

#### MEMORANDUM

To: Board of GovernorsFrom: Larry J. Martin, Executive DirectorDate: Nov. 30, 2021Re: Executive Director Report

Welcome to the second meeting of the fiscal year! We continue to navigate the challenges of the COVID-19 pandemic but want to welcome you back to the State Bar Center. As always, we are following state and federal health guidelines to keep our members and staff safe.



Larry J. Martin is the executive director for the State Bar of Wisconsin.

The vast majority of State Bar staff are

continuing to successfully and productively work remotely. In this Executive Director Report, you will see examples of the good work that our staff and volunteer members have done in the last couple months.

It is my hope that in January 2022, through a hybrid work schedule, we will be able to reestablish the in-person collaborations that are so crucial to the continued success of the organization.

I've said it before and I'll say it again. Working from home the last 21 months has had its benefits. But, for me, not being in the office and, more importantly, not interacting in person with members and colleagues has had significant drawbacks. Quite honestly, I have missed the interaction and the value of listening and learning directly from those I serve and work with.

Moving forward, we aim to strike a good balance in providing a flexible work schedules while maintaining in-person collaboration for our member-centric organization.

That said, in October, we put on the Wisconsin Solo and Small Firm Conference virtually. The programming was outstanding and the attendance was terrific. It took incredible effort to make this a great member-experience. Switching from in-person to virtual is no easy task, but in the end, I think for the members, it seemed flawless. I am personally grateful for everyone's efforts, including the efforts of our dedicated volunteers to make this a great event.

Finally, it is my great pleasure to report that on Nov. 1, the State of Wisconsin's State Capitol and Executive Residence Board unanimously approved the creation and placing of a statue honoring the late Vel Phillips at the south entrance of the State Capitol in Madison.

The State Bar of Wisconsin and Wisconsin Law Foundation were the first organizations to step up, endorse the proposal and make a significant joint pledge of \$25,000 on behalf of our 25,000 members. I attended a press conference at the State Capitol, where Vel Phillips' son Michael spoke about his mother and how the statue will help honor her legacy in Wisconsin.

Regardless of how you mark and celebrate this time of year, best wishes to you and your loved ones for good health and good cheer. May this holiday season be a time to recharge and reflect as we look to put the past in its proper place and prepare for what I know will be a brighter new year. Please continue to stay well and, as always, ever forward!



Plans for a statue of the Hon. Vel Phillips, one of Wisconsin's most prominent and influential attorneys over the last 100 years, moved forward Nov. 1, 2021, when The State Capitol and Executive Residence Board today officially approved the statue and siting on the Capitol grounds in Madison. Standing at the podium following the approval of the Vel Phillips statue is Phillips' son, Michael Phillips, with Phillips' goddaughter, Millie Coby, in front of a mock-up of what the statue may look like.

# **UPCOMING EVENTS to Keep on Your Radar**

- Forensic Justice Institute
   The institute that explores reliable forensic evidence is virtual, and will held on half days
   Jan. 20-21, 2022.
- G. Lane Ware Leadership Academy 2021-22 Sessions two and three: Jan. 21-22 and April 8-9, 2022, State Bar Center, Madison.
- Upcoming Board of Governors' Meetings
   The 2022 dates are: Feb. 25, 2022 (virtual); April 29, 2022 (State Bar Center); and June
   15, 2022 (Grand Geneva Resort & Spa).
- Annual Bankruptcy Update
   Feb. 24-25, 2022, The American Club, Kohler.
- Leadership Development Summit April 9, 2022, at the State Bar Center, Madison.
- 2022 State Bar Annual Meeting & Conference The State Bar Annual Meeting & Conference is scheduled for June 16-17, 2022, at the Grand Geneva Resort in Lake Geneva.
- 2022 Wisconsin Solo & Small Firm Conference Save the date for Oct. 27-29, 2022, at the Kalahari, Wisconsin Dells.

# **RECENT COLUMNS of Interest**

In case you missed my recent columns in the Wisconsin Lawyer<sup>™</sup> magazine:

• On the Road Again: Visiting with members in communities throughout the state is not only energizing but also important for connecting on a personal level so the State Bar can truly know and serve your needs. I hope to meet many more of you as I continue my travels this fall (94 Wis. Law. 9 (October 2021)).

• **Giving Purpose to Our Presence:** Our presence in Kenosha in September highlighted the State Bar's commitment and efforts in combating racial injustice while promoting equal justice, diversity, and inclusion (94 Wis. Law. 9 (November 2021)).

# **ITEMS of NOTE**

# Improvements Ongoing for WisBar.org and State Bar Center's Technology

- **Virtualization upgrade complete**. Continued improvements will provide for more reliable and better performance of our overall State Bar computer network.
- Full phone system upgrade complete. This provides better support our team members working remotely now and as we continue with hybrid work schedules.
- **Exchange project**. Between Thanksgiving and the end of this calendar year, our Exchange project moves email systems into the Cloud, which further prepares us organizationally for reacting to and recovering in the event of a disaster.
- **Google Ad manager**. Online management of advertisements moved from an internal ad server to Google Ad Manager. This allows more data storage in the Cloud, and provides a much more robust tracking of engagements with those advertisements good for us and good for others that place their advertisements with us on our WisBar website and in connection with other State Bar communications.

# 2022 Annual Meeting & Conference (AMC)



Mark your calendars – the AMC will take place June 16-17, 2022, at the beautiful Grand Geneva Resort in Lake Geneva. Planning is in full swing. Plenary speakers will be announced soon. You won't want to miss the largest in-person gathering of the legal profession in Wisconsin complete with representation from all levels of the judiciary and with representatives of the Wisconsin Association of Legal Administrators attending. Now is the prime time to secure your sponsorship spot. Contact Crystal Brabender at cbrabender@wisbar.edu for details on how you can showcase your law firm to attendees from around the state.

# **EDUCATE – Developing Skilled Legal Professionals**

## WSSFC 2021 Success

The State Bar Seminars Division hosted another very successful **Wisconsin Solo and Small Firm Conference** in October with 350 participants. The conference was held virtually again this year on the 6Connex platform, which included access to exhibitors and multiple networking events.

All breakout sessions were recorded and will be offered as webcast replays. The first two airings of each session will be available the weeks of Dec. 6 and Dec. 27. We are greatly looking forward to gathering next year at the Kalahari Resort in Wisconsin Dells, Oct. 27-29, 2022.

#### Forensic Justice Institute Coming

State Bar of Wisconsin PINNACLE<sup>®</sup> will be hosting our first-ever **Forensic Justice Institute** on Jan. 20-21, 2022. The event is meant for judges, defense attorneys, and prosecutors and will go indepth on forensics and the science behind the techniques. Visit **wisbar.org/FJI/Pages/Home** for more information.

#### Professional Development: New and Updated Books

The Professional Development Team released a number of book updates, as well as new second editions of three of our newer titles: *Immigration Consequences of Wisconsin Criminal Offenses, Sexual Orientation, Gender Identity, and the Law*, and *Advising the Evolving Family.* 

We also recently released the seventh edition of *The Attorney's Guide to the Seventh Circuit Court of Appeals*, which is relevant not only to Wisconsin attorneys practicing before this federal appellate court, but to all attorneys bringing cases before this court, including Illinois and Indiana.

We continue to regularly update and supplement our current titles. Please take a moment and visit the State Bar of Wisconsin Marketplace (marketplace.wisbar.org) to learn more about all the books, forms, and other products available.

As many of our current authors retire or move on to other ventures, the attorney-editors are busy recruiting new authors to take over current book projects. We are also always looking to expand our offerings into new areas of expertise. If you or someone you know is interested in becoming a State Bar of Wisconsin PINNACLE<sup>®</sup> author, or if you have suggestions about new areas for PINNACLE Books to explore, please contact Publications Manager Carol Chapman at cchapman@wisbar.org.

# Practice411: Supporting the Business of Law

The State Bar's Law Office Management Assistance Program Practice411<sup>™</sup> helps lawyers to improve their efficiency and effectiveness in the delivery of legal services and in implementing systems and controls to reduce risk and improve client relations. It helps lawyers manage the business aspects of their practices.



Law Practice Assistance Manager Christopher Shattuck met with members for roundtable law practice management discussions via teleconference in September and October to discuss tips for dealing with negative online reviews, end of the year law firm planning, and opportunities for adding practice areas.

Shattuck wrote for these State Bar publications:

- Get Paid Faster: Efficient Billing Strategies for SPD-appointed Cases and 5 Tips: Business Succession Planning for Lawyers appearing in the Sept. 1, 2021, issue of *InsideTrack*<sup>™</sup>.
- Six Tips for Developing a Business Plan for Uncertain Financial Times and Q&A: Eviction Mediation Resources for Tenants and Landlords appearing in the Sept. 15, 2021, issue of InsideTrack.

- Upping Your Remote Office Game: Prepping Your Firm to Be Flexible in the Oct. 6, 2021, edition of *InsideTrack*.
- **Practice Management: The Role of Legal Administrators in U.S. Law Firms** appearing in the October 2021 edition of *Wisconsin Lawyer*<sup>™</sup> magazine.

Shattuck and the Practice411 program provided a number of helpful educational sessions:

- Ethical Requirements for Continued Remote Work, for the Fond du Lac County Bar Association, on Oct. 21, 2021.
- In partnership with State Bar of Wisconsin PINNACLE<sup>®</sup> for the Wisconsin Solo & Small Firm Conference in October, Shattuck co-presented on the following sessions: "50 Tips in 50 Minutes," "Business Plans – A Practical Perspective," and "Upping Your Remote Office Game: Prepping Your Firm to Be Flexible."

To reach Practice411, contact Christopher Shattuck or call (800) 957-4670.

## **Providing Ethics Guidance**

The State Bar's **Ethics Program** provides guidance and help in resolving questions regarding Wisconsin's Rules of Professional Conduct for attorneys.

The Wisconsin Supreme Court unanimously approved Rules Petition 21-01, which was jointly filed by the Ethics Committee and the State Public Defenders



Office. The rule changes take effect on Jan., 1, 2022, and are discussed in in the Oct. 20, 2021, Ethical Dilemmas column in *InsideTrack*, "Dilemma: What are the New Conflicts Rules for Public Defenders?"

The September Ethical Dilemmas column in *InsideTrack* was **Dilemma: Can You Sue a Party Insured by a Client?** The Ethics Committee also issued Ethics Opinion EF-21-03, **Responsibilities of a Lawyer with a Fugitive Client**, also discussed in the November Ethical Dilemmas column in *InsideTrack*, **"Dilemma: What are Your Responsibilities to a Fugitive Client?**"

Ethics counsel recently gave these presentations:

PINNACLE Fall Ethics Program (Oct. 15, 2021):	Wisconsin Child Support Enforcement Association
"What's New in the World of Professional	Annual Fall Conference:
Responsibility" with Dean Dietrich, Tim Pierce,	"You Can't Change What You Can't See: Can the
Julie Spoke and Ben Kempinen [3 credit hours]	Rules of Professional Conduct Improve Our Vision
	and Help Us Overcome Implicit Bias Through Cultural
	Competency?" [1 credit hour]
Wisconsin Council of Estate Planning	American Alliance of Paralegals (Oct. 21, 2021): "Re-
Attorneys (Sept. 17, 2021): "Selected Ethical	Regulation: Paralegals and Paraprofessionals" [1
Issues in Estate Planning" [3 credit hours]	credit hour]
Fall 2021 Government Lawyers Ethics Training	PINNACLE Fall Ethics Series (Oct. 26, 2021):
(Sept. 22, 2021): "For the Times They Are A	"Common Ethics Issues for the Organizational
Changin': Recent Trends in Ethics" [1 credit	Lawyer" with Dean Dietrich and Tim Pierce [1 1/2
hour]	credit hours]
PINNACLE Worker's Compensation Update	Court Commissioners (Oct. 27, 2021): "Does the
(Sept. 23, 2021): "Common Yet Complicated	Duty of Competence and Language Access Include
Ethical Issues in a Worker's Compensation	Cultural Competency: ABA Formal Opinion 500" [1
Practice"	credit hour]
State Bar Strategic Planning Committee (Sept.	WSSFC (Friday, Oct. 29, 2021): "Revisiting
9, 2021): "What Has Been Happening in the	Reasonable Efforts with Remote Working
Legal Industry Since 2019" [1 ½ hours]	Technology" with Brent J. Hoeft [1 credit hour]
Wisconsin Association of County Corporation	American Association of Matrimonial Lawyers (Nov.
Counsels (Sept. 28, 2021): "The Conflicting	5, 2021): "Ethical Issues in Complex Family Law
Ethical, Legal and Public Policy Obligations of a	Matters" with Linda Balisle and Margaret Hickey [1
Government Attorney" [1 credit hour]	credit hour] (76 attendees)
Jefferson County Bar (Oct. 6, 2021): "Breaking	PINNACLE Fall Ethics Series (Nov. 9, 2021):
Up Is Hard to Do: Terminating the Lawyer-	"Common Ethical Issues for Litigators" with Dean
Client Relationship" [1 credit hour]	Dietrich and Tim Pierce [1 ½ credit hours]

#### The Ethics Program also gave the following presentations for these CLE sessions or

organizations: Annual Environmental Law Update (Sept. 9); Children and the Courts Conference (Sept. 23); Annual Employment Law Update (Oct. 8); PINNACLE Fall Ethics program (Oct. 15); Washington County Bar Association (Oct. 20); Family Business Law Update (Oct. 20); Pinnacle Ethics for Organizational Lawyers (Oct. 26); Ozaukee County Bar Association (Nov. 3); La Crosse County Bar Association (Nov. 5) PINNACLE, "Ethics for Litigators" (Nov. 9); Ozaukee County, "Ethics for Guardians ad Litem" (Nov. 12).

Questions? Contact Ethics Counsel Aviva Kaiser or Tim Pierce, or call the Ethics Hotline at (800) 254-9154.

# WisLAP: Keeping Wisconsin Lawyers Healthy

The Wisconsin Lawyers Assistance Program (WisLAP) provides free confidential assistance to lawyers, judges, law



students, and their families coping with substance use disorders, mental health challenges, or other stressors that negatively impact the quality of life and the practice of law. WisLAP also provides educational programming for firms, local bars, and other legal entities and associations on the topics of substance use, mental health, and well-being.

#### WisLAP staff and volunteers participated in the following presentations/events:

- Sept. 22 Joint Leadership Orientation, Kenosha
- Oct. 15 Fall Ethics Program
- Oct. 21 Family Law Section Board
- Oct. 28 Solo Small Firm Conference, Wisconsin Dells
- Nov. 17 Bankruptcy, Insolvency and Creditors Rights Section

#### WisLAP held it's volunteer training on Sept. 10

With help from attorneys Aviva Kaiser, Laura Gillespie, and Emily Dudak Leiter, WisLAP was able to provide training to almost 50 volunteers. The training covered the following topics:

- The role of WisLAP and the WisLAP volunteer;
- Ethical considerations for attorney wellness;
- Grief and loss issues for lawyers;
- Meditation and mindfulness techniques for attorney wellness.

During the training, WisLAP awarded John Carlson and Stephanie Osborne the title of WisLAP Volunteers of the Year for their hard work and dedication to the WisLAP program and the peers they selflessly serve.

#### WisLAP 24-hour Hotline

WisLAP continues to administer the peer assistance program, 24-hour hotline for lawyer assistance, and monitoring program at (800) 543-2625. Questions about WisLAP? Contact WisLAP Coordinator Jason Magill.

#### Division, Section, and Committee Reports

• The Senior Lawyers Division (SLD) is in the process of planning their annual CLE program, which will be held March 8, 2022, in Milwaukee. The division has recently started their blog, *Blog of Experience*, produced by the State Bar, to connect with division members and increase engagement. Blog authors have had two of their articles published in *InsideTrack*, including the Oct. 28, 2021, article, "New Emeritus Rules Reflect Our Changing Profession."

The SLD has also been working with PINNACLE to continue their *Staying Sharp Seminar Series*, featuring webcasts that are free to division members and focus on topics specific to senior lawyers. The programs have been used to build a virtual library of educational videos that are available to SLD members at any time. There are currently eight programs in the library, and more are being recorded and planned for the upcoming months.

The division submitted a Request for Proposal (RFP) for the 2022 Annual Meeting & Conference (AMC) titled, *Be Ethical: Plan for your Succession,* in collaboration with the Practice411 program.

• The **Government Lawyers Division** is exploring a division membership status for retired government attorneys, to continue their involvement and maintain a connection with their peers in government service. They aim to utilize the insight these members have gained from their years of experience as they plan division programs and projects.

The division is offering \$3,320 in grant money to help members with no other financial means to pay for CLE registration. If you know of a government lawyer in need, contact Karen Beall at the State Bar at kbeall@wisbar.org.

The division submitted an RFP for AMC titled, The Ins and Outs of Vaccine Mandates.

• The Young Lawyers Division (YLD) is planning their annual Young Lawyers Conference, to be held in Wisconsin Dells on March 11, 2022. The YLD is excited to provide not only CLE programming but also host networking opportunities for newer attorneys who have not had many occasions to engage with fellow members throughout the pandemic.

The division submitted an RFP for the 2022 AMC titled, Discrimination in the Time of COVID.

- The Nonresident Lawyers Division submitted an RFP for the 2022 AMC that will feature Attorney Laura Coates. Coates is a CNN Anchor and Senior Legal Analyst, SiriusXM Talk Show Host, and author. A native of Saint Paul, Minnesota, Coates graduated from Princeton University's Woodrow Wilson School of Public and International Affairs and the University of Minnesota Law School before beginning her legal career in private practice. The Criminal Law Section has signed on as a supporting sponsor of the session.
- The **Bankruptcy**, **Insolvency & Creditors' Rights Section** will hold their Annual Bankruptcy Update in February. This is an opportunity for section members to hear directly from U.S. Bankruptcy Court judges from the Eastern and Western Districts of Wisconsin and get up to speed on the latest trends and developments in bankruptcy practice.
- The **Business Law Section** chair and board members testified earlier this month on pending legislation the board drafted and worked on for several years. The legislation, which would modernize Wisconsin's business entity laws and bring them into line with those promulgated by the Uniform Law Commission, has been introduced as a bill in both the Wisconsin Senate and the Assembly.
- The **Construction and Public Contract Law Section** organized a volunteer day for members to volunteer in a construction-related project for **Revitalize Milwaukee** on Nov. 13. This was an opportunity for construction lawyers to both participate in a construction activity and help a member of the community at the same time.
- The **Elder Law and Special Needs Section** board will be holding a training on diversity and inclusion Dec. 6, 2021 for board members.
- The Family Law Section, in partnership with State Bar PINNACLE, produced two CLE seminars this fall focused on family law issues (*Advanced Skills and Techniques in Family Law* and *Family Law: How to Avoid an Ethics Complaint*), and provided scholarships for members to attend.
- The **Health Law Section** held a free CLE session for members, *Health Law Update*, on Nov. 16. The session provided updates on the various shifts and changes in the health law field.
- The Intellectual Property & Technology Law Section held their 15th Annual Door Country Intellectual Property Academy on Sept. 23-24. The conference provided a strong framework for

lawyers just starting out in the field, and was perfect for seasoned veterans who want updates on the ever-changing world of intellectual property law.

- The **Solo Small Firm and General Practice Section** board was integral to the planning of the 2021 Wisconsin Solo & Small Firm Conference, held at the end of October. The section also financially sponsored the event, presented the Lederer award to an attorney who has focused on improving the lives and practices of solo and small firm attorneys, and provided three scholarships to members to attend the conference.
- The **Sports and Entertainment Law Section** sponsored the National Sports Law Institute of Marquette University Law School's fall conference.
- The following sections held virtual **networking events with law students** to share information about their practice area: Business Law Section; Children and the Law Section; Environmental Law Section
- The following sections submitted proposals for the 2022 State Bar Annual Meeting and Conference:

Administrative and Local Government Section, cosponsored with Environmental Law Section – Conflicts on the Lake Nightmares While Living the Dream	Family Law and Health Law sections – Broken Record: The Complex Legal Landscape Impacting Medical Records
<ul> <li>Bankruptcy, Insolvency &amp; Creditors' Rights</li> <li>Section, cosponsored with Solo Small Firm</li> <li>and/or Family Law sections –</li> <li>What's Dischargeable in Bankruptcy and What's Not?</li> <li>Bankruptcy and the Government</li> <li>Potential Malpractice Risks and Claims</li> <li>Till Debts Do Us Part: The Intersection of Family and Bankruptcy Law</li> </ul>	<ul> <li>International Law Section –</li> <li>Privacy: Wisconsin to the World</li> <li>Discrimination in the Time of COVID, cosponsored with Young Lawyers Division</li> </ul>
Children and the Law and Family Law sections –	<ul> <li>Litigation Section –</li> <li>Common Ethical Scenarios in Litigation</li> </ul>

• Representing Best Interests in Volatile	• Nuts and Bolts of Successful Appeals:
Times	From the Judges' Perspective
<ul> <li>Construction and Public Contract Law</li> <li>Section –</li> <li>Promoting Diversity in Construction: The Development of Disadvantaged Business Enterprise Programs</li> </ul>	<ul> <li>Public Interest Law Section–</li> <li>Lessons from Ferguson: Municipal Court Debt Collection in WI, MO Nationwide, cosponsored with the Civil Rights and Liberties Section</li> <li>It happened on a Dirt Road Rural Cases that Changed the Law and Happy In Flannel: Succeeding in Rural Practice, cosponsored with Solo Small Firm</li> </ul>
<b>Criminal Law Section</b> –	Real Property, Probate and Trust Law
Annual Update on Wisconsin Criminal Law	Section –
and Procedure	Boundary Disputes from Start to Finish
<b>Dispute Resolution Section</b> – Get Out of Your Silo: What We Can Learn from Mediation in Different Subject Matters	<b>Taxation Law Section,</b> cosponsored with Business Law Section – Choice of Entity and Other Tax Planning for Closely-Held Businesses in Light of The New Tax Bill.

# **ADVOCATE – For Justice, Clients, the Legal System & the Profession**

# Advocacy & Access to Justice

The biggest issue of concern for the Legislature this fall has centered on elections: questions around election security, election integrity, and audits of the 2020 election have been an overriding theme and the subject of much debate.

Another topic of interest, also related to elections, was decennial redistricting. Following the 2020 census, the legislature has a duty to adopt maps for U.S. Congress and state Senate and Assembly districts. On Nov. 8 and 11, the GOP-led legislature passed a set of maps it created. Gov. Evers already vetoed these proposals, setting up litigation in the courts.

During this time, the Government Relations

team has been laying the groundwork for several bills supported by various State Bar sections to gain support and passage in the final stretch of the 2021-22 legislative session in spring. Those issues are discussed in-depth in the Aug. 9, 2021 edition of Rotunda Report.

More information and details on bills the State

#### What You Can Do

The State Bar encourages you to contact your legislators on issues affecting the legal profession. Use the State Bar Advocacy Network to send messages of support to your representatives. If you are interested in hosting a virtual or in-person meeting with your local lawmakers and/or local Bar Association, please contact Devin Martin at dmartin@wisbar.org.



Drew Parrish, chair of the Business Law Section, is seen on WisconsinEye on Oct. 21, 2021, as he testifies in support of AB/SB 566, which would modernize Wisconsin's business entity laws and bring them into line with those promulgated by the Uniform Law Commission.

Bar is tracking can be found on the Government Relations Advocacy Network page at www.wisbar/org/GovRelations.

Finally, grassroots work continues to connect and build strong relationships between State Bar members and their lawmakers.

Another legislative meeting was held on Sept. 17 in Kenosha with the participation of Kenosha County Bar Association members and Sen. Van Wanggaard (R-Racine), Reps. Samantha Kerkman (R-Salem), Tip McGuire (D-Kenosha), and Tod Ohnstad (D-Kenosha), and Kenosha Mayor John Antaramian. Over a lunch served to State Bar members by Ashling on the Lough, lawmakers took turns introducing or reintroducing themselves to the local legal community, discussing legal topics of interest, and discussing ways that State Bar members can better become engaged. Meeting with lawmakers, either in-person or virtually, remains one of the best ways to interact with and influence the legislative process. Future virtual meetings are in the works for the La Crosse, southwestern Wisconsin, and Marathon County areas. The State Bar looks forward to continuing to meet with elected officials around the state, and encourages you to reach out if you are interested in having a meeting with your lawmakers.



# Continuing Our Work on Racial Justice, Diversity & Inclusion

#### Vel Phillips Capitol Statue Proposal Moves Forward with State Bar Support

As noted, plans for a statue of the Hon. Vel Phillips, one of Wisconsin's most prominent and influential attorneys over the last 100 years, moved a step closer to reality. On Nov. 1, 2021, the State Capitol and Executive Residence Board officially approved the statue and siting on the Capitol grounds, which now allows the board to engage a sculptor to create the statue to be erected at the corner of West Main and South Carroll streets.

The State Bar will contribute \$20,000, and the Wisconsin Law Foundation will donate \$5,000 from its Fund to Promote Diversity. The statue is expected to cost about \$250,000.

In 1951, Phillips became the first African-American woman to graduate from the U.W. Law School, and in 1956 became the first African-American woman elected to Milwaukee's Common Council, serving until 1971, when Gov. Patrick Lucey appointed Phillips, at age 46, to the Milwaukee County Circuit Court, making her the first African-American to serve in Wisconsin's judiciary and the first female judge in Milwaukee. In 1978, she became the first African-American electedSecretary of State.

- The **Diversity & Inclusion Oversight Committee (DIOC)**, and affinity bar and State Bar leaders met Nov. 1, 2021. DIOC has initiated and will continue increasing Law School outreach. Connections with the law school student affinity groups from U.W. and Marquette law schools continue, successfully strengthening the pipeline to the legal profession. The committee also met Dec. 2, 2021.
- **Diversity Clerkship Program (DCP):** Information sessions took place Oct. 25, 2021, at Marquette University Law School, and Oct. 27, 2021, at U.W. Law School, with a combined attendance of 79 students. The subcommittee met the last week in October, and will be exploring new approaches and processes for future programs. If you are interested in having a clerk from the program in 2022, please email Jacque Evans, State Bar Diversity & Inclusion Specialist.

# **FACILITATE – Helping the Public Access the Legal System**

#### Pro Bono: Connecting the Legal Community with Opportunities

- Pro Bono Portal The State Bar Pro Bono Portal powered by software from Paladin provides an easy way for volunteers to find and connect with pro bono opportunities online. We now have 22 participating legal services organizations using the website and 273 volunteer opportunities have been posted (72 are actively recruiting).
- Small Business Assistance The Business Law Section has launched their new free legal assistance effort for Wisconsin small business who have non-litigation legal issues. Volunteers staff a weekly virtual legal clinic with help from students at Marquette Law School. Since the project launched on Feb. 5, 2021, volunteers have assisted 64 small businesses in every area of the state.

 Newsletter - The State Bar's monthly Pro Bono Highlights email newsletter was distributed to all members in October and November to provide an update on pro bono efforts, resources, and opportunities for volunteers in Wisconsin. Recent highlights include the call for



more volunteers to assist Afghan refugees at Fort McCoy and an interview with volunteer Randall Westgate about his work at Judicare Mediation Services. Want to sign up for the newsletters? **Contact State Bar Pro Bono Coordinator Jeff Brown**.

# Access to Justice Commission: Expanding Help to the Unrepresented

- The Commission recently published an article in the Wisconsin Counties Association Magazine highlighting the importance of access to civil legal aid and encouraging counties to look for ways to collaborate with legal services organizations in their communities.
- Wisconsin Free Legal Answers, the Commission sponsored pro bono project, provides an easy to use online legal clinic that is available statewide. The program received 697 questions in FY22 thus far and volunteers have responded to 93% of them, assisting 605 clients. The leading areas for questions in since July 1, 2021, are family (252), tenant/landlord (99), consumer debt (75), employment (55), real estate (28), and probate (41).
- Wisconsin Law Help website The Commission continues to working collaboratively with the State Bar's Legal Assistance Committee, the State Law Library, WisTAF, and others to develop an easy to use website where Wisconsin residents can search for and connect with appropriate legal resources that fit their circumstances and legal issues. The group has developed its project description and is now working on its governance and staffing model as well as funding. The project is inspired by similar law help websites that exist in Illinois, Ohio, Michigan, Minnesota, and most other states.

# Fee Arbitration: Helping Resolve Disputes

The State Bar's **Fee Arbitration Program** is a confidential, inexpensive way for clients and lawyers to resolve fee disputes. Currently, the program has 42 open cases, with 16 new arbitration requests received since July 1. Hearings continue to be held via videoconference.

#### Increasing Awareness through the Media

Through its statewide media outreach and response efforts, the State Bar provides information, corrects inaccurate reporting, connects the media with lawyers as experts on a variety of issues, and serves as a trusted resource to journalists while highlighting the critical role and expertise lawyers play in society. Here are some recent examples of media inquiries and referrals:

- Fox6 Milwaukee, Zoom transformed our court system, now what? Oct. 13, 2021. Judge Carl Ashley; Director of State Courts Randy Koschnick; Mary Triggiano, chief judge of Milwaukee County Circuit Court.
- TMJ4 Milwaukee, In-Depth: Risks and benefits of defendants testifying in their own trials, Nov. 10, 2021.
- NBC News, Could Kyle Rittenhouse Face Civil Penalties Despite Acquittals in Kenosha Deaths?

## LRIS: Connecting Attorneys to Clients

The State Bar of Wisconsin Lawyer Referral and Information Service (LRIS) connects attorneys with clients who are carefully prescreened for legal issue, geographic location, and ability to pay. More than 375 lawyers serve on the LRIS panel, covering 40 practice areas.

Bilingual Spanish-speaking panel members are needed as the LRIS program has had an increase in Spanish speaking referrals. The LRIS webpage has been updated to add a Spanish version.

Since July 1, LRIS specialists responded to 10,584 calls. Approximately one in four callers are referred to an attorney; the remaining callers are given assistance in the form of information, referrals to community or government agencies, or basic legal advice through the State Bar Lawyer Hotline. To learn more or register as a panelist, visit **the Lawyer Referral and Information Service webpage on WisBar.org**.

## Mock Trial 2022 Is Virtual

The State Bar of Wisconsin High School Mock Trial Tournament 2022 registration opened Sept. 20. The competition will be held virtually, as it was in 2021. Regionals are Feb. 12 & 13, with semifinals March 5 & 6. There are currently 80 teams participating.

This year features a civil case. A college student scores a job at the best employer in town. When the student collapses on the job, the student is fired. Discrimination? Fallout of sibling rivalries in management coming to a head? Or come combination? Read more about it, and why the case also includes two special witness names, in *InsideTrack*.

Wisconsin High School Mock Trial is funded by the Wisconsin Law Foundation. To learn more about mock trial and about how to volunteer, visit the mock trial webpage, at wisbar.org/mocktrial.

## Pro Hoc Vice System Upgraded

The pro hoc vice admissions has launched a new online system. Attorneys seeking to try a case in Wisconsin no longer have to mail in the documents to the State Bar, but can apply online, at **wisbar.org/prohacvice**. All applications must be filed and all fees paid online using the above link. Applications are no longer accepted by mail.

# Promoting Public Understanding of the Law: Wisconsin Law Foundation

#### Young Lawyers Receive Scholarships for Representing the Underserved

The Wisconsin Law Foundation granted **Belle Case La Follette Awards** in the amount of \$2,400 each to three recent law school graduates. The awards recognize recent law school graduates who are State Bar members that practice law in Wisconsin and represent underserved populations. This year's recipients are:

- **Taylor M. Hart**, U.W. 2017, of Martinez & Ruby LLC, Baraboo. The overwhelming majority of his clients are appointed by the State Public Defenders Office (SPD) to represent, spread across 10 rural Wisconsin counties.
- Jacob A. Haller, Marquette 2018, of Legal Action of Wisconsin, Milwaukee. Jacob works with Disabled Offenders Economic Security (DOES) Project to advocate for incarcerated persons who are nearing the end of their sentence and also living with a mental health related disability.
- **Megan E. Lee**, Michigan State 2019, Wisconsin Judicare, Wausau. Megan represents victims of crime in the northern 33 counties in Wisconsin. She also represents victims of domestic abuse in family law cases.

# Remember the Wisconsin Law Foundation in Year-end Giving

Like so many other charitable groups, the Wisconsin Law Foundation faces a significant hole in its fundraising efforts due to the pandemic and the cancellation and



postponement of the last two Fellows Dinner, its largest annual fundraising event. If you are in a position to do so, please support the critical work of your Wisconsin Law Foundation by making an end-of-the-year contribution.

Contributions support new diversity initiatives, scholarships that help new lawyers reduce debt and establish practices in underserved areas, the Wisconsin's High School Mock Trial program, and programming to develop the next generation of legal leaders.

Make donations online at **wisbar.org/wlfdonate** or send a check to the Wisconsin Law Foundation, 5302 Eastpark Blvd., Madison, WI 53718.

# Advancing the Wisconsin Law Foundation's Mission

• Thanks to Kevin and Roseanne Lyons, Donations Make Twice the Impact

A reminder that thanks to a generous pledge by Law Foundation Board member attorney Kevin Lyons and his wife, Roseann Lyons, all donations from individuals who have not contributed to the Wisconsin Law Foundation since July 1, 2018, will be matched for a cumulative dollar total of up to \$25,000. Donations through June 30, 2022, will have twice the impact!

#### • Fellows Dinner to Return in May and September 2022

The 2021 Wisconsin Law Foundation Fellows Recognition Dinner, previously postponed, will be held on Thursday, May 5, 2022, at the Monona Terrace & Convention Center in Madison.

The annual Fall Fellows dinner will return on Thursday, Sept. 29, 2022 to be held at the Wisconsin City Club in Milwaukee.

The Fellows program recognizes those members of the State Bar of Wisconsin who have demonstrated outstanding legal ability and devotion to the welfare of their community, state and nation, as well as to the advancement of the legal profession. Opportunity to join the Fellows is limited to 2.5% of the State Bar's total membership and is extended, by nomination, to only to a limited number of Wisconsin lawyers each year.

#### • Steve R. Sorenson Receives Distinguished Service Award

Neenah attorney, and Past State Bar President, **Steve R. Sorenson** is recipient of the Law Foundation's **2021 Charles L. Goldberg Distinguished Service Award.** The award recognizes a lifetime of service to the profession and the community. Steve has a long history of professional and community service, including leadership roles with the State Bar, the Wisconsin Law Foundation and the Fellows of the Wisconsin Law Foundation. He will be honored at the Fellows dinner on May 5, 2022, in Madison.

#### • Diversity Clerkship Alumni Participate in WSSFC

Thanks to scholarships from the Law Foundation's **Fund to Promote Diversity**, eight young attorneys who participated in the State Bar's Diversity Clerkship Program when they were in law school, attended this year's Wisconsin Solo & Small Firm Conference (WSSFC).

#### • G. Lane Ware Leadership Academy

The Law Foundation provided a \$4,000 grant to the State Bar's **G. Lane Ware Leadership Academy,** a multi-session training program designed to enhance leadership skills, inspire leadership involvement, build professional networks, and foster the professional development of a diverse group of lawyers. The Leadership Academy helps to improve the leadership skills of lawyers who are interested in becoming leaders in their community, in their places of employment or in the legal profession, whether at the local level or within the State Bar.

The first session of the 2022-23 Leadership Academy took place in-person at the State Bar Center on Nov. 5 & 6, 2021. This year's class is made up of 20 lawyers from around the state.

# **INNOVATE – Planning Together for the Future**

#### Dues Prepayment Plan Starts in January

In response to members' requests, in December 2019, the State Bar of Wisconsin introduced a Supreme Court assessment and State Bar dues prepayment plan for members' fiscal year 2021 assessments and dues.

We are happy to again offer this option to members for fiscal year 2023 Supreme Court assessments and State Bar dues. Members opting into this plan agree to prepay their dues and assessments through a credit or debit card for five installments (January through May), with lawyers making their final sixth payment through the State Bar's online dues processing system.

When making this final payment, the member can join optional sections and divisions, apply the Keller dues reduction, donate to the Wisconsin Law Foundation, and sign the trust account certificate online. Please note, there is *no* additional administrative fee to participate in the plan. To participate in this plan, members must sign up by Jan. 9, 2022, with the first credit or debit card installment payment occurring in January.

If you have any questions regarding this prepayment plan, please review the **prepayment plan** FAQs or call State Bar of Wisconsin customer service at (800) 728-7788.

#### Meet Our 2022 Wisconsin Legal Innovators



Wisconsin Legal Innovators (from left): Peter Tempelis, Waukesha County District Attorney's Office; Lifetime Legal Innovator Keith Findley, U.W. Law School; Joe Keuler, State Public Defenders Office; Meghan Elledge, Wisconsin Department of Health Services; and Chris Lang, State Public Defenders Office. Photos: Andy Manis

Meet these risk takers – forward thinkers all – who are advancing the legal profession and serving the public with perseverance, creative thinking, big ideas, and fast action in another year of unusual events. A focus on criminal law characterizes this year's legal innovators.

The 2021 Legal Innovators are:

- Lifetime Innovator Keith Findley: Improving Forensic Science in Courtrooms
- Peter Tempelis: Creating a Raft of Prosecutorial Reforms
- Joe Keuler: Bolstering Efficiency, Effectiveness of Public Defense
- Chris Lang: Client Advocacy and the Power of Video
- Lift Wisconsin: Legal Tune Up and Clearing Records to Move Forward
- Meghan Elledge: Targeting Health Disparities through the Office of Health Equity

Find out more in the November 2021 issue of Wisconsin Lawyer magazine.

#### Know a Legal Innovator?

Are you one? Nominations open March 1 and close on June 30. To learn more, visit **ThatsaFineIdea.com**.

#### Law Student Outreach

The State Bar is committed to exposing law students to the benefits, services and experiences the State Bar offers to members, so they will chose to practice law in Wisconsin and become active in the State Bar when they graduate. In efforts to continue building stronger relationships with the law schools, Executive Director Larry Martin, President Cheryl Furstace Daniels, President-elect Margaret Hickey, and Jacque Evans, State Bar D&I Specialist, met separately with Marquette Law School Dean Joseph Kearney and U.W. Law School Dean Daniel Tokaji.

The first newsletter for FY22 was released the first week of October.

# Leadership Development Committee

All of the Subcommittees have met and the programming is ramping up:

#### Leadership Academy Subcommittee

Session one of the G. Lane Ware Leadership Academy was held on Nov. 5-6 with 20 participants in this year's class. Session two is scheduled for February, with session three held in April.

This year's G. Lane Ware Keynote speaker will be Justice Ann Walsh Bradley. She will speak at the final day of the program for those involved in the Leadership Academy and those invited to participate in the Leadership Development Summit.

Session one faculty included Kristen Hardy, Natalie Fleury, Betsy Delzer, and Christina Plum. To learn more about this year's agenda and the program, see **WisBar.org**.

#### • Leadership Development Summit Subcommittee

This is your opportunity to identify the next generation of State Bar leaders! We are looking for talented individuals who are:

- new lawyers not yet involved with the State Bar;
- community and civic-minded lawyers; and
- candidates interested in volunteering for Bar service after an introduction to State Bar opportunities.

You will soon be receiving an email from Subcommittee Chair, Steve Krueger, asking you to nominate lawyers new to the profession who you believe have leadership potential to participate in the **Leadership Development Summit** in April 2022.

The event is designed to help them understand the "why" behind the time investment in bar volunteer service to convince their supervisors it's time well spent; see the benefits of greater engagement to their professional growth; and understand how to balance family, professional, and volunteer responsibilities. Diversity and inclusion is very important and you are strongly encouraged to nominate diverse professional colleagues.

The call for nominations are due by Dec. 15, and have been distributed to BOG members by email. If you have someone to nominate, or questions on the process, please contact Beth Drake at bdrake@wisbar.org.

#### • Ready.Set.Practice. Mentoring Program (RSP) Subcommittee

Mentors and mentees were recruited using the same Sept. 1 through Oct. 15 timeline as previous years. This year's recruitment efforts resulted in record-setting numbers:

- 32 mentees;
- 25 mentors; and
- 12 law students.

The law student program has been redesigned and relaxed to provide a lawyer "advisor" to answer questions as students explore the legal profession and build their professional network. The Racial Justice Task Force requested increased recruitment efforts for this program.

# Insurance & Member Benefits Committee

The State Bar of Wisconsin group health plan for law firms continues to provide health care coverage options for attorneys and staff. WPS Health Insurance and WPS Health Plan has just announced their rates for new business, and you could save up to 50%, subject to underwriting, for new groups of 100 or less! Cost-savings will vary based on product, benefit level, and location throughout the state. We encourage firms to take advantage of the new improved pricing and request a quote today.

Remember, law firms can enroll in the group health plan at *any time* throughout the year, not just during open-enrollment time in November. For coverage effective Jan. 1, paperwork must be submitted by Dec. 15.

To qualify, law firms need to employ at least two nonfamily members who work 26 hours or more per week (i.e., lawyer and one other employee), and coverage must be offered to all, but may be declined. Under current federal and state association health plan law, the State Bar's plan cannot provide coverage to individual attorneys either working as solo practitioners without at least one nonfamily employee. Video resources available to learn more about the plan:

- Association Health Plan for Law Firms: Deeper Dive Into Value Added Services (Sept. 29)
- Town Hall Meeting Q & A (June 24)

To request your quote, please contact the following representatives at Professional Insurance Programs:

- Christine Nadolski, Team Lead-Benefits, cnadolski@profinsprog.com, (414) 755-4172
- Wendy C. Block, Benefits Account Manager, wblock@profinsprog.com, (414) 755-4185

#### New Member Benefits

The Insurance & Member Benefits Committee continually explores and reviews products and services to make available to State Bar members. **Explore your new member benefits on WisBar.org** and take advantage of the many discounts available to you as a State Bar member.

The following new programs are available to members:

- 1-800-FLOWERS: Find the perfect business gift with 1-800 Flowers. Explore exclusive flowers and gourmet gifts while saving on your purchases. Members save on 1-800 Flowers with their membership. To take care of all the clients on your list, browse a full catalog of flowers, baked goods, gift baskets, and more.
- HP Computer Equipment: members can save up to 35% on HP products with free shipping. HP even offers personalized assistance to help find the perfect PC or other HP home and office products.

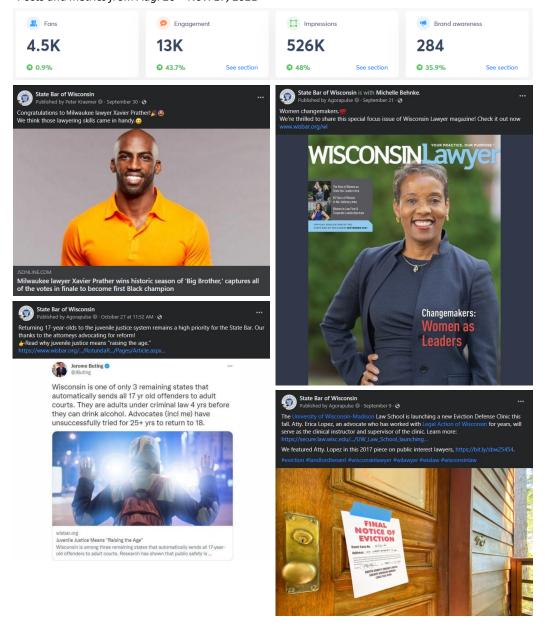
If you have any questions, contact Annette Ashley.

# Social Media: A Look at Top Content

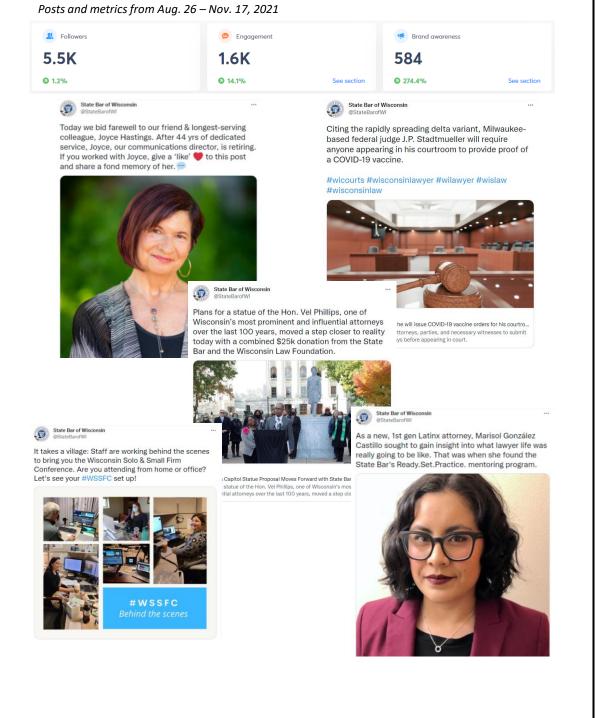
Increasingly, our members engage with the State Bar and each other through our social media channels. Join the conversation; connect with us on Facebook, Twitter (@statebarofwi), LinkedIn, and Instagram (@statebarofwi). Here are some recent metrics and examples that demonstrate how social media plays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

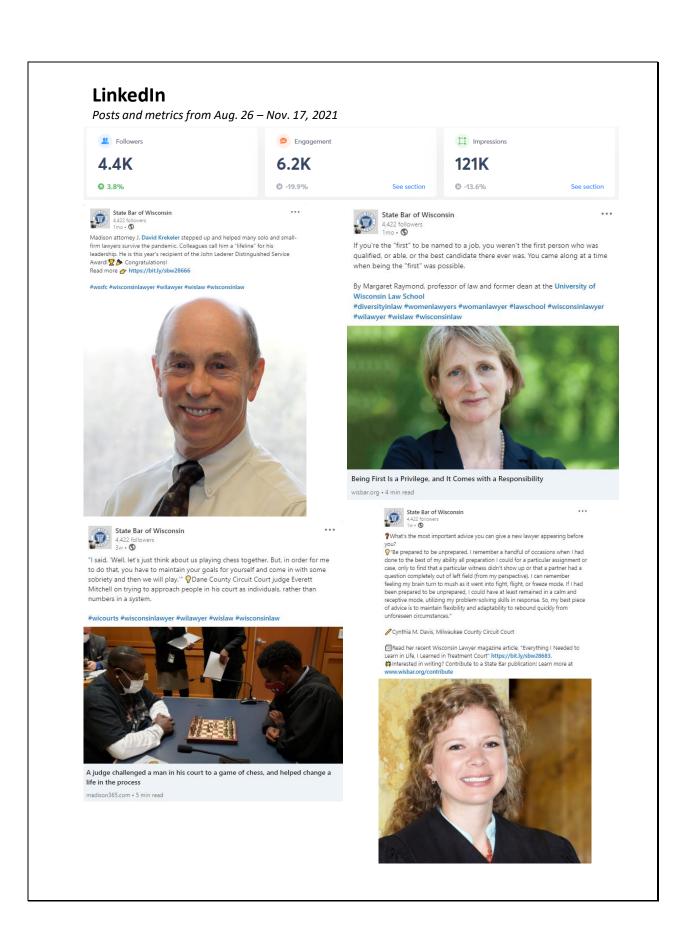
# Facebook

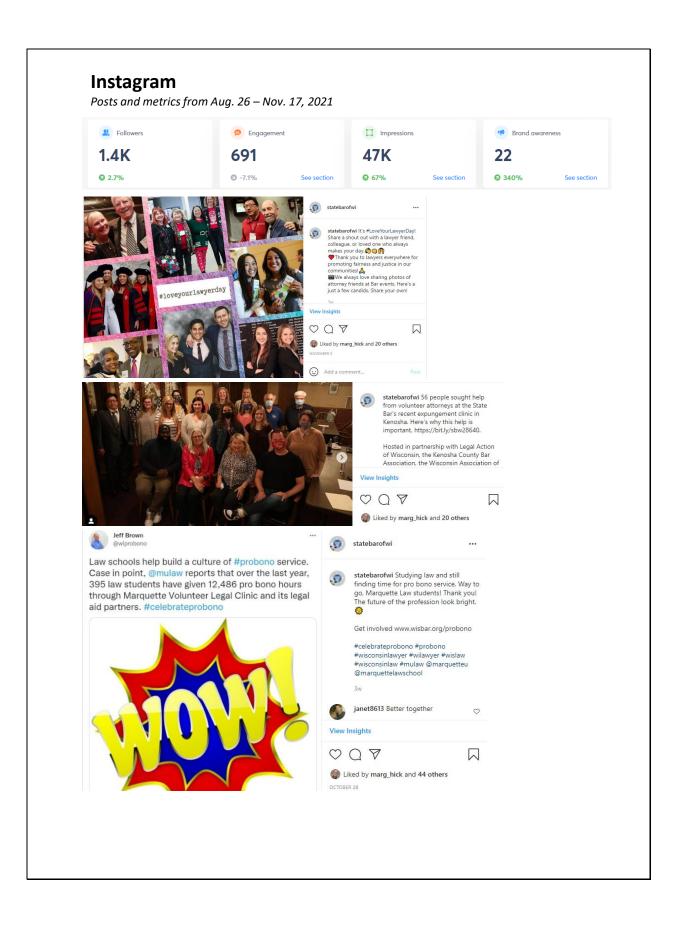
Posts and metrics from Aug. 26 – Nov. 17, 2021



# Twitter







#### Larry is on Twitter!

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



Final approval has just been given for a statue of Vel Phillips at the south entrance to WI State Capital. Proud that @StateBarofWI & WI Law Foundation were first major pledge commiting \$25K on behalf of our 25K members.

@WAALawyers @SBWRotundaRpt @WisconsinLaw @Practice411





It's hard to believe, but on Saturday, we will mark twenty years since the <u>#September11</u> attacks on our country. As we pause and reflect, I wanted to share with you what was only my second column in Wisconsin Lawyer magazine as Executive Director, bit.ly/sbw25819.





56 clients helped yesterday at our expungement clinic in Kenosha! @StateBarofWI co-hosted with @LegalActionWI @WAALawyers Kenosha Co Bar & Racine/Kenosha Urban League. @wiprobono @SBWRotundaRpt @Practice411 @NABE\_News





Great to once again join the Tri-County Bar (Vilas, Oneida, Forest) last night for the annual Deer hunt dinner. Great reconnecting with friends and enjoying a "wedge salad" at the White Stag up in Sugar Camp. An annual tradition!

@StateBarofWI @Practice411



Larry J. Martin @LarryJMartinED

Here's how to have your donation to Wisconsin Law Foundation matched, dollar for dollar...

Distate Bar of Wisconsin @StateBarofWI · Nov 3

Haven't donated to the Wisconsin Law Foundation recently? Well, your donation could go twice as far thanks to a generous matching offer from the Kevin and Roseann Lyons Fund. Find our more and donate today to see your dollars double. wisbar.org/aboutus/Wiscon...

