



GRAND RAPIDS  
BAR ASSOCIATION

*Since 1902*

LAWYER REFERRAL AND  
INFORMATION SERVICE

**Panel Member  
Handbook**

Revised September 2005

**Grand Rapids Bar Association**  
**Lawyer Referral and Information Service**  
Waters Building 161 Ottawa Avenue NW Suite 203-B  
Grand Rapids, MI 49503  
**Panel Membership Application**

Name \_\_\_\_\_ P# \_\_\_\_\_

Firm \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail: \_\_\_\_\_

Date first admitted to practice law in any jurisdiction: \_\_\_\_\_

Date admitted to practice law in Michigan: \_\_\_\_\_

In what other states are you licensed to practice law? \_\_\_\_\_

I have selected at least one *Experience Panels* (Not Required) and I will complete all additional applications when I receive them in the mail. Yes \_\_\_\_\_ No \_\_\_\_\_

I have selected at least one *Of Counsel Panel* (Not Required): Yes \_\_\_\_\_ No \_\_\_\_\_

For your three largest areas: List the categories of law and percentage of practice you devote:

\_\_\_\_\_ %

\_\_\_\_\_ %

\_\_\_\_\_ %

Have you ever been admonished, disciplined, or are you under investigation concerning any allegation of professional misconduct or wrongdoing? Yes \_\_\_\_\_ No \_\_\_\_\_  
(If yes, please explain on separate sheet and attach.)

List any foreign languages in which you are proficient: \_\_\_\_\_

Are you willing to meet with clients at: Home \_\_\_\_\_ Hospital \_\_\_\_\_ Jail \_\_\_\_\_

Installment Payment Plans are possible with your office (on non-contingent cases);  
Including waiver of the retainer. Yes \_\_\_\_\_ No \_\_\_\_\_

You are required to have \$100,000/\$300,000 professional liability insurance coverage *exclusive of defense costs* in order to be listed with the service. Please provide the necessary insurance information.

Professional Insurance Policy # \_\_\_\_\_

Expiration Date \_\_\_\_\_

Carrier \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Grand Rapids Bar Association  
**Lawyer Referral and Information Service**  
**Category Selection Form**

You may select a total of five subcategories of law.

Probate Law
Estate Planning
Guardianship
Probate
Adoption
Name Change

Consumer
Insurance Dispute
Consumer Protection

Labor
Discrimination Labor
Labor Issues
Employee Benefits
Union Issues
Wrongful Discharge

Tort
Personal Injury
Medical Malpractice
Legal Malpractice
General Tort

Financial
Bankruptcy
Credit/Collections
Taxation

Civil Rights
Discrim. Non Labor
Police Brut./ False Arrest
Student Rights

Administrative Law
Social Security/Medicare
Unemployment
Worker Compensation
Immigration
State/Local Licensing

Real Estate
Condemnation
Forfeit/Foreclose
Landlord/Tenant
Land Use/Zoning
Real Estate Trans.
Real Estate Disputes
Const. Contracts/Liens

Other
Animal Law
Admiralty
Entertainment/Athletics
Computer Law
Environmental

Criminal
Criminal Arrest
Driving Issues
Criminal Appeal
Juvenile

Business and Corp.
Business Formation
Business Disputes
Securities
Copyrights/Patents

Experience Panels
Medical Malpractice
Bankruptcy
Contested Custody
Federal Felony
State Felony
Additional Application Required

Family Law
Child Cust. and Support
Divorce

Selection	Quantity	Annually	Total
Panel Membership	1: Includes a selection of five general panels	\$50	\$50
Additional Panels		\$10	
Experience Panels		\$30	
Of Counsel Panels	Indicate an Of Counsel Selection with the Initials O.C. next to the area of law. Of Counsel panels do not count toward the five general panels, but LRIS membership and 15 years experience is required. There is no charge for Of Counsel Membership.		\$0
<b>Total Due</b>			

Please remit payment due with completed order form and all relevant applications.

Payments should be made payable to:

**Lawyer Referral and Information Service**

Waters Building 161 Ottawa Avenue Suite 203-B

Direct Questions and Comments to Nancy King, LRIS Administrator

Phone: 454-5550 FAX: 454-7707 E-Mail: nancy@grbar.org

# Grand Rapids Bar Association Lawyer Referral and Information Service

## Internal Operation

### I. Client Intake

The Lawyer Referral and Information Service (LRIS) answers as many as thirty calls each day; each caller has a unique problem and is in need of legal assistance. Trained LRIS Intake Consultants listen carefully to the caller to identify the type of attorney or community organization the caller may need. In the event that a community organization can assist the client in resolving his or her problem, the intake consultant will provide the client with the organization name, contact telephone number, and information on the nature of the organization. There is no charge for this service.

When a referral to an attorney is needed, information is obtained from the client regarding the circumstances surrounding the legal issue. The intake consultant will use this information to make a referral to the proper attorney. Clients utilizing the LRIS for the location of an attorney are charged a \$25 administrative fee. This fee is collected prior to scheduling an appointment.

### II. Client Referral

Intake consultants input the information received from callers into the referral database. Referrals to Panel Members are made on a rotating basis, determined by geographical location, area of practice, and availability. Panel Members provide initial half-hour consultations these clients at no charge. A central factor of our service is the Panel Member's willingness to consult with clients who may not have legal issues requiring additional service, but need an attorney, not the LRIS, to make that determination.

When a referral is made to an attorney, the LRIS office sends a referral notice to both the Panel Member and the client. The client also receives a disclosure form explaining the service procedures and expectations; he or she is asked to sign this form and return it to the LRIS.

Each LRIS client receives a survey form thirty to sixty days after his or her referral to an attorney. These survey forms gauge the client's satisfaction with the LRIS and the referred attorney; it also inquires as to whether the referred attorney was retained and what fees, if any were paid. These forms help the LRIS both improve the service provided to clients by the staff and attorneys and track client cases.

### III. Of Counsel

When attorneys are confronted with a legal issue new to them, they may contact the LRIS for a referral to a practitioner with experience in that area of law. A phone consult will be scheduled between the two attorneys at a convenient time for both.

### IV. Attorney Forms

**A. Satisfaction Surveys** – The LRIS will send satisfaction surveys to attorneys on an annual basis. These surveys give Panel Members a chance to comment on the services provided and suggest improvements. The LRIS staff will then use these comments to enhance the service provided, develop new programs, and clarify any misconceptions regarding the LRIS operations. Although this is only an annual survey, suggestions from Panel Members are always welcome and can be directed to the LRIS Administrator.

- B. Referral Notices** – Referral notices are sent for each referral made to the Panel Member. The Panel Member has thirty days to return this notice indicating the outcome of the half-hour consultation. Second notices will be sent in the event of a delinquent reply. These notices inform the LRIS whether or not the attorney expects to provide further service to the client.
- C. Open Case Status Reports** – This quarterly report requests an update on the status of all cases which are “open” according to the database. A case is open when the attorney’s office responds “Additional Services” or “Possible Additional Services” on the initial Referral Notice. A case is not “closed” until it is indicated clearly that the following two conditions exist: (1) the attorney’s office has closed the case, and (2) no percentage fees are owed to the LRIS for the case OR (3) all percentage fees due have been paid. The report lists any percentage fees previously remitted for each case. Any additional percentage fees collected should be forwarded to the LRIS at the same time the status report is returned. Please note the amount being forwarded for each case and whether the case is open or closed.
- D. Liability Insurance Report** -- Panel Members must carry \$100,000/\$300,000 liability insurance coverage, *exclusive of defense costs*. Each month the LRIS requests this information from panel members whose insurance is near expiration. Panel Members must provide the name of the carrier, insurance policy number, and expiration date. When an attorney’s insurance expires, our system will automatically remove that attorney from the panel rotation until the LRIS receives the renewal information.

**Grand Rapids Bar Association  
Lawyer Referral and Information Service  
Attorney Membership Procedures and Guidelines**

**I. Purpose**

- A. The Lawyer Referral and Information Service (LRIS) is sponsored by the Grand Rapids Bar Association (GRBA) as a public service.
- B. The LRIS Mission: The mission of the LRIS is to provide access to resources, including attorneys and community organizations, that can assist to the public in resolving legal issues.

**II. Panel Membership Eligibility**

- A. Panel Membership is open to attorneys who are in good standing with the State Bar of Michigan, have the required liability insurance coverage, and meet any additional required criteria.
- B. Attorneys who want to be listed with the LRIS must complete all necessary application forms and remit annual dues. Panel membership is for a period of one year and may be renewed annually.
- C. The LRIS and the GRBA have the right and power to review panel members for suitability of panel membership. Furthermore, the LRIS and the GRBA have the right and power to deny or limit an application for or renewal of membership to the LRIS or any individual panel. The LRIS and the GRBA also have the right to remove any member from membership or any individual panel. Exercising these rights does not imply finding of professional misconduct or wrongdoing.

**III. Panel Membership Requirements**

- A. Panel Members must be in good standing with the State Bar of Michigan (SMB). Standing is checked with the SMB upon application or renewal of panel membership.
- B. Panel Members must carry \$100,000/\$300,000 professional liability insurance coverage, *exclusive of defense costs*. Panel Members must provide the name of the carrier, insurance policy number, and expiration date.
- C. Panel Members are required to remit annual membership dues. General membership dues are \$50 for each attorney. This entitles the attorney to selection of five panels; additional panels are \$10 each. Member attorneys are eligible for application for of counsel and experience panels. An additional dues payment of \$30 is required for each experience panel. There is no additional dues for counsel panels.
- D. For membership to of counsel and experience panels, attorneys must meet additional criteria as specified by that particular panel. Attorneys must provide all required documentation.

**III. Panel Membership Guidelines**

- A. Anytime a case referred by the LRIS generates attorney fees of \$300 or more; the Panel Member shall remit 10% of that fee to the LRIS. For the purposes of computing the amount owed to the service when a Panel Member is associated with a firm or other group, the fee received by the firm or group shall be deemed the gross amount received by the Panel Member.
- B. Panel members shall, within 30 days, complete and return referral statements, case status reports, and other reports received from the LRIS.
- C. Clients referred by the LRIS make an advanced payment of \$25. For the convenience of panel attorneys, the LRIS collects this fee prior to the referral. The fee is paid to defray

the GRBA's administrative costs in running the LRIS program. The client is entitled to a free half-hour consultation with a panel member. The panel member and the client must agree upon compensation for any additional time or services beyond the initial consultation.

- D. Attorneys are required to treat clients with respect and handle the LRIS retained cases in a timely and serious manner.
- E. Panel members must understand that there is no assurance that fee-generating referrals will result from membership on any panel.
- F. Each Panel Member who is retained to handle a matter referred to such Member by the LRIS shall maintain responsibility for and control of such matter. A Panel Member shall not transfer responsibility or control of any matter referred by the LRIS without the knowledge of the LRIS, unless required by law, court order, or the written direction of the client.
- G. A Panel Member who does not accept a matter referred by the LRIS shall **not** recommend another attorney to the client. Panel Members not accepting cases on a referred matter should direct the client to contact the LRIS for further service.
- H. Panel Members wishing to withdraw from the LRIS are directed to do so in writing. Withdrawing attorneys are still required to report and remit fees on past LRIS referrals.

#### **V. Suspension or Removal from Membership**

- A. Attorneys must abide by the guidelines described in this Panel Membership Handbook. Attorneys failing to follow any guideline may be subject to suspension or removal from LRIS Membership.
- B. Upon the discovery of a violation of these panel guidelines as stated in II A, B, and C and III A and B, the LRIS Administrator, under the direction of the Executive Director of the GRBA, may temporarily suspend a Panel Member. This Panel member must be notified in writing of the temporary suspension. After receiving this notification, the panel member may respond. Temporary suspensions resulting from delinquent report submission shall be removed upon guideline compliance.
- C. All other complaints against a panel member will be handled by the Lawyer Referral and Information Service Committee on a case by case manner. Upon receipt of such complaint, the panel member will be notified in writing at the discretion of the committee. Panel members are invited to respond. Information regarding the violation(s) and the Panel Member's response shall be forwarded to the members of the Lawyer Referral and Information Service Committee. Panel members may be temporarily suspended until the material is reviewed at the next regularly scheduled meeting. Upon review, continued suspension or removal from the LRIS will be considered. Removals and Suspensions are at the sole discretion of the Lawyer Referral and Information Service Committee.
- D. Admission to the panel at the commencement of any membership year shall be at the discretion of the Lawyer Referral and Information Service Committee.
- E. In all matters, the GRBA Board of Trustees will be the final arbiter of any dispute.