



PACO

**2017 Biennial Workshop
& Exhibition**

Session Descriptions & Bios of Presenters

September 29, 2017

Session I - 9:00 – 10:30 a.m.

Title: The Empowered Paralegal – Managing You, Your Attorney & Your Clients

Moderator: Mindi L. Schaefer, Administrative & Paralegal Support Director Poling Law – PACO NFPA Primary Representative and Social Media & Website Committee Chair

Panelists:

Clare Krumlauf, Assistant General Counsel - Nationwide Mutual Insurance Company

Peg Buehrle, Certified Executive Coach - Take Action Business Coaching

Bridgett S. Klingbeil, Director of Paralegals/Paralegal – Vorys, Sater, Seymour and Pease LLP

This workshop will explore the inner workings of the legal team and how there is competitive advantage through a collaborative, inclusive work environment. Some topics that will be discussed include how to maximize productivity in the workplace through time and workload management; client and calendar management; work-life balance and stress management; relationship management and professionalism.

10:30 – 11:00 a.m. – Break, Network & Visit Exhibits

Session II - 11:00 – 12:30 p.m.

Title: A View from the Bench – Lessons Learned from the Top – A Judicial Panel Discussion

Moderator: Andrea M. Enderle, Litigation Paralegal, Bricker & Eckler – PACO Vice President and BWE Sub-Committee Co-Chair

Panelists:

Judge Charles A. Schneider – Franklin County Common Pleas Court, Franklin County, Ohio

Magistrate Elizabeth J. Watters – Franklin County Common Pleas Court, Franklin County, Ohio

Judge Jodi Thomas – Franklin County Municipal Court, Franklin County, Ohio

This workshop will provide opportunities to enhance your repertoire of courtroom knowledge and court house best practices through a conversational discussion with local judges about 'lessons learned' from the bench; what is judicial balance; whether emotional intelligence has an effect from the bench; events that have shaped their career; and advice to paralegals to help make them a successful part of the legal team in the courtroom.

12:30 – 2:00 p.m. – Lunch & Keynote Speaker – (*1:00 – 2:00 p.m. – Keynote Speaker, Lisa Pierce Reisz) - Advancing in the Legal Profession through Inclusive Environments & Diverse Leadership – A Perspective from Lisa Pierce Reisz, President of the Columbus Bar Association

2:00 – 2:30 p.m. – Break, Network & Visit Exhibits

Session III - 2:30 – 4:00 p.m.

Title: The Diversity of Paralegal Careers – Breaking Down Barriers

Moderator: Rebecca M. Lewis, Compliance Manager, Nationwide Mutual Insurance Company; PACO – Student Liaison Representative and BWE Sub-Committee Co-Chair

Panelists:

Mary Beth Schmidt, President & Chief Operating Officer - The Gnoësis Group, A Certified Woman-Owned Business

Amy Moore, Director of Human Resources - Primary One Health

Kristin Gordon-Hock, Paralegal - Wolinetz & Horvath, LLC

This workshop will explore emerging industries and increasing efficiencies in the legal industry that continue to drive a high demand for paralegal services. Some topics that will be discussed in this session include the current needs in the legal industry; how to build successful relationships through mentors and connecting with professionals; the likability factor; how to optimize your transferability skills; types of businesses where paralegal skills frequently adapt; and successful tips for ‘career changers’.



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Panelist and Moderator Bios



Keynote Speaker - Lisa Pierce Reisz

Title: Advancing in the Legal Profession through Inclusive Environments & Diverse Leadership – A Perspective from Lisa Pierce Reisz, President of the Columbus Bar Association

Lisa is a partner in the Vorys' Columbus office and a member of the health care and litigation groups. She also chairs the HIT/HIPAA/HITECH subgroup. Her areas of expertise include health information privacy and security, including HIPAA/HITECH compliance, data breach analysis and notification, and state privacy law compliance. Lisa is the current President of the Columbus Bar Association, and serves on the Board of the Legal Aid Society of Columbus and the Ohio State Legal Services Association. She is a proud graduate of the Ohio State University Moritz College of Law.



Session I: The Empowered Paralegal – Managing You, Your Attorney & Your Clients

Panelist: Clare Krumlauf, Assistant General Counsel, Nationwide Mutual Insurance Company

Clare Krumlauf is an Assistant General Counsel at Nationwide Insurance Company. Since joining Nationwide in 1996, she has worked in a variety of roles and is currently part of the Property and Casualty legal team providing legal support to product, pricing and underwriting. Clare has worked on the business and the legal side in a variety of roles including commercial claims, sales legal, and as a litigator in Nationwide's Trial division.

Clare graduated with a B.A. in Psychology from Miami of Ohio and a received her law degree from Cleveland Marshall College of Law in Cleveland, Ohio. She also has her CPCU designation. She and her husband, Kyle, reside in Dublin with their two sons, Evan (8) and Henry (4).



Session I: The Empowered Paralegal – Managing You, Your Attorney & Your Clients

Panelist: Peg Buehrle, Certified Executive Coach - Take Action Business Coaching

Peg is a certified Executive Coach, providing executive insight, advice, coaching and mentoring services to varying sized businesses. With over 20 years of experience in managing high performance teams, her passion lies in helping executives learn, grow and better use their time. This has a greater impact on their direct reports and the company as a whole. As an Executive Coach and advisor, Peg helps clients deliver the results they desire using proven tools, methods and systems, tested and perfected over tens of thousands of businesses worldwide for more than two decades. She holds her clients accountable for their results like a sports coach would push their athletes to perform at optimal levels. A graduate of The Ohio State University, she lives in Upper Arlington with her husband and two children.



Session I: The Empowered Paralegal – Managing You, Your Attorney & Your Clients

Panelist: Bridgett S. Klingbeil, Director of Paralegals/Paralegal – Vorys, Sater, Seymour and Pease LLP

Bridgett is the director of paralegals as well as a practicing litigation paralegal in the Vorys Columbus office. As the director of paralegals, Bridgett is responsible for the management and oversight of paralegals, practice group assistants and project assistants in each of the firm's offices. Her responsibilities include recruitment, orientation, training, evaluations, salary administration, discipline, some workload management and policy administration.

A litigation paralegal since 1995, Bridgett is involved in all aspects of litigation from file management to hearings and trial. She is experienced in electronic and traditional discovery, including identifying, gathering, analyzing and producing responsive information. She is highly skilled in the use of electronic information management, including the design and usage of database programs, litigation document management software, and trial software. Bridgett is accomplished in contract litigation, securities litigation, civil and criminal antitrust, Medicaid fraud litigation, trademark and copyright litigation.

Bridgett's special skills are involving case and project management; multiple court electronic filing procedures; Westlaw/LexisNexis; Excel/ Access; Summation/Viewpoint/Relativity; and Sanction.

Bridgett's professional and community activities involve:

- Capitol Law School Paralegal Program Advisory Board Member, 2011-present
- International Paralegal Management Association, 2011-present
- Columbus Bar Association Associate Member and Paralegal Association of Central Ohio, Member, 1996 - present; Executive Board and 2nd VP and Membership Director 2002-2004; Public Relation Director 2001-2002; Program Committee Chair, 1999-2000, and Job Bank Committee Chair, 2004-2011.



Session I: The Empowered Paralegal – Managing You, Your Attorney & Your Clients

Moderator: Mindi Schaefer, Administrative & Paralegal Support Director Poling Law – PACO NFPA Primary Representative and Social Media & Website Committee Chair

EDUCATION

- 1999 – A.A.S. (Legal Assisting), Sinclair Community College, Dayton, Ohio
- 2006 – B.A. *Cum Laude* (Political Science), Wright State University, Dayton, Ohio
- 2011 – M.S. (Communications & Marketing), Franklin University, Columbus, Ohio

CERTIFICATION

- 2010 – Ohio State Bar Association Certified Paralegal
- 2011 – American Alliance Certified Paralegal
- 2013 – National Federation of Paralegal Associations PACE Registered Paralegal

AWARDS

- Paralegal Association of Central Ohio Outstanding Committee Chair for 2009 to 2010
- Paralegal Association of Central Ohio Ten Year Paralegal Service Award in 2009
- Paralegal Association of Central Ohio Outstanding Member for 2010 to 2011
- Paralegal Association of Central Ohio Paralegal of the Year 2011 to 2012
- Paralegal Association of Central Ohio Paralegal of the Year 2012 to 2013
- Paralegal Association of Central Ohio Fifteen Year Paralegal Service Award in 2014

PROFESSIONAL ASSOCIATIONS

- Ohio State Bar Association
- Notary Public for the State of Ohio
- National Notary Association
- National Federation of Paralegal Associations
- American Alliance of Paralegals, Inc.
- Columbus Bar Association
- Paralegal Association of Central Ohio
- Franklin University Alumni Association
- Wright State University Alumni Association
- Sinclair Community College Alumni Association
- Paralegal Knowledge Institute
- American Association for Paralegal Education

As Administrative & Paralegal Support Director, Mindi Schaefer is responsible for the management of the administrative and paralegal support staff which includes recruiting, training, work-flow coordination, productivity management, and continuing legal education. Additionally, she analyzes public relation and promotional strategies for the firm including sponsorship activities, pro bono opportunities, and speaking engagements. She researches print and electronic media options for the firm to promote and advertise the firm. In addition, Mindi focuses on social media implementation and website content management to maintain fresh and current firm content.

With years of experience, Mindi participates in various types of litigation cases in the areas of medical malpractice, professional liability, general liability, governmental entity liability, business planning, and business disputes. She handles all aspects of the legal process including investigation, discovery, file management, and trial preparation. Through her work at Poling, Mindi works closely with clients, counsel, and the legal community to illustrate the firm's belief in results, service, and relationships.

Mindi actively participates in the Paralegal Association of Central Ohio ("PACO") and presently holds the positions of Social Media & Website Coordinator and National Federation of Paralegal Associations ("NFPA") Primary Representative for PACO. Additionally, Mindi serves as the Leadership Coordinator for the NFPA.

She is also a Professor in Capital University Law School's Paralegal and Legal Nurse Consultant Programs teaching Introduction to Paralegal Studies and Civil Litigation. Mindi is a continuing legal education presenter with NFPA, myLawCLE, and Institute for Paralegal Education focusing on the areas of case preparation from start to Trial and document management. She has been a featured author with PACO and National Paralegal Reporter (affiliated with the NFPA) focusing on topics associated to paralegals, PACO, employment, mentoring, and trial preparation. Mindi

is also a frequent guest speaker at local area high schools and colleges focusing on interviewing, entering the paralegal profession, and the overall paralegal profession in Central Ohio.

Email: mschaefer@poling-law.com

Office: (614) 737-2914

Mobile: (937) 417-9813



Session II: A View from the Bench – Lessons Learned from the Top

Panelist: Judge Charles A. Schneider - Franklin County Common Pleas Court, Franklin County, Ohio

Current Position - Judge, *Franklin County Common Pleas, General Division*

2004 – present

- ◆ Presiding Judge 2015 – present
- ◆ Administrative Judge 2011 – 2013

Prior Judicial Experience

Judge, *Franklin County Municipal Court*

- ◆ 1996 – 2004. Five years as Administrative Judge

Private Practice:

- ◆ Wilcox, Schlosser & Mirras, Associate 1976 – 1978
- ◆ Mirras & Schneider, Partner 1978 – 1987
- ◆ Charles A. Schneider, Solo Practitioner 1987 – 1992
- ◆ Vorys, Sater, Seymour & Pease, Of Counsel 1992 – 1996

Other Experience:

- ◆ Safety Director, City of Hilliard, 1981 – 1996
- ◆ Law Director, City of Hilliard, 1984 – 1996

- ◆ Chairman, Ohio Elections Commission 1993 - 1994

As a practicing attorney I had significant civil trial experience. I also handled criminal defense and served as a prosecuting attorney. Prior to taking the bench in 1996, most of my practice was devoted to representing governmental entities. In addition to serving the City of Hilliard, I was special counsel for the Upper Arlington School District, the Buckeye Valley School District, and Pleasant Township.

Chair of the Commission when it was a part of the Office of the Secretary of State and the first Chair of the Commission when it became independent in 1996.

- ◆ U.S. Army 1970 - 1973

Education

- ◆ University of Michigan, BA 1970
- ◆ Ball State University, MA 1973
- ◆ The Ohio State University, JD 1976

Community and Professional Organizations

Current

- ◆ Columbus Bar Association Board of Governors
- ◆ Ohio Jury Instructions Editorial Board
- ◆ State Commission on Certification of Attorneys as Specialists
- ◆ Maryhaven, Director & Past President
- ◆ Advanced Scientific Technological Adjudicated Resource Fellow
- ◆ Franklin County Law Library Resources Board, Secretary
- ◆ Columbus Law Library, Secretary Treasurer
- ◆ North Central Mental Health, Director, Past President
- ◆ Ohio State Bar Association, Member
- ◆ Notary Public Committee CBA, Instructor
- ◆ State of Ohio Consortium of Law Libraries, Chairman

Prior

- ◆ Metropolitan YMCA, Director
- ◆ Miami-Jacobs Career College, Advisory Board
- ◆ State of Ohio Citizens Advisory Council for Family Violence
- ◆ OSU Harding Hospital, Board of Trustees
- ◆ City of Hilliard, Charter Review Commission
- ◆ State of Ohio Law Library Task Force, Chairman

- ◆ Contributing Author, Reflection on Life and the Law

Personal

Married, Wife Judy

Daughter Lara

Married, Husband Brad

Son Thomas 17

Son Mitchell 14

Son Charles Jr.,

Married, Wife Cathy

Daughter Angela 14

Son Charles 11

Son Vincent 10



Session II: A View from the Bench – Lessons Learned from the Top

Panelist: Magistrate Elizabeth Watters - Franklin County Common Pleas Court, Franklin County, Ohio

Elizabeth J. Watters is a Magistrate with the County Court of Common Pleas, Franklin County, Ohio. She works for Judges Schneider and Holbrook. As a Magistrate, she presides over civil jury and jury-waived trials, including contracts, personal injury, product liability, construction, workers' compensation, landlord/tenant, and consumer actions. She conducts evidentiary hearings on motions, including preliminary injunctions, discovery disputes, and determination of damages. She presides over felony arraignments in criminal cases. Prior to becoming a Magistrate, she was an associate at the New York law firm of Winthrop, Stimson, Putnam & Roberts (now Pillsbury Winthrop), and then a partner at Chester, Willcox & Saxbe, LLP in Columbus. For nearly 22 years she was a trial attorney representing clients in all aspects of commercial and employment related legal matters. Notably, she served as outside counsel for the State of Ohio's case against the tobacco industry, resulting in a \$10 billion settlement for the State of Ohio.

Other Professional Experience

Associate Member, Ohio Judicial Conference Civil Law & Procedure Committee
ADR Mediator for the U.S. District Court (Southern District of Ohio), 2006-2011

Education

The Ohio State University College of Law, J.D. 1990
Managing Editor, *Ohio State Law Journal*
The Ohio State University, B.A., *cum laude* in sociology, 1987

Professional Memberships and Community Service

Columbus Bar Association, President (2009-2010); Board of Governors (2003-11);
Judicial Screening/Judiciary Committee (2000-03, 2010-12); Past Chair, Common
Pleas Court Committee; Fellow, Columbus Bar Foundation

Ohio State Bar Association, Council of Delegates (2006-present); Fellow, Ohio State
Bar Foundation, Class of 2008
Women Lawyers of Franklin County, Past President
Metropolitan Bar Caucus, American Bar Assoc., Executive Committee (2011-2015)
The Ohio State University Moritz College of Law, Past President of Alumni Society
(1999-2000), and National Council Member (1993-2012)

Achievements and Awards

AV Preeminent, Peer Review Rated, Martindale-Hubbell
Bar Register of Preeminent Women Lawyers
Columbus CEO, Top Lawyers in Columbus, 2010-2014
Ohio Super Lawyers, General Litigation, 2004, 2005 & 2006
1999 Business First's "Forty Under 40" Award
2011 Ohio State University Distinguished Service Award



Session II: A View from the Bench – Lessons Learned from the Top

Panelist: Judge Jodi Thomas - Franklin County Municipal Court, Franklin County, Ohio

Judge Jodi Thomas is a lifelong resident of Franklin County. She is a graduate of Gahanna Lincoln High School, and went on to attend The Ohio State University where she earned her bachelor's degree and license in social work. Judge Thomas received her Juris Doctorate in May of 2001 from Capital University Law School. She went on to spend 14 years as an attorney for the Franklin County Public Defender, where she trained and supervised new attorneys.

During her last five years at the Public Defender's Office, Judge Thomas was assigned to the Franklin County Specialized Dockets as the lead attorney. Dockets include: Mental Health Court, Military and Veterans Specialized Docket, Changing Actions to Change Habits (CATCH) Human Trafficking Specialized Docket, Alcohol and Drug Addiction Program (ADAP) Specialized Docket, and the Opiate Extension Program. Judge Thomas was appointed to the Franklin County Municipal Court Bench by Governor Kasich in April of 2016.

Prior to joining the bench, Judge Thomas dedicated her career to helping victims of human trafficking, veterans, and those suffering from mental health issues and drug addiction. She has been recognized for her work and has received the following honors: ADAMH Attorney of the Year Mental Health Court, Excellent Service Award Alcohol and Drug Addiction Program, Rise to the Challenge Award Military and Veterans Service Program, ADAMH Attorney of the Year Opiate Extension Program/Alcohol and Drug Addiction Program, and Model of Justice Award from the Justice League of Ohio. She was also inducted into the Gahanna Lincoln High School Alumni Hall of Fame.

Judge Jodi Thomas is seeking to retain her seat for the unexpired term this November. Jodi and her husband Jamie live in Gahanna with their two daughters, Abigail, 13, and Brooke, 9.



Session II: A View from the Bench – Lessons Learned from the Top

Moderator: Andrea M. Enderle, Litigation Paralegal, Bricker & Eckler – PACO Vice President and BWE Sub-Committee Co-Chair

ANDREA ENDERLE, a paralegal in Bricker & Eckler's Litigation group, has vast experience in both the personal and commercial insurance industries. She assists in every aspect of a file, including electronic document collection, analysis and production. Prior to working at Bricker & Eckler LLP, Andrea worked at Nationwide Insurance for fifteen years. During her time with Nationwide, Andrea held a variety of positions including paralegal with the Discovery Management Unit as well as a Sr. Paralegal with the claims personal and commercial lines legal team.

Andrea attended The Ohio State University receiving a bachelor's in criminology before pursuing her paralegal certificate from Capital University Law in 2010.



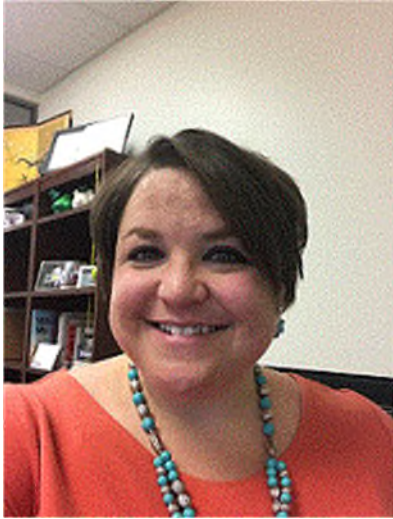
Session III: The Diversity of Paralegal Careers – Breaking Down Barriers

Panelist: Mary Beth Schmidt, President & Chief Operating Officer - The Gnoêsis Group, A Certified Woman-Owned Business

Ask Mary Beth Schmidt what makes Gnoêsis different from other legal staffing and strategic consulting firms, and her answer is instantaneous: the people. Mary Beth is deeply relationship oriented, and it shows in everything she says and does. Her unique combination of business smarts and gut-level intuition enable her to excel at what she considers the "art & science" of finding the right people for the job—it all comes down to communication, innate understanding, and respect.

As one of the founders of Gnoêsis, Mary Beth is focused on getting the basics of the business right, and then doing them over and over, better and better each time. With more than 30 years of experience in the legal staffing space, she firmly believes that customer service is in her DNA, and has been essential to her lifelong success. After attending California State College in Los Angeles, Mary Beth took a position at a national firm before joining an independently owned staffing company in San Diego, where she learned to "keep the main thing the main thing." Today, as the head of business development and operations for Gnoêsis, she can be found telling the Gnoêsis story to law firms and corporate law departments across the U.S. Her loyalty to the professionals she recruits is second only to the passion she has for the business and the clients she feels privileged to serve.

When she's not singing the praises of the people she works with, Mary Beth can be found at home in Westerville enjoying the company of her husband and three amazing sons.



Session III: The Diversity of Paralegal Careers – Breaking Down Barriers

Panelist: Amy Moore, Primary One Health – Director of Human Resources

Amy has built a 15-year career in Human Resources working primarily in the non-profit sector. She's currently the Director of Human Resources for PrimaryOne Health, a Federally Qualified Health Center serving the Central Ohio community. Amy obtained her BA in Journalism from Ohio Wesleyan University; she attended Capital University Law School and obtained her Paralegal Certification, concentration in Labor & Employment Law and Workers Compensation; has her Master of Science, Human Resources Administration from Central Michigan University; and is SPHR and SHRM-SCP certified.



Session III: The Diversity of Paralegal Careers – Breaking Down Barriers

Panelist: Kristin Gordon-Hock, Paralegal, Wolinetz & Horvath, LLC

Kristin Gordon-Hock is a paralegal at Wolinetz & Horvath, LLC, a law firm specializing in family law. She has been a paralegal in the family law practice area her entire career, having worked previously for OSBA family law certified specialist attorneys at Friedman & Mirman Co., LPA and the law firm of Dagger, Johnston, Miller, Ogilvie & Hampson, LLP. She completed the post-baccalaureate paralegal studies certificate program at Columbus State Community College in 2005. Prior to that time, Kristin worked as a print news reporter for Gannett, Inc. newspapers until 2004, starting first as an intern in 1997 and working through the duration of her undergraduate studies at Ohio University. Kristin has held various volunteer roles with the Paralegal Association of Central Ohio (PACO), currently serving as an Advisory Board Member. She is a paralegal member of the Columbus Bar Association and a member of the National Federation of Paralegal Associations; a board member of the Income Council for United Way of Fairfield County; a member of Fairfield Medical Center's TWIG 1; and is a founding member of Columbus Eastside Running Club (CERC) – Baltimore. In her free time, Kristin enjoys running races from 5ks to marathons, practicing yoga, cooking, and spending time with her husband and two yellow Labradors.



Session III: The Diversity of Paralegal Careers – Breaking Down Barriers

Moderator: Rebecca M. Lewis, Compliance Manager, Nationwide Mutual Insurance Company; PACO – Student Liaison Representative and BWE Sub-Committee Co-Chair

Rebecca M. Lewis, MBA, MPA, is PACO's Student Liaison Representative, the 2017 Biennial Workshop & Exhibition Sub-Committee Co-Chair, and a member of the Mentoring Committee. Rebecca is currently employed as a Compliance Consultant Manager within P & C Claims Shared Services at Nationwide Mutual Insurance Company, Columbus, Ohio. Rebecca leads a team of analysts and has involvement in strategic planning to enable innovative and expansive services from a compliance perspective to the claims organization in support of 'One Nationwide'. This is accomplished through collaboration with business teams targeting process improvements and consistency, transparency of workflows, evaluation and analysis in order to present recommendations to claims leadership that may affect the entire claims organization.

Rebecca has her Master's Degree in Business Administration (MBA) and Master's Degree in Public Administration (MPA) both from the Keller Graduate School of Management. Additionally, she is a graduate from the University of Toledo where she earned a Bachelor's of Science Degree in Individualized Studies Program (Cum Laude) and an Associate Degree in Legal Assisting Technology (High Honors).

Rebecca's current professional affiliations consist of being a Mediator in the Franklin County Municipal Court, Small Claims Division; Member of the Nationwide OCLO Pro Bono Committee; Member of the National Federation of Paralegal Associations; Associate Member of the Columbus Bar Association; Paralegal Member of the Ohio State Bar Association; and, a Notary Public in the State of Ohio.