



## New Member Spotlight!

**Delisse Otero**  
Firm Administrator  
[Kozloff Stoudt Attorneys](#) | Wyomissing, PA

Delisse joined the Independence Chapter in July, 2023. She is currently working as the Firm Administrator for Kozloff Stoudt Attorneys, a role that entails managing the daily operations and business aspects of the firm. She aptly states, "I'm sure every Administrator knows that this title means we do everything, except practice law." Delisse's desire to learn from others in the Legal space led her to join the ALA. She sees it as a valuable platform to gain insights into managing a law firm and to hear about the experiences of fellow members.

Delisse began her career as a CPA working in public accounting. Later, she ventured into entrepreneurship by starting her own business, hoping to spend more quality time with her children. While she did find more time for her family, she also found herself working countless nights and weekends to keep her business going.

Her career took a turn when a client made her an offer she couldn't refuse. She transitioned into a Controller role for his restaurant construction business, followed by a position as Controller for a multi-location funeral home. Her responsibilities expanded rapidly, encompassing everything from operations and finances for five funeral homes to managing a wholesale casket business and eventually a commercial rental property. Delisse's role included tasks ranging from daily operations to human resources, accounting, technology implementation, and marketing.

*"I have found the ALA Community very helpful ~ I easily lose track of time reading the daily digest topics, it's so helpful, I should have joined sooner. I thought I was the only one experiencing some of these issues." - Delisse*

Her journey into the legal world wasn't a planned one. The turning point came during the COVID-19 pandemic when she began reflecting on her career aspirations. Surprisingly, opportunity knocked on her door. "Without looking or even uploading my resume anywhere, I received a call from a local community member whom I hadn't spoken to in several years. He said that a friend of his was looking for someone, preferably a CPA, to take over his position as a law firm administrator." Her curiosity led her to engage with the opportunity, and she quickly realized a strong connection with the firm's commitment to the community and giving back.

Given her unique journey, Delisse offers insightful predictions about the evolving legal industry. She believes that technological advancements and AI are reshaping the field. While some individuals may attempt to navigate legal matters independently, Delisse emphasizes the enduring importance of lawyers, especially when self-reliance leads to complications. She asserts, "There will always be a place for lawyers; we just need to make sure we are adapting and changing with the times."

Delisse is embarking on an exciting new chapter in her career as she started law school in August. Balancing the rigors of law school while effectively managing her law firm presents a formidable challenge. However, her determination and adaptability are evident, and she's ready to embrace this new adventure.

Delisse's journey is a testament to the unexpected twists and turns that life can bring. Her transition into legal administration and her pursuit of further education highlight her commitment to personal and professional growth. As a new member of the ALA Independence Chapter, Delisse is poised to contribute her unique perspective and learn from the experiences of her peers.

Delisse resides in Sinking Spring, Pennsylvania, with her husband, a retired Army and Coast Guard veteran, their five children, two cats and a dog. They love the outdoors and challenging each other to games of ping pong and badminton.



## Choosing Limits for your Lawyers' Liability Insurance

by **Jody Campbell** | Regional Sales Director  
Minnesota Lawyers Mutual Insurance Company



Imagine having to call your malpractice insurance provider to report a claim, only to discover that the alleged damages far exceed your policy limits. It is crucial to select adequate malpractice insurance limits for both you and your firm. This article aims to guide you in making the right choices regarding coverage limits and deductibles for your professional liability policy.

Firstly, you must determine the appropriate limits of coverage. Your insurance policy will specify a per claim limit of liability and an aggregate limit of liability. The per claim limit pertains to the amount available to cover damages and defense costs stemming from a single incident or event leading to a claim. When selecting a per claim limit we recommend reviewing your office's files – both open and recently closed – to estimate the value for each file. Then make sure you select a claim limit amount that will adequately cover your most substantial typical case. This exercise should provide a solid basis for choosing an appropriate per claim limit that safeguards you from personal exposure in the event of a malpractice claim.

Next, assess the aggregate limit of coverage required. The aggregate limit represents the maximum amount available to settle all claims within a policy year. If your aggregate limit matches the per claim limit, a single claim could deplete both limits within the same policy year. Be prepared for worst-case scenarios.

Finally, the deductible is what you would have to pay for a settlement or (dread the thought) loss. Some attorneys opt for high deductibles to save money on their premium. Typically, the premium difference for a lower deductible is minimal, making it worthwhile to consider whether paying an extra amount in premium now, will save you more money down the road if you have a claim. MLM's professional liability policy features a loss-only deductible, triggered only when MLM makes an indemnity payment on your behalf.

Taking the time to thoroughly evaluate your practice and your capacity to cover a specific deductible is a prudent and essential exercise. More attorneys are experiencing malpractice lawsuits, with some experts estimating that new attorneys may encounter three to four claims in their careers. Ensuring you have the right coverage will provide peace of mind when dealing with a malpractice claim. When renewing your policy, ensure that your initial analysis still aligns with your practice, and make necessary adjustments if needed.



## Get Certified In Mental Health First Aid!

by **Kate MacArdle** | Practice Support Manager | Ballard Spahr LLP

### When you hear the phrase "first aid," what comes to mind?

Bandages, antibiotic ointment, ice packs? Maybe a red box with a great big plus sign on the front indicating there are helpful tools inside to be used in case of a physical emergency? But what about a mental emergency? How could non-stick sterile pads or antiseptic wipes help in that instance? The fact is, they can't. And that's where the Mental Health First Aid certification comes in.

This program has enabled millions of people around the U.S. to recognize and appropriately respond to someone experiencing a mental health or substance use challenge or crisis. By getting certified in Mental Health First Aid, not only will you have the knowledge and tools to assist family, friends, coworkers, and colleagues living with mental health or substance use challenges, you'll also gain a deeper understanding of mental illness and the stigma that surrounds it.

Armed with the information provided in this program, you can be an advocate for change and join the fight against misinformation, judgment, and negative language about mental health and substance use disorders.



## Joan Wean Scholarship Fund

*More info coming soon...*



## Business Partner Event

by **Megan Marnie** | Philadelphia Office Manager | Cipriani & Werner P.C.

### Another great event was hosted by the Independence Chapter on Thursday September 14, 2023 at Our Town Alley

Any excuse to get together with Chapter members for some networking, food and drinks is always a good time but when we do it to show our Business Partners how much we appreciate their support it's an even better night!

It was also a little bittersweet as we held our first raffle in honor of Joan Wean. The Joan Wean Scholarship Fund will be a new annual tradition for the Independence Chapter, and we will be sharing more details in the future..

We wanted to thank all that donated and participated in the raffle as we get things started in Joan's memory. Lots of laughs were had while we dusted off our bowling skills and caught up with each other and we look forward to seeing all of you again at the next event.

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## Adopting and Implementing Inclusive Hiring Practices

by **Megan Marnie** | Philadelphia Office Manager | Cipriani & Werner P.C.



On August 9, 2023, the Independence Chapter hosted a dynamic DEIA Education Event via Zoom present by Angela Taylor, Esquire from Cipriani & Werner. The topic was focused on Adopting and Implementing Inclusive Hiring Practices in our firms. Angela provided us reasoning and statistics behind the need for building an inclusive workforce and ideas on how to simply put plans and practices in place.

Those of us in attendance received lots of insight and data on different perspectives we may have not used in analysis our internal hiring and selection process. Recruiting and retention is certainly a big focus for most firms today and we all play a big part in that process. Information and discussion surrounding outsourcing, job fairs, recruiters, and other avenues to select and recruit candidates was certainly valuable.

Personally, I found the suggestion for creating a focused framework and documentation of the interview process most valuable. The changing market is moving fast these days and implementing a centralized list of questions, assessment forms, etc. for our interviewers to utilize will be helpful in the future to keep us all on track of the bigger picture! The session was very well attended, and we thank Ms. Taylor for her time and hope to host more topics of this nature in the future for our Chapter members.

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## Back to School Drive

by **Amy Coral** | Troutman Pepper Office Administrator

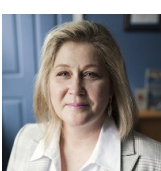
On August 12th, the Crime Victim's Center of Chester County witnessed an outpouring of community support as several dozen families gathered to collect much-needed school supplies for their eager young scholars. These essential tools for success were generously donated by ALA member law firms spanning Bucks, Chester, Delaware, and Montgomery counties.

The event, aimed at easing the back-to-school burden on local families, received backing from not only the Independence Chapter but also from the Chester County Bar Association and Franklin Mint Federal Credit Union, whose collective efforts made this initiative possible.

Reflecting on the impact of these donations, one of the dedicated CVC social workers shared, "A client visited and found everything their child needed." The child's mother extends her heartfelt blessings to all the compassionate donors who made this event possible.

Another CVC social worker chimed in, "Today, I had the privilege of delivering a backpack filled with school supplies to a client's daughter. The mother faces transportation challenges, and her child was so thankful. The mother, deeply moved by the support, sends her heartfelt thanks to all the contributors who came together to bring smiles to the faces of these children and their families."

It is a heartwarming reminder that when a community comes together, it can overcome challenges and bring hope to those in need.



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