COVID-19 RESPONSE
Liaised with the Governor’s Office and Judicial Branch to provide critical information to members.

DIVERSITY & INCLUSION
Formed a Diversity Committee and BIPOC Lawyers Section to address diversity, inclusion, and equality in the Bar.

VIRTUAL LEARNING
Pivoted to support virtual CLE programming and remote work resources for members and staff.

Annual Report 2020
It is my pleasure to submit the Maine State Bar Association’s Annual Report for 2019-2020. The Association’s leadership, membership, and staff worked under unprecedented circumstances to meet the goals embodied in our mission:

The Maine State Bar Association promotes the honor, dignity and professionalism of lawyers; advances the knowledge, skills, and interests of its members; and supports the public interest in a fair and effective system of justice.

We continue to place the highest priority on educating our members and the public about our services, positions, and activities. We built on already exceptional relationships with the judiciary, legal service providers, and the Governor’s Office. And we learned to do it all virtually!

Under the guidance of President Thaddeus Day, the Association began the year focused on attorney wellness and community engagement. Like everyone, though, the general activities of the Association changed dramatically in mid-March due to the COVID-19 pandemic. After enjoying an outstanding Annual Bar Conference in January, which included a plenary on Maine’s new eFiling system, the country shut down. The Annual Bar Conference was our last in-person full-membership event in 2020.

The Association quickly pivoted to support remote work by staff and virtual meetings and CLE programming by Zoom. President Day worked with Governor Mills’ Office and the Secretary of State’s Office to secure temporary authorization of remote notarization during the state of civil emergency. We provided feedback to the Judicial Branch regarding interpretation and implementation of its Pandemic Management Orders. We stood up an Ad Hoc Pandemic Committee, which focused primarily on remote deposition issues. And we launched Bar Talk, a daily Zoom briefing with President Day and myself, to keep members informed of changes in the Maine courts and to share information from a wide range of stakeholders about law practice during the pandemic. Aside from being an informational service, though, Bar Talk kept us connected through the year.

Our work continued in other areas. We created a new membership category for the Public Service Sector. We established a Diversity Committee to recommend steps to address diversity, inclusion, and equality within the Association and the greater legal community. We also established a Black, Indigenous and People of Color (BIPOC) Lawyers Section. The Board of Governors has authorized a seat on the Board for a representative from the BIPOC Lawyers Section and when it is safe to hold an in-person membership meeting, members will have a chance to vote on this bylaws amendment.

Although we weren’t able to gather in person for the Summer Bar Conference, due to the Governor’s order prohibiting large group gatherings, we continued to offer virtual opportunities for our attorneys to receive live CLE credits, and to meet their education requirements around ethics and harassment and discriminatory conduct. We featured a variety of CLE programs and guest speakers on Bar Talk who shared ways our members could safeguard their social and emotional well-being during the pandemic. While President Day’s focus on community engagement was curtailed by the pandemic, we held our annual Law Day essay and poster contests for Maine students, and we supported the virtual Maine State High School Mock Trial Competition.

We mourned the loss of Jacqueline “Jackie” Rogers, following a courageous battle with cancer. Jackie served as executive director of the Board of Overseers of the Bar since 2004, and was an employee of the MSBA for over 20 years in various positions. We also mourned the loss of Juliette Holmes-Smith, executive director of the Volunteer Lawyers Project, who passed away following complications from a stroke. Among the many losses in Maine’s legal community in 2020, these two hit home especially hard.

Although 2020 was a challenging year, the Association was able to maintain a strong financial position and enjoy solid connections to its members, the broader legal community in Maine, and the public. Although it’s hard to say what “normal” will look like, we look forward to its return in 2021.

Angela P. Armstrong
Executive Director

MSBA Staff

<table>
<thead>
<tr>
<th>DEPARTMENT DIRECTORS</th>
<th>ADMINISTRATIVE SUPPORT STAFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communications Director</td>
<td>CLE Coordinator</td>
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<tr>
<td>Kathryn A. Holub</td>
<td>Mindy Coates</td>
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<td>Lawyer Referral Service Director</td>
<td>Communications &amp; Program Coordinator</td>
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<td>Rachel V. MacArthur</td>
<td>Valerie A. Schriver</td>
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<td>CLE Director</td>
<td>Membership Services Coordinator</td>
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<td>Linda Morin-Pasco</td>
<td>Molly E. Rogers</td>
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<td>Administration &amp; Finance Director</td>
<td>Karen Staples (Jan.–Aug. 2020)</td>
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<td>Lisa A. Pare</td>
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Executive Director
Angela P. Armstrong

Deputy Executive Director
Heather L.S. Seavey
2020 Board of Governors

President
Thaddeus V. Day, Esq.
Law Office of Thaddeus V. Day PLLC
North Yarmouth

President Elect
Kelly W. McDonald, Esq.
Murray Plumb & Murray
Portland

Vice President
Frank H. Bishop Jr., Esq.
Hudson Cook LLP
Portland

Immediate Past President
Eric N. Columher, Esq.
Eric N. Columher, PC
Ellsworth

Treasurer
James B. Haddow, Esq.
Petrucelli Martin & Haddow LLP
Portland

Governor: District Three (Cumberland)
Ernest J. Babcock, Esq.
Eaton Peabody
Portland

Governor: District Four (Sagadahoc & Lincoln)
Meegan J. Burbank, Esq.
Berry & Burbank
Boothbay Harbor

Governor: District Six (Kennebec)
Teresa M. Cloutier, Esq.
Cloutier Carrillo
Augusta
*August–December

Governor: District Three (Cumberland)
Rachel Deschuaytner, Esq.
McKenna Deschuaytner, PLLC
Portland

Governor: District Three (Cumberland)
Jonathan M. Dunitz, Esq.
Verrill
Portland

Governor: Women’s Law Section
Susan A. Faunce, Esq.
Berman & Simmons PA
Lewiston

Governor: District Eight (Waldo & Knox)
Haley B. Hall, Esq.
Camden Law LLP
Camden

Governor At-Large: Public Service Sector
Susan P. Herman, Esq
Office of the Attorney General
Augusta

Governor: District Seven (Somerset & Piscataquis)
Tonya H. Johnson, Esq.
C.W. & H.M. Hayes, P.A.
Sanford

Governor: District Ten (Hancock & Washington)
Derek A. Jones, Esq.
Maine Board of Tax Appeals
Augusta
(January - March)

Governor: District Two (Oxford & Franklin)
Jennifer F. Kreckel, Esq.
Kreckel Law PA
Rumford

Governor: District Ten (Hancock & Washington)
Zachary F. McNally
Hale & Hamlin, LLC
Ellsworth
(April–December)

Governor: New Lawyers Section
Forrest C. Peterson
Old Republic National Title Insurance Co.
Portland

Governor At-Large: In-House Counsel
William E. Saufley, Esq.
Residential Mortgage Services, Inc.
South Portland

Governor: District Six (Kennebec)
Stephen C. Smith, Esq.
Lipman & Katz
Augusta
(January–June)

Governor: District Five (Androscoggin)
Stacy O. Stitham, Esq.
Brann & Isaacson, LLP
Lewiston

Governor: District Eleven (Aroostook)
John W. Tebbetts
Tebbetts Law Office, LLC
Presque Isle

Governor: District Nine (Penobscot)
Ezra A.R. Willey, Esq.
Willey Law Offices
Bangor

Governor At-Large: In-House Counsel
William E. Saufley, Esq.
Residential Mortgage Services, Inc.
South Portland

Governor: District Eleven (Aroostook)
John W. Tebbetts
Tebbetts Law Office, LLC
Presque Isle

Governor: District Nine (Penobscot)
Ezra A.R. Willey, Esq.
Willey Law Offices
Bangor
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<td>Administrative Law</td>
<td>Charles F. Dingman, Esq.</td>
<td>Kozak &amp; Gayer, PA</td>
<td>Augusta</td>
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<td>Alternative Dispute Resolution</td>
<td>Peter Schroeter, Esq.</td>
<td>Shaheen &amp; Gordon PA</td>
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<td>Bankruptcy Law</td>
<td>Tanya Sambatakos, Esq.</td>
<td>Molleur Law Office LLC</td>
<td>Biddeford</td>
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<td>Katherine M. Krakowka, Esq.</td>
<td>Murray Plumb &amp; Murray</td>
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<td>BIPOC Lawyers</td>
<td>Carlos Diaz, Esq.</td>
<td>Cumberland County District Attorney</td>
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<td>Thomas L. Douglas, Esq.</td>
<td>Douglas McDaniel &amp; Campo LLC PA</td>
<td>Westbrook</td>
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<td>Business Law</td>
<td>David M. Austin, Esq.</td>
<td>Eaton Peabody</td>
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<td>Child Protective &amp; Juvenile Justice</td>
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<td>Consumer &amp; Financial Institution Law</td>
<td>Andrea J. Shaw, Esq.</td>
<td>Lighthouse Legal Solutions</td>
<td>Gorham</td>
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<td>Criminal Law</td>
<td>Kristine C. Hanly, Esq.</td>
<td>Hanly Law, LLC</td>
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<td>Elder Law</td>
<td>Paul D. Shapiro, Esq.</td>
<td>Carlin &amp; Shapiro PA</td>
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<td></td>
<td>Rachel Trafton</td>
<td>Maine Elder Law Firm</td>
<td>Bangor</td>
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<td>Environmental &amp; Energy Law</td>
<td>Emily K. Green, Esq.</td>
<td>Conservation Law Foundation</td>
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<td>Family Law</td>
<td>Scott L. Sells, Esq.</td>
<td>The Sells Law Firm, LLC</td>
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<td>Amy T. Robidas, Esq.</td>
<td>Robidas Law LLC</td>
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<td>Health Law</td>
<td>Karen F. Wolf, Esq.</td>
<td>Verrill</td>
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<td>Intellectual Property</td>
<td>Andrew J. Zulieve, Esq.</td>
<td>Skelton Taintor &amp; Abbott</td>
<td>Waldoboro</td>
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<td>International Practice</td>
<td>Frederick L. Lipp, Esq.</td>
<td>Bernstein Shur</td>
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<td>John P. Gause, Esq.</td>
<td>Eastern Maine Law LLC</td>
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<td>Adrian P. Kendall, Esq.</td>
<td>Norman Hanson &amp; DeTroy LLC</td>
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<td>Litigation</td>
<td>James E. O’Connell III, Esq.</td>
<td>Berman &amp; Simmons PA</td>
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<td>Philip R. Saucier, Esq.</td>
<td>Bernstein Shur</td>
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<td>Alexander Price, Esq.</td>
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<td>John M. Kirk III, Esq.</td>
<td>Schaeffer Douglas Title LLC</td>
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<td>Olga J. Goldberg, Esq.</td>
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<td>Dylan Maebly, Esq.</td>
<td>Pine Tree Legal Assistance</td>
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<td>Sarah Gilbert, Esq.</td>
<td>Camden Law LLP</td>
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<td>Christiana E. Mann, Esq.</td>
<td>Mann Law</td>
<td>Yarmouth</td>
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<td>Workers Compensation</td>
<td>Norman G. Trask, Esq.</td>
<td>Currier, Trask &amp; Dunleavy</td>
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<td></td>
<td>Anne-Marie L. Storey, Esq.</td>
<td>Rudman Winchell</td>
<td>Bangor</td>
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Silent Partners Program

In a low-key yet supportive way, the Maine State Bar Association offers a program to assist lawyers in dealing with problems in substantive areas and administrative areas of the law where there may be a lack of familiarity or comfort in helping a client. The program provides confidentiality recognized by M.R. Prof. Conduct 1.6(b)(4).

Legislative Advocacy 2020

As a champion for Maine's system of justice, the Maine State Bar Association advocates on behalf of its members and the public for laws that are fair and sound. MSBA members are encouraged to take a personal interest in legislative matters. During Maine legislative sessions, the MSBA provides its members with periodic updates on pending bills affecting the legal profession, as well as bills addressing broad issues of public policy. Through its various sections, the MSBA also serves as an information resource to Maine's citizen legislature.

James I. Cohen, of Verrill, leads the MSBA's legislative advocacy efforts. Internally, Executive Director Angela Armstrong and Governors Kelly McDonald (chair), Frank Bishop, Meegan Burbank, Eric Columber, Rachel Deschuytner, Haley Hall, and Kristine Hanly served on the Legislative Review & Response Committee.

In 2020, the MSBA testified on LD 657 and LD 1859 before the Maine Legislature shut down due to the COVID-19 pandemic. The MSBA issued 27 Legislative Updates.
MSBA by the Numbers

Members by County

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<td>Cumberland</td>
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Members

- Honorary: 3
- Judicial: 34
- Retired: 70
- Non-Practicing: 68
- Life: 135
- Non-Resident: 149
- Student: 226
- Standard: 2155

Social Media

- Twitter followers: 3,185
- Facebook likes: 726
- LinkedIn Group members: 716
- Facebook followers: 916
Continuing Legal Education

The role of the Continuing Legal Education (CLE) Committee is to provide, or assist in providing, high quality legal educational programs, publications, and materials that will promote lawyer competency and assist lawyers in meeting their mandatory CLE requirements.

2020 CLE Committee Members:

Members who resigned in 2020 include Benjamin R. Gideon, Esq. and John D. Pelletier, Esq.

Read CLE Committee Chair Erica Veazey’s annual report on the next page.

Casemaker Online Legal Research

Casemaker is a comprehensive online legal research library exclusively for MSBA members, which includes mobile apps, online training and support, and premium services. In 2020, members gained access to the new Casemaker4, which features faster results, a cleaner look, new functionality, and a new alerts feature.

- 43,115 Casemaker searches
- 3,593 Average monthly Casemaker searches
- 1,983 Registered Casemaker users
- 292 Average monthly unique users
- $1,040 Value of your Casemaker subscription
- $19 Member cost to Access Casemaker

Annual Bar Conference

After a brief hiatus, we held the Annual Bar Conference again in January. MSBA President Thaddeus Day hosted this year’s sold-out event, which featured a new location, the Westin Portland Harborview. We were pleased to partner with the Judicial Branch for an informative morning presentation about the state’s new eFiling system, and an afternoon of programming that addressed substantive areas of law as well as attorney wellness.
The role of the Continuing Legal Education (CLE) Committee is to provide, or assist in providing, high quality legal educational programs, publications and materials that will promote lawyer competency and assist lawyers in meeting their mandatory CLE requirements. Following are highlights of the Committee’s activities undertaken in 2020 to accomplish this mission:

When the pandemic hit in 2020 the Maine State Bar Association’s CLE Committee and MSBA CLE staff hit the ground running to quickly reschedule programs and move programs from live venues to live online programs to keep faculty, attorneys and staff safe and to make sure programs were available for attorneys to earn their CLE credits as required in Maine Bar Rule 5.

Over 795 attorneys attended free CLE programs that offered live credits. Programs included topics on coping with the Coronavirus that focused on dealing with stress; best practices in reopening your office; and an interactive conversation about the practice of law during a pandemic. MSBA CLE cosponsored programs with the Maine Board of Overseers of the Bar that also offered free registration.

Effective Jan. 1, 2019, the revised Maine Bar Rule 5 was implemented, requiring attorneys to earn 12 CLE credits including the new harassment and discriminatory conduct (H&D) credit. In 2020, the CLE Committee and staff presented or co-presented 25 programs that offered live H&D credits. Approximately 2,400 attorneys registered for these programs earning a total of over 3,132 H&D credits.

The CLE Committee made the decision to present Legal Year in Review as a virtual conference. More than 250 attorneys registered for a total of 1,929 credits on various topics presented from Nov. 16 through Nov. 18, 2020.

Due to COVID-19, the Family Law Institute originally scheduled for September 2020 was rescheduled to September 2021. In addition, Bridging the Gap originally scheduled for December 2020 was rescheduled to May 2021 and will be presented as a virtual conference.

CLE staff processed over 6,700 registrations for live programs. Attorneys earned approximately 10,171 credits at MSBA CLE programs that qualified for live credits and that were reported to the Overseers.

Orders were processed for 105 attorneys who purchased CLE program course materials and media which qualified for self-study credit. When MSBA staff began working remotely due to the pandemic, attorneys were directed to the InReach online platform to purchase MSBA course materials that qualified for self-study credits. On the InReach platform attorneys earned over 1,300 self-study credits.

In 2020 CLE’s online partner WebCredenza rebuilt its website and CLE offerings. Beginning in June 2020, attorneys were able to purchase live audio webcast and self-study products as well as the previous telephone seminars on this redesigned platform. WebCredenza has provided this new platform for attorneys to earn self-study credits and in the last quarter of 2020 Maine attorneys earned 60 self-study credits.
The CLE Committee held telephonic meetings to review and approve program proposals and develop additional programs. At each meeting the Committee also reviews the CLE monthly financial statements and program registration history and trends.

The Committee is grateful to all section leaders, members, and speakers for their efforts in organizing, presenting and supporting MSBA CLE seminars. Program organizers and presenters demonstrated great patience and cooperation in moving programs to online platforms in order to safely meet the needs of Maine attorneys.

I would like to thank all the CLE Committee members for their dedication and efforts in designing programs to fulfill this mission and in making 2020 a safe and successful year. Members in 2020 included: The Hon. Donald G. Alexander; Karen E. Boston, Esq.; Jennifer L. Frank, Esq.; Michael H. Griffin, Esq.; Stacy Stitham, Esq.; Erica Veazey, Esq.; and Debby L. Willis, Esq. Member(s) who resigned in 2020: John Pelletier.

The CLE Committee looks forward to working with section leaders and MSBA members as we continue efforts to develop programs that meet the needs of the Maine bar. Their commitment and expertise are what makes it possible for the Committee to bring the best in CLE to our members.

The Committee would also like to thank the MSBA CLE staff Mindy Coates for all her efforts in processing registrations and credit reporting requirements.

Finally, the CLE Committee wishes to extend sincere gratitude to Linda Morin-Pasco for her continued leadership and dedication to keeping CLE programming afloat in the midst of this unprecedented time. The success of CLE programming in 2020 rest largely on the efforts of Linda and her team to quickly pivot and move programming to online formats. Attendees of MSBA CLE programs in 2020 likely have no idea how much extra effort Linda and her staff have put into making sure the programs run seamlessly online, as they simply get to experience the polished and professional high-quality end product. The CLE Committee knows, however, that moving all programming online involved herculean efforts in everything from planning, registration, and reporting of final credits to the Board of Overseers. In a time of drastic change and upheaval, Linda managed to keep CLE program on track. The CLE Committee is grateful for all of her hard work and dedication in 2020.
MSBA Diversity Report

In addition to standing up a Diversity Committee, the Association asked several new demographic questions of members during annual dues renewal in order to collect a better snapshot of our membership. The following questions were mandatory: birthday, gender, practice type, and years of experience. These questions were optional, but responses were highly encouraged: military experience, race, sexual orientation, and job title.
The Lawyer Referral Service (LRS) has been helping the public to find the right lawyer for their situation and location since 1972. In addition, we assist Maine licensed attorneys in building their practice, and spreading information about their practice more widely. LRS continues to use the Community.lawyer platform which is a valuable asset in making referrals anytime and anywhere, which is extremely helpful for the program’s staff of one. The majority of attorneys seem to appreciate the ability to update reports, renew their information and memberships, and make payments online, as well.

### 2020 Committee Members:

James A. Clifford, Esq.; Eric N. Columber, Esq.; Andre G. Duchette, Esq. (chair); Salvatore Savatteri, Jr., Esq.; Steve Smith, Esq.; and, Heather T. Whiting, Esq.

### Referrals by Matter Type

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<td>Criminal Law</td>
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<td>Business Law</td>
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<td>Protection Orders</td>
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<td>Elder Law</td>
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### Cost to operate LRS in 2019

- Client fees collected: $8,350
- Membership fees: $20,125
- Returned in percentage fees: $6,474
- Fee per referral: $25
- Total cost to operate LRS in 2019: $62,103

### Areas of Law

- LRS Attorneys: 110 MSBA Members, 7 Non-Members
- (Marijuana panel added)
"My attorney was extremely attentive to my issue. He was professional and pleasant to talk to. He left me with a homework that I have to do to continue our future work. After a conversation with my attorney, I felt very confident, and wanted him to represent me. Thank you."

“My attorney is great! I’m so appreciative of your service as I did not know where to go to find a lawyer to help me with my issue. Thank you so much!”

“My attorney was quick to respond and schedule an appointment. She is fantastic to work with.”

“My attorney was awesome! He gave me sober advice about my situation and answered all my questions. He’s the 1st person I’ve run into in this situation who really seemed to be on my side. 5 stars!”

“If he sent me a bill I’d still pay it. We lost my SSDI case but I’m confident he did an amazing job regardless. I’m not sure if I’m going to file again but if I do, I will ask for his expert help.”

“Excellent and extremely thorough. I appreciate the time and energy he took to look into my questions. He provided me with reasonable advice, and I am hopeful that it’s all resolved.”

“My attorney called me right on time, was understanding, listened. He explained what the next step would be if I wanted to proceed. I will call him the next time I need an attorney.”

“Very welcoming staff & willingness to go the extra mile to assist me with my legal matter.”
Notable Highlights

The MSBA proudly hosted or supported the following efforts:

- Transitioned Meetings and CLE Programs to Virtual Platforms
- Launched Bar Talk
- Published COVID-19 Response Web Page
- Law Day Essay & Poster Contest
- NLS Holiday Drive
- Elder Law UnProgram
- Section Leadership & Legislative Meeting
- Diversity Committee
- BIPOC Lawyers Section
- Focus Groups for New Lawyers
- Launched Casemaker4

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John W. Ballou Award:

Jacqueline M. Rogers
March 26, 1962–April 29, 2020

MSBA Pro Bono Student Award:
Troy Andrew Lawrence
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Read Investment Committee Chair David Levesque’s annual report [here](#).
Review the entire financial report [here](#).
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