but also their processes, policies, and employee attitudes.

In this article, we give an overview of three critical security principles you should require from your vendors and adopt at your firm.

From a high-level, these principles will institute a defense-in-depth approach to security that involves multiple layers of protection, combining technologies, controls, policies, and human expertise across a myriad of vectors to help prevent attacks, compress detection time, minimize the attack surface, and increase resiliency and data protection.

Security by Design

At its core, security by design means that security considerations are addressed throughout both its technical architecture and organizational operations, from planning and design through to execution and remediation.

This approach is a significant departure from industry norms that often attempt to retrofit security around pre-designed architecture and processes.

Security by design will translate to:

- Architecting or, if necessary, rearchitecting computer networks with security as the foremost priority
- Continuously training and educating staff to identify and avoid cybersecurity risks
- Calibrating all key operational processes through a security lens, such as information access and sharing, client communications, document management, change management, etc.
- Continuously reviewing the cybersecurity landscape to identify new threats and threat techniques and evaluating the next generation of security tooling to enhance defense and prevention capabilities

Security by design ensures that all elements of an organization are evaluated from a security perspective, including technology, processes, and people.

Zero-trust Architecture

As defined by the National Institute of Standards and Technology (NIST):

"Zero Trust assumes there is no implicit trust granted to assets or user accounts based solely on their physical or network location (i.e., local area networks versus the Internet) or based on asset ownership (enterprise or personally owned). Authentication and authorization (both subject and device) are discrete functions performed before a session to an enterprise resource is established."



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Kits for a Good Cause

by Amy Coral | Troutman Pepper | Office Administrator

Independence Chapter members gathered at Troutman Pepper's Berwyn office to assemble care bags for the caregivers at the Philadelphia Ronald McDonald House this past March. They assembled over 50 activity bags filled with adult coloring books, colored pencils, activity books, journals, pens and stress balls.

Being a caregiver of a child with a serious illness can be stressful. We hope that these bags helped ease a bit of that stress. Thank you to all members and business partners who donated items.

Zero-trust Architecture informs the decisions to:

- Enforce multi-factor authentication to access critical applications, explicitly requiring users to validate their authorization before getting access into distinct environments or different areas of that environment
- Structure permission levels using the Principle of Least Privilege, which gives users the minimum level of access needed to perform their job functions. One example of how the Principle of Least Privilege might manifest within a law firm is to ensure that even managing partners cannot access case files for any case they aren't actively working on.
- Inspect and log all activity across a computer network and environment to monitor for threats and reduce response times

This approach minimizes the ability of an attacker to gain traction in an organization's environment, as there is no presumed permission level from one access point to another.

The Human Firewall

The vast majority of cybersecurity incidents involve human error, such as clicking on malicious links or not securing login credentials. While technology can and does prevent some of these missteps, the best prevention is educating and training employees to avoid the situation altogether.

Employees remain a critical component of a security posture by acting as:

- A human firewall and line of defense against sophisticated attacks
- The key participants in defined processes to mitigate risk and increase security

Maintaining a human firewall means investing in employee awareness and training programs to educate and continually reinforce security processes. In a spear phishing attack, for example, a human firewall involves both an employee recognizing a cleverly crafted phishing attack as being fake, but also a policy that requires verbal confirmation from an authorized firm leader prior to a wire transfer being executed. Training helps the employee question the phishing email, while the established finance process provides a second layer of defense if the email isn't flagged. This arms your workforce to more quickly recognize potential risks and practice good security hygiene.

Combining these Principles

Ultimately, these three principles coalesce into a unified, multi-layered defense framework that interweaves people, process, and technology together for improved protection. They provide context to the decisions made, and provide guidance for future decisions, regarding the specific tools, technologies, and processes employed by an organization.

Brand names of tools used or lists of processes will not give you the full picture of an organization's security posture. Starting with understanding the principles that constitute your own and a vendor's approach to security will help you gain a better realization of the true nature of the security.

A Technology Partner Your Law Firm Can Rely On

Here at Afinity, we are motivated by a single goal: Help law firms drive profitability and growth through smart technology decisions. Since 1986, that's exactly what we've been doing.

Law firms turn to our cloud IT solutions, which combine proven industry experience with deep cloud expertise, to unlock growth, productivity, and efficiency. Our cloud platform increases security and business agility without changing the way you work. We've spent more than three decades helping law firms manage growth and weather changes in technology, privacy regulations, and economic environments. Today we service law firms across the country, supporting a range of 25 – 400 users with managed IT and cloud services.