

**NFPA 2020 Joint Conference  
Leadership Conference Agenda  
Friday, April 24, 2020**

	<b>Topic</b>	<b>Presenter(s)</b>
<b>8:30 a.m.</b>	Opening Remarks	Tom Stephenson, ILAP <i>NFPA Vice President &amp; Director of Membership</i> Illinois Paralegal Association
<b>8:35 a.m.</b>	Getting Your Leaders to Play Well in the Sandbox	Ed Schneider, M.A. <i>NFPA Advisory Council – Human Resources</i> Rocky Mountain Paralegal Association
<b>9:20 a.m.</b>	NFPA 2.0: Walking on Common Ground	Donald P. Bristol, RP®, Pa.C.P. <i>NFPA Primary; NFPA Webinar Coordinator</i> Chester County Paralegal Association  Angela Gonzalez, SBWCP <i>NFPA Primary</i> Paralegal Association of Wisconsin  Jessica Croteau <i>NFPA Primary</i> Central Connecticut Paralegal Association
<b>10:00 a.m.</b>	Break – Make a new friend	
<b>10:15 a.m.</b>	<b>NFPA Presents: Leadership Quick Hits</b>	
<i>10:15 a.m.</i>	Be Aware: Association Management Red Flags	Jamie Holzer, MnCP <i>Board Advisor &amp; NFPA Secondary</i> Minnesota Paralegal Association
<i>10:30 a.m.</i>	Discover Your Leadership Voice	Mianne Besser <i>NFPA Secretary &amp; Director of Operations</i> Rocky Mountain Paralegal Association
<i>10:45 a.m.</i>	Managing Strong Personalities	Yvonne DeAntoneo <i>President Elect &amp; NFPA Secondary</i> Tampa Bay Paralegal Association
<i>11:00 a.m.</i>	Leading with Intent	Maren Schroeder, RP®, MnCP <i>NFPA Leadership Coordinator &amp; NFPA Primary</i> Minnesota Paralegal Association
<i>11:15 a.m.</i>	Building an Inclusive Association	Tom Stephenson, ILAP <i>NFPA Vice President &amp; Director of Membership</i> Illinois Paralegal Association
<i>11:30 a.m.</i>	Motivating Members for the Future of Your Association	Valerie Wilus, RP®, Pa.C.P. <i>NFPA Board Advisor</i> Philadelphia Association of Paralegals
<b>11:45 a.m.</b>	Lunch Break – Invite someone new to join you	
<b>1:00 p.m.</b>	<b>Workshop: Leadership Development and the Future of NFPA</b>	
<i>1:00 p.m.</i>	Direction	Michael Reed
<i>2:00 p.m.</i>	Alignment	Michael Reed
<b>3:00 p.m.</b>	Break – Like really, take a break this time, you'll need it	
<i>3:15 p.m.</i>	Commitment	Michael Reed
<b>4:00 p.m.</b>	Bringing it Home: A facilitated group discussion	Maren Schroeder, RP®, MnCP, Facilitator <i>NFPA Leadership Coordinator &amp; NFPA Primary</i> Minnesota Paralegal Association
<b>4:45 p.m.</b>	Class dismissed	

## Getting Your Leaders to Play Well in the Sandbox

This session is designed to discuss the critical theories of emotional intelligence and mutual respect and how it applies to effective and positive leadership in any organization. Attendees will be challenged to look in upon themselves about how they may react to different situations and discuss how being emotionally intelligent can help enhance any relationship in a professional environment in the spirit of mutual respect and avoiding assumption of ill-intentions.



**Ed Schneider, MA** is a former senior litigation and appellate paralegal who, after 11 years of service as a paralegal and 5 years of service as a paramedic, moved into the law firm administration world. Acting as an HR professional, Ed oversees the non-attorney staff in the California and Colorado offices of Faegre Drinker Biddle & Reath LLP, an AM-LAW 50 law firm based in the Midwest.

Ed is the immediate past president of the Rocky Mountain Paralegal Association, former Regulation Review Coordinator and Joint Conference Host Coordinator for the NFPA, and presently serves on the NFPA Advisory Council. Ed is a graduate of Grand Valley State University and American Military University and is a member of the Arapahoe Community College Paralegal Program Advisory Committee.

## NFPA 2.0: Walking on Common Ground

Where are we now and where do we need to go? Join a diverse panel of newer delegates who will share their observations, successes, and frustrations in their experience with NFPA. Panelists include Angela Gonzalez, SBWCP, Paralegal Association of Wisconsin, Donald P. Bristol, RP, Pa.C.P., Chester County Paralegal Association, and Jessica Croteau, Central Connecticut Paralegal Association.



**Donald P. Bristol, RP(R), Pa.C.P.** Don is an experienced Estates and Trusts Paralegal with 15 years' experience in a law firm setting in the Greater Philadelphia area. He is skilled in all aspects of complex estate and trust administration, including Pennsylvania, New Jersey, and Delaware probate and associated tasks, formal fiduciary accountings and other court-related filings, preparation of state and federal death tax returns and gift tax returns, and preparation and filing of federal and state fiduciary income tax returns. Don supervises the firm's estate paralegals and a roster of over 150 active estate and trust administration matters.

A long time and active member of the Chester County Paralegal Association, Don has served in all CCPA Officer positions and currently serves as CCPA's Treasurer, CLE Coordinator, and Newsletter/Website/Publicity Coordinator. He is also proud to be involved with the National Federation of Paralegal Associations, currently serving as NFPA®'s Webinar Coordinator and as CCPA's Primary Delegate to NFPA®. He has authored articles for his firm's publications and has also presented CLE-credit seminars for CCPA. Don has also coordinated the legal community talent show portion of CCPA's most recent major annual fundraisers that benefit both CCPA and Legal Aid of Southeastern Pennsylvania.

Don maintains the PACE Registered Paralegal® (RP®) and Pa.C.P. Pennsylvania Certified Paralegal (Pa.C.P.) credentials. He received his Paralegal Certificate from Villanova University in 2008, a Piano Performance Bachelor's Degree (2002) and Piano Pedagogy Master's Degree (2004) from West Chester University, West Chester, PA.

As a pianist, Don is active in collaborative ensembles, working with fellow musicians on concert series in Schuylkill and Chester Counties, while still accompanying local musicians in various settings. He is also regularly sought as an adjudicator for local music teachers' association piano festivals. For the past 20 years, Don has also enjoyed teaching private piano lessons at a studio in West Chester, working with students of all ages and abilities.



**Jessica L. Croteau** is a graduate of the University of Hartford and holds her Bachelor's Degree in Criminal Justice. During her time at University she was a co-founder of the College's Criminal Justice Club as well as a tutor in English and Math. She believes in treating all experiences as a learning opportunity and is always looking to expand her knowledge of the legal and criminal justice fields.

Jessica is employed as a Trust and Estates Paralegal at Nirenstein, Horowitz & Associates, P.C. in Glastonbury, CT. She has been with the firm for seven years and through her diligence and desire to learn has become the sole paralegal responsible for working with the firm's Legacy Clients. She works closely with the managing partner to help create estate planning that is custom fit to each client's needs. Additionally, Jessica is responsible for maintaining the firm's maintenance program for some 250 individuals. This program includes drafting updated Power of Attorney documents every year, creating and sending quarterly newsletters, putting together an annual mailing regarding financial reviews and a planning a fun client appreciation event.

Currently Jessica serves as Central Connecticut Paralegal Association's NFPA Primary Delegate & Vice President. In her five years as a board member she has pushed for (positive) change not only within her local association but within NFPA as well.

When she's not working or volunteering, Jessica is an avid outdoorswoman who loves to take to the woods or water whenever she gets the chance. She's hiked parts of the Appalachian Trail, camped all over New England and fished up and down the East Coast.



**Angela M. Gonzalez, SBWCP**, is a paralegal at Ruder Ware, L.L.S.C., in Wausau, Wisconsin. She received her Master's degree from Jagiellonian University in Krakaw (Poland) and taught English to adults in Poland and Hungary. Ms. Gonzalez determined a law degree would round out her higher education adventures and earned her Bachelors of Laws (LLB) degree from the University of London. While working as a paralegal in Budapest (Hungary), she developed a passion for research and drafting documents in a law firm setting, which led to her continuing her legal experiences when she returned to the United States in 2009. Her varied background earned her the ability to communicate easily with

anyone on any topic. As a paralegal at Ruder Ware, L.L.S.C., she's able to sit with a grieving client and empathize or celebrate with a client who has just survived a drawn-out probate process for a loved one. Prior to joining the firm, Ms. Gonzalez was a civil litigation legal assistant and paralegal, as well as a corporate paralegal where she spent much of her time preparing work product in due diligence matters and multi-national business transactions. At Ruder Ware, L.L.S.C., Ms. Gonzalez specializes in trust and estate administration. Ms. Gonzalez is State Bar of Wisconsin Certified Paralegal.

## NFPA Presents: Leadership Quick Hits

## Be Aware: Association Management Red Flags

As a leader of your local association, you need to know and understand what is happening, what your board members and employees or contractors are doing, and who is tasked with completing initiatives on behalf of your organization. When the simplest task or duty is overlooked, it can cause issues now and in the future. Jamie Holzer, MnCP, past President of the Minnesota Paralegal Association will use this Quick Hit to reflect on her three years leading a local association through leadership transitions, membership challenges, and association growth.



**Jamie Holzer, MnCP**, is a member of the Minnesota Paralegal Association and was the President of MPA from 2017-2019, and Director of Membership in 2016. Jamie became a Minnesota Certified paralegal in 2016 and was awarded the MPA's Outstanding Paralegal Newcomer of the Year Award in October 2014. She works at Gustafson Gluek PLLC, in Minneapolis, MN, where she started as a paralegal in 2013. She is a cum laude graduate of Minnesota State University Moorhead with a Bachelor of Science Degree in Health Services Administration and a Bachelor of Science Degree in Athletic Training and graduated with high honors from Minnesota School of Business with an A.A.S. in Paralegal Studies. Prior to working for Gustafson Gluek P.L.L.C., Jamie was a Consultant and Research Analyst at Health Planning & Management Resources, Inc.

## Discover Your Leadership Voice

Great leaders pay special attention to their voice. They've mastered this skill because they know the words they use can literally make or break their team, motivate and inspire someone or leave a colleague feeling like a complete failure. As you bring focus to becoming a great leader, you have to understand the power of your voice and how to use it.



**Mianne L. Besser** is a Corporate Paralegal for Whiting Petroleum Corporation where she contributes her 22 years of experience. She has a background in multiple legal disciplines, with a focus in litigation; she also has extensive trial experience and is well-versed in eDiscovery.

Ms. Besser received her BA in Management and Business Administration from the University of Phoenix. In 1996, she received her paralegal certificate from the Denver Paralegal Institute, an ABA-approved program.

Prior to being elected as Secretary and Director of Operations, Ms. Besser served three terms as NFPA Region Director, Region II; member and Chair of the State of the Paralegal Profession Committee; member of the Budget Committee; and Special Projects Coordinator. Ms. Besser served in a variety of positions for the Rocky Mountain Paralegal Association (RMPA), including two non-consecutive terms as President, President-elect, Board Advisor, NFPA Primary Representative, NFPA Secondary Representative, Director-at-Large and Editor. She is also a member of the American Bar Association, Colorado Association of Litigation Support Professionals and Women in eDiscovery.

Ms. Besser is a CLE speaker at events hosted by NFPA and RMPA. She is also a Faculty Member of the Institute for Paralegal Education (IPE). She has been interviewed for her perspective on the paralegal profession by LawCrossing.com, Paralegal411.com, CareersandLiberty.com, Andrew Morkes, Laurel Vietzen, The Paralegal Mentor and Practical Paralegalism. She has authored, or co-authored, articles which were

printed in the National Paralegal Reporter and Trial Talk (Colorado Trial Lawyers Association). While serving as NFPA's Special Projects Coordinator, she wrote two articles, "Legal Process Outsourcing" and "Ethical Considerations for Paralegals and Social Media".

Ms. Besser's community service and awards include: Community College of Aurora, Paralegal Advisory Committee Member (2008 to present); NFPA Outstanding Local Leadership Award (2012); Paralegal Gateway Paralegal Superstar (2011); Adjunct Instructor of Paralegal Studies, Community College of Aurora (2012 - 2013); Adjunct Instructor of Paralegal Studies, Kaplan College (2009 - 2010); Colorado Bar Association, Paralegal Committee (2007 to 2015 [Committee sunsetted]); and Colorado Trial Lawyers Association, Legal Staff Member (2003 to 2015) and Chair (2007 to 2014). Ms. Besser has served as a coordinator for many planned giving events benefitting many organizations including The Gathering Place, Volunteers for Outdoor Colorado, Bears on Patrol, and Free the Girls.

## Managing Strong Personalities

Being a leader of your local paralegal association often means acting as a mediator between your board members and/or vocal members. Finding the right balance to coach these "difficult" personalities can channel their passions into action. This Quick Hit will focus on tips for managing those strong personalities in your life by finding the balance of respect, a productive outlet and trust to help these individuals become stronger leaders and colleagues.



**Yvonne DeaAntoneo** is an in-house paralegal with the St. Petersburg law office of State Farm's local counsel. Yvonne has been a litigation paralegal for over thirty years working in both large and small law firms, as well as in-house. In addition to her work as a paralegal, Yvonne has been involved with her local paralegal association, Tampa Bay Paralegal Association. She was the founding president twenty years ago and was recently elected as President-Elect of TBPA. Yvonne also is a previous NFPA Vice President & Director of Membership (2015 through 2019) and Region III Director.

When not wearing her paralegal hat, Yvonne enjoys spending time with her two teenage daughters, Katherine and Sarah, as well as time with great family and friends.

## Leading with Intent

As leaders, we often spend more time putting the fires out than we do installing the smoke detectors. How do you, as a leader, shift from reaction to proactive measures to curtail the next breakdown (or meltdown)? Techniques to prevent crises and put the focus back on growth are the discussion points for this Quick Hit.



**Maren Schroeder, RP, MnCP** holds an M.B.A. in Legal Administration, and is a PACE Registered, Minnesota Certified Paralegal who performs freelance paralegal, government relations, and political consulting work for attorneys, organizations, and candidates for office. She is the current NFPA Primary and Director of Positions & Issues for the Minnesota Paralegal Association (MPA), represents MPA on the Minnesota Supreme Court's Paraprofessional Practice Pilot Project Implementation Committee, and serves as Leadership Training Coordinator and 2020 NFPA Convention Host Co-Coordinator for NFPA. Previously, she served as

MPA's Director of Greater Minnesota, Director of Professional Development, and Director of Marketing, and as NFPA's Regulation Review Coordinator and Association Management Coordinator.

Maren is an advocate for drug policy reform and harm reduction, currently serving as Policy Director for Sensible Change Minnesota, where she works on medical cannabis patient access and harm reduction initiatives at the Minnesota state legislature. A trained facilitator with 100+ hours of mediation training, she serves as a volunteer facilitative mediator for Mediation & Conflict Solutions, a low-cost community mediation program in Rochester, Minnesota. Finally, Maren is a volunteer crisis advocate for her county's sexual assault crisis line and has served on her city's Planning & Zoning Commission since 2013.

## Building an Inclusive Association

An inclusive organization benefits all: It reflects the reality we live in, spurs innovation, broadens and challenges beliefs, dispels stereotypes, and enriches discussions. But how can we resolve to strengthen our commitment to inclusion within our associations – and ultimately gain a deeper understanding of each other and a greater sense of connection? This Quick Hit will touch on how to connect with others in our profession whose backgrounds and experiences are aligned and how to build connections with those we do not usually get the opportunity to know.



**Tom Stephenson, ILAP** works as a paralegal at Keller Lenkner, LLC with over a decade of experience in the areas of complex commercial and business litigation, corporate governance and reorganization, class action, and labor and employment.

Mr. Stephenson is an accredited paralegal and received his paralegal degree from Minnesota State Community and Technical College. In 2015, he received his Master of Arts in Legal Studies from the University of Illinois at Springfield.

Tom serves as NFPA's Vice President and Director of Membership. Prior to being elected as Vice President and Director of Membership, Tom served in a variety of positions for the Illinois Paralegal Association, including on the Board of Directors, Secretary, NFPA Primary Representative, Information Technology Chair, Social Media Chair, and Diversity, Inclusion & Equity Chair. In 2016, he was awarded IPA's Outstanding Member of the Year award. Mr. Stephenson served as NFPA Regulation Review Coordinator and member of the Diversity, Inclusion & Equity Committee.

## Motivating Members for the Future of Your Association

Steve Jobs once said "[i]f you are working on something that you really care about; you don't have to be pushed - the vision pulls you". How can we pull our members into caring about the future of the paralegal profession by getting involved on the front lines - the member association? Discussion points to motivate involvement and long-term commitment to the local association.

**Valerie A. Wilus, RP, PaCP** is a Litigation Paralegal with Ross Feller Casey, LLP, with over 22 years of experience. Valerie specializes in cases involving medical malpractice, wrongful death, personal injury, birth injury, brain injury, stroke injury, spinal cord injury, workplace injury, amputations, train accidents, automobile litigation, product liability and premises liability. She also has a background in legal malpractice, general commercial litigation, first party and third-party insurance defense litigation, breach of contract claims, estate planning, estate administration, corporate and immigration. Valerie has extensive trial experience and is proficient in the rules and regulations dealing with arbitrations, mediations, the county and state courts of Pennsylvania and New Jersey, various Federal district courts and other Appellate courts.



Valerie is the immediate Past President of the National Federation of Paralegal Associations. She has previously served as President, and other Board member positions, of the Philadelphia Association of Paralegals and as Chairperson of the Keystone Alliance of Paralegal Associations. Valerie also served as past Chair of the Regulation Ad Hoc Committee of the Keystone Alliance that developed the *Pennsylvania Certified Paralegal Program* that is currently offered to the Paralegals throughout the Commonwealth of Pennsylvania.

Valerie is a Registered Paralegal (R.P.) through the National Federation of Paralegal Associations and obtained her designation on June 1, 2004. She also obtained her Pennsylvania Certified Paralegal (Pa.C.P.) designation on March 13, 2009, through the Keystone Alliance of Paralegal Associations.

## **Leadership Development and the Future of NFPA: Direction, Alignment, and Commitment**

In a three-part active learning workshop, participants will work with one another to explore leadership principles and practices and develop a clear vision for NFPA's future.

The role of leadership will be explored as a social process, one where individuals work together as a cohesive group to achieve amazing results. To make the experience count, we'll use NFPA as our case study. We'll use data and insights to talk about the organization we have today and becoming the organization our profession will need in the future. We will look at leadership not as a single person, or as a board of directors, but rather as a whole system of structures, interactions, and exchanges between NFPA's formal leadership and the needs, beliefs and values of the members of the organization. Participants will learn how to create impact in their own organizations. We'll talk about creating widespread agreement for shared goals, coordinating efforts to leverage the skills and others, and building accountability and mutual responsibility.



**Michael Reed** is a Founding Partner at Bloch | Reed Association Advisors, and an organizational development expert who has spent 25 years working with associations and their leaders. Early in his career, Michael developed leadership and chapter operation programs for two collegiate fraternal organizations and later started a technology company that offered back-office solutions for small and medium-sized nonprofits.

As an association executive, he led membership, certification, and human resources efforts for the Association of Pool & Spa Professionals and for Strategic

and Competitive Intelligence Professionals. He has served in a variety of volunteer leadership roles and is currently on the research committee for the AMC Institute, the trade association for association management companies.

Michael's passion for executive development and his insights regarding organizational culture help leaders drive change and provide greater value to stakeholders. He provides coaching and strategic guidance to executive and volunteer leaders of professional societies, trade associations, community nonprofits and colleges and universities.

Michael is a graduate of San Francisco State University and George Washington University. He is currently pursuing a doctoral degree at St. Joseph's University in Philadelphia, where his research interests focus on trust and leader development in associations.

## **Bringing It Home**

A facilitated group discussion led by Maren Schroeder, RP®, MnCP, NFPA Leadership Coordinator and trained facilitator, attendees will discuss strategies for taking information from NFPA's Leadership Conference back to their local associations. What has been successful, new strategies, and implementing the content from the day with their local association.