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The cover photo for this issue is of the steampunk tree house at the Dogfish Head Brewery in Milton, DE.

Please forward all article submissions for future newsletters to:
Susan Holton, sholton@skjlaw.com
President’s Message

Every year, regardless of what I have been doing to fill my time, I am reminded that time stands still for no one! A gentle reminder to fill the hours, days, weeks and months with people, events and memories that will give your time the greatest value. Often, in a fleeting thought, I wonder “Where has the time gone?” I count myself fortunate for being able to attribute many recent moments and memories to my relationship with the First State Chapter.

It doesn’t feel so long ago that I was encouraged to join ALA, knowing little about it, and less about the people. Now, looking at my membership card to determine my start date, it says “November 22, 2005.” Again, where has the time gone!! I have now taken this opportunity to give some serious thought to identifying, with regard to ALA, lessons I have learned, friends I have met, places I have had the opportunity to visit, and events I have been excited to plan and/or participate in. After this reflection on 12 years with the First State Chapter, it is no wonder the time has flown! As a fresh face in the HR world, to a trusted member “encouraged” to take over the role of Social Committee Chair (which continued for the better part of 8 years), I also enjoyed a level of involvement in various other committees. As I began to better understand the goals of our Chapter, I felt inclined to grow my involvement by joining the Executive Board as Secretary. This allowed me an introductory understanding of how the Board operated. Beyond the role of Secretary, I eventually decided it was time to ease into the progression as Vice President, then President-Elect, ultimately leading me to the privilege of being the current Chapter President for 2017-2018. Over the course of these years, I have observed a very engaged Board, whose focus has always been to offer the best available resources to our membership, establish generous programs to give back to the local community, and develop strong, healthy relationships with our Business Partners. I am honored to be a part of these continuing efforts, and privileged to work with such respected peers.

Since I anticipate my term as First State Chapter President will undeniably fly by, let’s take a quick look at what we have already accomplished in 2017, and a sneak peek into what is ahead! The Education Committee has developed a schedule filled with a variety of valuable topics including Emergency Responses / Active Shooter awareness, Identity Theft, and How to Survive a Compliance Audit. The Social Committee hosted the annual Children’s Easter Egg Hunt at St. Michael’s School, and have preliminary details in place for other community and social events to be held throughout the year. The Past Presidents’ Committee hosted a light-hearted, yet very informative, Leadership Event based on firm culture. The Business Partner Committee most recently hosted a fantastic annual event to honor our esteemed Business Partners that included a networking happy hour followed by the team-building challenge of an Escape Room. While no one “made it out alive,” we all agreed we were just minutes away from breaking out and had a blast while trying! The Membership Committee continues to seek out potential new members, showing them First State Chapter hospitality while introducing them to the many benefits of being a member. And last but not least, our Marketing & Communications Committee -- who tirelessly pull this comprehensive newsletter together every quarter -- also continue to maintain our Chapter website with the latest updates for you. Clearly it takes a village to build and maintain a successful ALA Chapter. I would personally like to express my gratitude to all of our Committee Chairpersons, and Committee members, who volunteer their time and talents to keep us rolling. Thank you for taking a few moments of your time to read my first President's Message! I look (Continued on page 5)
forward to seeing all of you at upcoming events. At any time if you’d like to connect, you can always reach me at (302) 651-7522, or snyder-roncace@rlf.com. Wishing you a beautiful summer filled with special people, exciting events and lasting memories!

Fondly ~

Kellie Snyder-Roncace
First State Chapter President
Meet Your Board of Directors
Deborah A. McKinney
Reed Smith

On March 21, 2017 the First State Chapter of the Association of Legal administrators held its annual election of officers. Please meet your new First State Chapter Officers.

**Kellie Snyder-Roncace**
President

Kellie is the Human Resources Administrator at Richards, Layton & Finger. She has been a member of the ALA since 2005 and has served on the First State Chapter’s board as Social Committee Chair, Secretary, Vice President and President-Elect. Kellie has also worked her magic on the Social Committee and the Marketing & Communications Committee. Kellie is a Pennsville, NJ resident along with her husband, Jeff, and furry cat friends Lovey, Bizzy and Kiki (who she recently rescued from under a shed at 4 weeks old), as well as their dog, Chloe.

**Rachel Nuzzi**
President-elect

Rachel is the Human Resource Director at Maron, Marvel, Bradley, Anderson & Tardy. She has been an ALA member since 2012 and has served as Vice President on the First State Chapter’s board. Rachel’s busy home is in West Grove, PA with her husband, Luke, boys Miles (6 years) and Bodhi (3 months!) and their two dogs.

**Garry Quell**
Vice President

Garry is the Business Manager at Schmittinger & Rodriguez. Garry has been an ALA member since 2013 and earned his CLM Certification in 2016. Garry resides in Delaware with his wife, Jenny, and four children Molly, Jessica, Sara and Luke.

**Angie Poulin**
Secretary

Angie is Executive Operations Manager with Gellert, Scali, Busenkell & Brown. Angie was new to the ALA in 2015 and currently serves on the 2017 Regional Legal Management Conference Committee. Angie resides in Wayne, PA.

**Lisa Pedicone**
Treasurer

Lisa is the Office Administrator at Landis, Rath & Cobb. Lisa joined the ALA in 2013 and has been the First State Chapter’s Treasurer since 2015 as well as serving on the Business Partner and Communications Committees. Lisa lives in Wilmington with her husband, Michael, and her three children Michael, Michelle and Renee.

**Julie Dubreuil**
Immediate Past President

Julie is the Administrator at DLA Piper. She has been an ALA member since 2006 and has served on the First State Chapter’s board as Treasurer, Vice President, President-Elect and President. Julie has also chaired the Marketing and Communications Committee and served on the Business Partner and Social Committees. Julie lives in Wilmington with her son, Christopher and her two shih tzu, Susie and Benny.

Congratulations to all on your board elections.

□
Compensation and Benefits Survey

Pre-sale available now. Final survey will be released later this fall.

Every year, new job titles and levels of responsibility crop up as the industry evolves, and ALA’s Compensation and Benefits Survey helps define these new positions and their value to firms.

New this year:

- Associate Attorney and Summer Associate positions
- New industry roles, including specialists for compliance, privacy and cybersecurity

The more firms participate, the more localized and useful the results will be. Plus:

- Receive customizable reports and digital dashboards
- Save on the purchase price of the final report – presale is open now

Order the survey today!
alanet.org/compsurvey
Please provide some biographical highlights about yourself: title, primary responsibilities, number of years at the Buccini/Pollin Group, the positions you have held there, what you did prior to working there, education, any other organizations you belong to or relevant industry affiliations.

Liz Allman, Corporate Sales & Marketing Manager, LuxiaSuites

I joined Buccini/Pollin Group at LuxiaSuites in November of 2015. Before LuxiaSuites, I held various positions in sales and client retention for a global services company where I worked for 21 years. All of my work experience has revolved around service and hospitality in one form or another including eight years as Vice President of Client Relations. In this role, I interviewed top clients to understand their perspective of our service delivery and collaborated with our company leadership to ensure strategic direction based on our clients’ needs. I am excited to be back in the Wilmington community where I began my career at Hotel du Pont. I have a B.A. in Art History from the University of Delaware which has greatly enriched my life and travels.

Describe the accomplishment in which you take the most pride, with relation to your role in your company.

I have had similar conversations about the future of Wilmington with many of the legal administrators I have met through ALA. The legal industry has remained a major economic engine in this city throughout the time other businesses withdrew or scaled back. Legal administrators are passionate about the development of our city and their need for quality hotels, meeting spaces, restaurants and all of the many services required for legal support. We are excited about the influx of creative culinary talent, hotels, technical services and the more than 2000 residents living on or near Market Street and the river front area. I am proud to work for a company with a focused strategic vision and proud to do my part towards a positive trend for Wilmington.

What trends, areas of focus or challenges do you foresee as most important to your customers?

Value (the optimal balance between quality and cost) is critical to all of our customer segments. Legal administrators really do their homework and ultimately choose the options they consider to be the best value for their clients. Gone are the days where price point does not matter.

Working with law firms requires a unique approach which differs from that of other corporations - how has your experience been working with law firms as

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opposed to non-law firm clients and traditional corporations?

Trial teams happen in a more compressed time frame than our corporate stays. Trial team members must stay focused every minute in order to make critical decisions that impact the outcome of the trial. We need to provide an environment that takes away the little stresses of everyday living to allow our clients and guests to remain focused on their priorities. We want to make the experience seamless for the coordinator; everyday communication throughout the day is key as there are multiple changes and add-on requests each day.

Why do you support the ALA?

As mentioned before, the legal industry is a major employer in Delaware and critical to the present and future economic livelihood of Wilmington. Not only is it important for business and especially the hospitality sector to support ALA, it is personally satisfying to benefit from ALA programs and to make new friends that I look forward to seeing at ALA and other networking events.
Tax Day Has Come and Gone — But Compliance Always Remains

By Baker Tilly

The April tax deadline has passed and for most law firms and their partners, major income tax compliance is complete for the remainder of the year. However, there are still compliance filings and payments that both partners and law firms should keep on their radar.

Preparing an annual compliance checklist of required filings and payments is a great idea for most businesses. If your firm does not already have one, it may be wise to prepare one to stay organized and ensure the various federal, state and local business deadlines are met.

Compliance items are vital to a successful business, and you should be aware of some state and local compliance requirements that are commonly overlooked.

Quarterly estimates are required when a business or individual expects to owe tax to a jurisdiction based on the previous quarter’s net income. The upcoming 2017 federal estimated tax payments for individuals are due June 15, 2017; Sept. 15, 2017; and Jan. 16, 2018. States tend to follow the federal deadlines.

One of the most overlooked filings is unclaimed property. Your accounting personnel likely can identify outstanding payroll and vendor checks through the monthly bank reconciliations. Outstanding checks that remain unsettled for a specified period of time typically need to be remitted to the state authorities depending on the state. The specified period of time depends on the state, but the obligation is on the business to remit the unclaimed property. Some states require businesses to file an annual unclaimed property report — even when there is no unclaimed property to report. This compliance requirement is often overlooked, and some states which could reduce a business’ property tax bill to zero dollars if its personal property is under the threshold. Important to note though, even if a business owns no personal property but rather leases property from a vendor through an operating lease, the business likely is still required to file a zero dollar tax due return to report the value of the leased equipment used in the state. This way, the state will know to look for the tax from the lessor.

The due dates for unclaimed property returns, use tax returns and personal property tax returns all vary depending on the state. Consulting with your state and local governments and/or with
your tax advisor can provide you with the necessary details on when to and what needs to be filed.

As you can see just from these three examples, state tax compliance has become increasingly more complicated and jurisdictions are becoming more aggressive on compliance. It is easier today for lawyers and law firms to do business in states in which they do not have a physical presence. Because of this, several states have adapted their laws to the changing times to increase tax revenue. Doing business in another state could lead to nonresident withholding compliance on behalf of law firm partners as well as nonresident payroll tax filings for the law firm’s employees.

You may also need to review entity-level returns based upon gross receipts or other computational factors. For example, if you are doing business in the state of Washington, the business and occupation tax is a tax based upon gross receipts. The amount of your projected income in the state will determine how often this return needs to be filed and tax remitted (i.e., monthly, quarterly or annually). Ohio has a similarly computed Commercial Activity Tax (CAT). Some cities in California, including Los Angeles and San Francisco, follow a comparable model to Washington’s B&O tax, taxing gross receipts sourced to these cities and requiring filings at various times during the year. Many other cities and counties across the country levy either income or gross receipts taxes on various business activities within their jurisdictions.

Foreign filing requirements are becoming increasingly complex for international law firms too. The most common foreign filing requirement outside of informational reporting within your law firm’s business tax return is the foreign bank account report – FinCEN Form 114. If a U.S. business is operating overseas and has foreign financial accounts, they likely are aware of the U.S. filing requirement for the business, which is to report the balance in these accounts if the aggregate value of all foreign financial accounts exceeds $10,000 at any time during the calendar year. What sometimes is overlooked from a compliance standpoint is the issue of U.S. individuals that have signature authority over these accounts. These individuals also have a filing requirement separate from the business. This isn’t just limited to law firm partners either, it includes every employee that has signature authority on an account, typically the CEO, CFO, director of administration and/or the controller. The initial filing deadline for the foreign bank account report was April 15, 2017, but the report has an automatic extension for the 2016 calendar year reporting to Oct. 15, 2017. If you have not reviewed who has signature authority in a few years, it might be worth confirming with the bank. The penalties assessed by the U.S. government for noncompliance are high.

Staying in touch with your tax advisors throughout the year and keeping them informed of any new activity will help make sure you’re up to date on these and other compliance filings. The cost of compliance is a necessary element of business, but the cost of failing to be compliant could be higher. □
Bragging Rights

If you have an item you’d like to contribute to a future column, please send it to Susan Holton at sholton@skjlaw.com

Congratulations to Robert Half International on being ranked first on Forbes® magazine’s 2017 list of America’s Best Professional Recruiting Firms.

Sherry Perna, CLM has been announced as the new Executive Director at Morris James LLP. Ms. Perna brings 16 years of experience in legal management and administration, most recently as the Chief Financial Officer at Morris James LLP. Congrats Sherry!

A Colorado Fish Story by Cathy James

After attending the ALA National Conference in Denver this Spring, I tried catch-and-release fly-fishing in Estes Park, Colorado. I caught my first fish ever - a beautiful Rainbow Trout. That’s him in the picture. He’s not actually smiling, he’s telling me to hurry up and get to the release part! Altogether, I hooked 12 trout that day. In fact, a little after this picture was taken, in a branch of the Big Thompson River, I caught an even bigger Cutbow Trout - more than 24 inches long! It was so exciting hooking that one and trying to bring him in. There would be a picture of that one, but he twisted up out of the water, snapped the line, and got away. True story! Anglers never exaggerate!
Welcome Newest Chapter Members

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ssines@mgmlaw.com
**Behind The Desk**
**Member Spotlight On: Alison Keys, Bayard, PA.**

<table>
<thead>
<tr>
<th><strong>Bio</strong></th>
<th>I’m a proud Delawarean. I am married with 5 children (not all are mine!), 3 dogs and a cat. I started in the legal field as a Legal Secretary about 15 years ago and here I am now.</th>
</tr>
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<tr>
<td><strong>Childhood Ambition</strong></td>
<td>I loved basketball as a child and thought I’d be in the WNBA.</td>
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<td><strong>Favorite Outdoor Activity</strong></td>
<td>Playing soccer with my kids</td>
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<td><strong>Historical Figure You Admire</strong></td>
<td>Rosa Parks</td>
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<td><strong>Memorable Moment in Your Life</strong></td>
<td>Marrying my husband. We basically got married in the rain, but it didn’t even matter when I saw him!</td>
</tr>
<tr>
<td><strong>Historical Event You’ve Experienced</strong></td>
<td>9/11 which was the most tragic and unforgettable moment of my life.</td>
</tr>
<tr>
<td><strong>Your Proudest Moment</strong></td>
<td>The birth of my little boy, Ethan. It is the best thing that has ever happened in my life and that will never change.</td>
</tr>
<tr>
<td><strong>Your Biggest Challenge</strong></td>
<td>Being a stepmother of 4</td>
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<td><strong>Your Perfect Day</strong></td>
<td>I live for summers at the beach</td>
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<td><strong>Your First Job</strong></td>
<td>Rita’s Water Ice</td>
</tr>
<tr>
<td><strong>The best advice I’ve received from a fellow legal administrator</strong></td>
<td>There are never problems, just situations!</td>
</tr>
<tr>
<td><strong>An Accomplishment You Never Thought You Would Attain</strong></td>
<td>I am still working on this…</td>
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<tr>
<td><strong>Lunch with anyone, dead or alive.</strong></td>
<td>Jimmy Fallon – laughter keeps me going sometimes</td>
</tr>
<tr>
<td><strong>Favorite Movie</strong></td>
<td>The Notebook</td>
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Grooming Future Leaders for a Legal Career in Management

By Charles A. Volkert, Esq.
Robert Half Legal

Finding and grooming the potential leaders in your law firm or corporate legal department is not just a matter of promoting legal professionals based on their education or legal career experience. It takes work to identify, develop and nurture the legal career of promising leaders among your staff. And given the onset of baby boomer retirements, discovering and developing the next generation of legal managers is more important than ever.

But which characteristics separate the best potential leaders from the rest? And what can you do today to help up-and-coming stars become great legal managers? Here are some answers and strategies:

Look for certain qualities

Certainly, legal managers must have a strong command of the law. But soft skills are crucial, as well. In a recent Robert Half Legal survey, 45 percent of attorneys said that good judgment was the most important attribute for leaders, aside from legal knowledge. Those surveyed also noted collaboration skills (22 percent), high ethical standards (14 percent) and diplomacy (14 percent) as vital to good leadership.

Be on the lookout for up-and-coming legal professionals who excel in those areas, as well as those who are strong communicators. Legal managers must have good communication skills to motivate employees, build morale and loyalty, solve problems with personnel, workflow and vendors, and resolve conflicts with employees and clients.

Hire with leadership in mind

You don’t have to limit your search for the next generation of legal managers to your current staff, though. You should keep your eye out for potential leaders whenever you’re hiring, even when the job opening is entry-level or for a summer internship.

When sifting through applications, look for candidates who’ve held leadership positions in legal and other environments; someone who served on the board of a college student organization or took a position in a volunteer group is likely to have some solid leadership experience. Then, during interviews, ask behavioral questions that point to candidates’ leadership skills, such as “Tell me about a time you took the lead on a challenging project” or “Describe a time when you coached or mentored someone to a successful outcome.” The answers should help you spot candidates who have the potential to become legal managers.

Invest in training

Once you’ve identified future leaders, encourage them to attend continuing legal education (CLE) conferences and courses. Managerial candidates should go to CLE seminars focusing on professional ethics, conflict resolution and growth management. In addition, they should polish and strengthen their knowledge of legal trends like eDiscovery, cloud-based legal research, cyber security, predictive coding, and artificial intelligence through classes and other training.

Also, make sure you’re giving legal professionals a chance to shore up their weaknesses through targeted training. Some people are brilliant with processes and workflows, but do not have a healthy relationship with their coworkers. Others are motivational and inspirational, yet falter when it comes to time management, deadlines and follow-up. If candidates for management aren’t equally strong in both project and people skills, recommend the appropriate professional development.

Build a mentoring program

So many of the soft skills required for a thriving legal career — good judgment, decision making, teamwork, collaboration, conflict resolution, adaptability and client relations — are not taught in a classroom. They’re learned on the job, and one effective way to make sure potential legal managers are developing these skills is to match them with an experienced mentor.

(Continued on page 16)
Formal mentoring programs for junior and mid-level employees can be one-time meetings during which a tenured member of the team passes on knowledge or advice (otherwise known as flash mentoring) or long-term relationships, depending on the mentor and mentee’s goals.

If your company doesn’t have an in-house mentoring program, you should strongly consider starting one. Besides the obvious benefit of guiding a young professional’s legal career, mentoring often has other positive effects: for example, reverse mentoring, where knowledge percolates up the hierarchy; and better intergenerational dynamics, particularly between baby boomers and Generation Z.

Identifying and developing future legal managers in your firm or company can be a challenge. But if you invest the time and energy into succession planning today, you’ll reap the benefits of your efforts for years to come. □
First State Chapter - Easter at St. Michael’s

On Wednesday, April 12, members of the First State Chapter hopped on over to St. Michael’s School and Nursery to throw an Easter Party for the kids. Volunteers helped dye eggs and put on an egg hunt. A good time was had by every bunny! □
First State Chapter - Business Partner Event

On Monday, June 12th, the First State Chapter ALA, joined by their Business Partners, enjoyed networking at a social held at V&M Bistro in North Wilmington. After a nice time socializing, the crowd moved across the road to Exodus Escape Room. For many, it was their first experience at an escape room. Fortunately, there were some folks who had previously experienced an escape room and had some tips for the newbies. One group was immediately locked up in cells and handcuffed to others – the groups were split with half members and half business partners. What a great way to network - handcuffed together! Our groups made it to the very end and were just minutes shy of figuring out the last clues to escape but a fun time was had by all.

This annual business partner event is always combined with an effort to raise funds for a charitable organization. This year, the decision to raise funds was made right at the time that Corporal Stephen Ballard was tragically gunned down here in New Castle County. Both members and business partners donated funds to the Delaware State Troopers Association memorial fund for the family of fallen Corporal Stephen Ballard. We were proud to have raised and donated a total of $7,400!
First State Chapter Business Partners

The Blue Hen News and the First State Chapter support Green initiatives and this is an electronic newsletter. Please do not print this newsletter unless it is absolutely necessary.