



The Official Publication of the  
Montgomery County Paralegal Association  
[www.montcoparalegals.org](http://www.montcoparalegals.org)

**December 2017**



**Kick Off Celebration**

**New MCPA Officers**

**Welcome New Members**

**Membership Renewal**

**Five Critical Steps in  
Selecting a Managed  
Services Partner**

**Save the Date**

**Officers**

**Board of Directors**

**Committee Chairs**



**Visit us at:**

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



**Newsletter Committee:**

**Contributing Editor:**

Suzanne Sarver, RP  
[suzannehoffman32@yahoo.com](mailto:suzannehoffman32@yahoo.com)

**Layout Editor:**

Michelle Calkins, Pa.C.P.  
[Mcalkins@millerturetsky.com](mailto:Mcalkins@millerturetsky.com)

## *2018 Kick Off Celebration*

**Thursday, January 18, 2018  
Normandy Farms  
6:00—8:00 p.m.**

*Special Guest*

**HONORABLE WENDY ROTHSTEIN**

*Join us as the MCPA inducts its newly elected board members and officers. Hear from Judge Wendy Rothstein about the importance of paralegals!*

*Don't miss out on experiencing a new venue and the Farmers Daughter Restaurant at Normandy Farms. This restaurant boasts a contemporary farm-chic feel serving heirloom and locally sourced ingredients using seasonal harvest in the surrounding region. The plates are innovative with sumptuous, deep, pure flavors.*

**Normandy Farms  
1401 Morris Road  
Blue Bell, PA 19422  
(215) 616-8300**

**\$20.00 MCPA members  
\$20.00 for NFPA affiliated members  
(with proper identification)  
\$25.00 for non-members**

**Space is limited. All responses will  
be on a first come first serve basis.**

**Please RSVP no later than  
January 11, 2018 to Jennifer  
Kuemmerle, CRP, Pa CP at**

**[jkuemmerle@lutherwoods.org](mailto:jkuemmerle@lutherwoods.org)**

# CONGRATULATIONS

## 2018 MCPA OFFICERS

*Nancy Piechota, Pa.C.P.—President*

*Kelly Smith, Pa.C.P. — Vice President*

*Christopher Gregg—Treasurer*

*Jen Kuemmerle, CRP, Pa.C.P.—Secretary*

### WELCOME NEW MEMBERS

*Lee Aarron Levan, Family Design Resources, Inc.*

*Jennifer Shackleton, Lansdale School of Business*

*Travis Klement, Lansdale School of Business*

*Erica Redahan Weiherer, O'Donnell, Weiss & Mattei, PC*

*Caroline Mountney, Kane, Pugh, Knoell, Troy & Kramer*

*Tremayne Wilson*

# MEMBERSHIP RENEWAL

Dear Colleague:

Thank you for your membership and interest in MCPA during 2017.

We currently have approximately 100 members who work in law firms, corporations, banks, life insurance companies, our local courthouses, nonprofit organizations, as well as freelance and virtual paralegal positions.

The MCPA continues to maintain its membership with the Keystone Alliance of Paralegal Associations and the National Association of Paralegal Associations so that the MCPA may continue working to promote the paralegal profession in Pennsylvania and across the country.

It is once again time for our annual membership drive. For 2018 dues received by February 10, 2018, are \$75 for Voting Members, \$60 for Associate Members, \$30 for Student Members. For renewals received after that date, the fees increase by \$5 to \$80 for Voting Members, \$65 for Associate Members, and \$35 for Student Members. MCPA annual dues include the yearly membership dues to the National Federation of Paralegal Associations, Inc. and the Keystone Alliance of Paralegal Associations. Exciting news--this year MCPA is accepting membership renewals via our website [www.montcoparalegals.org](http://www.montcoparalegals.org).

If you are currently a Voting, Associate or Student member and wish to renew in the same classification, you may either complete the three page form attached with this letter or complete your renewal electronically via the website. Please note that all payments must be mailed at this time. If you wish to change membership categories, you may either complete the Application electronically via the website or print out and complete an Application for Membership form which is found on the website. Again, payments must be mailed.

Please return your completed form and/or your membership dues check made payable to "MCPA" to Montgomery County Paralegal Association, PO Box 1765, Blue Bell, PA 19422. Return your Renewal Form by February 10, 2018, to ensure that you remain on our mailing list and ListServ.

New Members are always welcome. Please feel free to copy and share this mailing with your colleagues and friends who may be interested in the MCPA.

Remember to check the Association's website frequently as we update the website regularly with Association news and events. Also check us out on [Facebook](#) and [LinkedIn](#).

MONTGOMERY COUNTY PARALEGAL ASSOCIATION

Tracey L. Barnes, RP, Pa. C.P.  
Chairperson, Membership Committee

## Five Critical Steps in Selecting a Managed Services Partner

*By Christa Iannone, The MCS Group*



**W**ith the proper research and asking the right questions, you can be sure to get the perfect match for your managed service's needs.

In my previous article, "A Simplified Approach to Making the Managed Services Decision, I discussed how you could go about deciding on whether or not a managed services program is the right choice for your firm. Once the decision is made that it is, there are five critical factors to consider in selecting the perfect partner.

1. **The Company** Quite often we get so caught up in the services a company offers that we forget about asking questions about the company itself. For example, what do you know about the company's business plan: How long has the company been in business? What is the company's business plan over the next five years? Is the company financially secure? Are there any plans to divest or sell? It is also very important that its culture is in sync with your firm's. For example, is it invested in its people and technology? What is the tenure of employees? How are employees motivated? What types of educational training and advancement are offered? Be sure to ask for references and client satisfaction surveys. Once you are comfortable with the company, you can then start to probe the specific service details.

2. **Project Management/Team Members** When you are evaluating any service provider, meeting all direct client-facing personnel is critical. Demanding at least two client-facing contacts is recommended. Ask to see their resumes and understand their experience in the industry. Remember, a certification in any software can never take the place of real-time project experience. The project manager must have law firm experience in my opinion with a strong legal background to understand technology and how it applies to the law. The project manager must be an excellent communicator both when writing and speaking, so I would recommend an in-person meeting to evaluate the latter. The service provider should bring the project manager to any presentation, and if that doesn't happen, question it. Also, don't be afraid to ask about other team members such as the subject matter experts. Do they understand the process and can they take you over the finish line?

3. **Technology** When evaluating any service provider, have a detailed understanding of what software is offered. Choose a partner with options to support your projects. For example, remember to ask detailed questions regarding processing software and how the software manipulates the data (e.g., how does it deduplicate?). Second, get a feel for its artificial intelligence capabilities (e.g., what information does the software utilize to create email threading?). Furthermore, be clear on what the software can't do (e.g., what capabilities does the software have regarding native file redactions or video review?). In addition, detail what you can do yourself versus what the vendor will have to do for you. For example, are you able to load your own data and manage your own databases?

## **Five Critical Steps in Selecting a Managed Services Partner**

### **CONTINUED**

4. **Scalability** Another determining factor when choosing an e-discovery partner is how scalable services truly are. First, have a concrete understanding of how much data your partner will be able to turn over within a 24-hour period. The key factors here must be ingesting raw data (denisting, deduplication, indexing); traditional filter testing (applying keyword and date restrictions); applying AI (email threading/clustering and categorization); and finally, image conversion output (how many images can be processed?). Find out the timeline from client approval of a production to when it will be ready to send to the opposing party. Having these questions answered ahead of time will set any project on the path to a successful outcome for your client.

5. **Security** The hot topic in any decision on an e-discovery provider is security. When you first think of security, you think of an outside individual or entity infiltrating an office or data center, but you should also be considering client data in transit between the law firm and the vendor.

First and foremost, it is essential to visit the vendor's office and also its data center, which could be in two different locations. Observe the protocol for entering and exiting the building. In case of a disaster, confirm the provider has a second data center location. Also understand the turnaround time to have you data restored if a disaster occurs. Ask for the written documentation surrounding the vendor's disaster recovery program and also share this with your chief security officer.

Confirm all necessary steps the provider takes to ensure data protection and minimize the risk of data infiltration. Ask the vendor to supply all security documentation and share it with your firm's and/or client's chief security officer to make sure it meets all internal compliance standards. This should also include data breach audits and infiltration testing. See the EDRM security questionnaire (<https://www.edrm.net/resources/security-audit-questionnaire/>) on this topic for more information.

If the vendor meets all security infiltration standards and protocols for your firm and your client, the next security discussion should involve handling of data once it leaves the client.

The question to ask is: How will the client data get into the hands of the vendor? Usually it goes through what I call the "multiple copy syndrome": Through the normal course of business the client will make a copy of the data to send to the law firm. The law firm usually makes a copy and then sends it to the vendor. We now have three copies of the same data. To minimize the risk, it would be better for the client to send the data directly to the vendor via a secure data portal.

The final security question involves how the provider handles privileged information. It is critical that you understand how privileged information is protected. Ask questions regarding the privilege review workflow and understand the quality control involved in production team preparations. Finally, ask how PII and privacy standards are met through redaction protocol methods and procedures.

Selecting the right partner can seem daunting, but with the proper research and asking the right questions, you can be sure to get the perfect match for your managed service's needs.

*Christa Iannone is a senior discovery consultant with The MCS Group ([themcsgroup.com](http://themcsgroup.com)) where she counsels corporate law departments and law firms on how to apply a cost-effective solution to every day challenges in Information Governance, Security and eDiscovery.*





*Collections for  
Toys-For-Tots & Cradles to Crayons*

A special shout  
-out and thank  
you to our  
sponsors for a  
wonderful  
evening with  
friends, good  
food and  
drinks!



**MCPA  
HOLIDAY  
SOCIAL**

*Oh*  
**WHAT  
FUN!**





## SAVE THE DATE!

The Keystone Alliance of Paralegal Associations

*presents its*

### 2018 Education Summit: Professional Responsibility

Saturday, May 5, 2018

at Lehigh Carbon Community College's  
Lisa Scheller and Wayne Woodman Community Services Center  
4525 Education Park Drive, Schnecksville, PA 18078

*Co-sponsored by*



Lehigh Carbon  
COMMUNITY COLLEGE

*4 CLE Credits available for paralegals  
and attorneys*

*(3 substantive; 1 ethics)*

*Breakout sessions for students  
and job seekers*

*Registration Fees:*

*\$50 early bird registration fee  
for Keystone Alliance members*

*\$65 after April 21, 2018*

*\$20 for students*

*\$85 for attorneys and non-members*

*breakfast and lunch included*

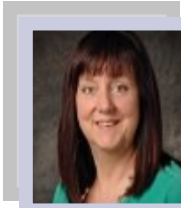
Additional Sponsors:





**OFFICERS*****Roberta (Ro) Fedorka, Pa.C.P.— President***

Villari, Brandes & Giannone, PC  
(610) 256-5444  
rfedorka@villarilaw.com

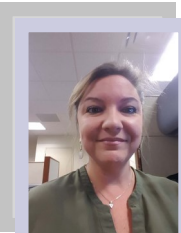


Ro is a Paralegal at the law firm of Villari, Brandes & Giannone, PC in Conshohocken. She has been a member of MCPA since 2005 and has served as chair of the Planning &

Community Outreach Committees. She has also previously served as Treasurer for four years and Secretary for two years and was recently elected to serve as President. She resides in West Norriton with her husband, Larry.

***Suzanne H. Sarver, RP— Vice President***

Gramercy Property Trust  
(267) 620-2963  
suzannehoffman32@yahoo.com



Suzanne works for Gramercy Property Trust as a Registered Paralegal in the Horsham office. She currently serves as a Board of Director of the Association as well as Contributing Editor to its

newsletter and has recently been elected as the Vice President. She resides in Upper Gwynedd with her husband Brian and their two labs, Frack and Powerstroke.

***Jen Kuemmerle, CRP, Pa.C.P.—Secretary***

Luther Woods Nursing & Rehabilitation Center  
(215) 675-5005  
jkuemmerle@lutherwoods.org

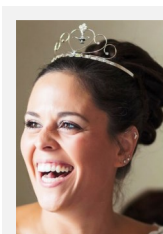


Jen is the Vice President of Finance at The Luther Woods Nursing & Rehabilitation located in Hatboro. She has served on the Association's Board of Directors and was

recently elected to serve as its Secretary. She lives in Hatboro with her husband and two children.

***Kelly Smith, Pa.C.P. —Treasurer***

Kane, Pugh, Knoell, Troy & Kramer  
(610) 275-2000  
ksmith@kanepugh.com



Kelly has been a paralegal at Kane, Pugh, Knoell, Troy and Kramer since 2011. She received her paralegal certified from Villanova University in 2011 and became a Pennsylvania Certified Paralegal in 2016. She serves

as the association Treasurer and job bank coordinator. She is an avid runner and reader. Kelly and her new husband, Brian, live in Phoenixville with their cat, Emmett.



**BOARD OF DIRECTORS**

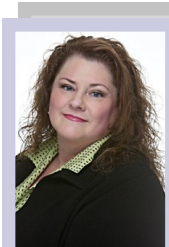
***Christopher Gregg***  
***(2017—2019)***

Chris works for the law firm, Kane, Pugh, Knoell, Troy & Kramer as a Paralegal. He has been an active board member for the past 3 years and serves as its Social Media Committee Chair. Chris was born and raised in Willow Grove and still resides there with his family and their dachshund Queenie.



***Noreen Messmer, Pa.C.P.***  
***(2017—2019)***

Noreen is a Paralegal with the law firm of Ford & Buckman, P.C. in Blue Bell and has worked with Sarah Ford, Esquire for over 40 years. She has been a Board member since 2010 and also serves on the Hospitality/Planning Committee. Noreen lives in Blue Bell and is the mother of three and Nana to three granddaughters.



***Michelle Calkins, Pa.C.P.***  
***(2017—2019)***

Michelle is a Paralegal with Miller, Turetsky, Rule & McLennan located in Collegeville. She is an active member of the Association and currently serves as the Layout Editor of the MCPA newsletter. She lives in Collegeville with her husband, Wes.



***Shari Weber Bradley, Pa C.P., CDFA®***  
***(2016—2018)***

Shari works for Peter E. Bort, Esquire at Bort Law which is a general practice firm. A long time member of MCPA, she has served on the board for the past two years. In addition to her Paralegal Certification, Shari recently earned her CDFA which certifies her as a Divorce Financial Analyst, a financial role in Collaborative Divorce. Shari lives in Eagleville with her husband Sheldon and is the mother of two young men and stepmother of three young men.



***Nancy Piechota, Pa.C.P.***  
***(2016—2018)***

Nancy is a Paralegal at the law firm of Mannion Prior, LLP in King of Prussia. Nancy was recently elected to the Board of Directors and also serves as Chair of the Marketing Committee. She lives in Berks County with her husband, Joe and rescue dogs.

## COMMITTEE CHAIRS

<b>BAR LIAISON</b>	Annette M. Long-Tulio, CRP, Pa.C.P. <a href="mailto:amlong83@gmail.com">amlong83@gmail.com</a>
<b>CERTIFICATION AMBASSADOR (PACE &amp; PCCE)</b>	[ OPEN POSITION ]
<b>CLE COORDINATOR</b>	Tracey Barnes, RP, Pa.C.P. <a href="mailto:tbarnes@dischellbartle.com">tbarnes@dischellbartle.com</a>
<b>COMMUNITY OUTREACH &amp; PRO BONO</b>	Deborah L. Arbuckle, Pa.C.P. <a href="mailto:darbuckle@kaplaw.com">darbuckle@kaplaw.com</a>
<b>HOSPITALITY &amp; EVENTS PLANNING</b>	Nancy Marchese, Pa. C.P <a href="mailto:Nmarchese@millerturetsky.com">Nmarchese@millerturetsky.com</a>
<b>JOB BANK COORDINATOR</b>	Kelly Smith, Pa. C.P <a href="mailto:ksmith@kanepugh.com">ksmith@kanepugh.com</a>
<b>KEYSTONE ALLIANCE DELEGATES</b>	Primary: Debbie Long, Pa. C.P. <a href="mailto:deblong420@gmail.com">deblong420@gmail.com</a>  Secondary: Annette M. Long-Tulio, CRP, Pa.C.P. <a href="mailto:amlong83@gmail.com">amlong83@gmail.com</a>
<b>MARKETING</b>	Nancy Piechota, Pa.C.P. <a href="mailto:npiechota@mansionprior.com">npiechota@mansionprior.com</a>
<b>MEMBERSHIP</b>	Tracey L. Barnes, RP, Pa.C.P. <a href="mailto:TBarnes@dischellbartle.com">TBarnes@dischellbartle.com</a>
<b>NEWSLETTER</b>	Suzanne Hoffman Sarver, RP—Contributing Editor <a href="mailto:suzannehoffman32@yahoo.com">suzannehoffman32@yahoo.com</a>  Michelle Calkins, Pa.C.P.—Layout Editor <a href="mailto:mcalkins@millerturetsky.com">mcalkins@millerturetsky.com</a>
<b>STUDENT AFFAIRS &amp; MENTORING</b>	Lisa LaPenna, Pa.C.P. <a href="mailto:llapenna@kaplaw.com">llapenna@kaplaw.com</a>
<b>NFPA DELEGATES</b>	Primary: Debbie L. Arbuckle, Pa.C.P. <a href="mailto:Darbuckle@kaplaw.com">Darbuckle@kaplaw.com</a>  Secondary: Debbie Long, Pa. C.P. <a href="mailto:deblong420@gmail.com">deblong420@gmail.com</a>
<b>PUBLIC RELATIONS</b>	Jen Kuemmerle, Pa.C.P. <a href="mailto:jkuemmerle@lutherwoods.org">jkuemmerle@lutherwoods.org</a>
<b>SOCIAL MEDIA</b>	Christopher Gregg <a href="mailto:cgregg@kanepugh.com">cgregg@kanepugh.com</a>
<b>STUDENT LIAISONS</b>	<b>Peirce College:</b> Annette M. Long-Tulio, CRP, Pa.C.P. <a href="mailto:amlong83@gmail.com">amlong83@gmail.com</a>
<b>WEBMASTER</b>	Shari Weber Bradley, Pa.C.P. <a href="mailto:sweber@bortlaw.com">sweber@bortlaw.com</a>