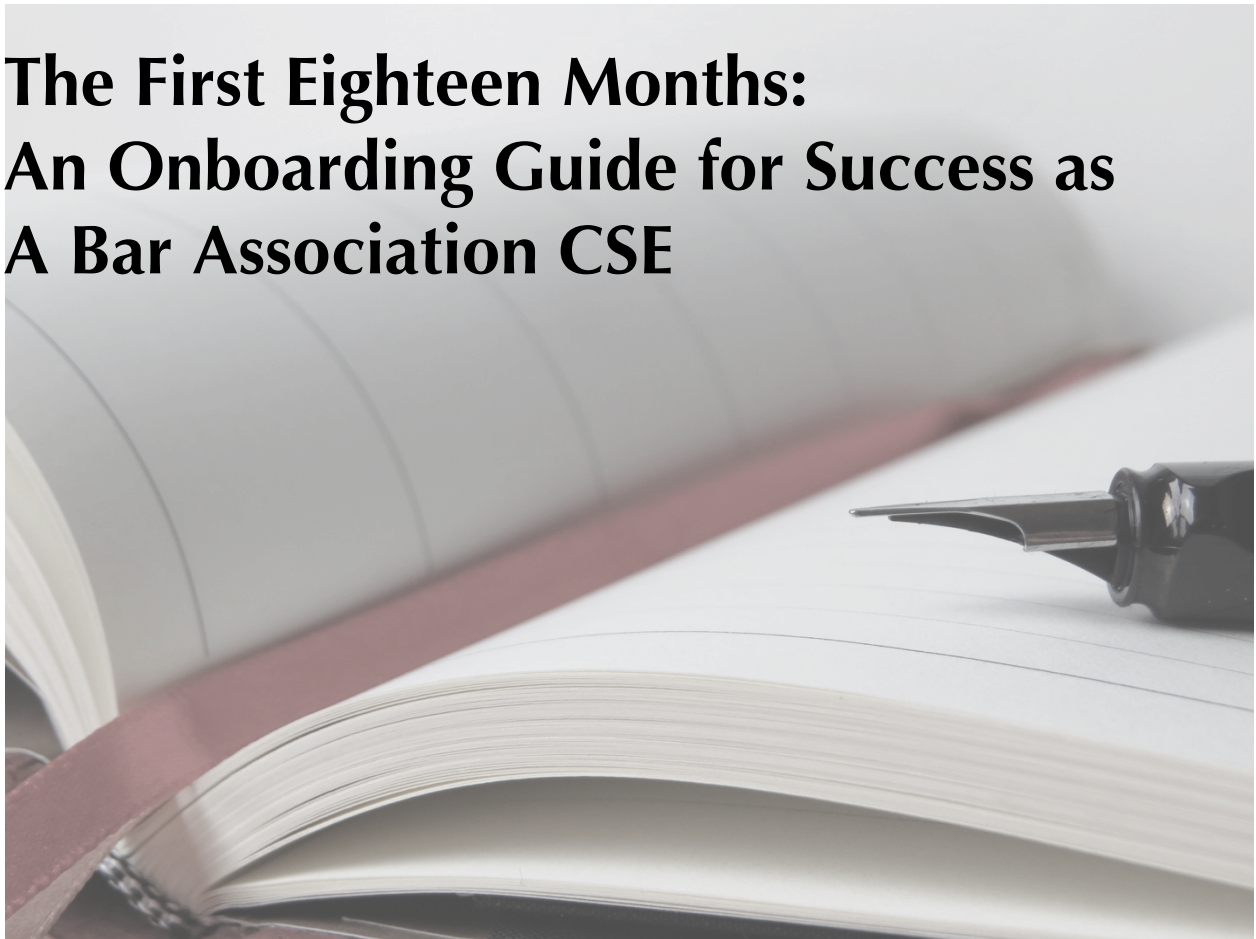




The First Eighteen Months: An Onboarding Guide for Success as A Bar Association CSE



#naBEMoreKnowledgeable

#naBEMorePrepared

#naBEMoreSupported

September 2019 Revised January 3, 2023



Table of Contents

How to Use this Guide	2
Week One	3
Weeks Two-Six	5-7
Weeks Seven-Twelve	7-8
Weeks Thirteen-Twenty-Four	9
Weeks Twenty-Five-Thirty-Six	10
Weeks Thirty-Seven-Fifty-Two	10-11
Weeks Fifty-Three-Seventy-Eight	11
Reading List	12
Policy Checklist	13
Glossary of Acronyms	14
Sample Executive Director Reports to the Board	18

How to Use Your First Eighteen Months: An Onboarding and Integration Guide

This guide is intended to help you be successful during your first year and a half as the chief staff executive (CSE) of a bar association. Whether you are experienced at being in charge or new to the CSE role, the first year has been described as "drinking from a firehose." NABE and your colleagues are here to support you to #naBEMore. We will smooth your journey by connecting you with people and knowledge resources that can help. Make sure that you visit your [profile](#) and tell us about yourself.

Not all recommended tasks are pertinent to every situation. It depends on the size and complexity of your organization. Some tasks will require your attention earlier or later, depending on when you begin your job relative to the bar's program, governance, and financial cycles. While we have categorized the tasks, few of them are exclusively one thing or another.

- **Administrative Tasks** address paperwork and process.
- **Management Tasks** involve staff and volunteers, and how the work gets done.
- **Governance Tasks** are those that include the board and other governing bodies and the exercise of their oversight and fiduciary responsibilities. Governance is both policy and process.
- **Relationship-building Tasks** focus on internal and external stakeholders.
- **Self-care Tasks** help you to succeed by avoiding burnout and reducing stress.

Successful transitions are the result of traversing the cultural, political, and technical aspects of your leadership role.

A [reading list](#), [policy list](#), and [glossary](#) are linked in this report.

Finally, be sure to follow NABE and the ABA Division for Bar Services on social media for the latest news and updates.

www.nabenet.org

www.americanbar.org/groups/bar_services/



@NABE_News



@NABEBAREXCS



@ABABarServices



Week One

Welcome to your first weeks as the executive director of your bar organization. Your first days will set the tone for your leadership and communication styles. Now you will begin to integrate the knowledge that you gained during the recruitment process into a bigger, more in-depth picture of the association.

1. Relationship-building Task: Meet the Staff.

Meet all of the staff who are present and accounted for on day one of your new adventure. If you have a large staff host a town hall and arrange for an introduction from the president or president-elect. Don't make promises from the seemingly minor to the revolutionary.

2. Administrative Task: Fill out the paperwork.

It is important to get paid. It also is your first exposure to the process and procedures related to human resources management. Ask questions. Take notes. If you have a human resources manager or point person, ask to work through the process with him or her to experience it both from their perspective and onboarding employee. If you do not have an human resource professional on staff, consider reviewing the onboard process with labor counsel to ensure you are observing current best practices.

3. Administrative Task: Review scheduling and calendaring norms.

Are drop-ins okay? Are there days of the week or times of the day designated "no meetings"? Is there a shared staff calendar? Is there a calendar of the association events and critical deadlines? If not, request staff to compile a comprehensive one.

4. Management Task: Review the organizational chart and determine how well it reflects reality.

5. Administrative Task: Understand building security and parking. Obtain keys and access codes.

6. Relationship-building Task: Be visible.

Engage in building relationships by walking around. Visit someone in their office rather than sending an email. Visit the staff kitchen or lunchroom.

7. Administrative Task: Settle into your office.

Make yourself comfortable. Order your favorite post-it-notes and learn how to use the office coffee maker. Understand the current Board and Executive files/records system(s).

8. Management Task: Request Departmental Program Assessments from Directors.

Ask for assessments of what is working well, what needs attention, and any pending decisions or issues on the horizon that will require your input and consideration. Ask managers to identify their challenges and opportunities.

9. **Management Task:** Schedule one-one meetings with all department heads or if you have a manageable staff size with each member of your staff. Listen. Ask questions. Identify events that you should attend. This effort is about information and insight gathering not problem-solving unless there is an urgent matter requiring a decision.

10. **Relationship-building Task:** Request a list of top 10-20 stakeholders from your officers, board members, and senior staff. These may include vendor partners and sponsors, managing partners of the community's largest law firms, judicial officers, audit firm, law school deans, and bar association colleagues. Developing relationships and building support for your leadership is very important. Understanding expectations and aligning them should be a priority.

11. **Management Task:** Set times for regular staff or direct reports meetings.

12. **Relationship-building Task:** Familiarize yourself with the acronym soup of association management, the legal profession, and bar associations. This glossary will help you.

13. **Governance Task:** Meet with the officers. Identify their goals and expectations for the short term. Share your onboarding plan with them and ask for introductions to key stakeholders. Clarify expectations for governance: scheduling, agenda preparation, minute taking, and regular communications. Ask about written and unwritten Board policies and procedures.

14. **Relationship-building Task:** Calendar upcoming events that you should attend. Consult with officers, board members, and senior staff to prioritize events.

15. **Administrative Task:** Execute corporate resolution. Complete paperwork for signing contracts, corporate credit card, and check signing authority, as appropriate to the bar's policy and procedures.

16. **Administrative Task:** Understand the travel reimbursement policy.

Things to Read:

- Bylaws
- Court Rules governing the Bar
- CLE and other reporting regulations
- Minutes from board meetings for the last year
- Financial statements
- Budget reports
- Audit reports
- Employee Policy Manual
- Board policies
- Leadership briefing materials

- Section and Committee chair orientation materials
- The First 90 Days by Michael D. Watkins [link]
- Foundation and Association Annual Reports

Weeks Two - Six

1. **Management Task:** Prepare your elevator speech for your conversations with stakeholders. Why did you want the job as executive director? What opportunities have you identified?
2. **Management Task:** Write an introductory column for the newsletter or hold an interview with the newsletter/journal editor and local legal media.
3. **Administrative Task:** Review policy and operational manuals.
4. **Relationship-building Task:** Introduce yourself to the National Association of Bar Executives CSE [Community](#) by creating a login password to your [NABE account](#).
5. **Governance Task:** Review the [policy checklist](#). Identify what may be missing or requiring attention and set priorities in consultation with appropriate staff such as the Human Resources Director, Finance Director and/or General Counsel.
6. **Self-Care Task:** Identify and register for upcoming professional development events. Plan to attend the National Association of Bar Executives (NABE) Annual and Midyear meetings and Chief Staff Executives Retreat [link to calendar document]. If you are a local bar executive, your state may host a bar professionals' group and a statewide bar leaders conference.
7. **Governance Task:** Meet with board members. Scheduling board member meetings will depend on the size of the board and the geographical reach of your organization. If you are a statewide bar association with a 50-member board, individual meetings may not be practical. But there are alternatives. Consider video calls using Skype or Zoom.

If there is a board meeting within a month of your start date, you might want to forgo the individual in person meetings and script an introductory phone call.
8. **Management Task:** Determine some early wins that align with both board and operational priorities.
9. **Relationship-building Task:** Return your NABE docent's phone call and set-up a conference call. Your NABE docent is an experienced chief staff executive available to help you navigate your first 18-months serving as a sounding board, confidant, and guide.

10. Administrative Task: Compile –or delegate– a list of contracts and insurance policies and their expiration dates. Check for those that auto-renew and set a reminder for review before the notification date.

11. Management Task: Meet with outside consultants to whom functions -- such as payroll, bookkeeping, web development, human resources, or IT-- are outsourced.

12. Relationship-building Task: Schedule and meet with external stakeholders in person or by telephone.

13. Management Task: Assess membership trends, demographic information, and chart dues billing and renewal cycles.

14. Administrative Task: Develop a list of emergency contact information (staff, building security information, banking, and insurance resources) and store off-site and online.

15. Administrative Task: Determine data security and backup procedures, including cyber insurance.

16. Governance Task: Work with the president to develop agenda and materials for your first board meeting.

17. Relationship-building Task: Plan and invite members to meet and greet.

18. Management Task: Attend departmental staff meetings.

19. Management Task: Learn about the current fiscal (and operational?) audit process. Meet with auditor(s) and Audit/Finance Committee representative(s) as appropriate.

Things to Read:

- Membership Survey Results
- Performance Reviews of Direct Reports
- Strategic Plan
- Operational Plan(s)
- Last several issues of printed newsletter or journal
- Website
- Internal Disaster Recovery Plan
- Disaster Plan (Procedures in case of a mass disaster such as an airplane crash or natural disaster that impacts members and community.)
- Communications Plan
- Policy on responding to unwarranted criticism of judges
- New Bar President* and *New Bar Board Member* published by the ABA Division for Bar Service

Weeks Seven - Twelve

- 1. Management and Governance Task:** Determine your organization's status and lifecycle position. Does it require a turnaround? Turnarounds require swift and decisive action. They could be marked by dwindling membership, faltering finances, stale programming, low-staff moral and a disengaged board. Realignments are necessary when outcomes are okay, but there are signs that things are getting worse. Change is more deliberate in realignments and requires building allies and support. If everything seems tip-top and running smoothly, you are sustaining success. You may be facing different imperatives in different functions of the organization. Finances may need a turnaround while programming needs realignment. Assess by functional area.
- 2. Administration and Governance Task:** Check on the status of regulatory filing compliance such as the 990, state non-for-profit registration, lobbying registration, OSHA, sales tax, etc.
- 3. Management Task:** Attend a CLE program and other routine events. Get a feel for programming and use the opportunity to meet members.
- 4. Management Task:** Talk to the receptionist. What do people call about? What frustrates members when they call?
- 5. Governance Task:** Meet weekly with the President to review project status and your onboarding progress.
- 6. Relationship-building Task:** Identify an informal group of internal and external advisors who can offer technical, cultural, or political insight. Look beyond your direct reports and your officers. These are the folks that can give you a reality check and help you to negotiate changes. In the process, make sure to be inclusive of longtime staff members.
- 7. Administrative Task:** Analyze capital expenditure needs for the bar building or office space. Are there deferred maintenance issues that need to be addressed? When does the lease expire?
- 8. Governance Task:** Prepare for your first board meeting, include a written executive director's report to be included with the board background packet. Highlight key meetings and accomplishments.

- 9. Management Task:** Assess your learning agenda.
After reviewing all the essential documents determine your learning agenda: What else do you need to know? Who has the information that you need?
- 10. Management Task:** Further determine how things work.
Explore the mechanics of significant projects. How does the renewal process work? How is a CLE program planned and executed? When who and how is the legislative agenda set?
- 11. Management Task:** Attend departmental staff meetings.
- 12. Relationship-building Task:** Continue to meet with external stakeholders and identify key points of contention and support for the association.
- 13. Governance Task:** Familiarize yourself with best practices in bar board governance. [link to DBS Governance Resources]
- 14. Management Task:** Read legislative agenda materials to familiarize yourself with the players and process. Meet with outside legislative counsel, as appropriate.
- 15. Management Task:** Examine the performance review process and methods for determining salary increases.
- 16. Management Task:** Identify points of internal conflict among staff members and organizational entities.
- 17. Self-Care Task:** Check in with your NABE docent.
- 18. Governance Task:** Meet with the executive committee or designated entity to establish your performance goals.
- 19. Management Task:** Determine modes of staff recognition and celebration. Cake for birthdays? Annual outings? Summer hours?

Things to Read:

- 990s (three-years)
- Committee charges
- Section charges
- Job descriptions
- Lease
- Association-Foundation MOU
- NABE Compensation & Benefits Survey (published every two years)
- ABA Division for Bar Services (DBS) Annual Benchmark Survey (customized reports may be requested from the DBS)

Weeks Thirteen - Twenty-Four

1. **Management Task:** Share your organizational assessment with leadership and appropriate staff: governance, human resources, and financial policies in need of revision; staff matters requiring attention; and those things that are running well.
2. **Governance Task:** Refine your staff report to the board and consider developing a Key Performance Indicator document (KPI) to present the board with a monthly or quarterly snapshot.
3. **Administrative Task:** Review staff benefits package, including health insurance.
4. **Management Task:** Review staff professional development plans, and opportunities. Participate in NABE Classroom events.
5. **Management Task:** Understand the technology infrastructure and the plan for replacing equipment.
6. **Relationship-building and Management Task:** Attend your regional state bar conference, State Bar Local Bar Leadership Conference, or the Conference of Metropolitan Bar Association Annual Meeting.
7. **Administrative, Management, and Governance Task:** Revise or create prioritized staff, financial, or governance policies. In revising governance policies work with a board committee or task force.
8. **Self-care Task:** Close the office early before a holiday weekend or for no reason at all.
9. **Management Task:** Assess staff skillsets against identified organizational needs. Begin the realignment process.
10. **Management Task:** Review existing documentation “inventory” and updating/revision processes and schedules.

Things to Read:*

- NABE Bulletin
- NABE News
- Bar Leader Magazine and Bar Leader Weekly*

*electronic

Weeks Twenty-Five - Thirty-Six

- 1. Governance Task:** Hold a six-month check-in with your officers on your progress towards your goals and your onboarding plan. Recalibrate as necessary.
- 2. Governance Task:** Review and work with staff to revise board orientation materials. Coordinate and schedule orientation.
- 3. Management Task:** Evaluate staff wellness initiatives.
- 4. Self-Care Task:** Schedule a vacation. Avoid burnout.
- 5. Management Task:** Host a staff retreat. Develop an agenda for creating an operational plan based on your assessment. Create some space at the retreat to continue to build your team.
- 6. Administrative Task:** Begin the budget process. Determine your role vis-à-vis your finance staff, treasurer, and the Finance Committee. Identify a pool for staff compensation and bonuses.
- 7. Management Task:** Monitor program processes and begin to guide and lead change.
- 8. Relationship-building, Governance and Self-Care Task:** Plan to attend the CSE Retreat and the ABA Bar Leadership Institute with your president-elect (March). These are must-do events and serve as both an orientation and an opportunity to build your network.
- 9. Governance Task:** Shepherds the Nominating or Election process. Ensure compliance with notification dates.
- 10. Self-Care Task:** Establish your “kitchen cabinet” of NABE colleagues to turn to for substantive advice and information sharing.

Week Thirty-Seven – Fifty-Two

- 1. Management Task:** Conduct performance reviews and determine raises and bonuses.
- 2. Governance Task:** Perform a self-evaluation in advance of your review by the Executive Committee or the Human Resources/Personnel Committee.
- 3. Management Task:** Meet with those doing your performance review and set goals for year two.
- 4. Self-Care Task:** Celebrate your first year.

5. **Management Task:** Set your personal goals for year two.
6. **Management Task:** Prepare written year in review highlighting your achievements.
7. **Management Task:** Engage in operational planning with your team.

Weeks Fifty-Three - Seventy-Eight

1. **Management Task:** Reassess and update organizational alignment.
2. **Governance Task:** Consider formal updating of the strategic plan.
3. **Relationship-building Task:** Meet with new board members.
4. **Administrative Task:** Respond to NABE Compensation and Benefits Survey request and ABA Division for Bar Services Benchmark Survey response request.
5. **Management Task:** Assess ongoing programs and activities.
6. **Self-Care Task:** Celebrate achievement of goals. Be sure to communicate your success to bar leaders.
7. **Self-Care Task:** Update your perpetual planning calendar and/or checklist and evaluate it for what is realistic. Make sure you have allowed time for outside interests.
8. **Relationship-building Task:** Consider how you can “give back’ to your colleagues:
 - What can you share from your first-year (plus) experience?
 - Who can you mentor?
 - Consider how you can do this and more through NABE volunteer involvement
9. **Governance Task:** Establish or update the board development plan.
10. **Governance Task:** Conduct a Board Assessment and Evaluation to determine how the board can improve its work.

Things to Read

- Bylaws
- Court Rules governing the Bar
- CLE and other reporting regulations
- Minutes from board meetings for the last year
- Financial statements
- Budget reports
- Audit reports
- Employee Policy Manual
- Board policies
- Leadership briefing materials
- Section and Committee chair orientation materials
- [*The First 90 Days*](#) by Michael D. Watkins
- Foundation and Association Annual Reports
- Membership Survey Results
- Performance Reviews of Direct Reports
- Strategic Plan
- Operational Plan(s)
- Last several issues of printed newsletter or journal
- Website
- Internal Disaster Recovery Plan
- Disaster Plan (Procedures in case of a mass disaster such as an airplane crash or natural disaster that impacts members and the community.)
- Communications Plan
- Policy on responding to unwarranted criticism of judges
- [*New Bar President and New Bar Board Member*](#) published by the ABA Division for Bar Service
- 990s (three-years)
- Committee charges
- Section charges
- Job descriptions
- Lease
- Association-Foundation MOU
- [*NABE Compensation & Benefits Survey*](#) (published every two years)
- ABA Division for Bar Services (DBS) [*Annual Benchmark Survey*](#) (customized reports may be requested from the DBS)
- [*NABE Bulletin*](#) (you are automatically enrolled as a NABE member)
- [*NABE News*](#) (you are automatically enrolled as a NABE member)
- Bar Leader Magazine and Bar Leader Weekly*

The First 18-Months Policy Checklist

- Bylaws
- Certificate of Incorporation, Resolution
- Conflict of Interest
- Confidentiality
- Court Rules applied to regulation
- Internal Financial Controls
- Conduct Standards
- Sexual Harassment
- Whistle Blower
- Antitrust Avoidance Statement
- Risk Management (D&O Insurance)
- Statement of Jurisdiction or Public Position Guidelines (apparent authority)
- Records Retention
- Social Media Policy
- Editorial Policy
- Advertising Policy
- PCI Compliance Procedures
- Employee Handbook
 - Vacation/Administrative Leave/PTO
 - Non-discrimination/EEOC compliance
 - Holidays
 - Salary administration

Glossary¹ of the Alphabet Soup of Bar Acronyms

Bar-related Membership Organizations for Staff Professionals and Volunteer Leaders

NABE—National Association of Bar Executives. NABE is the membership organization for professional staff of bar associations and law-related organizations, promoting and supporting excellence and professionalism among bar executives. In addition to its biannual meetings during the ABA Midyear and Annual Meetings, NABE presents section-sponsored workshops for staff specialists that supplement general educational programs. A retreat for chief staff executives is held each March prior to the ABA Bar Leadership Institute. Membership is on an individual basis, with discounts for multiple members of a bar association. Staffed by the ABA Division for Bar Services until July 1, 2023 when management is assumed by Jaffe Management.

NCBP—National Conference of Bar Presidents. The membership organization for present, future, and past bar presidents, NCBP's primary purpose is education. Through its biannual meetings in conjunction with the ABA Midyear and Annual Meetings, NCBP provides high-quality programming on issues of concern to bar leaders at state, local, and national bar associations. Membership is on an organizational as well as an individual basis. Staffed by the ABA Division for Bar Services.

NCBF—National Conference of Bar Foundations. NCBF provides a medium for professional staff, officers, and board members of bar foundations to exchange ideas and information related to best practices in the area of bar foundation management, fundraising, and public service programming. NCBF meets independently of NCBP and NABE. Membership is on an organizational as well as individual basis.

MBC—Metropolitan Bar Caucus. MBC supplements the educational programming offered by NCBP, with a specific focus on metro bar matters. Membership is by organization and the caucus welcomes both executives and officers of bar associations with membership in excess of 1,500. Targeted programming is offered on Friday afternoons during Midyear and Annual Meetings of NCBP.

ACLEA—Association for Continuing Legal Education

ACLEA is comprised members who represent bar association, academic, and commercial providers of continuing legal education. There are both individual and organizational membership options. ACLEA sponsors a Midyear and an Annual meeting with interim online learning opportunities. It is a resource for CLE rules and regulations.

NOBC—National Organization of Bar Counsel

NOBC is of legal professionals whose members enforce ethics rules that regulate the professional conduct of lawyers who practice law in the United States, Canada, The United Kingdom and other countries around the world. It meets in conjunction with the

¹ Courtesy of the ABA Division for Bar Services

ABA Midyear and Annual meetings. NOBC also takes advocacy positions on matters relating to the regulation of the practice of law and facilitates the submission of briefing on litigated issues of nationwide importance through its Amicus Committee.

National Minority Bar Associations

Next, there are several nationwide bar associations that represent lawyers of specific racial, ethnic, and cultural backgrounds. They are:

HNBA—Hispanic National Bar Association. HNBA represents the interests of more than 25,000 Hispanic American lawyers, judges, law professors, and law students in the United States and Puerto Rico. Its primary objectives are to increase professional opportunities for Hispanics in the legal profession and address issues of concern to the national Hispanic community.

NAPABA—National Asian Pacific American Bar Association. The only national association of Asian Pacific American lawyers, NAPABA advocates for the legal needs and interests of the APA community. It provides a national network for its members and affiliates, representing over 40,000 attorneys in 85 local APA bar associations.

NBA—National Bar Association. The oldest and largest national association of predominately African American lawyers and judges, the NBA represents a professional network of more than 20,000 lawyers, judges, educators, and law students. It has affiliate chapters throughout the United States and affiliations in Canada, the United Kingdom, Africa, and the Caribbean.

NNABA—National Native American Bar Association. The national association for Native American attorneys, judges, law professors, and law students, NNABA promotes issues important to the Native American community and works to improve professional opportunities for Native American lawyers.

ABA-related Groups

There are certain groups within the structure of the ABA that are of interest to leaders of other bar associations. These include:

SCOBAS—Standing Committee on Bar Activities and Services. The Standing Committee serves as the “eyes and ears” of the ABA in its relations with state and local bar associations and foundations. The committee works closely with the Division for Bar Services in its liaison efforts and, among its responsibilities, sponsors the annual Bar Leadership Institute and the ABA Partnership Awards Program.

NCSBA—National Caucus of State Bar Associations. A nonprofit unincorporated association, the National Caucus is comprised of the state bar associations of the 50 states and the District of Columbia, the territorial bar associations with representation in the ABA

House of Delegates, and the six regional state bar conferences. Each member organization has two delegates to the Caucus and meets during the Midyear and Annual Meetings of the ABA. The Caucus provides an educational forum for sharing information regarding items of interest to state bar associations that will be considered by the ABA House of Delegates. On occasion, it may take positions on issues that may be considered by the House.

Regional Conferences and Organizations

There are also organizations that give bar leaders from specific regions of the country a chance to get together and share ideas. They are:

COMBA—Conference of Metropolitan Bar Associations. The only local bar regional conference, COMBA grew out of joint meetings of local bar executives from Ohio and Michigan and expanded to include officers and executives from metro bars throughout the country. COMBA holds an annual conference in the fall for officers and CSEs of participating bar associations.

NEBA—New England Bar Association. Composed of bar leaders from the six New England states (Connecticut, Massachusetts, Maine, New Hampshire, Rhode Island, and Vermont), NEBA's board meets three or four times during the year and holds an annual meeting in the fall. Formed in 1969, NEBA tracks federal legislation and takes joint stands on issues that the six states have in common.

MABC—Mid-Atlantic Bar Conference. Six state bars (Delaware, District of Columbia, Maryland, New Jersey, New York, and Pennsylvania) banded together in 1979 to form the newest of the state bar regional conferences. Besides its annual conference in the fall, the group holds a breakfast meeting at ABA Midyear and Annual Meetings to review reports before the ABA House of Delegates.

SCBP—Southern Conference of Bar Presidents. The largest of the state bar regional conferences, with 21 bars from 17 states (Alabama, Arkansas, Florida, Georgia, Kansas, Kentucky, Louisiana, Maryland, Mississippi, Missouri, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia), Puerto Rico, and the Virgin Islands, SCBP conducts an annual meeting as well as business meetings at the ABA Midyear and Annual Meetings. Established in its current format in 1969, SCBP takes stands on issues and occasionally adopts resolutions in addition to providing educational programming.

WSBC—Western States Bar Conference. Established in 1949, the WSBC is the oldest of the regional state bar conferences and has a membership of 17 state and territorial bars (Alaska, Arizona, California, Hawaii, Idaho, Montana, Nevada, New Mexico, North Dakota, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, and the Northern Marianas Islands). It meets once a year after the ABA Midyear Meeting. A standard feature of its annual meeting is the roll call of the states.

Great Rivers Bar Leaders Conference. Formerly known as the Midwest Regional Conference of State Bar Leaders, the Great Rivers Conference formed in 1972 and is composed of nine state bars (Colorado, Illinois, Iowa, Indiana, Michigan, Minnesota, Nebraska, Ohio, and Wisconsin). The Conference sponsors an annual meeting and informal dinners at ABA Midyear and Annual Meetings.

Jackrabbit Bar Conference. The Jackrabbit bar comprises eight member states (Idaho, Montana, Nevada, New Mexico, North Dakota, South Dakota, Utah, and Wyoming). It is the least formal of the state bar regional conferences, meeting once a year, generally in early June in a resort location.

MANAGING PARTNERS

THE DASHBOARD

SEPTEMBER 11, 2018

Today's Agenda

Welcome and Introductions..... President
Remarks from host, Bhavik Patel, Managing Partner, Sandberg Phoenix & von Gontard, P.C.
Breakfast
BAMSL Update Executive Director
Open Discussion President
BAMSL Community Service Projects
Adjourn

Upcoming Events

BAMSL Night at the Ballpark..... September 21
Maritime Law Seminar September 21
Business Skills Seminar.....September 25
Welcome to the Bar Celebration.....September 25
Inventor of the Year Awards & CLE..... October 11
Spirit of Justice Celebration..... October 12
Oktoberfest Trivia Night..... October 19
Rap 'N Pack Community ServiceOctober 25
World Food Day Community Service....November 2
Securities Industry SymposiumNovember 14
Rap 'N Pack Community ServiceNovember 29
BAMSL Member Holiday PartyDecember 5
Motion for Kids Holiday PartyDecember 15

Community Service Opportunities

Attorneys Against Hunger - Project XOXO Run, Rap n' Pack, Share the Love, World Food Day
Motion For Kids Holiday Party - provide requested gifts for children impacted by the judicial system

Membership as of 9/7/2018

ATTY I	3,203
ATTY II	294
ATTY III	117
ATTY IV	354
ATTY V	270
Judge	67
LGL Admin	17
Paralegal	44
Student	1,064
Honorary	54
	5,484

Hon. Richard B. Teitelman Memorial St. Louis Pro Bono Challenge

2017 = 32,054 hours 2018 = 20,492 hours

2018 Firms

AEGIS LAW	Lashly & Baer, P.C.
Brown & Crouppen, P.C.	Lathrop Gage LLP
Bryan Cave LLP	Little Mendelson PC.
Capes Sokol	Ogletree, Deakins, Nash, Smoak & Stewart, P.C.
Dennis Buchheit, Attorney	Paule, Camazine & Blumenthal, P.C.
Dentons US LLP	Polsinelli PC
Dowd Bennett LLP	RCJ Law, LLC
Fox Galvin, LLC	The Family Law Center
Gray, Ritter & Graham, P.C.	The Simon Law Firm, P.C.
Herzog Crebs LLP	Stinson Leonard Street LLP
Husch Blackwell LLP	Thompson Coburn LLP
The Jacob Law Firm, LLC	

100% Club Firms

Amen, Gantner & Capriano, Your Estate Matters, L.L.C.	Goldenberg Heller & Antognoli, P.C.	Lewis Rice LLC	Schuchat, Cook & Werner Senniger Powers LLP
Berger, Cohen & Brandt L.C.	Goldstein & Pressman PC	McAnany, Van Cleave & Phillips, P.A.	Shands, Elbert, Gianoulakis & Giljum, LLP
Boggs, Avellino, Lach & Boggs, LLC	Gray, Ritter & Graham, P.C.	McMahon Berger, PC	Sher Corwin Winters LLC
Brown & Brown Attorneys At Law	Growe Eisen Karlen Eilerts, LLC	Mickes O'Toole, LLC	Stange Law Firm PC
Brown & Crouppen, P.C.	Haar & Woods, LLP	Mogab & Hughes PC	Stone, Leyton & Gershman, A Professional Corporation
Bryan Cave Leighton Paisner	Harris Dowell Fisher & Harris LC	Neville, Richards & Wuller LLC	SWMJ Law, LLC
Buckley & Buckley LLC	Husch Blackwell LLP	Ogletree, Deakins, Nash, Smoak & Stewart, P.C.	The Center for Family Law
Capes Sokol	Kamykowski, Gavin & Smith, P.C.	Page Law	The Hullverson Law Firm
Dobson Goldberg Berns & Rich LLP	Kassin & Carrow LLC	Polsinelli PC	The Simon Law Firm, P.C.
Dowd Bennett LLP	Kilo Flynn Billingsley Trame & Brown PC	Rosenblum Goldenhersh	Thompson Coburn LLP
Evans & Dixon, L.L.C.	Kortenhof McGlynn & Burns LLC	Rossiter & Boock, LLC	Uthoff Graeber Bobinette & Blanke
Fox Galvin LLC	Lashly & Baer, P.C.	Sandberg Phoenix & von Gontard P.C.	Zerman Mogergerman LLC
Galloway Johnson Tompkins Burr & Smith, a PLC	Leritz & Plunkert PC	Schlichter, Bogard & Denton, LLP	

BOARD OF GOVERNORS

THE DASHBOARD

MARCH 20, 2019

Today's Agenda

Call to Order	President Simon
Sustaining Partner - Alaris.....	Jennifer Matthew
Finance Report	Treasurer Carey
Membership Report	Judge Norton
Executive Director Report	Executive Dir. Linza
President's Report	President Simon
President-Elect's Report	President-Elect Neill
YLD Report	Andrea Stanley, YLD Chair
Consent Agenda	President Simon
Other Business	President Simon
Adjourn	

Upcoming Events

Judicial Retirement Dinner.....	March 21
Managing Partner Roundtable.....	March 26
MOBAR BLI.....	April 4-5
ABA Day in Washington, DC.....	April 9-11
Law Day.....	May 2
Corporate Counsel Institute.....	May 15
Bench & Bar Conference.....	May 29-31

CLE by the Numbers

20 CLE SEMINARS :

- ▶ 15 at BAMSL Headquarters
- ▶ 4 in Clayton
- ▶ 1 in Olivette

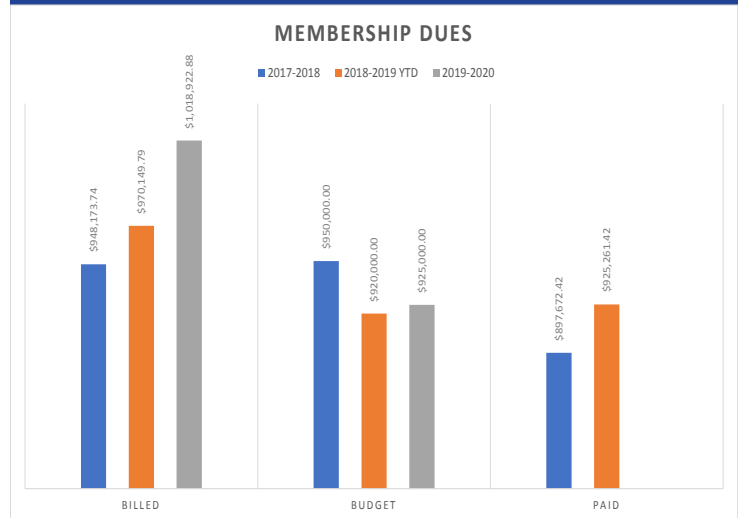
PLUS:

- ▶ 4 Webcasts, Powered by Geniecast

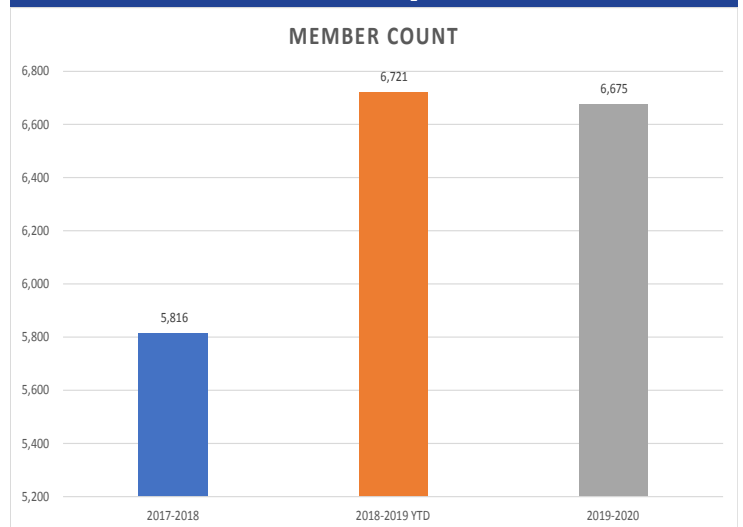
CLE REGISTRATION TOTAL: 586*

**Includes webcasts, does not include Journey to Cuba & CLE by the Sea*

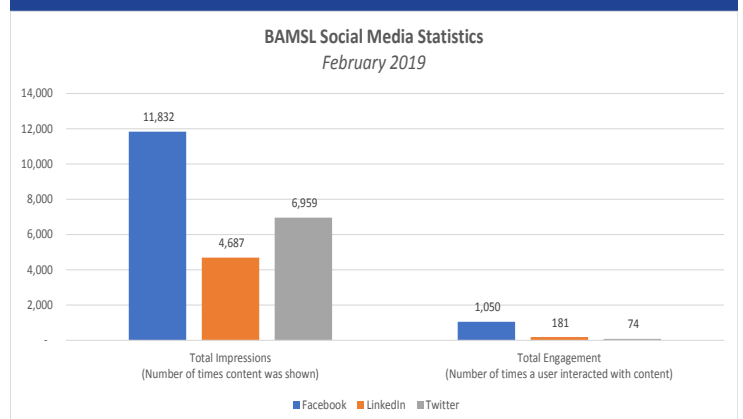
Membership Dues



Membership Count



Social Media Statistics



To: Missouri Bar Board of Governors
From: Sebrina Barrett, Executive Director
Re: End-of-Year Report
Date: November 21, 2014

It has been a great year, focused on being relevant to members and the public and working under the overall theme that The Missouri Bar is “Here to Help”.

I am providing this report to summarize our accomplishments and to identify the opportunities and challenges that we will experience in 2015. I am grateful for the continued support of tremendous bar leaders and the hard work by the Bar’s dedicated staff.

Accomplishments

Missouri Bar Programs & Initiatives

- Passage of the *Criminal Code* rewrite, along with three other bar-sponsored bills
- Significant advancement of *Relevance* initiatives, including expanding Mini Law School to Columbia and Kansas City; providing a prison civics program; launching a new public website (missourilawyershelp.org); improving JPE publication efforts (yourmissourijudges.org); expanding the practical skills podcast library for members; updating the member website; and adding new member benefits.
- Approval of and launch of *committee restructuring* initiative
- New *Dialogue* format in e-newsletter form
- Launch of *Veterans Initiatives*, including several clinics across the state and a Lawyer Referral Discount program
- Completed *database programming* to bar fee process as required by the bar fee increase
- Work under way to study *expungement* and develop bar drafted legislation
- Continued *building relationships* with *state and federal legislature* through second Legislative Day; regional events; committee events and visits to Washington D.C.

Board Governance/Bar Leadership

- Reformatted *Board Orientation* program
- New *Conflict of Interest* policy
- New *Past Presidents/Supreme Court* dinner
- *Bar Foundation Audit* RFP

Personnel Management

- Revised *Employee Handbook*
- Created employee *job descriptions*
- Instituted “*all staff*” meetings
- Enhanced *security measures*, including routine re-set of staff computer passwords; development of incident breach policy; employing automatic computer lock settings

- Hired **Media Writer** to assist with media relations, social media and other communications strategies to members and the public, Relevance initiatives, among other projects
- New **Conflict of Interest** policy
- **Document Retention**: eliminated need for off-site storage; developing document retention policy; working toward electronic document retention
- **Workplace safety**: emergency procedures in the event of fire, tornado, etc., added to the employee handbook; purchase of defibrillators; new keypad entry system

Opportunities/Challenges

- Plan for the future of the print shop
- Finalize evaluation of the defined benefit investment
- Continue to monitor financial status of CLE Program and Publication departments
- Continue to implement the new committee structure
- Implement Document Retention Policy
- Carry out and evaluate the effectiveness of the pilot revisions to the legislation review process
- Produce a successful diversity summit
- Continue to monitor threats to the unified bar and the non-partisan court plan
- Further expansion of Mini Law school to Springfield and four additional communities through a pilot project with University of Missouri Extension
- Celebrating 75th Anniversary of The Missouri Plan through the Speakers Bureau and a traveling exhibit developed in partnership with the Missouri Humanities Council



STATE BAR OF WISCONSIN
Your Practice. Our Purpose.®

MEMORANDUM

To: Board of Governors
From: Larry J. Martin, Executive Director
Date: June 12, 2019
Re: Report of the Executive Director

This memo updates you on select activities since the Board of Governors met in April, and how they fit into the State Bar's core mission. In case you missed my recent columns in the *Wisconsin Lawyer* magazine, here are the links:

- [Passing the Gavel](#). State Bar presidents are among the hundreds of members who volunteer their services each year to help the organization support members, the legal system, and the public.
- [In 280 Characters or Less](#). Being on Twitter has given me a pulse on the communities where I live and work.

UPCOMING EVENTS to Keep on Your Radar

- [Annual Meeting & Conference](#)
Date: June 13-14, Hyatt Regency/KI Convention Center, Green Bay
- [Recognition of Justice Shirley S. Abrahamson](#)
Date: June 18, 4:30 p.m., State Capitol Rotunda, Madison, RSVP by June 11
- [Diversity Clerkship Recognition Reception](#)
Date: July 18, State Bar Center
- [CLE at Miller Park 2019](#)
Date: July 12, 4:30-5:30 p.m., Miller Park, Milwaukee
- [Health, Labor and Employment Law Institute 2019](#)
Date: Aug. 15-16, Glacier Canyon Lodge at the Wilderness Resort
- **Board of Governors' Meeting/Bar Leader Orientation**
Date: Sept. 19-21, Lake Lawn Lodge, Delevan

EDUCATE – Developing Skilled Legal Professionals

PINNACLE® Books and Seminars

Under the brand PINNACLE®, the State Bar produces Wisconsin-focused seminars and substantive practice resources, including live, webcast, and on-demand seminars and a comprehensive library of 80-plus treatises and system books, and practice forms. This work is collectively created by the State Bar's professional staff with your colleagues. Here are new editions, updates, codebooks and seminars of interest:

New Editions:

- *Business Litigation and Dispute Resolution in Wisconsin*
- *The Wisconsin Public Records & Open Meetings Handbook*
- *Wisconsin Judicial Benchbook: Criminal/Traffic*

New Updates:

- *Law of Damages*
- *Family Law in Wisconsin: A Forms and Procedures Handbook*
- *Advising Older Clients and Their Families, Volume 2*
- *Wisconsin Civil Procedure Before Trial*
- *Wisconsin Ethics Opinions*
- *LLCs and LLPs: A Wisconsin Handbook*

New Codebooks:

- *Civil Litigation*
- *Employment Law*
- *Probate & Estate Planning Statutes*
- *Public Utility Statutes*
- *Real Estate and Real Property*
- *Rules of Appellate Procedure*
- *Rules of Evidence, Pocket Codebook*

PINNACLE® Programs of Note:

- Covering an emerging area of law, “[Hemp & CBD Oil in WI: The New Green Gold](#)” will address regulation and liability surrounding hemp and CBD businesses and include all stages of the process from manufacturing to processing to selling. This CLE program will be held at the State Bar Center on Wednesday, June 19, from 8:30 a.m. -12:30 p.m. It will have a simultaneous webcast and numerous replays.
- Join your colleagues for a [CLE event at Miller Park](#) on Friday, July 12. Catch a seminar eligible for 1.5 EPR credits, mingle at the reception, and enjoy the game between the Milwaukee Brewers and the San Francisco Giants from seats behind the third base dugout. Space is limited.
- The [Health, Labor, and Employment Law Institute](#) will cover the latest legislative updates, case law developments, and legal trends. With 17 breakout sessions and five plenaries, there will be something for everyone in the employment-related fields. The CLE is set for Aug. 15-16 at Glacier Canyon Lodge at the Wilderness Resort in the Wisconsin Dells.

Annual Meeting & Conference

The [Annual Meeting & Conference](#) will be held June 13-14 in Green Bay. New this year, members unable to attend, particularly nonresident members, can watch the opening, lunch, and closing plenaries via livestream for \$199. The schedule for the plenaries:

- Opening Plenary: June 13, 8:15-9:30 a.m., James Foreman Jr., Pulitzer Prize winning author
- Luncheon Plenary: June 13, 12:25-1:35 p.m., Joan Biskupic, CNN legal analyst and author
- Closing Plenary: June 14, Dr. Andrea Coleman and Chris Osborn, both of ReelTime LLC.

Visit www.amc.wisbar.org for program information.

Ethics and Wellness Guidance

WisLAP is partnering with the Senior Lawyers Division to recruit WisLAP volunteers who can be trained to recognize and assist members with cognitive impairment issues, as well as issues relating to transitioning from law practice. More information to come on this important initiative.

WisLAP continued its office hours at U.W. Law School through the end of the academic year. The program supports the wellness needs of law students and administers the WisLAP monitoring program.

WisLAP reached out in April and May by giving presentations, serving on panels, and attending events:

- **“Mental Health and Wellness in the Legal Community,”** Marquette University Law School Organization for Student Wellbeing
- **“Strategies For Increasing Lawyer Well-being and Resilience,”** U.W. Law School
- **“Preparing For Transition,”** Senior Lawyer Division CLE Program
- **“Taking Care of Yourself While Serving Others,”** Wisconsin Bar Leaders Conference
- **Wisconsin Department of Justice SPET Training,** Green Bay
- **WisLAP volunteer Jim Baxter** promoted services to the Kenosha, Jefferson and Walworth County Bar Associations

Between April 1 and May 30, the State Bar ethics counsel answered **approximately 500** questions for ethics assistance. In addition, more than 235 lawyers attended the following ethics programs offered by State Bar ethics counsel:

- **“Technology and Ethics,”** Door County Bar
- **“Do the Rules of Professional Conduct Provide Strategies for Creating a Culture That Does Not tolerate Sexual Harassment?”** Diversity Counsel Panel
- **“The E-Banking Trust Account Rule,”** at Considerations for Starting a Law Practice CLE, Solo/Small Firm & General Practice Section
- **“Ethical Considerations in Child Abuse Prosecutions,”** New Prosecutors Conference
- **“Hot Topics in Ethics for Family Lawyers,”** Society of Family Lawyers
- **“The Ethics of Cultural Competency,” “The Ethics Game Show,” and “Pitfalls in Fee Agreements,”** Wisconsin National Guard Judge Advocate Corp
- **“Some Questions about SCR 20:4.2,”** Portage County Bar Association
- **“Ethics for the Government Lawyer,”** Department of Natural Resources

Practice Management on the Road

State Bar Practice411™ met with members for roundtable law practice management discussions at the State Bar Center on April 23 and at Krekeler Strother S.C. in Madison on May 16. Law practice discussion group meetings concentrate on strategies for running a successful firm, marketing, business development, and technology.

The Practice411 program also went on the road, meeting with the following groups:

- **“Safeguarding the Client File,”** Wisconsin Association for Justice
- **“Business Continuity and Disaster Planning for Law Firms,”** Nonresident Lawyers Division in Dallas and Las Vegas

- “**Technology for Transitioning Attorneys,**” Senior Lawyers Division in Eau Claire and Madison
- Co-presented “**Network Like Yourself & The Not-So-New E-Banking And Trust Account Rule: Options For Trust Account Management,**” Solo/Small Firm & General Practice Section, State Bar Center

Divisions, Sections, and Committees

- Divisions sponsored or co-sponsored programming at the State Bar’s Annual Meeting & Conference, including the luncheon plenary “The Chief: The Life and Turbulent Times of Chief Justice Roberts” (**Senior Lawyers Division**); “Slanted, How Being Asian Got Me Into Trouble” (**Nonresident Lawyers Division**); “Reduce Stress and Improve Productivity” (**Young Lawyers Division**); and “The Impact of 2017 Wisconsin Act 67 on Local Government Land Use Practices (**Government Lawyers Division**)
- More than 100 people attended the **Senior Lawyers Division’s** annual CLE, “Do’s and Don’ts of Considering Retirement or Transitioning Your Professional Life,” in Eau Claire on May 2 and in Madison on May 14.
- **Senior Lawyers Division Scholarships:** For the first time, the SLD is providing scholarships for its members to attend the 2019 Annual Meeting & Conference and/or the 2019 Solo & Small Firm Conference. To date, the division has awarded \$3,794 in scholarships to attend the AMC. Scholarship money is still available.
- The **Nonresident Lawyers Division** held successful chapter CLE and networking events in Las Vegas and Grapevine, Texas. Chris Shattuck, law practice assistance manager, presented “Safeguarding the Clint File: Business Continuity and Disaster Planning for Law Firms.” Attendees earned 1 CLE credit in both Wisconsin and the state the event was held.
- The **Government Lawyers Division** has awarded \$984 in grants this year to help divert expenses for division members attending CLE conferences. In exchange, recipients write an article about their experience for the division newsletter. Additional grant money is still available.
- The **Government Lawyers Division** is developing a communication strategy, which includes a Facebook page.
- The **Construction and Public Contract Law Section** held a joint networking event with the Wisconsin Association of African American Lawyers on May 6. The section is continuing its efforts to increase diversity of its membership.

- Following a tragic fatality at a construction site, the **Construction and Public Contract Law Section** presented a May 22 CLE, “Dealing with Disaster.” This CLE explored ways to manage accidents when they occur and how to prevent them from occurring.
- The **Elder Law and Special Needs Section** co-produced with PINNACLE® and WisPACT the Annual WisPACT Update on April 26. This includes any legal developments that may affect the elderly or disabled clients who receive medical assistance or other entitlement benefits.
- The **Environmental Law Section** hosted a pizza lunch and panel discussion with the Marquette Law School Environmental Law Society. Twenty law students interacted with six lawyer-panelists representing various perspectives of environmental law.
- The **Solo Small Firm and General Practice Section** presented “Considerations for Starting a Law Practice” on May 4. This program, in partnership with the Practice411™ program, provides information for attorneys considering opening their own firm. The event included tips on marketing, networking, ethics, and practice management.
- The **Section Leaders Council** met May 10. The purpose of these meetings is to share ideas and success stories, to increase collaboration between sections, and to connect with Bar leadership. President Chris Rogers, President-elect Jill Kastner, and Larry Martin discussed developments regarding recent challenges to the State Bar’s mandatory membership status, and President-elect Kastner’s priorities for her year as president. The meeting included discussions regarding section member benefits, diversity and inclusion efforts, and law school student outreach.
- The **Local Bar Relations Committee** held the Wisconsin Bar Leaders Conference May 3 at the State Bar Center and included sessions from Justice Dan Kelly, Judge Carl Ashley and Chief Judge Lisa Neubauer. The conference provides an opportunity for bar leaders to network, share information, and listen to quality speakers. Local, special, and affinity bar leaders were encouraged to attend.

ADVOCATE – Advocating for Justice, Clients, the Legal System & the Profession

Advancing Our Legislative Agenda

The State Bar’s legislative priorities include increasing the private bar rate, bail reform, supporting expungement, and returning 17 year olds to the juvenile justice system.

There is great news to report: The State Legislature’s Joint Finance Committee (JFC) voted May 28 to give preliminary approval to include the following in the biennial state budget:

- **Approved a \$70 rate for private bar with a start date of Jan. 1, 2020.** However, JFC did not approve all the funding associated with the rate increase. Therefore, a shortfall will occur later in this biennium. Indexing of the rate was not included.
- **Approved 2% salary adjustments for SPD and ADAs.** This is much less than the previous three biennial budgets, which included a full step pay increase for ADA and SPD attorneys.
- **Approved 34 new ADA positions.** District attorneys had requested an additional 60.85 positions.
- **Approved a pass through to counties for increase to county-appointed rates.** Total funding was \$3.6 million again less than requested \$7.5 million from the coalition.

While not everything the State Bar is supporting was approved, the increase in the private bar rate alone is long overdue. Thanks to our members who contacted their elected officials. Our coordinated grassroots efforts are paying off!

- The Wisconsin State Legislature's Finance Committee is working through the \$83 billion proposal for state funding for the next two years. One of the State Bar's priorities to increase **civil legal aid funding** has yet to be taken up by Finance, but Gov. Evers proposed funding at \$1 million, which the legislature has supported in the last two budget cycles.
- The State Assembly voted May 15 to approve [AB 33](#) to modify the state's **expungement laws**. Fifty-eight members of Assembly joined as co-sponsors of the legislation that would remove the requirement that expungement be sought at the time of sentencing and removes the age limit of 25 years of age. The Senate Committee on Judiciary and Public Safety has already approved the Senate version of the bill, [SB 39](#), as well, providing an opportunity for the full Senate to approve the measure.
- The State Assembly Committee on Family Law held a public hearing on [AB 47](#), a 10-year project of the Children and Law Section. The bill makes numerous changes to **juvenile guardianship laws**. The [Legislative Council Study Committee on Minor Guardianships](#) recommended AB 47 for introduction and passage in the legislature.
- The Assembly Family Law Committee also held a hearing on several bills supported by the Legislative Study Committee on **Child Placement and Support**. Many of the bills incorporated feedback from Family Law Section members, and one of the bills included in this hearing was AB-095, an initiative of the section and supported by the Study Committee.

Grassroots on Criminal Justice Reform



The State Bar’s **Grassroots Advocacy Network** welcomed [Sen. Dan Feyen](#) (R – Fond du Lac) and [Rep. Jeremy Thiesfeldt](#) (R – Fond du Lac) to a joint luncheon with the Fond du Lac County Bar Association on May 16 to talk about the State Bar’s priority issue of **expungement reform**. The Grassroots Advocacy Network is planning a June 12 breakfast with Green Bay area legislators.

Increasing Awareness Through Media

The State Bar of Wisconsin is committed to positioning the organization and its members as credible authorities dedicated to advancing the legal profession through proactive stories that highlight the organization’s work on behalf of its members and the public. Additionally, the State Bar aims to provide timely response on breaking news, so that the State Bar is out in front on issues that impact its role as an advocate for justice and provider of value-driven services.

- Wisconsin Public Radio Capital Bureau Chief Shawn Johnson sat in on the April 16 PINNACLE® CLE, “Alcohol Beverage Laws in Wisconsin,” to learn more about the industry as part of a two-week WPR series, “Alcohol Culture In Wisconsin.” Read his article, [“History, Politics Shape Wisconsin’s Alcohol Laws.”](#)
- A story that appeared in the May 19 *Capital Times* (“[Why is Wisconsin Sending Hundreds of Children Out of State for Mental Health Care](#)”) featured Atty. Eileen Fredericks. Her quote was taken from a March 2018 *InsideTrack* article that was originally published in the State Bar’s Children & the Law Section blog.
- Hemp and CBD oil is a hot media topic that offers the State Bar a chance to promote its members as experts. The media is invited to cover the State Bar’s June 19 PINNACLE® CLE, “Hemp & CBD Oil in Wisconsin: The New Green Gold.”

- The *Wisconsin News Reporters' Legal Handbook* (7th edition) is in final stages of review and should be available in June. The handbook helps journalists understand the judicial process and legal terminology.

FACILITATE – Helping the Public Access the Legal System

Resolving Client Disputes

The State Bar's Fee Arbitration Program is a way for clients and lawyers to resolve fee disputes. This year, 83 requests for fee arbitration were submitted to the program for resolution. Efforts are underway to streamline the program for lawyers and clients.

Estate Planning for First Responders

Volunteer lawyers in the Wisconsin Wills for Heroes program have held nine free basic estate planning clinics and have completed 370 estate plans for first responder organizations in Milwaukee, Racine, and Eau Claire. The program was created after Sept. 1, 2011, as a way to assist emergency personnel in preparing basic estate planning documents that will protect them and their families.

Protecting Clients of Lawyer Theft

The **Wisconsin Lawyers' Fund for Client Protection** reimburses victims of lawyer theft. For this fiscal year, the committee reviewed 63 new claims, deferred 20 claims, and reconsidered five claims. Clients were reimbursed \$259,851 due to attorney misconduct.

Expanding Access to Justice for Unrepresented, Low-Income Residents

- The **Access to Justice Commission** met with the Wisconsin Supreme Court May 20 to provide an update on its priorities and how it is pursuing them. The commission's priorities are: improving communication and collaboration on access to justice, increasing funding for civil legal aid in Wisconsin, increasing the use of technology to support access to justice, and reducing barriers to access to justice.

The commission is continuing its work to support efforts to increase the state legislature's appropriation for civil legal services and it is optimistic that this collaborative effort will succeed.

- [The Free Legal Answers](#) project is growing with 206 volunteers who have answered 368 questions through the website in 2019. The leading questions pertain to family (43%), consumer/bankruptcy (14%) and housing (11%) law. While the majority of volunteer lawyers practice in urban areas, the majority of the questions come from rural communities.
- Congratulations to 372 Wisconsin lawyers honored through the **2018 Pro Bono Honor Society**. These lawyers provided at least 50 hours of pro bono legal services to assist clients with limited

means last year. The full list is available on the commission's [website](#) and will be published in an upcoming issue of *Wisconsin Lawyer*.

Educating the Public

Shorewood High School competed in the **National Mock Trial Tournament** May 16-18 in Athens, Georgia. Shorewood placed 24 out of 46 teams competing in the tournament.

This year, 1,300 students competed in the regional rounds requiring the support of 360 volunteers. The Mock Trial program gives students a positive glimpse of the legal profession. It also showcases the State Bar's commitment to teaching young people important skills that will help them throughout their careers.

This program is made possible in part through the contributions from the Wisconsin Law Foundation's Mock Trial designated fund.

Advancing the Wisconsin Law Foundation's Mission

- The Foundation is **accepting applications for the Charles L. Goldberg Distinguished Service Award through July 1**. This award's nominees will be judged based upon their accomplishments in the law, service to the profession, and service to the community as a whole over an entire career. For information, go to the [WLF Scholarships & Awards page](#).
- The **2019 Fellows Recognition Dinner is set for Oct. 10** at the Monona Terrace in Madison. This annual dinner honors new Fellows and raises funds to advance the Foundation's work. Costs for the gathering are underwritten in part by the Senior Lawyers Division, the exclusive sponsor for this year's event.
- **The Fellows Board of Trustees** is accepting nominations for the **2019 Fellows Class**. The Fellows program recognizes members of the profession who are known by their peers for high professional achievements, distinguished service to community and the profession, and outstanding contributions to the advancement and improvement of the administration of justice in Wisconsin. To nominate a Fellow, complete the [Fellows nomination form](#).
- Please support the work of the Foundation when you submit your **2020 State Bar of Wisconsin membership dues**. Any contribution is gratefully appreciated. You can make your donation via Line 9 on your dues form. High school mock trial, teen courts, diversity initiatives, leadership, and law school debt-relief scholarships are made possible by your donations.

INNOVATE – Planning Together for the Future

New Marketplace Debuts at AMC

Check out the revamped Marketplace at the Annual Meeting & Conference on Thursday, June 13. Come to the State Bar’s booth for a demonstration of the new site and give us feedback prior to our “go live” date in late June.

Those purchasing State Bar products or registering for events will find a more intuitive shopping experience through the Marketplace on wisbar.org. Watch for more information in the June 19 edition of *InsideTrack*.

Streamlining Member Dues Payments

The annual State Bar Dues and Court Assessments statement was distributed to 25,322 members in early May, compared to 25,233 last year.

- 3,255, or 13%, of our members decided to forego receiving their first statements by mail, instead opting to pay their dues online. Last year, 1,994 members, or 8%, paid online. We are seeing an increasing trend in online payments, and we are monitoring the savings in printing and mailing costs. In FY18, 28% paid online, and 39% paid online in FY19.
- While membership numbers remain constant over the years, we are seeing changes in the categories of membership with fewer law school graduates and more members qualifying for Emeritus status.

Showcasing Legal Innovation

Last call! Help us identify our 2019 class of **Wisconsin Legal Innovators**, the movers and shakers that put new ideas to work to solve problems for their clients and communities.

Through "[That's a Fine Idea: Nominate a Wisconsin Legal Innovator](#)" initiative, the State Bar of Wisconsin annually solicits nominations from Wisconsin’s legal community, looking for examples that will encourage Wisconsin lawyers to adopt an entrepreneurial approach to delivering legal services.



Know a Legal Innovator? How about you? Nominations are open until June 30. Learn more at ThatsaFineIdea.com.

Offering New Member Benefits and Services

The Executive Committee is considering the Insurance & Member Benefits Committee's recommendation that the State Bar participate in a **health plan consortium** that will include the Wisconsin Dental Association and the Wisconsin Veterinary Medical Association benefits. If approved, the committee hopes to offer enrollment for member employees and dependents this fall.

Advancing Diversity and Inclusion

- The **Diversity Counsel Oversight Committee** hosted an April program titled, "The Issues Have Surfaced, but Was Anyone Listening? Proactively Addressing Gender Diversity in the Workplace" on April 29 at the Italian Center in Milwaukee. The program focused on women in the law, gender diversity issues in the workplace, the importance of a diverse workforce, closing the gender leadership gap, and an ethics session addressing sexual harassment and sexually harassing behaviors.
- The **Diversity Clerkship Program** is hosting a Celebration Reception on July 18 at the State Bar Center for 1L Marquette University and U.W. law students who are participating in the Bar's 10-week summer internship program. This year, the program matched 19 students with 18 Wisconsin employers and an employer in St. Paul.
- The cover article, "[From Lip Service to Commitment: a More Diverse Profession](#)," in the May *Wisconsin Lawyer* magazine, featured lawyers talking about the challenges of recruiting and retaining a diverse workforce. Special thanks to State Bar Board of Governor **Truscenialyn Brooks** for sharing her experiences as the chair of her firm's diversity committee.

Growing Future Leaders

- Through **Leadership Summit** on April 6, 24 attorneys learned about leadership opportunities through the State Bar and their local bar associations. The event, sponsored by the Leadership Development Committee, offered a great networking opportunity between State Bar leadership and participants.
- Recommend someone for next year's **G. Lane Ware Leadership Academy**. The academy is a multi-session training program designed to enhance the leadership skills, inspire leadership involvement, build professional networks, and foster professional development of a diverse group of lawyers. Applications for next year's academy will be accepted through Sept. 15.

The 2019-20 Leadership Academy will be held: Nov. 15 & 16, 2019; Jan. 10 & 11, 2020; and April 3 & 4, 2020. If you know colleagues that would benefit from the program, send them to the [website](#) for the details.

WRAPPING IT UP: OTHER NEWS OF NOTE

Justice Shirley S. Abrahamson: Celebrating a 43-Year Career

Join the Marquette University Law School, the University of Wisconsin Law School, and the State Bar of Wisconsin in celebrating Justice Shirley S. Abrahamson's legacy of service on Tuesday, June 18, in the State Capitol Rotunda. [RSVP](#) is requested by June 11.

Read more about Justice Abrahamson's 43-year career in the May issue of [Wisconsin Lawyer](#).

Welcome New Attorneys

The State Bar of Wisconsin welcomed 284 new Wisconsin lawyers after February and May admissions. [Nineteen individuals](#) passed the bar exam in February. [Marquette Law School](#) graduated 155 students on May 23, and the University of Wisconsin Law School graduated 110 students on May 29. Check out [wisbar.org](#) for photos and stories of the graduates.


Top Recent Social Media Posts (Will add this, but the link should work!)

[file:///C:/Users/mwiltse/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/PWPQMDEH/2019-05-ed-report-social2%20\(002\).pdf](file:///C:/Users/mwiltse/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/PWPQMDEH/2019-05-ed-report-social2%20(002).pdf)

Top Recent Social Media Posts


Increasingly, our members engage with the State Bar and each other through our social media channels. Join the conversation; connect with us on [Facebook](#), [Twitter](#) (@statebarofwi), [LinkedIn](#), and [Instagram](#) (@statebarofwi). Here are some recent examples that demonstrate how social media plays a role in advancing our mission.

Facebook




State Bar of Wisconsin
Published by Manager [?] · May 11 at 12:15 PM · 🌐

The University of Wisconsin Law School Restorative Justice Project brings crime victims and the criminals convicted of those crimes face to face. [60 Minutes](#) airs the full segment this Sunday at 6 pm on [CBS](#).




CBSNEWS.COM



Program brings crime victims face to face with perpetrators
The point of The Restora

4,523 people reached
367 engagements

Facebook




State Bar of Wisconsin
Published by Peter Kraemer [?] · May 16 at 11:50 AM · 🌐

Let's go, [Shorewood High School](#)! The [National High School Mock Trial Championship, Inc.](#) starts today in Athens, GA, and these bright mock-stars are representing Wisconsin. You make us proud!

Special shout out to attorney-coaches Nathan Bayer & Jasmyne Baynard! Thank you for donating your time to these kids and truly paying it forward!

#mocktrial #mocktrialwi #wisbar



2,474 people reached
653 engagements

Facebook



State Bar of Wisconsin
Published by Peter Kraemer [?] · May 17 at 1:07 PM · 🌐

We've said it before: Wisconsin has some amazing lawyers! 🙌 Thank you to the 372 attorneys who provided 50+ hours of pro bono service last year to assist persons of limited means. 🙌🙌🙌

Know someone on this list? Give them a shout out!



Wisconsin Access to Justice Commission
May 16 at 1:28 PM · 🌐

The Wisconsin Access to Justice Commission is pleased to recognize the 372 members of the 2018 Pro Bono Honor Society. These lawyers provided at least 50 hours of pro bono service last year to assist persons of limited means. <https://wisatj.org/.../probonosoc.../2018-pro-bono-honor-society>



WISATJ.ORG



2018 Pro Bono Honor Society | Wisconsin Access to Justice Commission

1,617 people reached
199 engagements

Twitter



State Bar of WI
@StateBarofWI

Happy [#LawDay](#)! Held every May 1, Law Day is a celebration of the rule of law. Thanks to our members for being guardians of the law & helping the public better understand how the legal system protects our liberty and works to achieve justice! H/t [@ABAesq](#)

WHAT IS LAW DAY?



HOW DID LAW DAY BEGIN?

Law Day, held annually on May 1, is a national day set aside to celebrate the rule of law. Law Day provides an opportunity to understand how law and the legal process protect our liberty, strive to achieve justice, and contribute to the freedoms that all Americans share.



1967: American Bar Association president Charles S. Rhyne envisioned a special day for celebrating our legal system.



1958: President Dwight D. Eisenhower established Law Day as a day of national dedication to the principles



1961: Congress designated May 1 as the official date for celebrating Law Day. This

18,208 impressions
272 engagements

Facebook



State Bar of Wisconsin

Published by Manager [?] · May 15 at 9:56 AM · 🌐

Congratulations to Carli McNeill! The assistant district attorney for Kenosha County was recently named the best young prosecutor in the state by the Wisconsin District Attorney Association.



KENOSHANEWS.COM

Local prosecutor wins statewide honor

Prosecutors in Wisco

1,730 people reached
129 engagements

LinkedIn



State Bar of Wisconsin

2,678 followers
3w

What's it like to witness an argument before the U.S. Supreme Court? Shelley Fite takes us to Washington, D.C., where she will watch her husband argue his case before the country's highest court.



Witness to a U.S. Supreme Court Argument

wisbar.org

👍 4 · 1 Comment

568 impressions
25 total engagements

Facebook

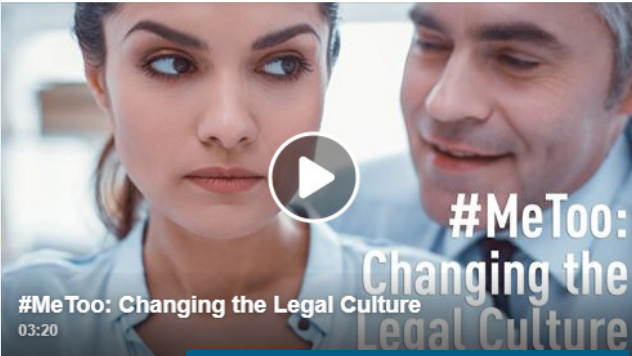


State Bar of Wisconsin

Published by Peter Kraemer [?] · May 10 at 1:30 PM · 🌐

Everyone has a role to play in eliminating sexual harassment in the legal profession. Men are crucial allies in changing the culture.

Attys. Heather Nelson, Frederick Strampe, and Nicole Marklein Bacher share insights from their panel discussion at the recent 10th Annual Young Lawyers Conference, hosted by the State Bar of Wisconsin Young Lawyers Division.



#MeToo: Changing the Legal Culture
03:20

1,448 people reached
208 engagements

Facebook



State Bar of Wisconsin

Published by Manager [?] · April 25 at 3:10 PM · 🌐

"The current system is illogical because it prohibits a judge from deciding on expungement after completion of a sentence when an offender's rehabilitation is more apparent," says Julie Grace, a policy analyst with the Badger Institute.



WATCHDOG.ORG

Expungement reform gains overwhelming bipartisan support

While some o

2,627 people reached
144 engagements

Facebook



State Bar of Wisconsin

Published by Manager [?] · May 19 at 11:35 AM · 🌐

"When asked why would you want to live up there, my response was typically the same: 'why do you vacation in northern Wisconsin?'"

H/t Marquette University Law School.



LAW.MARQUETTE.EDU

The Rewards of Being a Small Town Lawyer – Marquette University Law School Faculty Blog

The Rewards of Being a Small Town Lawyer By: Tyler Wickman
Posted on May 15,...

1,951 people reached
341 engagements

Facebook



State Bar of Wisconsin

Published by Manager [?] · May 24 at 11:35 AM · 🌐

In blazing her own path, Shirley Abrahamson opened doors to many others on her journey to the Wisconsin Supreme Court.

Join us in celebrating Justice Abrahamson: Tuesday, June 18, at the State Capitol. RSVP now, <http://bit.ly/2JVizil>.



WISBAR.ORG

Shirley Abrahamson: A Legacy of Judicial Service in Wisconsin

3,702 people reached
916 engagements

Larry is on Twitter!

Larry Martin is actively engaging with members and thought leaders on [Twitter](#) (@LarryJMartinED). Connect with him! A selection of his tweets are below.

Larry J. Martin
@LarryJMartinED

Happy Law Day! Attending one of my favorite events - Dane Co. Bar's Annual Law Day Pro Bono Breakfast. Honoring amazing attorneys, firms & law students who unselfishly give of their time and talent. @StateBarofWI proud to be a sponsor. @WAALawyers @WisconsinLaw @wiprobono

9:23 AM - 1 May 2019

2 Retweets 8 Likes

Larry J. Martin
@LarryJMartinED

Great discussion in Fond du Lac today with @SenDanFeyen & Rep. @Thiesfeldt on criminal justice reform. Two great leaders in moving important legislation forward. Thanks to Fond du Lac Co. Bar for hosting. @StateBarofWI @SBWRotundaRpt

3:39 PM - 16 May 2019

1 Retweet 4 Likes

Larry J. Martin
@LarryJMartinED

Over 100 Senior Lawyers this morning @StateBarofWI Center to learn the "Do's & Dont's of Considering Retirement or Transitioning Your Professional Life". Great program put on by our Senior Lawyers Division.

3:39 PM - 16 May 2019

1 Retweet 4 Likes

Wisconsin Law Foundation is on Facebook

Find the Wisconsin Law Foundation on Facebook! The page will help raise awareness of the good works made possible through the Foundation and engage a community of lawyer-leaders dedicated to its continued support. Follow us at facebook.com/wisconsinlawfoundation.

facebook

Email or Phone

Password

Log In

Forgot account?

WISCONSIN LAW FOUNDATION
Charitable Arm of the State Bar of Wisconsin

Wisconsin Law Foundation
@wisconsinlawfoundation

Home
About
Photos

Like Share ...

Donate Send Message