

# Board Book

State Bar of Georgia  
Board of Governors  
Agenda Book



2016 Annual Meeting  
Amelia Island, FL



# State Bar of Georgia

263<sup>rd</sup> BOARD OF GOVERNORS MEETING

9:00 a.m.–12:00 noon, Friday, June 17, 2016

Omni Amelia Island

Amelia Island, FL

Dress: Business Casual

## AGENDA

<u>Topic</u>	<u>Presenter</u>	<u>Page</u>
<b>1. ADMINISTRATION</b>		
a. Call to Order .....	Bob Kauffman .....	1-12
	President, 2015-2016	
b. Pledge of Allegiance and Invocation.....	Bill Rumer	
c. Recognition of Past Presidents, Judges.....	Bob Kauffman	
	and Special Guests	
d. Recognition of Retiring Executive Committee ...	Bob Kauffman .....	13
	Members and Retiring Board Members	
	• R. Chris Phelps, Northern Circuit – 32 years on Board	
	• William V. Custer IV, Atlanta Circuit – 18 years on Board	
	• S. Kendall Butterworth, Atlanta Circuit – 17 years on Board	
	• James E. Hardy, Southern Circuit – 16 years on Board	
	• Katherine K. Wood, Stone Mountain Circuit – 6 years on Board	
	• Gwyn P. Newsom, Chattahoochee Circuit – 4 years on Board	
	• Kenneth Ray Bernard Jr., Douglas Circuit – 4 years on Board	
	• Green Berry Moore III, Ocmulgee Circuit – 4 years on Board	
	• Virgil Louis Adams, Member at Large – 2 years on Board	
	• Kimberly Cooper Davis, Out of State – 2 years on Board	
e. Roll Call (by signature).....	Buck Rogers .....	14-20
	Secretary, 2015-2016	

<u>Topic</u>	<u>Presenter</u>	<u>Page</u>
f. Future Meetings Schedule .....	Pat O'Connor .....	21-22
	President Elect, 2015-2016 Treasurer, 2015-2016	
g. Minutes of the 262 <sup>nd</sup> Board of Governors .....	Buck Rogers .....	23-28
Meeting on May 7, 2016		

## 2. SPECIAL REPORTS

a. <b>Supreme Court of Georgia</b> .....	The Honorable Hugh Thompson Chief Justice, Supreme Court of Georgia	
b. <b>Court of Appeals of Georgia</b> .....	The Honorable Sara L. Doyle Chief Judge, Court of Appeals of Georgia	
c. <b>Office of the Attorney General</b> .....	Samuel S. Olens Attorney General, State of Georgia	

## 3. AWARDS and PRESENTATIONS

a. Presentation of Employee of the Year Award.....	Bob Kauffman	
b. Presentation of Other Awards.....	Bob Kauffman (Awards & recipients listed in Annual Meeting brochure)	

## 4. INFORMATIONAL REPORTS

a. Memorials .....	Bob Kauffman	
b. Attorney Wellness Task Force .....	Ken Hodges, Chair	
c. Lawyers for Equal Justice .....	Patrise Perkins-Hooker ...	201-206
d. Young Lawyers Division .....	Jack Long .....	29-30
	YLD President	

<u>Topic</u>	<u>Presenter</u>	<u>Page</u>
e. Investigative Panel .....	John Newberry, Chair	
f. Review Panel.....	Tony Askew, Chair	
g. Formal Advisory Opinion Board.....	Jeffrey Schneider, Vice Chair	
h. Clients' Security Fund.....	Paul Threlkeld, Chair	

**5. PRESIDENT'S ADDRESS**

- a. **State Bar of Georgia President's Address**.....Bob Kauffman  
(Introduction by Patrise Perkins Hooker)

**6. ADJOURNMENT** – The Board of Governors will meet again at 9:00 a.m., Saturday, June 18<sup>th</sup>.



# State Bar of Georgia

264<sup>th</sup> BOARD OF GOVERNORS MEETING  
9:00 a.m.–12:00 noon, Saturday, June 18, 2016

Omni Amelia Island  
Amelia Island, FL

Dress: Business Casual

## AGENDA

<u>Topic</u>	<u>Presenter</u>	<u>Pages</u>
<b>1. ADMINISTRATION</b>		
a. Call to Order .....	Bob Kauffman President, 2015-2016	
b. Presiding .....	Pat O'Connor President, 2016-2017	
c. Pledge of Allegiance .....	The Honorable Dax Lopez Judge, DeKalb County State Court	
d. Invocation .....	The Honorable Robert Benham Justice, Supreme Court of Georgia	
e. Recognition of Past Presidents, Judges and Special Guests .....	Pat O'Connor	
f. Welcome to New Officers & Board Members .....	Pat O'Connor	13

### New Officers

Pat O'Connor, President	Bob Kauffman, Immediate Past President
Buck Rogers, President Elect	Jennifer C. Mock, YLD President
Ken Hodges, Treasurer	Nicole Leet, YLD President Elect
Darrell Sutton, Secretary	Jack Long, YLD Immediate Past President

### New Board Members

Paige R. Whitaker, Atlanta Circuit, Post 8	Richard D. Campbell, Northern Circuit, Post 2
Jennifer A. Jordan, Atlanta Circuit, Post 20	Carl S. Cansino, Ocmulgee Circuit
Susan E. Edlein, Atlanta Circuit, Post 33	William J. Monahan, Out-of-State, Post 2
Amy C. Walters, Chattahoochee Circuit, Post 1	Christopher F. West, Southern Circuit, Post 1
Ryan R. Leonard, Douglas Circuit	Stacey K. Hydrick, Stone Mountain, Post 1
Tracee R. Benzo, Atlanta, Member-at-Large, Post 3	

<u>Topic</u>	<u>Presenter</u>	<u>Pages</u>
g. Roll Call (by signature).....	Darrell Sutton .....	14-20
	Secretary, 2016-2017	
h. Future Meetings Schedule .....	Pat O'Connor .....	21-22

**2. PRESIDENT’S REPORT .....**Pat O'Connor

- a. Approval of the Members of the State Disciplinary Boards (action)
  - Investigative Panel
  - Formal Advisory Opinion Board
- b. Approval of 2016-2017 Committees (action)
  - Standing Committees
  - Special Committees
  - Program Committees and Boards
- c. President’s Remarks:  
2016-2017 Proposed Program of Activities

**3. ACTION**

- a. Treasurer’s Report (information) .....Ken Hodges..... 31-37  
Treasurer, 2016-2017
- b. 2016 – 2017 State Bar Budgets (action) .....Ken Hodges..... 38-66  
(Operating Budget and Bar Center Budget) Pat O'Connor
- c. Financial Resolutions .....Ken Hodges..... 67
  - Authorization for president to secure blanket position bonds for officers and staff
  - Designation of depositories for general operations of the State Bar of Georgia
  - Employment of independent auditing firm to audit the financial records of the State Bar for the fiscal year 2015-2016.

<u>Topic</u>	<u>Presenter</u>	<u>Pages</u>
d. Executive Director Election .....	Pat O'Connor	
e. Executive Committee Election .....	Pat O'Connor	
<b>Two-Year Term 2016-2018 (group election)</b>		
(1) Expired term of Ken Hodges		
(2) Expired term of Phyllis Holmen		
(3) Expired term of Nicki Vaughan		
f. Georgia Legal Services Appointments		
(1) Patrick Flinn, Atlanta (reappointment for 2 year term)		
(2) Patricia Gorham, Atlanta (reappointment for 2 year term)		
(3) Russell Bonds, Atlanta (reappointment for 2 year term)		
(4) Marquette Bryan, Atlanta (appointment for 2 year term)		
(5) Keith Hill, Atlanta (appointment for 2 year term)		
g. Chief Justice's Commission on Professionalism Appointments		
(1) Monica Willis Parker, Atlanta (appointment for 3 year term)		
h. Election Schedule 2016-2017 .....		68

#### **4. INFORMATIONAL REPORTS**

a. Young Lawyers Division .....	Jennifer Mock YLD President, 2016-17	
b. 2016-17 Legislation Update .....	Jon Pannell ACL Chair, 2016-17	
c. Military Legal Assistance Program Update .....	Eric Ballinger, Chair .....	69-80
	Norman Zoller, Director	
d. Georgia Bar Foundation .....	Len Horton .....	81-82
	Executive Director	
e. Strategic Plan Update.....	Pat O'Connor .....	83-86

<u>Topic</u>	<u>Presenter</u>	<u>Pages</u>
<b>5. WRITTEN REPORTS</b>		
a. Executive Committee Minutes April 15, 2016 .....		87-93
b. Office of the General Counsel .....		94-97
c. Insurance Committee .....		98-100
d. Consumer Assistance Program.....		101-102
e. Fee Arbitration Program.....		103-106
f. Law-Related Education Program.....		107-110
g. Law Practice Management .....		111-115
h. Committee to Promote Inclusion in the Profession.....		116-123
i. Transition into Law Practice Program.....		124-146
j. Unlicensed Practice of Law.....		147-148
k. Committee on Professionalism.....		149-151
l. Chief Justice’s Commission on Professionalism .....		152-155
m. Media Report.....		156-161
n. Sections’ Annual Reports .....		162-200
• Aviation Section		
• Child Protection and Advocacy Section		
• Eminent Domain Section		
• Environmental Law Section		
• Family Law Section		
• Fiduciary Law Section		
• General Practice and Trial Section		
• Health Law Section		
• Intellectual Property Law Section		
• International Law Section		
• Local Government Law Section		



<u>Topic</u>	<u>Presenter</u>	<u>Page</u>
<b>6. CLOSING</b>		
a. Old Business .....	Pat O'Connor	
b. New Business .....	Pat O'Connor	
c. Executive Session .....	Pat O'Connor	
d. Remarks / Q&A / Comments / Suggestions		
e. Adjournment		
<b>f. Pictures (Very Important)</b>		
<b>Immediately following the meeting, photos will be made of:</b>		
(1) all new Board of Governors members*		
(2) all returning Board of Governors members who want their photos updated*		
(3) 2016-2017 Officers and Executive Committee		

*\*These photos will be used for the supplemental directory. If you have a headshot that you would like to provide instead, please email it to sarahc@gabar.org.*



**JUNE**

16-19

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Omni Amelia Island  
Plantation Resort

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*Opening Night Festival,  
CLE Opportunities,  
Presidential Inaugural  
Gala, Social Events,  
Family Activities, Exhibits*

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Early Bird & Hotel  
Cut-off Date: *May 13*  
Final Cut-off Date: *June 3*

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AMELIA ISLAND, FL

2016 STATE BAR OF GEORGIA

# ANNUAL MEETING



JOIN US AT AMELIA ISLAND!

On behalf of the Board of Governors and Executive Committee, I would like to invite you to attend the 2016 Annual Meeting of the State Bar of Georgia to be held June 16-19, at the Omni Amelia Island Plantation Resort at Amelia Island, Fla.

I hope you and your family will take this opportunity to enjoy a well-deserved vacation while we as a Bar review and reflect on the achievements and successes of the past year—including the development and implementation of the State Bar's strategic plan, the wellness initiative and a review of the entire disciplinary process—and look ahead to a year full of opportunities.

The world-class accommodations of the beautiful Omni Amelia Island Plantation Resort will meet every need for an outstanding program, as well as provide us all with the opportunity for fun, rest and relaxation.

I encourage you to take advantage of the many CLE opportunities that have been planned, along with wellness programs, section events, business meetings, alumni gatherings and other social functions. The festivities will begin with Thursday evening's Opening Night Festival featuring a fanciful Garden Circus

theme, and culminate with Saturday night's Presidential Inaugural Gala, where Patrick T. O'Connor will be sworn in as the 2016-17 Bar president.

There will be plenty of time to focus on your family and your well-being while at Amelia Island with the number of recreational opportunities available—including golf, tennis, biking or simply relaxing with your family and friends in a beautiful setting. Also, be sure to check out the Legal Exposition and Silent Auction, both open daily outside the meeting hall.

Thank you again for the honor and privilege of serving as your State Bar president for 2015-16 and for championing the cause of justice for all.

See you at Amelia Island!

ROBERT J. "BOB" KAUFFMAN  
President, State Bar of Georgia





## OPENING NIGHT FESTIVAL

THURSDAY, JUNE 16 | 6:30 - 9:30 P.M.

Come out and join your colleagues, their families and guests for a relaxing, fun-filled evening dedicated to good food, great music and a chance to catch up with old friends and make new ones. Put on your favorite casual attire and head to the Magnolia Garden Terrace (weather permitting) for the ultimate outdoor Garden Circus party, complete with a fire juggler, aerialists, interactive games and music to get the party started.

Many thanks to the State Bar's Sections and other organizations whose continuous support ensures the success of the Opening Night festivities. (See list of contributing organizations on back page.)

## PRESIDENTIAL INAUGURAL GALA

SATURDAY, JUNE 18 | 6:30 - 11 P.M.

The evening will begin with a reception honoring the Supreme Court justices and Court of Appeals judges, followed by the Awards and Inauguration Ceremony where Patrick T. O'Connor will be sworn in as the 2016-17 State Bar president. Following the inauguration and the awarding of the Distinguished Service and Employee of the Year awards, we invite you to enjoy the Gatsby Dinner Gala before moving into our three themed rooms of entertainment.

### COFFEE BAR

Enjoy a cup of coffee while relaxing in a quieter environment listening to the soothing sounds of an acoustic guitarist.

### BOURBON, SCOTCH AND CIGAR BAR

Sample smooth bourbon and scotch on comfy couches on the Magnolia Terrace Lawn while awaiting receipt of your hand-rolled cigar prepared by Julio "JC" Cordero, a master Cuban cigar roller.


### DANCE CLUB

Come inside and enjoy the sounds of the Swingin' Medallions, known as "The Party Band of the South." You won't be able to resist showing off your moves on the dance floor to the recognizable musical style of beach music, frat rock, R&B and shaggin' music. Bring your dancing shoes and prepare to end your weekend dancing until dawn.





## SCHEDULE OF EVENTS

### THURSDAY, JUNE 16

- 8 a.m. – 7:30 p.m. Registration
- 8 a.m. – 12 p.m. Exhibitor and Silent Auction Setup
- 9 a.m. – 12 p.m. CLE | 2016 Legislative Session Update
-  9 a.m. – 12 p.m. CLE | “Cope or Quit” Isn’t a Strategy: Wellness for Georgia Lawyers
- 10 a.m. – 4 p.m. Investigative Panel
- 10:30 a.m. – 12:30 p.m. MLAP Committee and Annual Meeting of the Military/Veterans Law Section
- 1 – 2 p.m. Bench and Bar Committee
- 1 – 6:30 p.m. Legal Exposition and Silent Auction Open
- 2 – 5 p.m. CLE | War Stories XVI, Plus Georgia Evidence Update
- 2 – 5 p.m. CLE | Setting Precedent: From Legal Marketing to Case Closure
- 2 – 5 p.m. Board of Bar Examiners
- 3 – 4 p.m. Budget Hearing
- 6:30 – 9:30 p.m. Opening Night Festival

### FRIDAY, JUNE 17

- 6 a.m. – 8 p.m. Registration
-  7 – 8 a.m. YLD/Pro Bono 5K Fun Run
-  7 – 8 a.m. Yoga Class
- 7 – 9 a.m. Tradition of Excellence Breakfast: General Practice & Trial Law Section
- 7 a.m. – 7 p.m. Legal Exposition and Silent Auction Open
- 9 a.m. – 12 p.m. Plenary Session: Awards Presentation, Annual Members Meeting and 2015-16 Board of Governors Meeting
- 12 – 1:30 p.m. ICLE Board of Trustees Summer Meeting
- 12 – 2 p.m. Criminal Law Legislative Update
- 12 – 2 p.m. Judicial Section Lunch | *Speaker: Mark Winne*
- 12 – 2 p.m. YLD Leadership Academy Lunch
- 12:30 – 4:30 p.m. Disciplinary Rules and Procedures Committee
- 1 – 4 p.m. Review Panel
- 2 – 4 p.m. YLD Pool Party and Meet the Candidates Reception

#### SILENT AUCTION, HOSTED BY THE GEORGIA LEGAL SERVICES PROGRAM (GLSP)

Thursday, June 16 – Saturday, June 18

Members are invited to a silent auction hosted by the Georgia Legal Services Program (GLSP), which will run for three days in the exhibit area. Don’t miss out on this great opportunity. Proceeds from the auction will benefit GLSP’s mission to provide access to justice and opportunities out of poverty for Georgians with low-incomes who reside in the 154 counties outside metro-Atlanta. Bidding will close promptly at 11 a.m. on Saturday, June 18. Bid as early and as often as you can. Low-income Georgians served by GLSP are counting on you. Your support is greatly appreciated.

#### OPENING NIGHT FESTIVAL

Thursday, June 16 | 6:30 – 9:30 p.m.

Don’t miss the annual Opening Night Festival. Bring your family and enjoy this year’s Garden Circus theme. See page 3 for a description of the events.

 Indicates an event specific to the State Bar’s wellness initiative.

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## SATURDAY, JUNE 18

- |                  |   |  |   |
|------------------|---|--|---|
| 2 – 5 p.m.       | CLE   CLE Like You Have Never Seen Before   | 7 a.m. – 1 p.m.  | Registration  |
| 2 – 5 p.m.       | CLE   The Lawyer's Role in Preserving Constitutional Liberty, Fostering Better Policing and Achieving National Security |  7 – 8 a.m. | Zumba Class   |
| 4 – 5 p.m.       | Member Benefits Committee   |  7 – 8 a.m. | Water Aerobics Class  |
| 5 – 7 p.m.       | Atlanta's John Marshall Law School and Savannah Law School Alumni Reception   | 7:30 – 8:30 a.m.   | New Board Members<br>Breakfast with the President   |
| 5 – 7 p.m.       | Emory University School of Law Alumni Reception   | 7:30 – 11 a.m.   | Silent Auction Open   |
| 5 – 7 p.m.       | Georgia State University College of Law Alumni Reception  | 7:30 a.m. – 1 p.m.   | Legal Exposition Open   |
| 5 – 7 p.m.       | Tradition of Excellence Reception: General Practice & Trial Law Section   | 9 a.m. – 12 p.m.   | 2016-17 Board of Governors Meeting  |
| 5 – 7 p.m.       | University of West Georgia Alumni Reception   | 12 – 1 p.m.  | Pro Bono Bloody Mary Reception<br>and Silent Auction Announcements  |
| 5:30 – 7 p.m.    | Mercer University School of Law Alumni Reception  | 6:30 – 11 p.m.   | Reception honoring the Supreme Court justices and Court of Appeals judges;<br>Presidential Inaugural Gala: Installation of Patrick T. O'Connor; Entertainment:<br>Swingin' Medallions |
| 5:30 – 7 p.m.    | UGA School of Law Reception honoring incoming President Patrick T. O'Connor<br>(sponsored by UGA and Oliver Maner LLP)  |  |   |
| 7:30 – 9:30 p.m. | YLD Dinner and Swearing-In Ceremony   |  |   |

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### YOUNG LAWYERS DIVISION DINNER AND SWEARING-IN CEREMONY

Friday, June 17 | 7:30 – 9:30 p.m.

Please join the Young Lawyers Division for its annual dinner and swearing-in ceremony to be held in the Amelia Ballroom. Following dinner, the YLD will present its outgoing officers and directors with gifts commemorating their service. The awards ceremony will also highlight the service of the YLD's many outstanding members, as President Jack Long presents the awards of achievement, as well as the Ethics and Professionalism Award, the Distinguished Judicial Service Award and the Ross Adams Award. The evening will be capped off by the swearing-in of the officers for the 2016-17 Bar year. Incoming YLD President Jennifer Mock will then highlight her plans for the YLD during the upcoming Bar year. This is an event open to all lawyers—members of the YLD and otherwise.

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### PRO BONO BLOODY MARY RECEPTION

Saturday, June 18 | 12 – 1 p.m.

The Pro Bono Resource Center will host a Bloody Mary Reception in the exposition area following the close of GLSP's Silent Auction. The reception honors the memory of H. Sol Clark, "father of legal aid in Georgia."

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### PRESIDENTIAL INAUGURAL GALA

Saturday, June 18 | 6:30 – 11 p.m.

Be sure to register for the Presidential Inaugural Gala, which includes the reception for the Supreme Court justices and Court of Appeals judges, the inauguration of Patrick T. O'Connor as the 2016-17 president of the State Bar, and the dinner, dancing and entertainment that traditionally closes out the evening. See page 3 for a description of the events.

STATE BAR OF GEORGIA 5



## 2016 EXHIBITORS

*\*At time of printing*

A-Action Bail Bonds  
 AccuTran  
 Affinity Insurance Agency, Inc.  
 Atlanta Custom Tailors  
 Bradford Health Services  
 Clio  
 Daily Report  
 Fastcase/Law Practice Management, State Bar  
 Georgia Trial Lawyers Association  
 GilsbarPRO  
 Hancock Askew & Co., LLP

Member Benefits  
 MetLife  
 Navigant Consulting  
 Network 1 Consulting  
 Pro Bono Resource Center, State Bar  
 Protexure Lawyers  
 Ridgeview Institute  
 Silent Auction/Georgia Legal Services Program  
 Simplifile  
 State Bank and Trust  
 Tabs3 Software  
 Thomson Reuters

6 ANNUAL MEETING 2016

CLE | THURSDAY

## "COPE OR QUIT" ISN'T A STRATEGY: WELLNESS FOR GEORGIA LAWYERS

9 A.M. – 12 P.M. | 3 CLE hours

Studies show that lawyers are the most unhappy, anxiety-ridden and addicted of all professions. But coping or quitting aren't the only options. This seminar will focus on attorney wellness and will provide concrete ways for lawyers to create a healthier profession by living more balanced and healthier lives. The program will feature presentations by a variety of wellness professionals and will focus on all aspects of wellness, including mental, physical and social well-being. Attorneys should not have to leave the practice of law to live lives that are full of joy and meaning. Join us as we explore ways we can transform our lives, our firms and this profession, by taking care of ourselves.

Moderators: R. Michael Ethridge, *Carlock, Copeland & Stair, LLC, Charleston, S.C.*, founder of lawyer wellness blog, "Lawyers in Search of Soul"; Kenneth B. Hodges III, *Ken Hodges Law, Albany, Chair, Attorney Wellness Task Force*

Co-Sponsor: State Bar of Georgia Attorney Wellness Task Force

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## 2016 LEGISLATIVE SESSION UPDATE

9 A.M. – 12 P.M. | 3 CLE hours

The State Bar of Georgia's Director of Governmental Affairs will lead this CLE comprised of an update of the entire 2016 Legislative Session. Of particular interest will be a review of the State Bar's legislative agenda and bills affecting the legal profession.

Moderator: W. Thomas Worthy, *Director, Governmental Affairs, State Bar of Georgia, Atlanta*

## SETTING PRECEDENT: FROM LEGAL MARKETING TO CASE CLOSURE

2 - 5 P.M. | 3 CLE hours: 1 ethics, 1 professionalism\* and 1 trial

Please join the Young Lawyers Division for a two-part CLE that focuses on setting yourself apart in the legal market through effective marketing and case management. Included will be presentations on the importance of legal marketing in the 21st century and best practices for attorneys when engaging in social media, blogging and creating content for a firm website. The CLE will conclude with a presentation on setting precedent as an effective case closer.

### TOPICS

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Moderators: John R. B. "Jack" Long, *YLD President, John R. B. Long, P.C., Augusta*; ShaMiracle S. Johnson, *Law Office of John C. Harris, Jr., Atlanta*

#### LEGAL AND SOCIAL MEDIA MARKETING IN THE 21ST CENTURY

Key Speakers: James E. "Jeb" Butler III, *Butler Tobin, Atlanta*; Heather H. Riggs, *MindMeld Marketing, Atlanta*

#### CLOSING THE CASE

Key Speaker: Hon. Glenda A. Hatchett, *The Hatchett Firm, Atlanta, former Judge, Fulton County Juvenile Court*

Co-Sponsor: State Bar of Georgia Young Lawyers Division

\*Professionalism credit is self-reporting, using the optional self-report form.

## WAR STORIES XVI, PLUS GEORGIA EVIDENCE UPDATE

2 - 5 P.M. | 3 CLE hours: 1 ethics, 1 professionalism\* and 3 trial

### TOPICS

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Moderators: Hon. Robert W. Chasteen Jr., *Judge, Superior Court, Cordele Judicial Circuit, Fitzgerald, Co-Chair, State Bar of Georgia Bench and Bar Committee*; David B. Bell, *Law Office of David B. Bell, Augusta, Co-Chair, State Bar of Georgia Bench and Bar Committee*

#### GEORGIA EVIDENCE CODE

Key Speakers: William V. "Bill" Custer IV, *Bryan Cave LLP, Atlanta*; Jennifer B. Dempsey, *Bryan Cave LLP, Atlanta*

Panelists: Hon. Lawton E. Stephens, *Judge, Superior Court, Western Judicial Circuit, Athens*; Hon. Tilman E. "Tripp" Self III, *Judge, Superior Court, Macon Judicial Circuit, Macon*; Hon. Jon F. Helton, *Judge, Superior Court, Dublin Judicial Circuit, Dublin*; Hon. Shawn E. LaGrua, *Judge, Superior Court, Atlanta Judicial Circuit, Atlanta*; Hugh B. McNatt, *McNatt, Greene & Peterson, Vidalia*; John Christopher Clark, *Clark & Smith Law Firm LLC, Macon*; Jennifer Auer Jordan, *Shamp, Speed, Jordan & Woodward, Atlanta*; Susan W. Cox, *Edenfield, Cox, Bruce & Classens, P.C., Statesboro*

Co-Sponsor: State Bar of Georgia Bench and Bar Committee



STATE BAR OF GEORGIA 7



## THE LAWYER'S ROLE IN PRESERVING CONSTITUTIONAL LIBERTY, FOSTERING BETTER POLICING AND ACHIEVING NATIONAL SECURITY

2 - 5 P.M. | 3 CLE hours

### TOPICS

Presiding: Gwendolyn S. Fortson Waring, *The Waring Law Firm, LLC, Savannah*; Joyce Gist Lewis, *Shingler Lewis LLC, Atlanta*, Co-Chair, *Committee to Promote Inclusion in the Profession, State Bar of Georgia*

#### TRIAL RE-ENACTMENT OF 63 JAPANESE AMERICANS RESISTING THE DRAFT AFTER BEING INCARCERATED AT HEART MOUNTAIN

Moderators: Hon. Denny Chin, *Judge, U.S. Court of Appeals, Second Judicial Circuit, New York, N.Y.*; Kathy Hirata Chin, *Cadwalader, Wickersham & Taft LLP, New York, N.Y.*; Hemant Digumarthi, *Sharon W. Ware & Associates, Atlanta*, Immediate Past President, *Georgia Asian Pacific American Bar Association (GAPABA)*

Panelists: Hon. Lisa Godbey Wood, *Chief Judge, U.S. District Court, Southern District of Georgia, Brunswick*; Hon. Carla Wong McMillian, *Judge, Court of Appeals of Georgia, Atlanta*; Hon. Alvin T. Wong, *Judge, DeKalb County State Court, Decatur*

#### BETWEEN 9/11 AND FERGUSON, MO: RACIAL AND RELIGIOUS PROFILING IN THE CURRENT ERA: A PANEL DISCUSSION

Moderator: Derrick Alexander Pope, *The Law Partners International, Inc., Decatur*, Co-Chair, *Committee to Promote Inclusion in the Profession, State Bar of Georgia*

Panelists: Edward J. Tarver, *U.S. Attorney, U.S. Attorney's Office, Southern District of Georgia, Savannah*; Ecleynne Mercy, *Mercy, Robinson & Associates, LLC, Atlanta*; Harold E. Franklin Jr., *King & Spalding LLP, Atlanta*

- ▶ **National Security—National Security Entry-Exit Registration Systems (NSEERS)**
- ▶ **The End Racial Profiling Act (ERPA)**
- ▶ **Alternative Policies to Profiling**

#### TO PROFILE OR NOT TO PROFILE: IS THERE A QUESTION?

Moderator: Laverne Lewis Gaskins, *Senior Legal Advisor, Augusta University, Augusta*

Panelists: Azadeh Shahshahani, *Legal & Advocacy Director, Project South, Atlanta*; Chadrick A. Mance, *The Mance Law Group, Savannah*

- ▶ **Profiling and Surveillance Since 9/11**
- ▶ **Religious Discrimination Against Muslims**
- ▶ **History of Section 1983 Wrongful Death Litigation at the Hands of State Actors—From Reconstruction to Modern Times**

Co-Sponsors: State Bar of Georgia Committee to Promote Inclusion in the Profession, GAPABA, GABWA, GAAAA and ICLE

## CLE LIKE YOU HAVE NEVER SEEN BEFORE

2 - 5 P.M. | 3 CLE hours: 1 ethics, 1 professionalism\* and 1 trial

### TOPICS

Moderator: J. Randolph Evans, *Dentons US LLP, Atlanta*, Co-author of *"Georgia Legal Malpractice Law"*

#### GREAT MOVIES AND GREAT MOMENTS IN PROFESSIONALISM

Key Speaker: Hon. Warren P. Davis, *Judge, Superior Court, Gwinnett Judicial Circuit, Lawrenceville*

#### LITIGATION ANTICS OR LITIGATION ETHICS: WHAT'S THE DIFFERENCE?

Key Speaker: Hon. Lawton E. Stephens, *Judge, Superior Court, Western Judicial Circuit, Athens*

Panelists: James E. Butler Jr., *Butler Wooten Cheeley & Peak LLP, Columbus*; J. Randolph Evans

\*Professionalism credit is self-reporting, using the optional self-report form.



GEORGIA  
**LAWYERS**  
LIVING WELL

Supporting President Bob Kauffman's wellness initiative, we are pleased to offer meeting attendees the opportunity to participate in one or more fitness classes, in addition to providing a unique opportunity to participate in a wellness screening. The fitness classes will be held in the fitness center and taught by staff instructors.

**WELLNESS SCREENING**

Thursday, June 16 – Saturday, June 18

In an effort to help keep our members in a good and healthy state of being, the State Bar of Georgia will be hosting a Stroke Scan Plus ultrasound screening at the Annual Meeting.

Do you have high blood pressure or high cholesterol, diabetes, or do you have a family history of heart disease, stroke or internal cancers? If so, do not miss this opportunity for early detection of a possible serious disease. The arteries in the neck, the main artery off of the heart, the thyroid, liver, kidneys, gallbladder and the arteries in the legs will all be scanned. These screenings are typically not performed at annual check-ups, nor will insurance companies pay for them unless you are symptomatic. Collectively, these screenings cost thousands of dollars. Stroke Scan will scan all areas for \$150. Insurance is NOT necessary to receive this discount.

Pre-registration is required to reserve a spot. Please indicate your interest on the registration form. We can only accept registration for this event until June 3. You will be contacted by a representative from Stroke Scan as soon as your registration has been processed to set up payment and a screening time. The screening will last approximately 45 minutes. No refunds will be allowed.

**YOGA CLASS**

Health and Fitness Center  
Friday, June 17 | 7 – 8 a.m.

**WATER AEROBICS  
CLASS OR ZUMBA**

Health and Fitness Center  
Saturday, June 18 | 7 – 8 a.m.



**GOLF**

The purpose of an afternoon on the golf course is to enjoy time with friends, and Amelia Island has three beautiful options from which to choose. Oak Marsh, Ocean Links and Long Point are all championship courses featuring breathtaking vistas. If you are interested in playing a round (or two) of golf, please call the Golf Pro Shop at 904-277-5907 to make reservations.

**TENNIS**

The Omni Amelia Island Plantation Resort tennis program has been recognized as one of the finest in the world, named the "No. 2 Tennis Resort on Florida's East Coast" and a "Top 50 Tennis Resorts in the U.S." by *Tennis Magazine*. For those interested in a friendly or competitive game of tennis, please call the Pro Shop at 904-277-5145 to make reservations.

**YLD/PRO BONO 5K FUN RUN**

Friday, June 17 | 7 – 8 a.m.

Sponsored by Capitol Partners Public Affairs Group, the Pro Bono Resource Center and the Young Lawyers Division, this complimentary run on the beach is guaranteed fun! There will be T-shirts for all finishers—don't forget to sign up!

**BEACH TIME**

Saturday, June 18 | 2 – 4 p.m.

State Bank and Trust and Network 1 Consulting invite all families to Oceanside Beach for fun and games. Enjoy beach volleyball, cornhole, ladder golf, bocce ball, spike ball and some chairs and umbrellas for parents to relax. There will also be disc giveaways!

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# hotel info

## OMNI AMELIA ISLAND PLANTATION RESORT

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39 Beach Lagoon  
Amelia Island, FL 32034  
904-261-6161 | Fax 904-321-5046  
Cut-off date is Friday, May 13

Omni Amelia Island Plantation Resort will be the Bar's host hotel, offering discounted room rates. A block of rooms has been reserved for the meeting. The room rates are \$189 single/double resort view. Ocean view rooms are \$235, up to \$509 for a three-bedroom ocean view villa. Rooms are subject to a resort fee plus 11 percent sales tax. To make reservations, please call the hotel at 904-261-6161 and mention you are with the State Bar of Georgia to receive the special rate. Reservations must be made by Friday, May 13, as rooms will be on a space and rate availability basis after this date.

Check-in time is 4 p.m. | Check-out time is 12 p.m.

### DIRECTIONS TO AMELIA ISLAND

Visit the website, [www.omnihotels.com/hotels/amelia-island-plantation/property-details/directions](http://www.omnihotels.com/hotels/amelia-island-plantation/property-details/directions), for driving directions.

### WHAT TO PACK

Opening Night Festival: casual summer attire  
Daytime meetings and events: casual attire  
Young Lawyers Division Dinner: business casual  
Supreme Court Reception/Inaugural Dinner: cocktail attire

10 ANNUAL MEETING 2016

## PLEASE NOTE

➔ *The State Bar of Georgia will not be offering any specific kids or teen programs during the 2016 Annual Meeting.*

The Omni Amelia Island Plantation Resort offers a variety of age-specific, supervised recreational activities for children and teens. Please visit <http://www.weeklyresortguide.com/activities/kids-adventures.aspx> for information, pricing and scheduling.

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### CHILD CARE/BABYSITTING SERVICES

#### Amelia Island Nanny, Inc.

Babysitting Services are available through Amelia Island Nanny, Inc. Please call 904-742-3481 or visit [www.ameliaislandnanny.com](http://www.ameliaislandnanny.com) for more information, including rates. You can also email [ameliaislandnanny@gmail.com](mailto:ameliaislandnanny@gmail.com).



# State Bar of Georgia

## REGISTRATION

Please use this form to register by checking events you plan to attend. Registration is required for all events, including "no charge" functions. Early-bird registrations are due May 13, 2016. "No charge" functions are limited to two tickets per attendee. One form per registrant. You may also register online at [www.gabar.org](http://www.gabar.org).

### Attendee Information

(Please print or type and use one form per attendee.)

Bar Number \_\_\_\_\_

Name \_\_\_\_\_

Nickname \_\_\_\_\_

Spouse/Guest name (if attending) \_\_\_\_\_

Firm/Address \_\_\_\_\_

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

Phone/Fax \_\_\_\_\_

Email \_\_\_\_\_

Special Needs/Dietary Restrictions \_\_\_\_\_

What type of law do you practice? \_\_\_\_\_

**ADA:** If you qualify for assistance under the Americans with Disabilities Act, please call 404-527-8627 for assistance.

### Registration Options

Registrations are processed on a first-come, first-served basis. Checks, money orders and credit cards (VISA/MC/AMEX) are accepted. Make checks payable to the State Bar of Georgia and mail to: State Bar of Georgia Annual Meeting, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303-2743. **EARLY BIRD REGISTRATION DEADLINE TO BE POSTMARKED BY MAY 13, 2016.** Cancellation deadline is June 3, 2016, for refunds. The State Bar of Georgia will accept only written requests for refund of registration fees. No refunds will be made after June 3, 2016.

### Packages

**Full Packages for Two (registrant and spouse/guest)**

- |   | Early<br>Bird<br>5/13/16 | Qty.  | Standard<br>After<br>5/13/16 | Qty.  |
|---|--------------------------|-------|------------------------------|-------|
| <input type="checkbox"/> Lawyer.....          | \$475                    | _____ | \$495                        | _____ |
| <input type="checkbox"/> Full-Time Judge..... | \$275                    | _____ | \$295                        | _____ |

Package includes: 2 Opening Night Festival tickets, 2 Supreme Court/Court of Appeals Reception tickets, 2 Inaugural Gala tickets, 2 Bloody Mary tickets

**Individual Package for One (registrant)**

- |   |       |       |       |       |
|---|-------|-------|-------|-------|
| <input type="checkbox"/> Lawyer.....          | \$275 | _____ | \$295 | _____ |
| <input type="checkbox"/> Full-Time Judge..... | \$179 | _____ | \$199 | _____ |

Package includes: 1 Opening Night Festival ticket, 1 Supreme Court/Court of Appeals Reception ticket, 1 Inaugural Gala ticket, 1 Bloody Mary ticket

### Georgia Legal Services Program Contribution

Please add to my registration payment a voluntary donation to the Georgia Legal Services Program\* to support its important work ensuring access to justice for all. \_\_\_\_\_ (+) \$ \_\_\_\_\_

### A la Carte Events

- |   |      |       |       |       |
|---|------|-------|-------|-------|
| <input type="checkbox"/> Plenary Session/Board of Governors Meeting (Fri.)..... | N/C  | _____ | N/C   | _____ |
| <input type="checkbox"/> Board of Governors Meeting (Sat.).....                 | N/C  | _____ | N/C   | _____ |
| <input type="checkbox"/> Bloody Mary Reception.....                             | \$25 | _____ | \$45  | _____ |
| <input type="checkbox"/> Opening Night Festival.....                            | \$99 | _____ | \$119 | _____ |
| <input type="checkbox"/> Opening Night Festival (ages 5 and under).....         | N/C  | _____ | \$20  | _____ |
| <input type="checkbox"/> Opening Night Festival (ages 6-20).....                | \$25 | _____ | \$45  | _____ |

Please specify age(s) \_\_\_\_\_

- |  |       |       |       |       |
|--|-------|-------|-------|-------|
| <input type="checkbox"/> Supreme Court/Court of Appeals Reception/Inaugural Gala ..... | \$149 | _____ | \$169 | _____ |
|--|-------|-------|-------|-------|

### Alumni Functions

- |   | Early<br>Bird<br>5/13/16 | Qty.  | Standard<br>After<br>5/13/16 | Qty.  |
|---|--------------------------|-------|------------------------------|-------|
| <input type="checkbox"/> Atlanta's John Marshall Law School/<br>Savannah Law School Alumni Reception.....           | N/C                      | _____ | \$20                         | _____ |
| <input type="checkbox"/> Emory University School of Law Reception.....  | N/C                      | _____ | \$20                         | _____ |
| <input type="checkbox"/> CSU Law Alumni Reception.....  | N/C                      | _____ | \$20                         | _____ |
| <input type="checkbox"/> Mercer University School of Law Reception.....   | N/C                      | _____ | \$20                         | _____ |
| <input type="checkbox"/> UGA School of Law Alumni Reception honoring<br>incoming President Patrick T. O'Connor..... | N/C                      | _____ | \$20                         | _____ |
| <input type="checkbox"/> University of West Georgia Alumni Reception.....   | N/C                      | _____ | \$20                         | _____ |

### CLE Seminars

- |  |      |       |       |       |
|--|------|-------|-------|-------|
| <input type="checkbox"/> 2016 Legislative Session Update.....                                  | \$95 | _____ | \$115 | _____ |
| <input type="checkbox"/> CLE Like You Have Never Seen Before.....                              | \$95 | _____ | \$115 | _____ |
| <input type="checkbox"/> "Cope or Quit" Isn't a Strategy:<br>Wellness for Georgia Lawyers..... | \$95 | _____ | \$115 | _____ |
| <input type="checkbox"/> Setting Precedent: From Legal Marketing to Case Closure.....          | \$95 | _____ | \$115 | _____ |
| <input type="checkbox"/> The Lawyer's Role in Preserving Constitutional Liberty.....           | \$95 | _____ | \$115 | _____ |
| <input type="checkbox"/> War Stories XVI, Plus Georgia Evidence Update.....                    | \$95 | _____ | \$115 | _____ |

### Section Functions

- |   |      |       |      |       |
|---|------|-------|------|-------|
| <input type="checkbox"/> Criminal Law Section Lunch.....                      | \$20 | _____ | \$40 | _____ |
| <input type="checkbox"/> General Practice & Trial Law Breakfast.....          | \$55 | _____ | \$75 | _____ |
| <input type="checkbox"/> General Practice & Trial Law Reception (member)..... | N/C  | _____ | \$20 | _____ |
| <input type="checkbox"/> (non-member).....                                    | \$20 | _____ | \$40 | _____ |
| <input type="checkbox"/> Judicial Section Lunch .....                         | \$35 | _____ | \$55 | _____ |

### YLD Events

- |  |       |       |       |       |
|--|-------|-------|-------|-------|
| <input type="checkbox"/> YLD Dinner and Swearing-In Ceremony.....              | \$105 | _____ | \$125 | _____ |
| <input type="checkbox"/> YLD Leadership Academy Lunch.....                     | \$70  | _____ | \$90  | _____ |
| <input type="checkbox"/> YLD Pool Party and Meet the Candidates Reception..... | \$35  | _____ | \$55  | _____ |

### Wellness

- |   |                              |       |                 |       |
|---|------------------------------|-------|-----------------|-------|
| <input type="checkbox"/> YLD/Pro Bono 5K Fun Run.....                                 | N/C                          | _____ | N/C             | _____ |
| <input type="checkbox"/> Water Aerobics.....  | \$10                         | _____ | \$30            | _____ |
| <input type="checkbox"/> Yoga.....  | \$10                         | _____ | \$30            | _____ |
| <input type="checkbox"/> Zumba.....   | \$10                         | _____ | \$30            | _____ |
| <input type="checkbox"/> Stroke Scan (check to be contacted by a representative)..... | <input type="checkbox"/> Yes | _____ | How many? _____ | _____ |

(Please indicate number of people who are interested in participating. You will be contacted prior to the meeting regarding payment and to schedule your screening date and time.)

### Other

- |  |     |       |      |       |
|--|-----|-------|------|-------|
| <input type="checkbox"/> Reception honoring incoming<br>President Patrick T. O'Connor..... | N/C | _____ | \$20 | _____ |
|--|-----|-------|------|-------|

TOTAL ENCLOSED \_\_\_\_\_

### Payment Information

I enclose a  check/money order \$\_\_\_\_\_.

Please bill my  Visa  MC  AMEX \$\_\_\_\_\_.

Account Number \_\_\_\_\_ CSV Code \_\_\_\_\_

Exp. Date \_\_\_\_\_

Name (as it appears on card) \_\_\_\_\_

Signature \_\_\_\_\_

Credit card and "no charge" registrations only may be faxed to 404-527-8717. Return with payment to: State Bar of Georgia Annual Meeting, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303-2743, or register online at [www.gabar.org](http://www.gabar.org).



## State Bar of Georgia

2016 Annual Meeting  
104 Marietta St. NW, Suite 100  
Atlanta, GA 30303-2743

PRST First-Class  
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**PAID**  
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Atlanta, GA

Look for the  for opportunities to include wellness in your meeting experience.

# SPECIAL THANKS

Special thanks to the following corporate sponsors for their support of the State Bar of Georgia!

**5**  
Gavel

**MB** | MemberBenefits

**2**  
Gavel

redefining standards<sup>SM</sup> 

Many thanks to the State Bar Sections that have contributed to the success of the 2016 Annual Meeting.

#### Gold

Criminal Law  
Product Liability Law

#### Silver

Workers' Compensation Law

#### Bronze

Corporate Counsel  
Real Property Law

#### Copper

Constitutional Law  
Eminent Domain  
Fiduciary Law  
Labor & Employment Law  
Legal Economics Law  
Nonprofit Law  
Tort & Insurance Practice

#### Other

Agriculture Law  
Animal Law  
Antitrust Law  
Appellate Practice  
Child Protection & Advocacy  
Creditors' Rights  
Dispute Resolution  
E-Discovery & the Use of Technology  
Employee Benefits Law  
Environmental Law  
Franchise & Distribution Law  
General Practice & Trial Law  
Health Law  
Immigration Law  
Intellectual Property  
Judicial  
Local Government Law  
Military/Veterans Law  
Senior Lawyers  
Technology Law

Register by the early bird date of May 13, 2016, to be entered into a drawing to receive a complimentary individual package.

**Retiring Executive Committee Members (term ends June 17, 2016)**

Patrise Perkins-Hooker

Vera Sharon "Sharri" Edenfield

**Retiring Board of Governors Members (term ends June 17, 2016)**

Atlanta Circuit, Post 8	Kenneth Bryant "Ken" Hodges III	Atlanta
Atlanta Circuit, Post 20	William V. Custer IV	Atlanta
Atlanta Circuit, Post 33	S. Kendall Butterworth	Alpharetta
Chattahoochee Circuit, Post 1	Gwyn P. Newsom	Columbus
Douglas Circuit	Kenneth Ray Bernard Jr.	Douglasville
Member-At-Large, Post 3	Virgil Louis Adams	Macon
Northern Circuit, Post 2	R. Chris Phelps	Elberton
Ocmulgee Circuit, Post 1	Green Berry Moore III	Gray
Out-of-State, Post 2	Kimberly Cooper Davis	Ridgeland, MS
Southern Circuit, Post 1	James E. Hardy	Thomasville
Stone Mountain Circuit, Post 1	Katherine K. Wood	Atlanta

**2016-2017 Officers (term begins June 18, 2016)**

President	Patrick T. O'Connor	Savannah
President-elect	Brian DeVoe "Buck" Rogers	Atlanta
Immediate Past President	Robert J. "Bob" Kauffman	Douglasville
Secretary	Darrell Lee Sutton	Marietta
Treasurer	Kenneth Bryant "Ken" Hodges III	Atlanta
YLD President	Jennifer Campbell Mock	Statesboro
YLD President-elect	Nicole Christine Leet	Atlanta
YLD Immediate Past President	John "Jack" Ryd Bush Long	Augusta

**2016-2017 New Board of Governors Members (term begins June 18, 2016)**

Atlanta Circuit, Post 8	Paige Reese Whitaker	Atlanta
Atlanta Circuit, Post 20	Jennifer Auer Jordan	Atlanta
Atlanta Circuit, Post 33	Susan Eichler Edlein	Atlanta
Chattahoochee Circuit, Post 1	Amy Carol Walters	Columbus
Douglas Circuit	Ryan Reese Leonard	Douglasville
Member-At-Large, Post 3	Tracee Ready Benzo	Atlanta
Northern Circuit, Post 2	Richard Dale Campbell	Elberton
Ocmulgee Circuit, Post 1	Carl Santos Cansino	Milledgeville
Out-of-State, Post 2	William J. Monahan	Washington, D.C.
Southern Circuit, Post 1	Christopher Frank West	Thomasville
Stone Mountain Circuit, Post 1	Stacey K. Hydrick	Decatur

**Board of Governors Attendance Record**

	10-13	1-14	3-14	6-14	6-14	6-14	11-14	1-15	4-15	6-15	6-15	10-15	1-16	1-16	5-16
	Jekyll	ATL	Oconee	Fri. Amelia	Sat. Amelia	Jekyll	ATL	Brass	Stone Mtn	Fri. Stone Mtn	Stone Mtn	Sav	Buford	ATL	ATL
Virgil L. Adams	n/a	n/a	n/a	n/a	•	•	•	e	•	•	•	•	•	•	•
Sarah Brown Akins	e	•	•	•	•	•	•	e	•	•	•	•	e	•	•
Mark W. Alexander	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Kent Edward Altom	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	•	•	•	•	•
Anthony B. Askew	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Eric A. Ballinger	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Donna G. Barwick	e	•	e	1-00	•	•	•	•	•	e	e	•	•	•	•
Joshua C. Bell	•	•	•	•	•	•	•	•	•	•	•	e	•	•	•
Kenneth R. Bernard	•	•	•	e	e	•	•	e	•	•	•	•	•	•	•
Diane E. Bessen	e	•	e	•	•	•	•	e	e	•	•	•	•	•	•
Sherry Boston	e	•	e	•	•	e	•	•	•	•	•	e	•	•	e
Jeb T. Branham	•	•	•	•	•	•	•	•	•	e	e	•	•	•	•
Thomas Neal Brunt	•	•	•	•	•	•	•	•	•	•	•	e	•	•	•
Thomas R. Burnside	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Stephanie D. Burton	e	•	•	•	•	e	•	e	•	•	•	•	•	•	e
JaDawnya C. Butler	•	•	•	•	•	•	•	•	•	•	•	e	•	•	e
Kendall Butterworth	e	e	e	•	•	•	e	e	e	e	e	•	e	•	•
David L. Cannon	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Paul Todd Carroll, III	•	•	•	•	•	•	•	•	•	•	•	e	•	•	•
Carol V. Clark	•	•	•	•	•	•	•	e	e	e	•	e	•	•	•
Chris Clark	•	•	•	•	•	•	•	e	e	•	•	•	•	•	•
Edward R. Collier	•	•	•	•	•	•	•	e	e	e	e	•	•	•	•
Martin L. Cowen III	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

To request an excused absence, please email Secretary Darrell Sutton (dls@sutton-law-group.com)

**Board of Governors Attendance Record**

	10-13	1-14	3-14	6-14	6-14	11-14	1-15	4-15	6-15	6-15	10-15	1-16	1-16	5-16
	Jekyll	ATL	Oconee	Amelia	Sat. Amelia	Jekyll	ATL	Brass	Stone Mtn	Stone Mtn	Sav	Buford	ATL	ATL
Susan W. Cox	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Terrence Lee Croft	e	•	•	•	•	e	•	•	e	e	•	•	•	e
Matthew B. Crowder	•	•	e											
William V. Custer, IV	•	•	•	•	•	•	•	•	•	•	•	•	•	•
David P. Darden	e	•	•	e	e	e	•	•	•	•	•	•	•	e
Gerald Davidson Jr.	•	•	•	e	e	•	e	e	•	•	•	•	•	•
J. Anderson Davis	•	•	e	e	e	•	e	e	•	•	•	•	•	•
Kim Davis	n/a	n/a	n/a	n/a	n/a	•	e	•	e	e	e	•	•	e
Randall H. Davis	•	•	•	•	•	•	•	•	•	•	•	•	•	•
J. Antonio Delcampo	•	•	•	•	•	•	•	•	•	•	e	•	•	•
Scott Dewitt Delius	n/a	n/a	n/a	n/a	•	•	•	•	•	•	•	•	•	•
Joseph W. Dent	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Foy R. Devine	•	•	•	•	•	•	•	•	•	•	e	•	•	•
Thomas V. Duck, III	•	•	•	•	•	•	•	•	•	•	•	•	•	•
V. Sharon Edenfield	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Damon E. Elmore	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Archibald A. Farrar	•	•	•	•	•	•	•	•	•	•	e	•	•	•
D. Kirk Farrar	•	•	•	•	•	•	e	•	•	•	•	e	•	•
Elizabeth L. Fite	•	•	•	e	e	•	•	•	e	•	•	e	•	•
John A. Fitzner III	e	•	•	•	•	e	•	e	•	•	•	•	•	e
Gary Stuart Freed	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	•	•	•	•	•
Gregory A. Futch	•	•	•	•	•	•	•	•	•	•	•	•	•	•
William Gil Gainer			•								•	•	•	•

To request an excused absence, please email Secretary Darrell Sutton (dls@sutton-law-group.com)



**Board of Governors Attendance Record**

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	Jekyll	ATL	Oconee	Amelia	Amelia	Sat.	Jekyll	ATL	Brass	Stone Mtn	Fri.	Sav	Buford	ATL	ATL
Laverne L. Gaskins	•	•	•	•	•	•	•	e		•	•	•	•		•
William C. Gentry	•	•	•	e	e		•	•	•	•	•	•	•		•
Walter J. Gordon Sr.	•	•	•	•	•		e	e	•	•	•		•		•
Patricia A. Gorham															
Karlise Y. Grier	e	•	•	•	•		•	•	•	•	e	•	•		•
Thomas F. Gristina	•	•	e	•	•		e	•	•	•	•	•	•		•
John Kendall Gross	•	e	e	•	•		e	e	e	•	•	•	e		e
James E. Hardy	•	•	•	•	•		•	e	•	•	•	•	•		•
John Haubenreich	•	•	•	•	•		•	•	•	•	•	•	•		•
Patrick H. Head															
Lawton C. Heard, Jr.	•	•	•	•	•		•	•	•	•	•	•	•		e
Render M. Heard Jr.	•	•	•	•	•		•	•	e	•	•	•	•		•
Thomas W. Herman	•	•	•	•	•		e	•		•	•	•	•		•
Javoyne Hicks White	e	•	•	•	•		e	e	e	•	•	•	•		•
Donna S. Hix	•	•	•	•	•		•	•	•	•	•	•	•		•
Michael D. Hobbs	e	e	•	•	•		e			•	•	e	•		e
Kenneth B. Hodges	•	e	•	•	•		•	•	•	•	•	•	•		•
Phyllis J. Holmen	•	•	•	•	•		•	•	e	•	•	•	•		•
J. Marcus E. Howard	e	•	e	•	•		e	e	•	•	•	e	•		•
Amy V. Howell	e	•	•	•	•		e	•	e	•	•	•	•		•
Roy B. Huff Jr.	e	•	•	e	e		•	•	•	•	•	e	•		•
James W. Hurt	•		•	•	•		•		•			•	•		•
Christopher Huskins		•	•					•					•		•

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### Board of Governors Attendance Record

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	Jekyll	ATL	Oconee	Amelia	Sat. Amelia	Jekyll	ATL	Brass	Stone Mtn	Stone Mtn	Sav	Buford	ATL	ATL
James T. Irvin	•	•	•	•	•	•	e	•	•	•	•	•	•	•
William Dixon James	•	•	•	e	e	•	•	•	•	•	e	•	•	•
Curtis S. Jenkins	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Lester B. Johnson, III	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Dawn M. Jones	•	•	•	•	•	•	•	e	•	•	•	•	•	•
Michael R. Jones, Sr.	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Elena Kaplan	•	•	•	•	•	e	•	•	•	•	•	•	•	e
Robert J. Kauffman	•	•	•	•	•	•	•	•	•	•	•	•	•	•
John F. Kennedy	•	•	•	•	•	e	•	e	•	•	•	•	•	•
William J. Keogh, III	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Barry E. King	•	•	•	•	•	e	•	•	•	•	•	•	•	•
Judy C. King	•	•	•	•	•	e	•	•	•	•	•	•	•	•
Seth Kirschenbaum	e	•	•	•	•	•	•	•	•	•	•	•	•	•
Catherine Koura	•	•	•	e	e	e	•	•	e	•	•	•	•	•
Edward B. Krugman	•	•	•	•	•	•	•	e	•	•	•	•	•	•
Jeffrey R. Kuester	•	•	•	•	•	e	•	•	•	•	e	•	•	•
Allegra Lawrence-Hardy	•	•	•	•	•	e	•	e	•	•	•	•	•	•
J. Alvin Leaphart	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Dawn Renee Levine	n/a	n/a	n/a	n/a	•	•	•	•	•	•	•	•	•	•
David S. Lipscomb	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Dax Eric Lopez	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	•	•	•	•	•
John Ryd Bush Long	n/a	n/a	n/a	n/a	•	•	•	•	•	•	•	•	•	•
Ronald A. Lowry	•	•	•	•	•	e	•	•	•	•	•	•	•	•

To request an excused absence, please email Secretary Darrell Sutton (dls@sutton-law-group.com)

**Board of Governors Attendance Record**

	10-13	1-14	3-14	6-14	6-14	6-14	11-14	1-15	4-15	6-15	6-15	10-15	1-16	1-16	5-16
	Jekyll	ATL	Oconee	Amelia	Sat.	Jekyll	ATL	Brass	Stone Mtn	Fri.	Stone Mtn	Sav	Buford	ATL	ATL
John Bell Manly	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Samuel M. Matchett	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
William R. McCracken	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Letitia A. McDonald	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Brad J. McFall	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Ashley W. McLaughlin	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Michael D. McRae	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Terry L. Miller	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
W. Benjamin Mitcham	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Jennifer C. Mock	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
G.B. Moore III	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Shondeana Morris	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Laura J. Murphree	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Gwyn P. Newsom	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Sam G. Nicholson	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Dennis C. O'Brien	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Patrick T. O'Connor	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Samuel S. Olens	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Jonathan B. Pannell	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Joy Renea Parks	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Carson Dane Perkins	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
Patrise Perkins-Hooker	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e
R. Chris Phelps	e	e	e	e	e	e	e	e	e	e	e	e	e	e	e

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### Board of Governors Attendance Record

	10-13	1-14	3-14	6-14	6-14	6-14	11-14	1-15	4-15	6-15	6-15	10-15	1-16	1-16	5-16
	Jekyll	ATL	Oconee	Amelia	Sat. Amelia	Jekyll	ATL	Brass	Stone Mtn	Fri. Stone Mtn	Sat. Stone Mtn	Sav	Buford	ATL	ATL
Will H. Pickett, Jr.	•	•	e			•		•			•				
W. Gregory Pope	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	•	•	•	•	•
Jill Pryor	e	•	•	e	e	•	•	e	e	e	e		e		•
William M. Ragland	e	•	•	•	•	e	•	•	e	e	e	•	•	•	•
Robert V. Rodatus	•	•	•	e	e	•	•	•	e	e	e	•	•	•	e
Tina S. Roddenbery	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Brian D. Rogers	•	e	•	•	•	•	•	•	•	•	•	•	•	•	•
Joseph Roseborough	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
William C. Rumer	e	•	•	•	•	e	•	e	e	e	e	•	•	•	•
Claudia S. Saari	e	•	•	•	•	•	•	•	e	e	•	•	•	•	•
Aimee P. Sanders	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	•	•	e	•	•
Dennis C. Sanders	e	•	•	•	•	e	•	•	•	•	•	•	•	•	•
H. Burke Sherwood	n/a	n/a	n/a	n/a	•	•	•	•	•	•	•		•	•	•
Robert H. Smalley, III	•	•	•	•	•	•	•	•	•	e	•	e	•	•	•
Philip C. Smith	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
R. Rucker Smith	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Daniel B. Snipes	•	•	•	•	•	•	e	•	•	•	•	•	e	•	•
R. Gary Spencer	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	•	•	•	•	•
H. Craig Stafford	e	•	e	•	•	•	•	•	•	•	•	e	•	•	•
Lawrence A. Staggs	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Lawton E. Stephens	e	•	•	•	•	e	•	•	•	•	•	e	•	•	•
C. Deen Strickland	•	•	•	•	•	•	•	e	•	•	•	e	•	•	e
Frank B. Strickland	•	•	e	•	•	e	e	e	e	e	•	•	•	•	•

To request an excused absence, please email Secretary Darrell Sutton (dls@sutton-law-group.com)



# Future Meetings Schedule

(5/16/2016)



## Executive Committee/Strategic Planning

September 9-11, 2016	Executive Cmte. Retreat, The Brice, Savannah, GA
Feb. 17-19, 2017	Supreme Court Retreat, The Inn at Palmetto Bluff, Bluffton, SC

## Board of Governors

Annual 2016	June 16-19, 2016	Omni Amelia Island, Amelia Island, FL
Fall 2016	Oct. 21-23, 2016	The Lodge & Spa at Callaway Gardens, Pine Mountain, GA
Midyear 2017	January 5-7, 2017	The Ritz Carlton, Buckhead, GA
Spring 2017	March 31-April 2, 2017 <i>(Date changed)</i>	Ritz at Lake Oconee, Greensboro, GA
Annual 2017	June 8-11, 2017	Jekyll Island, GA

## Young Lawyers Division

Annual 2016	June 16-19, 2016	Omni Amelia Island, Amelia Island, FL
Retreat 2016	July 22-24, 2016	Barnsley Gardens, Adairsville, GA
Summer 2016	Aug. 18-21, 2016	King & Prince, St. Simons Island, GA
Fall 2016	Nov. 3-6, 2016	Disney's Yacht & Beach Club Resort, Orlando, FL
Midyear 2017	January 5-7, 2017	The Ritz Carlton, Buckhead, GA
Spring 2017	March 9-12, 2017	Grove Park Inn, Asheville, NC
Annual 2017	June 8-11, 2017	Jekyll Island, GA

**American Bar Association Meetings**

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Annual 2016	August 4-9, 2016	San Francisco, CA
Midyear 2017	February 1-7, 2017	Miami, FL
Annual 2017	August 10-15, 2017	New York, NY
Midyear 2018	January 31-Feb. 6, 2018	Vancouver, British Columbia
Annual 2018	August 2-7, 2018	Chicago, IL
Midyear 2019	January 23-29, 2019	Las Vegas, NV
Annual 2019	August 8-13, 2019	San Francisco, CA
Midyear 2020	February 12-18, 2020	Austin, TX
Annual 2020	August 6-11, 2020	Toronto, Ontario, Canada
Midyear 2021	February 10-16, 2021	Orlando, FL
Annual 2021	August 5-10, 2021	Chicago, IL

**Southern Conference Meetings**

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2016	October 13-16, 2016	Big Cedar Lodge, Branson, MO
2017	October 2017	Tennessee
2018	October 2018	Louisiana
2019	October 2019	Georgia
2020	October 2020	Florida

**D-R-A-F-T**  
**STATE BAR OF GEORGIA**  
**BOARD OF GOVERNORS**  
**MINUTES**  
**Saturday, May 7, 2016**  
**State Bar Building/Atlanta, GA**

The 262<sup>nd</sup> meeting of the Board of Governors of the State Bar of Georgia was held at the date and location shown above. Robert J. Kauffman, President, presided.

Special Recognition

President Bob Kauffman recognized the members of the judiciary, the Past Presidents of the State Bar, and other special guests in attendance.

Roll Call

Secretary Buck Rogers circulated the roll for signature. The list of those in attendance is attached as Exhibit A.

Recognition of Retiring Board Members

President Bob Kauffman recognized the following retiring members of the Board of Governors: R. Chris Phelps (Northern Circuit), William V. Custer, IV (Atlanta Circuit), S. Kendall Butterworth (Atlanta Circuit), James E. Hardy (Southern Circuit), Katherine K. Wood (Stone Mountain Circuit), Gwyn P. Newsome (Chattahoochee Circuit), Kenneth Ray Bernard, Jr. (Douglas Circuit), Green Berry Moore, III (Ocmulgee Circuit), and Kimberly Cooper Davis (Out of State).

2015 State Bar Contribution to Georgia Legal Services Program

President Bob Kauffman presented a \$549,176 check to Phyllis Holmen that represents contribution to the 2015 State Bar Campaign. Darrell Sutton reported on a client served by the Georgia Legal Services Program (GLSP) and encouraged the Board of Governors members to contribute to GLSP through their dues statement, at the Annual Meeting Silent Auction, or today following the Board meeting.

Future Meetings Schedule

President Bob Kauffman referred the Board of Governors members to the Future Meetings Schedule and announced that the dates for the Spring Board of Governors Meeting have changed to March 30-April 2.



### Report of the President

President Bob Kauffman reported on the reconstitution of the Judicial Qualifications Commission (JQC) by the Georgia General Assembly, and his discussions with the Executive Committee, the Supreme Court of Georgia, the Governor's office, and the Bar appointees who currently serve on the Commission. While the State Bar remains opposed to the removal of its appointment power, he does not believe a statewide campaign in opposition of the constitutional amendment would be cost effective nor would it guarantee the amendment's defeat. Instead, he is hopeful that the State Bar will have another opportunity to work with the General Assembly when the bill comes back for needed revisions next year. Thereafter, he opened up the floor for discussion on the best path forward for the State Bar. Following comments by several members, he asked the Board of Governors to continue providing their input to him and the other members of the Executive Committee between now and the next Board meeting.

President Kauffman announced that the Georgia Bar Foundation received a check from Bank of America totaling almost \$13 million as part of its settlement with the U.S Department of Justice in a mortgage fraud suit. The funds are designated for use by legal aid organizations that help consumers prevent foreclosure.

### Treasurer's Report

President-elect and Treasurer Patrick T. O'Connor reported on the Bar's finances and investments. The Board of Governors received copies of the Operations and Bar Center Consolidated Revenues and Expenditures Report as of February 29, 2016; Income Statement YTD for the Eight Months Ended February 29, 2016; Bar Center Revenues and Expenditures Summary for the Eight Months Ended February 29, 2016; State Bar Balance Sheet for February 29, 2016; Summary of Dues and Voluntary Contributions at February 29, 2016; Investment Performance Comparison 2006-2016, and Legislative Fund and Cornerstones of Freedom Fund Activity Reports through February 29, 2016.

The Board of Governors received a copy of the minutes of the 1) March 23, 2016 Investment Committee meeting, 2) February 25 and March 25, 2016 Finance Committee meetings, and 3) February 12, 2016 Audit Committee meeting.

### Young Lawyers Division (YLD) Report

YLD President Jack Long reported on the activities of the Young Lawyers Division. He stated that the YLD continues to build on last year's momentum with the Succession Planning Pilot Program, the Wills Clinic and other initiatives. He

announced that when the final tally is announced, this year's 5<sup>th</sup> Annual Georgia Legal Food Frenzy will be the most successful to date. He reported that over \$135,000 was raised at the Annual Signature Fundraiser for Camp Lakeside to ensure that children of all abilities have access to life-changing outdoor recreation and therapeutic programs.

The Board of Governors received a written report on the YLD committees, programs and projects for the 2015-16 Bar year.

#### Strategic Plan Update

President Bob Kauffman provided an update on how the State Bar is addressing the priority strategies outlined in the Strategic Plan.

#### Attorney Wellness Task Force Update

Task Force Chair Ken Hodges provided an update on the activities of the Attorney Wellness Task Force. He outlined the fitness activities that will take place at the Annual Meeting, and called on Steve Soto with Stroke Scan Plus to describe the wellness screening that is also being offered.

#### Disciplinary Rules and Procedures Committee Update

Committee Chair John Haubenreich provided an update on the activities of the Disciplinary Rules and Procedures Committee and its review of the disciplinary system.

#### Minutes of the 259<sup>th</sup> Meeting of the Board of Governors

The minutes of the Board of Governors meetings on January 9, 2016 at the Legacy Lodge at Lake Lanier Island, Georgia, and on January 29, 2016, at the State Bar Building in Atlanta, Georgia, were approved by unanimous voice vote.

#### Appointment to the Judicial Qualifications Commission

Following a report by President Bob Kauffman, the Board of Governors, by majority voice vote, approved the appointment of Edward Donald Tolley to the Judicial Qualifications Commission (JQC) to fill the unexpired term of S. Lester Tate.

### Proposed Rules Changes

Following a report by Bill NeSmith, the Board of Governors took the following action on proposed Rules amendments (Exhibit B) to:

<u>Proposed Rule</u>	<u>Action</u>
1) Rule 1.7 Conflict of Interest	By unanimous voice vote approved recommending to the Supreme Court of Georgia
2) Rule 4.4 Respect for Rights of Third Persons	By unanimous voice vote approved recommending to the Supreme Court of Georgia

### Business Court Expansion

Following a report by Bill NeSmith, the Board of Governors, by unanimous voice vote, approved proposed Atlanta Judicial Circuit Rule 1004 – Metro Atlanta Case Business Case Division (Exhibit C), as a pilot project in Gwinnett County State and/or Superior Court effective as of the date of approval by the Supreme Court of Georgia.

### Dues 2016-17 Recommendation to the Board of Governors

Following a report by President-elect and Treasurer Patrick T. O'Connor, and in consideration of the recommendations submitted by the Programs, Personnel, and Finance Committees and the Executive Committee, the Board of Governors, by majority voice vote, approved maintaining the 2016-17 dues at \$248 for active members and \$124 for inactive members, which reflects no dues increase from the previous Bar year.

### Approval of Other Bar Dues Statement Items

Following a report by President-elect and Treasurer Patrick T. O'Connor, the Board of Governors, by unanimous voice vote, approved the following other dues statement items:

1. Section dues to be reflected on the dues statement ranging from \$10-\$35; and
2. Continuation of assessments required by Bar Rules regarding the Clients' Security Fund (\$100 @ \$25/year) and Bar Center Facility (\$200 @ \$50/year); and

3. Continuation of a \$100 opt-out contribution for the Legislative and Public Education Fund; and
4. A suggested \$300 opt-in provision for individual contributions and a \$100 opt-in contribution for young lawyers for Georgia Legal Services Program.

#### Approval of 2014-2015 Annual Audit

Following a report by President-elect and Treasurer Patrick T. O'Connor, the Board of Governors, by unanimous voice vote, approved the 2014-2015 Annual Audit (Exhibit D).

#### Legislative Update

Thomas Worthy provided an update on the 2016 General Assembly and the State Bar's legislative agenda. After announcing that he will be leaving the State Bar in the summer for other employment, the Board of Governors thanked him for his service.

#### Executive Committee Minutes

The Board of Governors received copies of the minutes of the Executive Committee meetings held on February 10 and March 24, 2016.

#### Office of the General Counsel

The Board of Governors received a written report on the activities of the Office of the General Counsel.

#### Military Legal Assistance Program

The Board of Governors received a written report on the Status of the Military Legal Assistance Program.

#### Consumer Assistance Program

The Board of Governors received a written report on the activities of the Consumer Assistance Program.

#### Law Practice Management Program

The Board of Governors received a written report on the activities of the Law Practice Management Program.

Chief Justice's Commission on Professionalism

The Board of Governors received a written report on the activities of the Chief Justice's Commission on Professionalism.

Media Report

The Board of Governors received a copy of the 2015-16 Media Report.

Old Business

Darrell Sutton referred the Board of Governors to the written report About Georgia Legal Services in the Board book. He asked that seven Board of Governors members pledge \$100 each to bring the \$549,175 contribution to GLSP up to \$550,000, and stated that Paula Frederick had pledged \$125 towards that end.

New Business

There were a few more comments about the JQC.

Remarks, Questions/Answers, Comments/Suggestions

The President opened up the meeting for questions and comments.

Adjournment

There being no further business, the meeting was adjourned.

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Brian D. (Buck) Rogers, Secretary

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Robert J. Kauffman, President



Board of Governors  
State Bar of Georgia  
104 Marietta Street  
Atlanta, Georgia 30303

Re: June 17, 2016 Report to the Board of Governors

Board Members:

It is my privilege to report to the Board on the activities of the State Bar of Georgia YLD. The YLD is committed to continually promoting its mission of service through its young lawyers who number nearly 10,000. Throughout the Bar year, the YLD has been busy both continuing already great programs and projects and improving initiatives from previous years. I would like to take this opportunity to highlight some of our achievements this year.

One of the YLD's premier programs is its annual Signature Fundraiser. This Bar year included the 10<sup>th</sup> Annual YLD Signature Fundraiser, held on January 23, at the Biltmore Ballrooms in Atlanta. This event was a success on all counts. More than 200 lawyers, judges and guests attended the fundraiser and danced the night away to a live band. These individuals together with our gracious sponsors helped make this year's event the most successful fundraiser to date by raising \$134,735 to benefit Camp Lakeside. Camp Lakeside is a collaboration with the YMCA of Greater Augusta and Children's Hospital of Georgia at GRU to provide outdoor recreation and therapeutic programs for children with disabilities and chronic illnesses. Thank you to everyone on the Board who supported this worthwhile event either by attending or donating. Through the generosity of Georgia lawyers who contributed to this worthy cause, a cabin will be constructed and named in honor of the YLD, leaving a legacy for years to come.

Another signature service program of the YLD is the annual Legal Food Frenzy. A partnership of the YLD, Attorney General's Office and the Georgia Food Bank Association, the Legal Food Frenzy is a fund and food drive competition amongst Georgia lawyers to benefit the regional food banks throughout the state. This year's competition brought record-breaking numbers. Raising the most since the competition's inception, lawyers came together to raise the equivalent of 1.2 million pounds of food. This victory led to the Competition meeting its goal of raising five million pounds in five years. Thanks to each of you who fought against hunger by participating in the 5<sup>th</sup> Annual Legal Food Frenzy.

In addition to these programs, the YLD has more than 30 committees that work to provide service to either the profession or the public. As the backbone of the YLD, our

committees have been nationally recognized for creating such projects or programs as the Georgia Legal Services Program, High School Mock Trial and the rewrite of Georgia's Juvenile Justice Code. This year, a sampling of our successful projects or programs include: Wills Clinics, Senior Citizens Handbook update, Leadership Academy, Public Interest Internship Program, Law School Outreach events and Lawyers in Public Service networking event. Moreover, our committees produced approximately 20 community service opportunities for our members and countless networking events and meetings.

In accordance with our bylaws, the YLD held four quarterly meetings throughout the Bar year which are open to all young lawyers. These meetings provide an opportunity for our members to provide feedback and report on their projects and programs, network with other young lawyers and hear for YLD leadership about the state of the organization. Each meeting features a CLE, service project and general session, as well as group dinners and outings.

I hope the Board shares in my enthusiasm for the great work the YLD has done this year and will continue to do in future years. I would like to thank my fellow YLD officers, our Board of Directors, Representatives and Committee Chairs for working hard this year to make it a success.

Truly Yours,

A handwritten signature in blue ink, appearing to read "John R.B. 'Jack' Long". The signature is fluid and cursive, with a large loop at the beginning.

John R.B. "Jack" Long  
2015-16 YLD President

5/17/2016

**State Bar of Georgia Consolidated Revenues and Expenditures as of April 30, 2016**  
**Operations and Bar Center**

Activity	2015-16 Net Dues	Actual YTD 2015-16			Budget 2015-16	
		# Memb.	Amount	% of Bud	# Memb.	Amount
Active	\$248	37,920	\$9,290,914	100.8%	38,050	\$9,215,600
Inactive	\$124	8,731	\$1,101,401	97.9%	8,975	\$1,125,575
Associates	\$100	15	\$1,600	72.7%	20	\$2,200
Foreign Legal Cnslt	\$248	8	\$1,984	114.3%	7	\$1,736
Students	\$0	157	\$0	0.0%	150	\$0
Emeritus	\$0	1,694	\$0	0.0%	1,750	\$0
Late Fees			\$206,550	79.4%		\$260,000
Prior Years Dues			\$4,063	58.0%		\$7,000
<b>Total License &amp; Dues</b>		<b>46,831</b>	<b>\$10,606,512</b>	<b>99.9%</b>	<b>47,202</b>	<b>\$10,612,111</b>
Bar Center Revenue			\$3,420,062	93.6%		\$3,652,767
Alloc. Section Fees			\$111,834	100.0%		\$111,834
CSF Expense Reimb.			\$60,833	83.3%		\$73,000
Advertising & Sales			\$96,378	90.3%		\$106,700
Membership Income			\$109,273	72.4%		\$151,000
Interest Income			\$60,341	92.8%		\$65,000
Miscellaneous			\$1,618	53.9%		\$3,000
<b>Total Revenue</b>			<b>\$14,466,851</b>	<b>97.9%</b>		<b>\$14,775,412</b>
<b>Total Expenses</b>			<b>\$12,654,082</b>	<b>80.4%</b>		<b>\$15,741,394</b>
<b>Net Gain (Loss)</b>			<b>\$1,812,769</b>			<b>(\$965,982)</b>

**Board Designated Amounts (Excluding Sections, and Restricted Funds)**

Operating Reserve	\$2,750,000
Bar Center Reserve	2,000,000
Litigation Reserve	250,000
Cornerstones of Freedom	600,000
<b>Total</b>	<b>\$5,600,000</b>
<b>Projected Surplus (Cash Basis) 6/30/16</b>	
<b>Operations</b>	<b>(\$2,716,553)</b>
<b>Bar Center</b>	<b>\$8,347,271</b>
<b>Total Reserves and Surplus</b>	<b>\$11,230,718</b>



**State Bar of Georgia**  
**Summary of Dues and Voluntary Contributions**  
**At April 30**

Total Number of Members at Apr 30 of prev Bar year (active and inactive)	<u>46,113</u>	<u>45,133</u>	<u>44,044</u>
	<b>Dues Season May Through April 2016</b>	<b>Dues Season May Through April 2015</b>	<b>Dues Season May Through April 2014</b>
<b>Dues</b>			
Active - Number Paid	37,928	37,430	36,719
Inactive - Number Paid	<u>8,731</u>	<u>8,683</u>	<u>8,414</u>
Total Number Paid	<u>46,659</u>	<u>46,113</u>	<u>45,133</u>
Percent Paid	<u>101.18%</u>	<u>102.17%</u>	<u>102.47%</u>
Total Amount Paid - Active and Inactive	<u>10,401,344</u>	<u>10,250,932</u>	<u>9,947,271</u>

**Georgia Legal Services**

Number Paid	<u>2,304</u>	<u>2,308</u>	<u>2,222</u>
Percent of Total Members Paid	<u>4.94%</u>	<u>5.01%</u>	<u>4.92%</u>
Amount Paid	<u>264,493</u>	<u>255,713</u>	<u>241,362</u>
Average Amount Paid	<u>\$ 115</u>	<u>\$ 111</u>	<u>\$ 109</u>

**Legislative**

Number Paid	<u>6,002</u>	<u>6,766</u>	<u>7,333</u>
Percent of Total Members Paid	<u>12.86%</u>	<u>14.67%</u>	<u>16.25%</u>
Amount Paid	<u>565,004</u>	<u>640,505</u>	<u>691,736</u>
Average Amount Paid	<u>\$ 94</u>	<u>\$ 95</u>	<u>\$ 94</u>

**Projected 2015-16 Dues Year Totals Based Upon The Current Participation Percentages (Note: Participation Usually Decreases For Members Who Pay Later):**

<b>Georgia Legal Services</b>	<u>\$ 264,493</u>
<b>Legislative</b>	<u>\$ 565,004</u>

**Contribution Amounts by Dues Year (May 1 - April 30)**

	<b>GLSP</b>	<b>Legislative</b>	
2014 - 2015	<u>\$ 255,713</u>	<u>\$ 640,505</u>	\$100 Contribution
2013 - 2014	<u>\$ 241,362</u>	<u>\$ 691,736</u>	\$100 Contribution
2012 - 2013	<u>\$ 244,707</u>	<u>\$ 685,283</u>	\$100 Contribution
2011 - 2012	<u>\$ 240,678</u>	<u>\$ 656,254</u>	\$100 Contribution
2010 - 2011	<u>\$ 241,772</u>	<u>\$ 657,626</u>	\$100 Contribution
2009 - 2010	<u>\$ 235,276</u>	<u>\$ 650,806</u>	\$100 Contribution
2008 - 2009	<u>\$ 249,480</u>	<u>\$ 660,570</u>	\$100 Contribution
2007 - 2008	<u>\$ 264,255</u>	<u>\$ 1,235,022</u>	\$100 Contribution
2006 - 2007	<u>\$ 295,646</u>	<u>\$ 802,482</u>	\$100 Contribution
2005 - 2006	<u>\$ 751,762</u>	<u>\$ 159,480</u>	\$25 Contribution
2004 - 2005	<u>\$ 170,210</u>	<u>\$ 273,613</u>	\$20 Contribution

May 17, 2016

**State Bar of Georgia**  
**Income Statement YTD - Operations Only**  
**For the Ten Months Ending April 30, 2016**

	YTD Actual	Annual Budget	Ytd % of Bud
<b>Revenues</b>			
Dues - Active	\$ 9,292,898	\$ 9,215,600	100.84
Dues - Inactive	1,101,401	1,125,575	97.85
Dues - Misc. Types	1,600	3,936	40.65
Dues - Late Fees	210,613	267,000	78.88
	<hr/>	<hr/>	
<b>Total Dues &amp; Licenses</b>	<b>10,606,512</b>	<b>10,612,111</b>	<b>99.95</b>
Section Expense Reimb.	111,834	111,834	100.00
CSF Expense Reimb.	60,833	73,000	83.33
Advertising and Sales	96,378	106,700	90.33
Membership Income	67,398	96,000	70.21
Pro Hac Vice Admissions	248,275	195,000	127.32
Pro Hac Vice GBF Contra Acct	(206,400)	(140,000)	147.43
Savannah Misc Income	0	0	0.00
Interest Income	60,341	65,000	92.83
Miscellaneous Revenues	1,618	3,000	53.93
	<hr/>	<hr/>	
<b>Total Revenues</b>	<b>11,046,789</b>	<b>11,122,645</b>	<b>99.32</b>
<b>Expenses</b>			
Administration	1,621,008	2,105,514	76.99
Management Info Systems	433,340	554,574	78.14
General Counsel	3,069,774	3,782,798	81.15
Consumer Assistance Pgm.	464,762	566,563	82.03
Communications	643,898	835,758	77.04
Fee Arbitration	402,198	534,623	75.23
Law Related Education	276,188	346,205	79.78
Law Practice Management	356,234	443,852	80.26
Coastal Georgia Office	175,856	212,729	82.67
South Georgia Office	126,535	162,433	77.90
Younger Lawyers Division	412,913	529,547	77.97
Unauthorized Practice of Law	633,440	779,147	81.30
Standards of the Profession	181,275	235,968	76.82
High School Mock Trial	88,220	118,816	74.25
Sections	81,883	111,834	73.22
Lawyer's Assistance Pgm	42,641	55,000	77.53
Pro Bono	176,847	212,216	83.33
Fastcase	162,231	191,000	84.94
Officers' Expenses	45,882	134,305	34.16
BASICS Program Contribution	140,000	140,000	100.00
Resource Center Contribution	110,332	110,332	100.00
Military/Vets Pro Bono	86,448	103,742	83.33
Other Expenses	325,143	718,032	45.28
	<hr/>	<hr/>	
<b>Total Expenses</b>	<b>10,057,048</b>	<b>12,984,988</b>	<b>77.45</b>
	<hr/>	<hr/>	
<b>Net Income</b>	<b>\$ 989,741</b>	<b>\$ (1,862,343)</b>	<b>(53.14)</b>

5/17/2016

**State Bar of Georgia - Bar Center  
Revenues and Expenditures - Executive Summary  
For the Ten Months Ended April 30, 2016**

Activity	YTD 4/30/16		Budget
	Actual	% Budget	FY 16
<b>Income and Cash Receipts</b>			
CCLC Contribution	\$1,385,803	106.6%	\$1,300,000
Interest Income	\$11,739	58.7%	\$20,000
Member Assessment	\$287,801	99.2%	\$290,000
Room Rentals and Various Charges	\$21,639	77.0%	\$28,100
Parking Revenues	\$265,377	110.1%	\$241,133
Rental Income	\$958,944	80.8%	\$1,187,023
Operating Budget Transfer	\$488,759	83.3%	\$586,511
<b>Total Income and Cash Receipts</b>	<b>\$3,420,062</b>	<b>93.6%</b>	<b>\$3,652,767</b>
<b>Expenses and Cash Disbursements</b>			
Building Rehabilitation	\$1,034	1.4%	\$75,000
Conference Floor Renovations	\$0	0.0%	\$20,000
Tenant Improvements	\$555,199	370.1%	\$150,000
Furniture and Equipment	\$10,047	102.5%	\$9,800
Architect and Design	\$32,921	0.0%	\$10,000
Parking Deck Enhancements	\$168,462	0.0%	\$125,000
Median and Landscaping	\$0	0.0%	\$5,000
Woodrow Wilson Exhibit and Law Museum	\$14,313	102.2%	\$14,000
President's Conference Room	\$976	19.5%	\$5,000
Law Related Education	\$19,470	73.5%	\$26,500
Conference Center Operating Expenses	\$333,767	77.0%	\$433,567
Third Floor Contingency	\$0	0.0%	\$25,000
Building Operating Expenses	\$1,198,636	76.5%	\$1,565,898
Parking Deck Operating Expenses	\$262,209	89.9%	\$291,641
Legal and Due Diligence Fees	\$0	0.0%	\$0
<b>Total Expenses and Cash Disbursements</b>	<b>\$2,597,034</b>	<b>94.2%</b>	<b>\$2,756,406</b>
<b>Net Cash Flow</b>	<b>\$823,028</b>		<b>\$896,361</b>

**State Bar of Georgia  
 Legislative Fund  
 Activity Report  
 Through April 30, 2016**

**7/1/15 Beginning Balance** **\$ 1,164,048**

Interest Income on Fund 5,188  
 Contributions 558,431

**Expenditures:**

Staff and Contract Lobbyists 410,903  
 Legislative Committee Expense 18,803  
 Grassroots Efforts 20,258  
 Travel 19,955  
 Shared Office Allocation 14,923  
 Miscellaneous 5,211  
490,053

**Net Balance 4/30/16** **\$ 1,237,613**

**Anticipated Expenditures  
 Prior to Fiscal Year End**

Staff and Contract Lobbyists 61,575  
 Legislative Committee Expense 1,000  
 Grassroots Efforts 1,500  
 Travel 5,045  
 Shared Office Allocation 2,985  
 Miscellaneous 1,500

Total Anticipated 73,605

**Legislative Fund  
 Net Anticipated Fiscal Yearend  
 Balance, 6/30/16** **\$ 1,164,008**

**State Bar of Georgia  
 Cornerstones of Freedom Fund  
 Activity Report  
 Through April 30, 2016**

<b>7/1/15 Beginning Balance</b>	<b><u>\$ 600,000</u></b>
Interest Income on Fund	2,262
Expenditures:	
Virtual Law Museum	114,800
Writing Services	27,000
Media Monitoring	2,623
Schoolgroup Travel-LRE	10,782
Public Information Campaign	60,000
iCivics	10,926
Wellness Program and Website	11,355
Miscellaneous	(24)
	<u>237,461</u>
<b>Net Balance 3/31/16</b>	<b><u><u>\$ 364,802</u></u></b>

**Anticipated Expenditures  
 Prior to Fiscal Year End**

Virtual Law Museum	17,200
School Travel	1,836
Rules--Recatalog	9,450
Wellness	9,000
Writing Services	4,000
iCivics	-
Media Monitoring	532
Public Information Campaign	14,000
Total Anticipated	<u>56,018</u>

Net Anticipated Fiscal Yearend Balance, 6/30/16	<u>\$ 308,783</u>
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<b>Anticipated Replenishment    Needed From Surplus</b>	<b><u><u>\$ 291,217</u></u></b>
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**State Bar of Georgia**  
**Balance Sheet**  
**April 30, 2016**

ASSETS - Current Assets

Total Cash & Short-Term Investments 17,391,739

Investment - Merrill Lynch 1,904,913

Investment - Fidelity 9

Investment - Georgia Banks 1,010,785

Total Long-Term Investments 2,915,707

Accounts Receivable 45,192

Accrued Interest Receivable 5,801

Due from Related Orgs/Emp (211,036)

Prepaid Expenses 563,676

Bar Center Prepaid Expenses (12,826)

Total Other Assets 390,807

Total Current Assets 20,698,253

Fixed Assets

Furniture & Equipment 6,049,850

Bar Center 26,004,590

Accum. Depreciation (17,475,688)

Total Fixed Assets 14,578,752

Total Assets \$ 35,277,005

LIABILITIES AND CAPITAL

Accounts Payable \$ 180,490

Other Current Liabilities 737,771

Vacation & Pers Day Accrual 483,630

Due to Client Security Fund 2,187,915

Deferred Income 83,008

BC-Accrued Expenses 70,030

Total Current Liabilities 3,742,844

Total Long Term Liabilities 0

Fund Balances - Beg. of Year

Total Fund Balances - Beg. of Year 29,409,575

YTD Activity 2,124,579

Total Liabilities & Capital \$ 35,276,998

# State Bar of Georgia

## Summary of Budget-Related Committee Recommendations

Item	Budget Impact	Contact/Committee
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### Program Committee Recommendations

(To be ratified by Finance Committee at Time of Budget Approval)

1.	BASICS Funding Increase for Monitoring	\$ 10,000
2.	Law-Related Education Virtual Law Museum (COF)	\$ 72,000
3.	Committee on Professionalism	\$ 2,500
4.	Justice Benham Community Service Awards	\$ 5,000
5.	YLD Committees-Law School Outreach	\$ 2,500
6.	YLD Committees-YLD Regional Summit One Time	\$ 3,000
7.	YLD Meetings Line Item Increase	\$ 10,000

### Personnel Committee Recommendations

(To be ratified by Finance Committee at Time of Budget Approval)

1.	Human Resources Director, Convert Staff Accountant Positions to Salaried	\$ 97,756
2.	Part-Time Sections Assistant	\$ 17,354
3.	Staff COLA/Merit Raise	\$ 180,000 max

### Changes from Draft One

1.	Add elevator refurbishment work—garage	\$ 300,000
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**2016-17 Proposed State Bar of Georgia Budget--with Bar Center**  
(Active dues remain \$248 and inactive dues remain \$124 in 2016-17)

Activity	2016-17		Actual 2014-2015		Actual through 12-31-2015		Budget 2015-2016		Projected 2015-2016		Budget 2016-2017	
	#	%	#	%	#	%	#	%	#	%	#	%
Active	37,651	81.0	37,645	80.9	38,050	80.6	37,860	80.9	37,860	80.9	38,560	80.9
Inactive	8,662	18.6	8,723	18.7	8,975	19.0	8,740	18.7	8,740	18.7	8,890	18.7
Associates	22	0.0	16	0.0	20	0.0	16	0.0	16	0.0	20	0.0
Foreign Legal Consultant	7	0.0	8	0.0	7	0.0	8	0.0	8	0.0	8	0.0
Students	153	0.3	167	0.4	150	0.3	170	0.4	170	0.4	170	0.4
Emeritus	1,629	0.0	1,660	0.0	1,750	0.0	1,600	0.0	1,600	0.0	1,650	0.0
Late Fees												
Prior Years Dues												
<b>Total Dues Revenues</b>	<b>46,495</b>	<b>100</b>	<b>46,559</b>	<b>100</b>	<b>47,202</b>	<b>100</b>	<b>46,794</b>	<b>100</b>	<b>46,794</b>	<b>100</b>	<b>47,648</b>	<b>100</b>
Bar Center Revenue												
Section Expense Reimb.												
Client Security Reimb.												
Advertising & Pub. Sales												
Membership Income												
Interest Income												
Miscellaneous Revenue												
<b>Total Revenue</b>												
Operating Expenses												
Bar Center Expenses												
<b>Net Gain (Loss)</b>												

Active and Inactive	700
Additional Active	150
<b>T O T A L</b>	<b>850</b>

**BUDGET SUMMARY**

2015-2016  
2015-16 projected expenditure is 95% of budget  
  
2nd draft budget is:  
103.9 % of 2015-16 budget  
109.4 % of 2015-16 projected

**Projected Reserves 6/30/17**

1. Board Designated Reserves	
Operating	2,750,000
Bar Center	2,000,000
Cornerstones of Freedom	600,000
Litigation	300,000
<b>Total Board-Designated</b>	<b>\$ 5,650,000</b>
2. Projected Undesignated, Unrestricted Surplus 6/30/17	
Operating	\$ (4,468,885)
Bar Center	\$ 9,190,363
<b>Total Surplus</b>	<b>\$ 4,721,478</b>

**Projected Reserves 6/30/17**

1. Board Designated Reserves	
Operating	2,750,000
Bar Center	2,000,000
Cornerstones of Freedom	600,000
Litigation	300,000
<b>Total Board-Designated</b>	<b>\$ 5,650,000</b>
2. Projected Undesignated, Unrestricted Surplus 6/30/17	
Operating	\$ (4,468,885)
Bar Center	\$ 9,190,363
<b>Total Surplus</b>	<b>\$ 4,721,478</b>



5/19/2016 3rd Draft 2016-2017 Proposed State Bar of Georgia Budget--Operations Segment Only  
(Active dues remain \$248 and inactive dues remain \$124 in 2016-17)

Activity	Actual 2014-2015			Actual through 12-31-2015			Budget 2015-2016			Projected 2015-2016			Budget 2016-2017		
	# Memb.	%	Amount	# Memb.	%	Amount	# Memb.	%	Amount	# Memb.	%	Amount	# Memb.	%	Amount
Net Dues															
Active	37,651	78.2	\$9,141,890	37,645	78.1	\$9,251,520	38,050	77.7	\$9,215,600	37,860	78.0	\$9,289,609	38,560	78.0	\$9,476,080
Inactive	8,662	18.0	\$1,105,491	8,723	18.1	\$1,090,916	8,975	18.3	\$1,125,575	8,740	18.0	\$1,101,624	8,890	18.0	\$1,103,060
Associates	22	0.0	\$2,200	16	0.0	\$1,600	20	0.0	\$2,200	16	0.0	\$1,600	20	0.0	\$2,000
Foreign Legal Consultant	7	0.0	\$1,736	8	0.0	\$1,984	7	0.0	\$1,736	8	0.0	\$1,984	8	0.0	\$1,984
Students	153	0.3	\$0	167	0.3	\$0	150	0.3	\$0	170	0.4	\$0	170	0.3	\$0
Emeritus	1,629	3.4	\$0	1,660	3.4	\$0	1,750	3.6	\$0	1,725	3.6	\$0	1,800	3.6	\$0
Late Fees			\$294,475			\$189,485			\$260,000			\$250,000			\$250,000
Prior Years Dues			\$6,899			\$2,889			\$7,000			\$7,000			\$7,000
<b>Total Dues Revenues</b>	<b>48,124</b>	<b>100</b>	<b>\$10,554,691</b>	<b>48,219</b>	<b>100</b>	<b>\$10,538,394</b>	<b>48,952</b>	<b>100</b>	<b>\$10,612,111</b>	<b>48,519</b>	<b>100</b>	<b>\$10,651,817</b>	<b>49,448</b>	<b>100</b>	<b>\$10,840,124</b>
<b>Section Expense Reimb.</b>			<b>\$107,520</b>			<b>\$111,834</b>			<b>\$111,834</b>			<b>\$111,834</b>			<b>\$131,566</b>
Client Security Reimb.			\$73,000			\$36,500			\$73,000			\$73,000			\$73,000
Advertising & Pub. Sales			\$93,336			\$68,625			\$106,700			\$124,339			\$128,700
Membership Income			\$163,913			\$61,852			\$151,000			\$157,530			\$158,030
Interest Income			\$63,372			\$37,596			\$65,000			\$70,000			\$75,000
Miscellaneous Revenue			\$5,243			\$1,345			\$3,000			\$2,700			\$2,500
Total Revenue			\$11,061,075			\$10,856,346			\$11,122,645			\$11,191,220			\$11,408,910
Total Expenses			\$12,284,888			\$6,242,715			\$12,984,986			\$12,335,737			\$13,494,991
Net Gain (Loss)			(\$1,223,813)			\$4,613,631			(\$1,862,341)			(\$1,144,517)			(\$2,086,081)

Active and Inactive	700
Additional Active	150
Additional Inactive	850
<b>TOTAL</b>	<b>850</b>

3/21/2016

2016-2017 State Bar of Georgia Expense Budget

3rd Draft	2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
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A. ADMINISTRATION:

Personnel Services:								
Salaries - full time	1,040,135	545,923	50.6	1,079,746	1,079,746	1,110,688	2.87	2.87
Salaries - part time	14,456	8,413	41.3	20,377	20,377	20,988	3.00	3.00
Overtime pay	5,812	622	7.7	8,100	8,100	7,600	(6.17)	(6.17)
Tax & benefits	247,907	115,644	45.1	256,637	256,637	275,326	7.28	7.28
Pension	73,903	42,378	49.2	86,132	86,132	86,305	(0.96)	(0.96)
<b>Subtotal</b>	<b>1,382,213</b>	<b>712,980</b>	<b>49.1</b>	<b>1,450,992</b>	<b>1,450,992</b>	<b>1,499,907</b>	<b>3.37</b>	<b>3.37</b>

Operating Expenses:

Shared Office Overhead	277,741	152,222	50.0	304,443	304,443	344,462	13.15	13.15
Postage & Freight	10,749	5,587	41.4	13,500	13,500	11,500	(14.81)	(14.81)
Supplies	4,512	3,090	46.8	6,600	6,600	6,000	(9.09)	(9.09)
Telephone	3,077	1,650	36.3	4,540	4,540	4,500	(0.88)	(0.88)
Subscriptions & Books	511	425	53.1	800	800	750	(6.25)	(6.25)
Dues & Memberships	3,850	1,608	40.2	4,000	4,000	4,000	0.00	0.00
Seminars & Training	3,313	1,465	48.8	3,000	3,000	3,500	16.67	16.67
Miscellaneous	22,144	655	3.3	20,000	20,000	6,000	(70.00)	(70.00)
Travel-Staff	32,050	8,827	22.6	39,000	39,000	41,675	6.86	6.86
Travel-Exec. Director	10,865	3,519	26.1	13,500	13,500	12,000	(11.11)	(11.11)
Luncheons	840	125	25.0	500	500	800	60.00	60.00
Banking Fees	125	0	0.0	500	500	0	(100.00)	(100.00)
Credit Card Discounts and Fees	150,479	71,659	47.8	150,000	156,000	160,000	2.56	6.67
Computer Hardware	10,519	4,552	113.8	4,000	4,000	4,000	0.00	0.00
Computer Software	0	0	0.0	1,000	1,000	0	(100.00)	(100.00)
Membership Software/License	57,010	27,569	51.9	53,139	53,139	53,140	0.00	0.00
Contract Programming	3,531	0	0.0	4,500	4,500	3,000	(33.33)	(33.33)

<b>Subtotal</b>	<b>591,316</b>	<b>282,953</b>	<b>45.4</b>	<b>623,022</b>	<b>629,022</b>	<b>655,327</b>	<b>4.18</b>	<b>5.19</b>
<b>Furniture &amp; Equipment:</b>	0	0	0.0	1,500	0	15,300	0.00	0.00
<b>Total Administration</b>	<b>1,973,529</b>	<b>995,933</b>	<b>48.0</b>	<b>2,075,514</b>	<b>2,080,014</b>	<b>2,170,534</b>	<b>4.35</b>	<b>4.58</b>

3/21/2016

2016-2017 State Bar of Georgia Expense Budget

2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
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**B. MANAGEMENT INFORMATION SYSTEMS**

Personnel Services:								
Salaries - full time	221,020	117,185	50.8	230,818	230,818	237,743	3.00	3.00
Overtime	362	16	3.2	500	500	500	0.00	0.00
Tax & benefits	67,717	35,547	46.8	75,988	75,988	76,868	1.16	1.16
Pension	13,673	8,472	50.0	16,943	16,943	17,603	3.90	3.90
<b>Subtotal</b>	<b>302,772</b>	<b>161,220</b>	<b>49.7</b>	<b>324,249</b>	<b>324,249</b>	<b>332,714</b>	<b>2.61</b>	<b>2.61</b>

Operating Expenses:								
Shared Office Overhead	52,076	26,863	50.0	53,725	53,725	57,410	6.86	6.86
Postage & Freight	124	15	10.0	150	140	150	7.14	0.00
Supplies	5,322	2,748	51.4	5,350	5,200	2,000	(61.54)	(62.62)
Subscription & Books	0	0	0.0	200	200	200	0.00	0.00
Seminars & Training	6,890	2,495	41.6	6,000	7,000	8,485	21.21	41.42
Miscellaneous	1,250	330	16.5	2,000	2,000	2,000	0.00	0.00
Staff travel	2,329	0	0.0	4,750	4,000	4,000	0.00	(15.79)
Computer Hardware	26,524	32,609	81.6	39,950	39,900	12,000	(69.92)	(69.96)
Computer Software	23,956	15,794	52.7	29,950	29,900	36,125	20.82	20.62
Offsite Backup/Storage	6,844	5,425	67.0	8,100	8,100	12,100	49.38	49.38
Contractors	18,808	44,003	84.9	51,800	50,000	16,800	(66.40)	(67.57)
Contract Programming	8,400	4,058	33.8	12,000	11,000	12,000	9.09	0.00
Internet Services	12,270	6,135	37.5	16,350	16,350	16,550	1.22	1.22
<b>Subtotal</b>	<b>164,793</b>	<b>140,475</b>	<b>61.0</b>	<b>230,325</b>	<b>227,515</b>	<b>179,820</b>	<b>(20.96)</b>	<b>(21.93)</b>

<b>Furniture &amp; Equipment:</b>	0	0	0.0	0	0	0	0.00	0.00
<b>Total Management Info. Systems</b>	<b>467,565</b>	<b>301,695</b>	<b>54.4</b>	<b>554,574</b>	<b>551,764</b>	<b>512,534</b>	<b>(7.11)</b>	<b>(7.58)</b>

3/21/2016

2016-2017 State Bar of Georgia Expense Budget

3rd Draft	2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
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C. GENERAL COUNSEL:

<b>Personnel Services:</b>								
Salaries - full time	2,149,290	1,158,530	50.6	2,290,866	2,290,866	2,359,593	3.00	3.00
Salaries - part time	35,553	(179)	-0	3,592	3,592	3,700	3.01	3.01
Overtime pay	2,176	310	11.5	2,700	2,700	2,700	0.00	0.00
Tax & benefits	460,453	216,929	43.2	502,349	502,349	493,399	(1.78)	(1.78)
Pension	145,970	89,878	50.0	179,797	179,797	186,444	3.70	3.70
<b>Subtotal</b>	<b>2,793,442</b>	<b>1,465,468</b>	<b>49.2</b>	<b>2,979,304</b>	<b>2,979,304</b>	<b>3,045,836</b>	<b>2.23</b>	<b>2.23</b>
<b>Operating Expenses:</b>								
Shared Office Overhead	381,894	205,947	50.0	411,894	411,894	440,146	6.86	6.86
Postage & Freight	19,967	9,324	44.4	21,000	21,000	21,000	0.00	0.00
Printing	1,507	42	1.4	3,000	1,000	1,000	0.00	(66.67)
Supplies	14,589	3,151	21.0	15,000	15,000	8,500	(43.33)	(43.33)
Telephone	1,967	1,032	28.7	3,600	3,600	2,900	(19.44)	(19.44)
Subscriptions & Books	17,242	8,011	42.4	18,900	18,900	18,200	(3.70)	(3.70)
Dues & Memberships	8,899	3,525	39.2	9,000	9,000	9,200	2.22	2.22
Seminars & Computer Training	5,357	3,188	70.8	4,500	5,357	6,000	12.00	33.33
Miscellaneous	2,194	562	28.1	2,000	2,000	2,600	30.00	30.00
Travel - Investigator	4,222	3,160	63.2	5,000	5,000	5,500	10.00	10.00
Travel - Attorneys	45,758	22,280	35.4	63,000	60,000	60,000	0.00	(4.76)
Lunches	2,036	557	22.3	2,500	2,500	2,500	0.00	0.00
Computer Hardware	8,147	11,490	81.5	14,100	14,100	10,000	(29.08)	(29.08)
Computer Software	0	535	107.0	500	1,000	1,500	50.00	200.00
Contract/Programming	5,250	1,906	18.2	10,500	10,500	10,500	0.00	0.00
Litigation/Depositions	100,075	50,426	59.3	85,000	50,000	0	(100.00)	(100.00)
Receiverships	0	0	0.0	5,000	5,000	5,000	0.00	0.00
Disciplinary/Investigative Panels	36,677	20,607	37.5	55,000	55,000	55,000	0.00	0.00
Contract Special Master	50,000	24,996	50.0	50,000	50,000	50,000	0.00	0.00
On-line Research	13,155	7,745	55.3	14,000	14,000	15,500	10.71	10.71
<b>Subtotal</b>	<b>718,936</b>	<b>378,484</b>	<b>47.7</b>	<b>793,494</b>	<b>754,851</b>	<b>725,046</b>	<b>(3.95)</b>	<b>(8.63)</b>
<b>Furniture &amp; Equipment:</b>								
	0	0	0.0	10,000	10,000	12,000	20.00	20.00
<b>Total General Counsel</b>	<b>3,512,378</b>	<b>1,843,952</b>	<b>48.7</b>	<b>3,782,798</b>	<b>3,744,155</b>	<b>3,782,882</b>	<b>1.03</b>	<b>0.00</b>

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3rd Draft

2016-2017 State Bar of Georgia Expense Budget

2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc(Dec) over Proj.	% Inc(Dec) over 15 Bud.
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D. CONSUMER ASSISTANCE PROGRAM

Personnel Services:

Salaries - full time	173,082	50.8	340,921	340,921	351,449	3.09	3.09
Overtime pay	36	7.2	500	500	300	(40.00)	(40.00)
Tax & benefits	49,261	47.2	104,430	104,430	105,972	1.48	1.48
Pension	22,268	50.0	23,420	23,420	24,261	3.59	3.59
<b>Subtotal</b>	<b>234,089</b>	<b>49.9</b>	<b>469,271</b>	<b>469,271</b>	<b>481,982</b>	<b>2.71</b>	<b>2.71</b>

Operating Expenses:

Shared Office Overhead	44,771	50.0	89,542	89,542	95,684	6.86	6.86
Postage & Freight	1,129	45.2	2,500	2,500	2,500	0.00	0.00
Printing	0	0.0	750	500	750	50.00	0.00
Supplies	34	2.8	1,200	650	750	15.38	(37.50)
Subscriptions & Books	0	0.0	0	0	0	0.00	0.00
Dues & Memberships	0	0.0	0	0	0	0.00	0.00
Seminars & Training	460	0.0	800	600	800	33.33	0.00
Miscellaneous	0	0.0	500	0	500	0.00	0.00
Travel-Staff	0	0.0	1,500	750	0	(100.00)	(100.00)
Computer Hardware	3,521	0.0	0	0	1,250	0.00	0.00
Contract Programming	0	0.0	500	500	500	0.00	0.00
<b>Subtotal</b>	<b>45,934</b>	<b>47.2</b>	<b>97,292</b>	<b>95,042</b>	<b>102,734</b>	<b>8.09</b>	<b>5.59</b>

Furniture & Equipment:

	197	0.0	0	0	0	0.00	0.00
<b>Total Consumer Assistance</b>	<b>280,220</b>	<b>49.5</b>	<b>566,563</b>	<b>564,313</b>	<b>584,716</b>	<b>3.62</b>	<b>3.20</b>

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2016-2017 State Bar of Georgia Expense Budget

2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
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E. COMMUNICATIONS

Personnel Services:								
Salaries - Full Time	223,277	117,255	49.5	237,049	237,049	244,161	3.00	3.00
Overtime pay	735	78	3.5	2,200	2,200	1,600	(27.27)	(27.27)
Tax & benefits	81,720	40,497	45.7	88,687	88,687	89,876	1.34	1.34
Pension	12,917	7,992	50.0	15,983	15,983	16,574	3.70	3.70
<b>Subtotal</b>	<b>318,649</b>	<b>165,822</b>	<b>48.2</b>	<b>343,919</b>	<b>343,919</b>	<b>352,211</b>	<b>2.41</b>	<b>2.41</b>

Operating Expenses:								
Shared Office Overhead	69,435	35,817	50.0	71,634	71,634	76,547	6.86	6.86
Postage & Freight	1,993	563	32.2	1,750	1,750	1,750	0.00	0.00
Supplies	1,266	48	1.7	2,850	2,500	2,300	(8.00)	(19.30)
Telephone	0	125	11.6	1,080	900	900	0.00	(16.67)
Subscription & Books	4,133	2,166	66.6	3,250	3,250	4,100	26.15	26.15
Dues & Memberships	575	0	0.0	400	400	400	0.00	0.00
Seminars & Training	1,120	1,355	90.3	1,500	1,500	3,300	120.00	120.00
Miscellaneous	1,065	1,230	82.0	1,500	1,500	2,000	33.33	33.33
Staff Travel	10,344	6,693	40.6	16,500	16,500	17,600	6.67	6.67
Luncheons	2,311	1,009	36.0	2,805	2,475	2,475	0.00	(11.76)
Computer Hardware	3,867	0	0.0	0	0	1,500	0.00	0.00
Computer Software	1,000	1,200	34.3	3,500	3,500	3,500	0.00	0.00
Web Programming	37,951	11,800	49.2	24,000	24,000	28,800	20.00	20.00
<b>Subtotal</b>	<b>135,060</b>	<b>62,006</b>	<b>47.4</b>	<b>130,769</b>	<b>129,909</b>	<b>145,172</b>	<b>11.75</b>	<b>11.01</b>

<b>Furniture &amp; Equipment:</b>	3,475	0	0.0	3,200	3,200	0	(100.00)	(100.00)
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<b>Subtotal</b>	<b>457,184</b>	<b>227,828</b>	<b>47.7</b>	<b>477,888</b>	<b>477,028</b>	<b>497,383</b>	<b>4.27</b>	<b>4.08</b>
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2016-2017 State Bar of Georgia Expense Budget

3rd Draft	2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
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E. COMMUNICATIONS (Cont.)

Programs/Other Services:								
Local & Circuit, Law Day	0	0	0.0	0	0	0	0.00	0.00
Law Day	1	11	0.2	5,000	5,000	5,000	0.00	0.00
Membership Certificates	2,120	817	54.5	1,500	1,500	1,500	0.00	0.00
<b>Subtotal</b>	<b>2,121</b>	<b>828</b>	<b>12.7</b>	<b>6,500</b>	<b>6,500</b>	<b>6,500</b>	<b>0.00</b>	<b>0.00</b>

Publications:

Bar Journal	239,019	127,251	47.2	269,400	269,400	282,000	4.68	4.68
Directory	60,676	52,270	78.1	66,950	54,000	56,000	3.70	(16.36)
Supplemental Directory	4,918	5,552	110.6	5,020	5,552	6,100	9.87	21.51
Special Publications and Printing	0	0	0.0	10,000	10,000	10,000	0.00	0.00
<b>Subtotal</b>	<b>304,613</b>	<b>185,073</b>	<b>52.7</b>	<b>351,370</b>	<b>338,952</b>	<b>354,100</b>	<b>4.47</b>	<b>0.78</b>

Total Communications

	<b>763,918</b>	<b>413,729</b>	<b>49.5</b>	<b>835,758</b>	<b>822,480</b>	<b>857,983</b>	<b>4.32</b>	<b>2.66</b>
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2016-2017 State Bar of Georgia Expense Budget

3rd Draft	2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
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F. FEE ARBITRATION:

Personnel Services:

Salaries - full time	233,151	122,979	50.8	242,295	242,295	249,564	3.00	3.00
Overtime pay	636	413	31.8	1,300	1,300	1,200	(7.69)	(7.69)
Tax & benefits	72,238	37,172	46.9	79,301	79,301	80,449	1.45	1.45
Pension	16,075	8,421	50.0	16,843	16,843	17,416	3.40	3.40
<b>Subtotal</b>	<b>322,100</b>	<b>168,985</b>	<b>49.7</b>	<b>339,739</b>	<b>339,739</b>	<b>348,629</b>	<b>2.62</b>	<b>2.62</b>

Operating Expenses:

Shared Office Overhead	69,435	35,817	50.0	71,634	71,634	76,547	6.86	6.86
Postage & Freight	7,263	3,474	38.2	9,100	7,400	8,800	18.92	(3.30)
Printing	1,119	125	5.4	2,300	2,300	2,400	4.35	4.35
Supplies	1,668	251	10.9	2,300	1,800	2,300	27.78	0.00
Subscriptions & Books	272	336	61.1	550	550	550	0.00	0.00
Dues and Memberships	320	0	0.0	400	320	400	25.00	0.00
Seminars & Training	250	0	0.0	500	400	700	75.00	40.00
Miscellaneous	1,392	595	99.2	600	1,200	1,200	0.00	100.00
Staff travel	929	0	0.0	1,800	1,800	2,500	38.89	38.89
Lunches	2,758	1,143	44.0	2,600	2,600	2,800	7.69	7.69
Computer hardware	1,079	714	89.3	800	714	5,700	698.32	612.50
Computer software	0	0	0.0	0	0	0	0.00	0.00
Contract labor	45,100	30,200	30.1	100,300	60,400	100,300	66.06	0.00
Contract Programming	1,156	0	0.0	2,000	1,200	2,000	66.67	0.00
Litigation/Depositions	0	0	0.0	0	0	0	0.00	0.00
<b>Subtotal</b>	<b>132,741</b>	<b>72,655</b>	<b>37.3</b>	<b>194,884</b>	<b>152,318</b>	<b>206,197</b>	<b>35.37</b>	<b>5.81</b>

Furniture & Equipment:

	0	0	0.0	0	0	0	0.00	0.00
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Total Fee Arbitration

	454,841	241,640	45.2	534,623	492,057	554,826	12.76	3.78
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2016-2017 State Bar of Georgia Expense Budget

3rd Draft	2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
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G. LAW PRACTICE MANAGEMENT

Personnel Services:								
Salaries	234,180	122,912	50.7	242,518	242,518	249,794	3.00	3.00
Overtime pay	0	80	53.3	150	150	150	0.00	0.00
Taxes and Benefits	80,034	40,529	46.8	86,575	86,575	87,812	1.43	1.43
Pension	15,300	8,037	50.0	16,075	16,075	16,631	3.46	3.46
<b>Subtotal</b>	<b>329,514</b>	<b>171,558</b>	<b>49.7</b>	<b>345,318</b>	<b>345,318</b>	<b>354,387</b>	<b>2.63</b>	<b>2.63</b>

Operating Costs:								
Shared Office Overhead	69,435	35,817	50.0	71,634	71,634	76,547	6.86	6.86
Postage & Freight	1,596	607	26.4	2,300	2,200	2,200	0.00	(4.35)
Printing	1,955	53	5.3	1,000	1,000	1,000	0.00	0.00
Supplies	291	98	3.9	2,500	2,000	2,000	0.00	(20.00)
Library/Subs & Books	7,029	4,167	52.1	8,000	8,000	8,000	0.00	0.00
Dues & Memberships	963	1,050	56.8	1,850	1,850	1,850	0.00	0.00
Seminars & Training	3,593	1,825	60.8	3,000	3,000	3,400	13.33	13.33
Miscellaneous	506	1	0.1	850	500	1,000	100.00	17.65
Staff Travel	14,171	8,021	46.4	17,300	17,000	17,000	0.00	(1.73)
Luncheons	0	0	0.0	200	200	250	25.00	25.00
Computer Hardware	880	2,602	80.1	3,250	3,250	1,500	(53.85)	(53.85)
Computer Software	753	0	0.0	0	0	995	100.00	100.00
Solo and Small Firm	1,532	18,252	100.0	0	18,300	18,300	0.00	100.00
Income Offset	(17,230)	(31,075)	181.2	(17,150)	(12,000)	(40,000)	233.33	133.24
<b>Subtotal</b>	<b>85,474</b>	<b>41,418</b>	<b>43.7</b>	<b>94,734</b>	<b>116,934</b>	<b>94,042</b>	<b>(19.58)</b>	<b>(0.73)</b>

<b>Furniture &amp; Equipment:</b>	0	3,227	84.9	3,800	0	400	100.00	(89.47)
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<b>Total Law Practice Management</b>	<b>414,988</b>	<b>216,203</b>	<b>48.7</b>	<b>443,852</b>	<b>462,252</b>	<b>448,829</b>	<b>(2.90)</b>	<b>1.12</b>
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2016-2017 State Bar of Georgia Expense Budget

3rd Draft	2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
<b>H. SOUTH GEORGIA OFFICE</b>								
<b>Personnel Services:</b>								
Salaries - full time	71,814	37,703	50.8	74,264	74,264	76,492	3.00	3.00
Salaries - part-time	14,236	7,249	40.0	18,133	18,133	18,677	3.00	3.00
Taxes & Benefits	17,151	8,095	46.6	17,387	17,387	17,691	1.75	1.75
Pension	5,667	3,099	50.0	6,199	6,199	6,461	4.23	4.23
<b>Subtotal</b>	<b>108,868</b>	<b>56,146</b>	<b>48.4</b>	<b>115,983</b>	<b>115,983</b>	<b>119,321</b>	<b>2.88</b>	<b>2.88</b>

<b>Operating Costs:</b>								
Postage & Freight	172	32	21.3	150	200	200	0.00	33.33
Supplies	2,661	525	21.9	2,400	2,600	2,100	(19.23)	(12.50)
Telephone	13,386	5,729	50.3	11,400	14,000	14,000	0.00	22.81
Subscriptions & Books	107	100	100.0	0	150	150	0.00	100.00
Dues & Memberships	0	0	0.0	0	0	0	0.00	0.00
Miscellaneous	124	252	63.0	400	400	400	0.00	0.00
Staff Travel	1,237	1,308	30.4	4,300	3,800	3,800	0.00	(11.63)
Luncheons	60	5	5.0	100	50	50	0.00	(50.00)
Computer Hardware	2,840	0	0.0	0	0	1,500	100.00	100.00
Computer Software	0	0	0.0	0	0	150	0.00	0.00
Equipment Maintenance/Rental	1,372	758	50.5	1,500	1,300	1,300	0.00	(13.33)
Rent & Utilities	20,189	9,975	45.5	21,900	20,189	21,500	6.49	(1.83)
Facilities Maintenance	854	220	11.0	2,000	1,000	1,000	0.00	(50.00)
Building Insurance	2,032	1,285	55.9	2,300	2,570	2,700	5.06	17.39
<b>Subtotal</b>	<b>45,034</b>	<b>20,189</b>	<b>43.5</b>	<b>46,450</b>	<b>46,259</b>	<b>48,850</b>	<b>5.60</b>	<b>5.17</b>

<b>Furniture &amp; Equipment:</b>	634	0	0.0	0	200	200	0.00	100.00
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<b>Total South Georgia Office</b>	<b>154,536</b>	<b>76,335</b>	<b>47.0</b>	<b>162,433</b>	<b>162,442</b>	<b>168,371</b>	<b>3.65</b>	<b>3.66</b>
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2016-2017 State Bar of Georgia Expense Budget

3rd Draft	2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Dec.
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I. COASTAL GEORGIA OFFICE

Personnel Services:

Salaries - Full-Time	73,220	38,441	50.8	75,717	75,717	77,989	3.00	3.00
Salaries - part-time	0	0	0.0	0	0	0	0.00	0.00
Overtime	174	10	4.0	250	250	250	0.00	0.00
Taxes & Benefits	36,878	18,891	46.6	40,497	40,497	44,147	9.01	9.01
Pension	4,369	2,283	50.0	4,565	4,565	4,702	3.00	3.00
<b>Subtotal</b>	<b>114,641</b>	<b>59,625</b>	<b>49.3</b>	<b>121,029</b>	<b>121,029</b>	<b>127,088</b>	<b>5.01</b>	<b>5.01</b>

Operating Costs:

Postage & Freight	184	49	16.3	300	200	300	50.00	0.00
Printing	0	0	0.0	100	0	100	100.00	0.00
Supplies	1,188	330	22.0	1,500	1,400	1,500	7.14	0.00
Telephone	13,300	7,365	44.6	16,500	14,200	15,500	9.15	(6.06)
Subscriptions & Books	0	0	0.0	100	0	0	0.00	(100.00)
Dues and Memberships	0	0	0.0	100	0	0	0.00	(100.00)
Seminars & Training	0	0	0.0	100	0	0	0.00	(100.00)
Miscellaneous	153	238	47.6	500	300	500	66.67	0.00
Staff Travel	1,122	22	0.9	2,400	1,300	2,400	84.62	0.00
Parking	3,695	1,367	34.2	4,000	3,700	4,000	8.11	0.00
Luncheons	37	0	0.0	100	25	100	300.00	0.00
Computer Hardware	1,079	850	85.0	1,000	850	0	(100.00)	(100.00)
Computer Software	0	0	0.0	0	0	150	0.00	0.00
Equipment Maintenance/Leasing	2,166	1,486	40.2	3,700	3,500	3,700	5.71	0.00
Rent & Utilities	53,296	28,449	55.5	51,300	51,300	55,000	7.21	7.21
Facilities Maintenance	2,926	1,320	33.0	4,000	3,000	4,000	33.33	0.00
Building Insurance	5,374	3,399	56.7	6,000	5,400	7,500	38.89	25.00
<b>Subtotal</b>	<b>84,520</b>	<b>44,875</b>	<b>48.9</b>	<b>91,700</b>	<b>85,175</b>	<b>94,750</b>	<b>11.24</b>	<b>3.33</b>
<b>Furniture &amp; Equipment:</b>	0	0	0.0	0	0	0	0.00	0.00

Total Coastal Georgia Office

	199,161	104,500	49.1	212,729	206,204	221,838	7.58	4.28
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2016-2017 State Bar of Georgia Expense Budget

3rd Draft	2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
	91,925	52,766	50.7	104,024	104,024	107,145	3.00	3.00
Salaries - full time	2,075	0	0.0	0	0	0	0.00	0.00
Salaries - part time	957	157	15.7	1,000	1,000	1,000	0.00	0.00
Overtime	42,344	23,528	47.1	49,935	49,935	51,072	2.28	2.28
Taxes and Benefits	3,864	3,269	50.0	6,538	6,538	6,808	4.13	4.13
Pension	141,165	79,720	49.4	161,497	161,497	166,025	2.80	2.80
<b>Subtotal</b>								

J. YOUNG LAWYERS DIVISION

Personnel Services:

Salaries - full time	17,359	17,909	50.0	35,817	35,817	38,274	6.86	6.86
Supplies	2,014	136	6.8	2,000	2,000	2,000	0.00	0.00
Telephone	900	300	27.8	1,080	900	900	0.00	(16.67)
Seminars & Training	0	0	0.0	800	0	800	100.00	0.00
Staff Travel	7,749	4,138	46.0	9,000	9,000	9,000	0.00	0.00
Computer Hardware	880	1,025	102.5	1,000	1,025	0	(100.00)	(100.00)
Computer Software	0	0	0.0	400	0	0	100.00	(100.00)
High School Mock Trial	10,000	0	0.0	10,000	10,000	0	(100.00)	(100.00)
YLD Newsletter	54,883	14,058	23.4	60,000	60,000	60,000	0.00	0.00
YLD Brochure	6,212	6,962	89.3	7,800	6,962	7,500	7.73	(3.85)
YLD Committees - Expense	85,556	42,150	38.7	108,860	108,860	114,360	5.05	5.05
YLD Committees - Income	(9,007)	(21,005)	210.1	(10,000)	(13,000)	(21,005)	61.58	110.05
YLD President	40,677	24,804	61.0	40,677	40,677	40,676	(0.00)	(0.00)
YLD President Elect	31,290	14,644	46.8	31,290	31,290	25,032	(20.00)	(20.00)
YLD Past President	15,165	16,743	63.0	26,596	26,596	26,596	0.00	0.00
YLD Meetings	35,230	42,730	100.0	42,730	42,730	52,730	23.40	23.40
<b>Subtotal</b>	<b>298,908</b>	<b>164,594</b>	<b>44.7</b>	<b>368,050</b>	<b>362,857</b>	<b>356,863</b>	<b>(1.65)</b>	<b>(3.04)</b>

Operating Costs:

Shared Office Overhead	0	0	0.0	0	0	0	0.00	0.00
Furniture & Equipment:	0	0	0.0	0	0	0	0.00	0.00
<b>Total Young Lawyers Division</b>	<b>440,073</b>	<b>244,314</b>	<b>46.1</b>	<b>529,547</b>	<b>524,354</b>	<b>522,888</b>	<b>(0.28)</b>	<b>(1.26)</b>

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2016-2017 State Bar of Georgia Expense Budget

3rd Draft	2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
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K. UNAUTHORIZED PRACTICE OF LAW

Personnel Services:								
Salaries - full time	436,518	229,170	50.8	451,398	451,398	464,940	3.00	3.00
Overtime pay	31	38	15.2	250	250	250	0.00	0.00
Tax & benefits	148,064	69,970	47.0	148,836	148,836	151,063	1.50	1.50
Pension	30,008	15,843	50.0	31,686	31,686	33,017	4.20	4.20
<b>Subtotal</b>	<b>614,621</b>	<b>315,021</b>	<b>49.8</b>	<b>632,170</b>	<b>632,170</b>	<b>649,270</b>	<b>2.70</b>	<b>2.70</b>

Operating Expenses:								
Shared Office Overhead	104,153	53,726	50.0	107,451	107,451	114,821	6.86	6.86
Postage & Freight	3,372	1,213	23.6	5,150	4,300	4,900	13.95	(4.85)
Printing	0	42	21.0	200	170	200	17.65	0.00
Supplies	2,919	222	8.9	2,500	2,400	2,500	4.17	0.00
Subscriptions & Books	683	0	0.0	775	770	780	1.30	0.65
Dues & Memberships	650	300	40.0	750	567	750	32.28	0.00
Seminars & Training	1,010	1,619	117.6	1,377	1,619	1,650	1.91	19.83
Miscellaneous	1,495	1,334	59.4	2,244	2,504	2,264	(9.58)	0.89
Travel - Staff	443	91	7.1	1,280	600	1,280	113.33	0.00
Travel - Investigators	5,603	5,989	59.9	10,000	9,900	10,000	1.01	0.00
Luncheons	4,199	0	0.0	4,500	4,450	4,540	2.02	0.89
Computer Hardware	0	2,550	85.0	3,000	2,550	3,000	17.65	0.00
Litigation/Court Reporter	1,780	865	17.3	5,000	3,000	0	(100.00)	(100.00)
LexisNexis Online	2,325	1,220	44.4	2,750	2,436	2,775	13.92	0.91
<b>Subtotal</b>	<b>128,632</b>	<b>69,171</b>	<b>47.1</b>	<b>146,977</b>	<b>142,717</b>	<b>149,460</b>	<b>4.72</b>	<b>1.69</b>

<b>Furniture &amp; Equipment:</b>	0	0	0.0	0	0	0	0.00	0.00
<b>Total UPL</b>	<b>743,253</b>	<b>384,192</b>	<b>49.3</b>	<b>779,147</b>	<b>774,887</b>	<b>798,730</b>	<b>3.08</b>	<b>2.51</b>

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2016-2017 State Bar of Georgia Expense Budget

2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
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L. STANDARDS OF THE PROFESSION (TILPP)

Personnel Services:

Salaries - full time	109,963	54,309	42.9	126,722	126,722	124,630	(1.65)	(1.65)
Salaries - part time	5,770	9,952	63.8	15,600	15,600	16,068	3.00	3.00
Overtime pay	57	0	0.0	300	300	300	0.00	0.00
Tax & benefits	28,038	11,254	36.3	30,994	30,994	30,983	(0.04)	(0.04)
Pension	5,538	4,392	50.0	8,785	8,785	9,736	10.83	10.83
<b>Subtotal</b>	<b>149,366</b>	<b>79,907</b>	<b>43.8</b>	<b>182,401</b>	<b>182,401</b>	<b>181,717</b>	<b>(0.37)</b>	<b>(0.37)</b>

Operating Expenses:

Shared Office Overhead	34,718	17,909	50.0	35,817	35,817	38,274	6.86	6.86
CLE Programs	285	0	0.0	1,000	350	750	114.29	(25.00)
CLE Fees	285	0	0.0	1,000	350	750	114.29	(25.00)
Postage & Freight	297	3	0.3	1,100	1,100	500	(54.55)	(54.55)
Printing	168	0	0.0	1,000	1,000	1,000	0.00	0.00
Supplies	1,802	278	23.2	1,200	1,200	1,200	0.00	0.00
Dues & Memberships	996	200	20.0	1,000	1,100	1,100	0.00	10.00
Seminars & Training	1,336	410	34.2	1,200	1,400	1,400	0.00	16.67
Miscellaneous	400	125	25.0	500	1,250	500	(60.00)	0.00
Staff Travel	7,110	4,193	59.9	7,000	7,000	8,250	17.86	17.86
Luncheons	479	288	57.6	500	500	500	0.00	0.00
Computer Hardware	880	1,860	186.0	1,000	1,860	2,000	7.53	100.00
<b>Subtotal</b>	<b>48,756</b>	<b>25,266</b>	<b>48.3</b>	<b>52,317</b>	<b>52,927</b>	<b>56,224</b>	<b>6.23</b>	<b>7.47</b>

Furniture & Equipment:

	0	136	10.9	1,250	1,250	500	(60.00)	(60.00)
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Total Standards of the Profession

	198,122	105,309	44.6	235,968	236,578	238,441	0.79	1.05
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2016-2017 State Bar of Georgia Expense Budget

3rd Draft	2014-2015 Actual	YTD 12/31/15 Expenditures	% Bud. 50.00%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.	% Inc/(Dec) over 15 Bud.
<b>M. LAW-RELATED EDUCATION</b>								
<b>Personnel Services:</b>								
Salaries - full time	137,034	90,066	50.4	178,730	178,730	184,092	3.00	3.00
Overtime	183	125	14.7	850	850	500	(41.18)	(41.18)
Tax & benefits	49,131	34,224	41.9	81,620	81,620	90,949	11.43	11.43
Pension	9,700	5,150	50.0	10,300	10,300	12,893	25.17	25.17
<b>Subtotal</b>	<b>196,048</b>	<b>129,565</b>	<b>47.7</b>	<b>271,500</b>	<b>271,500</b>	<b>288,434</b>	<b>6.24</b>	<b>6.24</b>

**Operating Expenses:**

Shared Office Overhead	34,718	26,863	50.0	53,725	53,725	57,410	6.86	6.86
Postage & Freight	41	42	8.4	500	20	100	400.00	(80.00)
Printing	694	728	97.1	750	750	1,000	33.33	33.33
Supplies	1,453	1,430	47.7	3,000	2,000	2,000	0.00	(33.33)
Subscriptions and Books	37	90	90.0	100	87	100	14.94	0.00
Dues & Memberships	0	0	0.0	0	0	0	0.00	0.00
Seminars & Training	0	460	306.7	150	460	150	(67.39)	0.00
Miscellaneous	12	687	34.4	2,000	1,200	1,500	25.00	(25.00)
Staff Travel	2,587	3,705	36.4	10,180	5,500	6,430	16.91	(36.84)
Luncheons	787	635	70.6	900	1,000	1,200	20.00	33.33
Computer Hardware	0	4,471	131.5	3,400	4,471	1,260	(71.82)	(62.94)
Income Offset	(273)	(142)	100.0	0	0	0	0.00	0.00
<b>Subtotal</b>	<b>40,056</b>	<b>38,969</b>	<b>52.2</b>	<b>74,705</b>	<b>69,213</b>	<b>71,150</b>	<b>2.80</b>	<b>(4.76)</b>

**Furniture & Equipment:**

	0	0	0.0	0	0	907	0.00	0.00
<b>Total Law-Related Education</b>	<b>236,104</b>	<b>168,534</b>	<b>48.7</b>	<b>346,205</b>	<b>340,713</b>	<b>360,491</b>	<b>5.81</b>	<b>4.13</b>

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2016-2017 State Bar of Georgia Expense Budget

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N. HIGH SCHOOL MOCK TRIAL

Personnel Services:								
Salaries - full time	55,535	29,156	50.8	57,429	57,429	59,152	3.00	3.00
Tax & benefits	20,291	9,562	46.1	20,753	20,753	21,048	1.42	1.42
Pension	3,306	1,725	50.0	3,451	3,451	3,555	3.01	3.01
<b>Subtotal</b>	<b>79,132</b>	<b>40,443</b>	<b>49.5</b>	<b>81,633</b>	<b>81,633</b>	<b>83,755</b>	<b>2.60</b>	<b>2.60</b>

Operating Expenses:								
Shared Office Overhead	17,359	8,954	50.0	17,908	17,908	19,137	6.86	6.86
Postage & Freight	551	144	14.4	1,000	550	650	18.18	(35.00)
Supplies	832	404	33.7	1,200	1,000	1,200	20.00	0.00
Telephone	88	37	29.6	125	100	125	25.00	0.00
Subscriptions and Books	0	0	0.0	0	0	0	0.00	0.00
Dues & Memberships	250	0	0.0	250	250	250	0.00	0.00
Seminars & Training	0	0	0.0	0	0	0	0.00	0.00
Miscellaneous	3,493	243	16.2	1,500	1,500	1,500	0.00	0.00
Staff Travel	848	240	19.2	1,250	1,000	500	(50.00)	(60.00)
Luncheons/Committee	396	294	65.3	450	450	550	22.22	22.22
Computer Hardware	0	1,047	87.3	1,200	1,047	150	(85.67)	(87.50)
Operating Account/Misc Revenues	(57,979)	(18,097)	30.2	(60,000)	(40,000)	(60,000)	50.00	0.00
Law Academy	1,981	3,422	15.6	22,000	3,422	5,000	46.11	(77.27)
Regional Competition	11,525	2,717	23.0	11,800	13,000	13,000	0.00	10.17
State Competition	19,830	0	0.0	18,500	19,500	20,500	5.13	10.81
National Competition	17,107	861	2.9	30,000	30,000	30,000	0.00	0.00
Contribution Transfer	0	0	0.0	(10,000)	(10,000)	(10,000)	0.00	0.00
<b>Subtotal</b>	<b>16,281</b>	<b>266</b>	<b>0.7</b>	<b>37,183</b>	<b>39,727</b>	<b>22,562</b>	<b>(43.21)</b>	<b>(39.32)</b>

Furniture & Equipment:	0	0	0.0	0	0	0	0.00	0.00
<b>Total High School Mock Trial</b>	<b>95,413</b>	<b>40,709</b>	<b>34.3</b>	<b>118,816</b>	<b>121,360</b>	<b>106,317</b>	<b>(12.40)</b>	<b>(10.52)</b>



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3rd Draft							
O. OTHER ACTIVITIES							
Officer's Expenses							
President	45,909	4,004	6.3	63,132	64,769	2.59	2.59
President Elect	19,052	3,210	9.3	34,679	39,696	14.47	14.47
President Elect-Elect (ABA, BLI)	0	0	0.0	3,500	3,500	0.00	0.00
Treasurer	3,197	2,000	100.0	2,000	2,000	0.00	0.00
Secretary	2,000	0	0.0	2,000	2,000	0.00	0.00
Immediate Past President	29,656	5,009	19.6	25,494	24,469	(4.02)	(4.02)
Past Past President (ABA, BLI)	6,566	3,500	100.0	3,500	3,500	0.00	0.00
<b>Officers Expense Subtotal</b>	<b>106,380</b>	<b>17,723</b>	<b>13.2</b>	<b>134,305</b>	<b>139,934</b>	<b>4.19</b>	<b>4.19</b>

Miscellaneous:							
Board of Governors & Members Meetings	142,455	36,399	25.2	157,000	157,000	103.49	103.49
Supreme Court Meetings	33,009	0	0.0	47,000	47,000	76.63	76.63
Court of Appeals Meetings	0	0	0.0	0	0	#DIV/0!	100.00
Lawyer's Assistance Program	55,000	27,500	50.0	55,000	59,000	7.27	7.27
Review Panel Attorney	30,010	0	0.0	30,000	30,000	0.00	0.00
Cornerstones of Freedom	584,200	0	0.0	0	0	0.00	0.00
Section Expenses	107,520	50,528	45.2	111,834	131,556	17.63	17.63
Comm To Promote Inclusion	0	0	0.0	5,000	0	100.00	(100.00)
Elections	50,179	0	0.0	42,720	40,581	(5.01)	(5.01)
Judicial Poll	0	0	0.0	31,200	31,200	0	(100.00)
Dues Notice	36,764	0	0.0	44,000	43,520	2.09	(1.09)
Letters of Good Standing	0	138	0.0	0	0	0.00	0.00
Bar Membership Cards	8,019	5,138	63.1	8,138	9,000	9.76	10.59
50 Year Certificates	1,410	20	1.3	1,500	1,553	3.53	3.53
Fastcase Contract	186,314	95,700	50.1	191,000	207,000	8.38	8.38
Database Maintenance Contingency	0	0	0.0	35,000	15,000	0	(100.00)
Membership Database Maintenance	9,563	0	0.0	11,674	0	100.00	(100.00)
President's Program	33,575	19,110	41.5	46,000	46,000	0	0
Executive Committee Meetings	29,202	14,596	48.7	30,000	39,164	(14.86)	(14.86)
State Bar Committees	35,000	0	0.0	30,000	32,500	8.33	8.33
Meetings Contingency	0	0	0.0	35,000	0	100.00	(100.00)
Strategic Plan	73,135	83,919	86.1	97,500	90,000	0	0
Conference Sponsorship	0	16,500	66.0	25,000	40,000	60.00	60.00
Incubator Contribution	0	85,000	100.0	85,000	85,000	0.00	0.00
ABA Delegate Breakfasts	1,622	1,153	32.9	3,500	2,500	(28.57)	(28.57)
Cubicles Project	0	0	0.0	0	270,512	100.00	100.00
Military/Veterans Pro Bono Program	102,007	51,869	50.0	103,742	103,742	0.00	0.00
Resource Center-Contributed Expense	110,332	110,332	100.0	110,332	110,332	0.00	0.00
BAS/CS Program-Contributed Expense	140,000	140,000	100.0	140,000	150,000	7.14	7.14
Chief Justice's Commission on Professionalism	5,000	0	0.0	5,000	10,000	100.00	100.00
Central Atlanta Progress	4,263	2,162	50.3	4,300	2,500	(41.86)	(41.86)
Access to Justice Pro Bono Awards	0	212	6.1	3,500	3,500	0	0
Unallocated Services	(57,207)	(38,657)	0.0	0	0	0.00	0.00

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Contributed Expense -Pro Bono	212,216	106,108	50.0	212,216	212,216	212,216	0.00	0.00
Miscellaneous Expense Subtotal	1,939,011	807,727	48.3	1,672,156	1,636,348	2,025,676	23.64	21.14
Total Other Activities	2,045,391	825,450	45.7	1,806,461	1,772,653	2,165,610	22.17	19.88
<b>GRAND TOTAL</b>	<b>12,242,997</b>	<b>6,242,715</b>	<b>48.1</b>	<b>12,984,986</b>	<b>12,856,226</b>	<b>13,494,991</b>	<b>4.97</b>	<b>3.93</b>

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<b>O. Shared Office Overhead</b>								
Facilities	27,322	10,966	24.4	45,000	30,000	45,000	50.00	0.00
Transfer to Bar Center	576,707	293,256	50.0	586,511	586,511	598,241	2.00	2.00
Telephone and Internet Service Lines	69,375	34,556	46.1	75,000	75,000	75,000	0.00	0.00
Equipment Rental & Maintenance	54,581	30,993	51.7	60,000	62,000	65,000	4.84	8.33
Supplies & Printing	54,988	23,736	45.6	52,000	46,000	54,000	17.39	3.85
Insurance (non-group)	103,002	64,277	49.4	130,000	130,000	135,000	3.85	3.85
Payroll, Actuary, Audit	25,771	27,096	60.2	45,000	41,000	41,000	0.00	(8.89)
Kitchen	19,765	9,789	39.2	25,000	22,000	23,000	4.95	(8.00)
<b>Subtotal</b>	<b>931,511</b>	<b>494,669</b>	<b>48.6</b>	<b>1,018,511</b>	<b>992,511</b>	<b>1,036,241</b>	<b>4.41</b>	<b>1.74</b>
Accounting	284,232	153,532	44.8	342,748	342,748	333,422	(2.72)	(2.72)
Human Resource	0	0	0.0	0	0	113,350	100.00	100.00
Receptionists	134,843	67,798	46.1	147,181	146,581	150,866	2.92	2.50
Mailroom	66,303	34,071	49.4	69,010	67,850	69,695	2.72	0.99
<b>Total Shared Office Overhead</b>	<b>1,416,889</b>	<b>750,070</b>	<b>47.5</b>	<b>1,577,450</b>	<b>1,549,690</b>	<b>1,703,574</b>	<b>9.93</b>	<b>8.00</b>
<b>Related Organizations - Shared Office Expense Allocations</b>								
Georgia Bar Foundation	1,176	1,326	50.0	2,652	2,652	3,063	15.49	15.49
CCLC	104,153	44,771	50.0	89,542	89,542	95,684	6.86	6.86
Pro Bono	30,458	16,062	50.0	32,124	32,124	32,559	1.36	1.36
Professionalism	1,676	1,275	50.0	2,550	2,550	3,050	19.61	19.61
Sections	17,359	8,954	50.0	17,908	17,908	19,137	6.86	6.86
<b>Subtotal - Related Organizations</b>	<b>154,822</b>	<b>72,388</b>	<b>50.0</b>	<b>144,777</b>	<b>144,777</b>	<b>153,493</b>	<b>6.02</b>	<b>6.02</b>
<b>State Bar Departments</b>								
Administration	277,741	152,222	50.0	304,443	304,443	344,462	13.15	13.15
Mgmt. Information Systems	52,076	26,863	50.0	53,725	53,725	57,410	6.86	6.86
Office General Counsel	381,894	205,947	50.0	411,894	411,894	440,146	6.86	6.86
Consumer Assistance Program	86,794	44,771	50.0	89,542	89,542	95,684	6.86	6.86
Communications	69,435	35,817	50.0	71,634	71,634	76,547	6.86	6.86
Fee Arbitration	69,435	35,817	50.0	71,634	71,634	76,547	6.86	6.86
Law Practice Management	69,435	35,817	50.0	71,634	71,634	76,547	6.86	6.86
Younger Lawyers	17,359	17,909	50.0	35,817	35,817	38,274	6.86	6.86
Unauthorized Practice of Law	104,153	53,726	50.0	107,451	107,451	114,821	6.86	6.86
Standards of the Profession	34,718	17,909	50.0	35,817	35,817	38,274	6.86	6.86
Law-Related Education	34,718	26,863	50.0	53,725	53,725	57,410	6.86	6.86
High School Mock Trial	17,359	8,954	50.0	17,908	17,908	19,137	6.86	6.86
Conference Center	69,435	35,817	50.0	71,634	71,634	76,547	6.86	6.86
Military Veterans Pro Bono	17,359	8,954	50.0	17,908	17,908	19,137	6.86	6.86
Legislative Program	17,359	8,954	50.0	17,908	17,908	19,137	6.86	6.86
<b>Subtotal - State Bar Departments</b>	<b>1,319,270</b>	<b>716,340</b>	<b>50.0</b>	<b>1,432,673</b>	<b>1,432,673</b>	<b>1,550,081</b>	<b>8.19</b>	<b>8.19</b>
<b>Total Shared Office Overhead</b>	<b>1,474,092</b>	<b>788,728</b>	<b>50.0</b>	<b>1,577,450</b>	<b>1,577,450</b>	<b>1,703,574</b>	<b>8.00</b>	<b>8.00</b>
<b>Under/(Over) Absorbed Overhead</b>	<b>(57,203)</b>	<b>(38,656)</b>		<b>0</b>	<b>0</b>	<b>0</b>		

5/19/2016

**State Bar of Georgia - Bar Center Component  
Budget Fiscal Year 2016-17**

	FY 13-14 Actual	FY 14-15 Actual	FY 15-16 through Amount	12/31/15 % of Budget	FY 15-16 Budget	FY 15-16 Projected	FY 16-17 Budget
<b>Income and Cash Receipts</b>							
CCLC Contribution	\$1,424,915	\$1,308,195	\$0	0.0%	\$1,300,000	\$1,385,803	\$1,300,000
Interest Income	\$11,845	\$18,655	\$7,461	37.3%	\$20,000	\$14,000	\$15,000
Member Assessment	\$291,518	\$317,677	\$272,051	93.8%	\$290,000	\$295,000	\$295,000
Room Rentals and Various Charges	\$22,399	\$24,987	\$13,124	46.7%	\$28,100	\$29,600	\$33,600
Parking Revenues	\$231,352	\$244,335	\$137,771	57.1%	\$241,133	\$263,000	\$287,235
Rental Income	\$1,180,833	\$1,105,143	\$527,537	44.4%	\$1,187,023	\$1,138,000	\$1,293,576
GDOT Settlement	\$248,775	\$0	\$0	0.0%	\$0	\$0	\$0
Operating Budget Transfer	\$568,184	\$576,707	\$293,256	50.0%	\$586,511	\$586,511	\$598,241
<b>Total Income and Cash Receipts</b>	<b>\$3,979,821</b>	<b>\$3,595,699</b>	<b>\$1,251,200</b>	<b>34.3%</b>	<b>\$3,652,767</b>	<b>\$3,711,914</b>	<b>\$3,822,652</b>
<b>Expenses and Cash Disbursements</b>							
Building Rehabilitation	\$35,614	\$14,840	\$30	0.0%	\$75,000	\$75,000	\$75,000
Conference Floor Renovations	\$0	\$0	\$0	0.0%	\$20,000	\$10,000	\$20,000
Tenant Improvements	\$339,150	\$20,362	\$462,532	308.4%	\$150,000	\$569,532	\$25,000
Furniture and Equipment	\$2,108	\$12,481	\$10,047	102.5%	\$9,800	\$10,047	\$67,500
Design Fees	\$5,025	\$26,413	\$32,921	329.2%	\$10,000	\$32,921	\$10,000
Lease Commissions	\$50,000	\$0	\$0	0.0%	\$0	\$0	\$0
Parking Deck Construction/Due Diligence	\$0	\$75,418	\$166,509	133.2%	\$125,000	\$75,418	\$307,000
Median and Landscaping	\$0	\$0	\$0	0.0%	\$5,000	\$5,000	\$5,000
Woodrow Wilson Exhibit and Law Museum	\$0	\$1,904	\$7,157	51.1%	\$14,000	\$14,000	\$5,000
President's Conference Room	\$8,564	\$0	\$976	19.5%	\$5,000	\$2,500	\$5,000
Law Related Education	\$40,676	\$52,500	\$12,980	49.0%	\$26,500	\$26,500	\$26,500
Conference Center Operating Expenses	\$385,916	\$383,194	\$201,860	46.6%	\$433,567	\$421,297	\$507,999
Third Floor Contingency	\$1,925	\$21,175	\$0	0.0%	\$25,000	\$25,000	\$25,000
Building Operating Expenses	\$1,450,599	\$1,456,363	\$770,713	49.1%	\$1,538,198	\$1,538,259	\$1,653,780
Parking Deck Operating Expenses	\$217,711	\$228,604	\$132,243	45.3%	\$291,641	\$275,281	\$245,894
Legal, Due Diligence and Closing Fees	\$0	\$0	\$0	0.0%	\$0	\$0	\$0
<b>Total Expenses and Cash Disbursements</b>	<b>\$2,537,288</b>	<b>\$2,293,254</b>	<b>\$1,797,968</b>	<b>65.2%</b>	<b>\$2,758,706</b>	<b>\$3,080,755</b>	<b>\$2,978,673</b>
<b>Net Cash Flow</b>	<b>\$1,442,533</b>	<b>\$1,302,445</b>	<b>(\$546,768)</b>	<b>-61.2%</b>	<b>\$894,061</b>	<b>\$631,159</b>	<b>\$843,979</b>
<b>Projected Reserves 6/30/17</b>							
<b>1. Board-Designated Reserves</b>							
Operating	\$	\$					
Bar Center	2,750,000	2,000,000					
Cornerstones of Freedom	600,000	600,000					
Litigation	300,000	300,000					
<b>Total Board-Designated</b>	<b>\$ 5,650,000</b>						
<b>2. Projected Undesignated, Unrestricted Surplus 6/30/17 (Considers Transfers to COF)</b>							
Operating	\$	\$					
Bar Center	(4,468,885)						
	\$ 9,190,369						
	\$ 4,721,478						
<b>Total Surplus</b>							

5/19/2016

3rd Draft

**2016-17 State Bar of Georgia Expense Budget**

2014-2015 Actual	YTD 12/31/15 Actual	% Bud. 50.0%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Incl/(Dec) over Proj.
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**BAR CENTER**

**Operating Income:**

Interest Income	13,456	7,636	38.2	20,000	14,000	15,000	7.14
Investment Gain/(Loss)	5,199	(175)	0.0	0	0	0	0.00
Member Assessment	317,677	272,051	93.8	290,000	295,000	295,000	0.00
Transfer from SBG Operating	576,707	293,256	50.0	586,511	586,511	598,241	2.00
CCLC Contributions	1,308,195	0	0.0	1,300,000	1,385,803	1,300,000	(6.19)
<b>Total Income</b>	<b>2,221,234</b>	<b>572,768</b>	<b>26.1</b>	<b>2,196,511</b>	<b>2,281,314</b>	<b>2,208,241</b>	<b>(3.20)</b>

**Operating Expenses:**

Architect/Design Fees	26,413	32,921	329.2	10,000	32,921	10,000	(69.62)
Parking Deck Construction/Technology	75,418	166,509	133.2	125,000	166,509	307,000	84.37
Landscaping	0	0	0.0	5,000	5,000	5,000	0.00
3rd Floor Contingency	21,175	0	0.0	25,000	25,000	25,000	0.00
3rd Floor Renovations	0	0	0.0	20,000	10,000	20,000	100.00
Museum, W. Wilson Exhibit	1,904	7,157	51.1	14,000	14,000	5,000	(64.29)
AV & Equipment	8,185	10,047	102.5	9,800	10,047	67,500	571.84
Building Rehabilitation	14,840	30	0.0	75,000	75,000	75,000	0.00
Tenant Improvements	20,362	462,532	308.4	150,000	569,532	25,000	(95.61)
Law Related Education	52,500	12,980	49.0	26,500	26,500	26,500	0.00
President's Board Room Costs	0	976	19.5	5,000	2,500	5,000	100.00

**Total Bar Center**

<b>220,797</b>	<b>693,152</b>	<b>149.0</b>	<b>465,300</b>	<b>937,009</b>	<b>571,000</b>	<b>(39.06)</b>
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**Net General Bar Center**

<b>2,000,437</b>	<b>(120,384)</b>	<b>(7.0)</b>	<b>1,731,211</b>	<b>1,344,305</b>	<b>1,637,241</b>	<b>21.79</b>
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5/19/2016

3rd Draft

2016-17 State Bar of Georgia Expense Budget						
2014-2015 Actual	YTD 12/31/15 Actual	% Bud. 50.0%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.

**CONFERENCE CENTER**

2016-17 State Bar of Georgia Expense Budget						
2014-2015 Actual	YTD 12/31/15 Actual	% Bud. 50.0%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.
<b>Revenues</b>						
	4,950	2,750	78.6	3,500	5,000	0.00
3rd Floor Room Rentals	0	0	0.0	1,600	1,600	0.00
3rd Floor Set Up Fees	10,020	7,003	58.4	12,000	14,000	16.67
3rd Floor After Hrs Fees	2,814	1,921	48.0	4,000	5,000	25.00
3rd Floor Beverage Service	7,203	1,450	20.7	7,000	8,000	14.29
3rd Floor Cleaning Fees	0	0	0.0	0	0	0.00
3rd Floor AV/Conferencing	24,987	13,124	46.7	28,100	29,600	33.60
<b>Total Revenues</b>						<b>13.51</b>

**Personnel Services:**

Salaries - full time	189,385	96,632	49.2	196,378	196,378	196,046	(0.17)
Overtime pay	9,951	3,881	24.3	16,000	9,500	11,000	15.79
Tax & benefits	63,509	31,823	46.1	69,030	69,030	72,952	5.68
Pension	11,953	6,445	50.1	12,890	12,890	12,649	(1.87)
<b>Subtotal</b>	<b>274,798</b>	<b>138,781</b>	<b>47.2</b>	<b>294,298</b>	<b>287,798</b>	<b>292,647</b>	<b>1.68</b>

**Operating Expenses:**

Shared Office Overhead	69,435	35,817	50.0	71,634	71,634	76,547	6.86
Postage & Freight	0	42	0.0	100	0	100	100.00
Printing	0	0	0.0	0	42	50	19.05
Supplies	9,484	1,683	21.0	8,000	4,000	7,500	87.50
Telephone/Internet	0	0	0.0	0	0	0	0.00
Subscriptions & Books	225	251	100.4	250	251	300	19.52
Dues & Memberships	0	700	0.0	0	0	0	0.00
Miscellaneous	2,778	475	15.8	3,000	2,500	3,000	20.00
Computer Hardware	0	1,810	67.5	2,680	2,680	1,500	(44.03)
Computer Software	0	0	0.0	0	0	0	0.00
Copier/Vending Software and Expense	0	0	0.0	0	887	2,700	204.40
After Hours Contract Labor	0	0	0.0	0	0	0	0.00
After Hours Security	5,596	3,108	44.4	7,000	7,000	8,000	14.29
After Hours Cleaning	0	0	0.0	0	0	0	0.00
Room Turn - Around Costs	1,615	2,960	59.2	5,000	5,000	8,000	60.00
Equipment Maintenance	1,455	3,663	73.3	5,000	5,000	7,000	40.00
Furniture Repairs and Maintenance	3,538	3,762	53.0	7,100	7,000	8,000	14.29
Kitchen	14,270	6,631	41.4	16,000	14,000	16,000	14.29
Vide Conferencing Support	0	0	0.0	7,500	7,500	10,300	37.33
<b>Subtotal</b>	<b>108,396</b>	<b>60,902</b>	<b>45.7</b>	<b>133,264</b>	<b>127,494</b>	<b>148,997</b>	<b>16.87</b>

**Furniture & Equipment:**

	4,296	2,177	36.3	6,005	6,005	66,355	1,005.00
<b>Total Conference Center</b>	<b>387,490</b>	<b>201,960</b>	<b>46.6</b>	<b>433,567</b>	<b>421,297</b>	<b>507,999</b>	<b>20.58</b>
<b>Net Conference Center</b>	<b>(362,503)</b>	<b>(188,736)</b>	<b>46.5</b>	<b>(405,467)</b>	<b>(391,697)</b>	<b>(474,399)</b>	<b>21.11</b>

2016-17 State Bar of Georgia Expense Budget						
2014-2015 Actual	YTD 12/31/15 Actual	% Bud. 50.0%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.

**BUILDING**

<b>Revenue</b>							
CW Rental Income	1,105,143	527,537	44.4	1,187,023	1,138,000	1,293,576	13.67

Operating Expenses:	2014-2015 Actual	YTD 12/31/15 Actual	% Bud. 50.0%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.
Personnel Mgmt Salary	30,977	17,151	38.1	45,000	45,000	35,000	(22.22)
Taxes	9,716	1,367	38.0	3,600	3,600	3,000	(16.67)
Benefits/WC Insurance	20,262	2,921	38.2	7,650	7,650	6,000	(21.57)
Travel	42	0	0.0	630	630	630	0.00
Supplies	1,065	93	1.6	6,000	1,500	1,500	0.00
Telephone Expense	10,795	9,261	86.2	10,740	10,400	0	(100.00)
Management Fees	50,182	25,462	51.9	49,080	50,924	52,143	2.39
Tenant Services	0	0	0.0	1,750	1,000	1,000	0.00
Bank Fees	1,253	619	46.9	1,320	1,320	1,380	4.55
R&M Salaries	185,504	87,707	49.0	178,815	172,000	178,815	3.96
R&M Taxes	12,335	5,758	39.9	14,432	12,000	14,432	20.27
R&M Benefits	56,703	16,864	28.6	59,000	53,000	59,000	11.32
R&M HVAC	32,439	35,840	86.9	41,226	58,000	91,226	57.29
R&M Plumbing	3,989	1,808	29.6	6,100	4,000	10,000	150.00
R&M Fire/Life Prevention	3,829	450	8.9	5,075	4,000	4,000	0.00
R&M Glass Replacement	0	0	0.0	500	500	500	0.00
R&M Electrical/Lamps	10,640	15,797	75.9	20,815	24,000	29,000	20.83
R&M Water Treatment	10,603	4,926	44.8	10,992	10,500	12,156	15.77
R&M Life Safety Contract	11,346	2,876	30.2	9,518	9,518	9,518	0.00
R&M Tools/Radios	2,676	242	8.1	3,000	2,600	3,000	15.38
R&M Elevators	26,672	12,230	43.6	28,065	28,065	28,140	0.27
R&M Pest Control	2,520	1,284	32.1	4,000	3,000	4,000	33.33
R&M Rubbish Removal	9,979	4,937	41.1	12,000	10,500	10,500	0.00
R&M Other: Locks & Keys	0	838	0.0	0	838	1,000	19.33
R&M Painting	690	6,350	127.0	5,000	6,350	5,000	(21.26)
R&M Other: General Building	3,699	924	6.8	13,640	13,640	32,840	140.76
R&M Other: Uniforms	1,377	0	0.0	2,300	2,300	2,300	0.00
R&M Lobby	0	0	0.0	500	500	0	(100.00)
Electric	421,208	250,790	54.5	460,000	450,000	475,000	5.56
Water	60,087	30,352	42.9	70,700	62,000	70,700	14.03
Gas	29,199	3,355	12.2	27,500	25,000	27,500	10.00
Security Contract	247,606	131,749	51.7	255,000	255,000	260,000	1.96
Cleaning	156,982	75,868	44.0	172,250	162,000	169,000	4.32
Grounds- Supplies & Maintenance	8,847	1,932	32.2	6,000	5,000	13,500	170.00
Insurance	33,142	20,962	58.2	36,000	41,924	42,000	0.18
<b>Total Building</b>	<b>1,456,363</b>	<b>770,713</b>	<b>49.1</b>	<b>1,568,198</b>	<b>1,538,259</b>	<b>1,653,780</b>	<b>7.51</b>
<b>Net Building</b>	<b>(351,220)</b>	<b>(243,176)</b>	<b>63.8</b>	<b>(381,175)</b>	<b>(400,259)</b>	<b>(360,204)</b>	<b>(10.01)</b>

2016-17 State Bar of Georgia Expense Budget

2014-2015 Actual	YTD 12/31/15 Actual	% Bud. 50.0%	2015-2016 Budget	2015-2016 Projected	2016-2017 Budget	% Inc/(Dec) over Proj.
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**PARKING**

<b>Revenues</b>							
Monthly Parking	116,494	53,988	43.6	123,776	116,000	121,000	4.31
Daily Parking	51,349	28,206	69.2	40,761	55,000	60,000	9.09
Special Events Parking	76,492	55,577	72.6	76,596	92,000	106,235	15.47
<b>Total Revenues</b>	<b>244,335</b>	<b>137,771</b>	<b>57.1</b>	<b>241,133</b>	<b>263,000</b>	<b>287,235</b>	<b>9.21</b>

**Operating Expenses:**

Salaries	86,396	44,963	44.8	100,311	87,000	74,700	(14.14)
Taxes	9,716	5,321	50.0	10,650	10,642	7,909	(25.68)
Benefits	11,471	7,834	55.3	14,156	14,150	10,486	(25.89)
Workman's Compensation	8,791	4,814	49.9	9,650	9,628	7,263	(24.56)
Signs	18	0	0.0	900	2,800	900	(67.86)
Uniforms	114	269	54.9	490	500	240	(52.00)
Repairs & Maint.	19,567	15,476	76.2	20,304	21,000	21,744	3.54
Tickets	1,012	1,012	33.7	3,000	2,500	2,000	(20.00)
Cell Phone/Beeper	346	175	48.6	360	2,623	5,000	90.62
Office Expense	5,121	2,835	945.0	300	5,700	21,011	268.61
Invoicing Expense	3,060	1,710	55.9	3,060	3,420	3,060	(10.53)
Bank Charges	1,532	915	50.1	1,827	1,850	1,749	(5.46)
Credit Card Fees	2,281	1,897	0.0	0	6,200	9,814	58.29
Refunds	0	0	0.0	750	0	0	0.00
Returned Checks	360	0	0.0	0	0	0	0.00
Garage Insurance	1,152	612	21.6	2,835	1,224	1,224	0.00
Business License	236	0	0.0	1,131	1,131	2,114	86.91
Management Fee	4,200	2,100	50.0	4,200	4,200	4,200	0.00
Security	69,655	40,377	41.1	98,350	85,000	62,310	(26.69)
Payroll Processing	1,183	760	34.2	2,225	1,800	1,120	(37.78)
Equipment & Supplies	817	215	41.0	525	525	850	61.90
Miscellaneous	0	0	0.0	6,729	3,500	0	(100.00)
Cleaning	0	0	0.0	7,800	7,800	6,400	(17.95)
Fire Safety	849	0	0.0	1,000	1,000	0	(100.00)
Incentive Mgt Fees	727	957	88.0	1,088	1,088	1,800	65.44
<b>Total Parking</b>	<b>228,604</b>	<b>132,243</b>	<b>45.3</b>	<b>291,641</b>	<b>275,281</b>	<b>245,894</b>	<b>(10.68)</b>

**Net Income-Parking**

<b>15,731</b>	<b>5,528</b>	<b>(10.9)</b>	<b>(50,508)</b>	<b>(12,281)</b>	<b>41,341</b>	<b>(436.63)</b>
---------------	--------------	---------------	-----------------	-----------------	---------------	-----------------



Pro Forma	Robin	Buck	Patrise	Bob	Pat	Buck	?	?	?	?	?	?	?
95% Budget Spend	2017/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	?
\$2 Annual Dues Increases after 2017-18	\$240	\$244	\$248	\$248	\$248	\$248	\$250	\$252	\$254	\$256	\$258	\$260	?
Utilize Bar Center Operating Surplus													
Revenue	10,380,463	10,806,373	11,061,075	11,191,220	11,408,910	11,593,879	11,882,218	12,165,029	12,464,715	12,772,837	13,088,889	13,383,127	
Expenses	10,824,527	11,512,099	12,335,737	12,335,737	13,494,991	13,899,841	14,316,836	14,746,341	15,188,731	15,644,393	16,113,725	16,597,137	
Expenses @ 95%			12,284,888	12,335,737	12,820,241	13,204,849	13,600,994	14,009,024	14,429,295	14,862,173	15,308,039	15,767,280	
Operating Gain (Loss) @ 95%	(444,064)	(705,726)	(1,223,813)	(1,144,517)	(1,411,332)	(1,610,970)	(1,718,776)	(1,843,995)	(1,964,579)	(2,089,336)	(2,239,150)	(2,384,152)	
Bar Center Gain (Loss)		1,775,540	1,302,445	631,159	843,972	1,150,000	1,150,000	1,150,000	1,150,000	1,150,000	1,150,000	1,150,000	
Unrestricted Surplus (Operating) - Ending **	1,264,454	528,431	(1,372,036)	(2,857,563)	(4,488,885)	(6,279,895)	(8,198,631)	(10,242,626)	(12,407,205)	(14,696,541)	(16,995,691)	(19,319,843)	
Unrestricted Surplus (Bar Center) - Ending **	5,528,817	7,305,701	7,715,225	8,346,384	9,190,363	10,340,363	11,490,363	12,640,363	13,790,363	14,940,363	16,090,363	17,240,363	
<b>Total Unrestricted Surplus All Sources</b>	<b>6,793,271</b>	<b>7,834,132</b>	<b>6,343,189</b>	<b>5,488,831</b>	<b>4,721,478</b>	<b>4,060,508</b>	<b>3,291,732</b>	<b>2,397,737</b>	<b>1,383,158</b>	<b>243,822</b>	<b>(845,328)</b>	<b>(2,079,480)</b>	

**Program Assumptions**

No significant changes to existing programs for members or the public  
 No new programs will be added after 2014-15 without a dues increase  
 No existing programs will be deleted

**Revenue Assumptions**

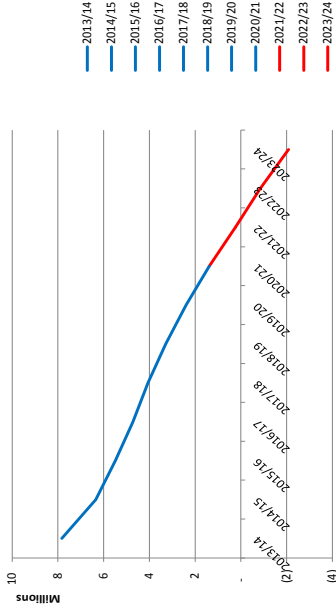
Revenue from 2016-17 budget plus membership growth  
 Revenue increase is based on 850 NET new members each year (675 active and 175 inactive)

**Expense Assumptions**

Expense increases for 2017-18 Bar Year and beyond based on 3% inflation

Dues to Cover Expenses @ 95% in 2016-17	286.26
Dues to Cover Expenses @ 95% in 2021-22	279.51
Dues to Cover Expenses @ 95% in 2023-24	288.88

**State Bar Surplus**  
**\$2 Increases After 2017-18 /95% Spend**



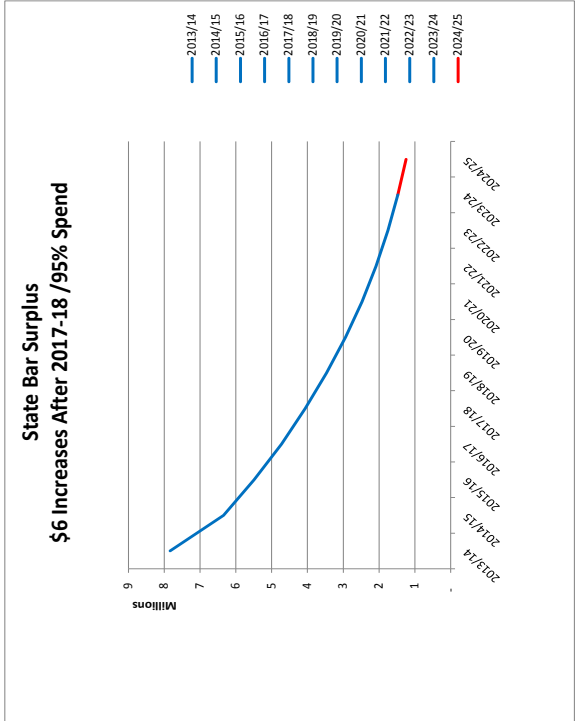
Pro Forma	Robin	Buck	Patrice	Bob	Pat	Buck	?	?	?	?	?	?	?	?
95% Budget Spend	2017/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	?	?
\$6 Annual Dues Increases after 2017-18	\$240	\$244	\$248	\$248	\$248	\$248	\$254	\$260	\$266	\$272	\$278	\$284		
Utilize Bar Center Operating Surplus														
Revenue	10,380,463	10,806,373	11,061,075	11,191,220	11,408,910	11,593,879	12,060,366	12,527,425	13,017,459	13,522,045	14,020,649	14,543,539		
Expenses	10,824,527	11,512,099	12,335,737	12,335,737	13,494,991	13,899,841	14,316,936	14,746,341	15,188,731	15,644,393	16,113,725	16,597,137		
Expenses @ 95%			12,284,888	12,335,737	12,820,241	13,204,849	13,600,994	14,009,024	14,429,295	14,862,173	15,308,039	15,767,280		
Operating Gain (Loss) @ 95%	(444,064)	(705,726)	(1,223,813)	(1,144,517)	(1,411,332)	(1,610,970)	(1,540,628)	(1,481,589)	(1,411,835)	(1,340,128)	(1,287,390)	(1,223,740)		
Bar Center Gain (Loss)		1,775,540	1,302,445	631,159	843,979	1,150,000	1,150,000	1,150,000	1,150,000	1,150,000	1,150,000	1,150,000		
Unrestricted Surplus (Operating) - Ending **	1,264,454	528,431	(1,372,036)	(2,857,553)	(4,488,885)	(6,279,855)	(8,020,483)	(9,702,082)	(11,313,917)	(12,854,045)	(14,341,435)	(15,765,175)		
Unrestricted Surplus (Bar Center) - Ending **	5,528,817	7,305,701	7,715,225	8,346,384	9,190,363	10,340,363	11,490,363	12,640,363	13,790,363	14,940,363	16,090,363	17,240,363		
<b>Total Unrestricted Surplus All Sources</b>	<b>6,793,271</b>	<b>7,834,132</b>	<b>6,343,189</b>	<b>5,488,831</b>	<b>4,721,478</b>	<b>4,060,508</b>	<b>3,469,880</b>	<b>2,939,281</b>	<b>2,476,446</b>	<b>2,086,318</b>	<b>1,748,928</b>	<b>1,475,188</b>		

**Program Assumptions**  
 No significant changes to existing programs for members or the public  
 No new programs will be added after 2014-15 without a dues increase  
 No existing programs will be deleted

**Revenue Assumptions**  
 Revenue from 2016-17 budget plus membership growth  
 Revenue increase is based on 850 NET new members each year (675 active and 175 inactive)

**Expense Assumptions**  
 Expense increases for 2017-18 Bar Year and beyond based on 3% inflation

Dues to Cover Expenses @ 95% in 2016-17	265.26
Dues to Cover Expenses @ 95% in 2021-22	279.51
Dues to Cover Expenses @ 95% in 2023-24	288.88



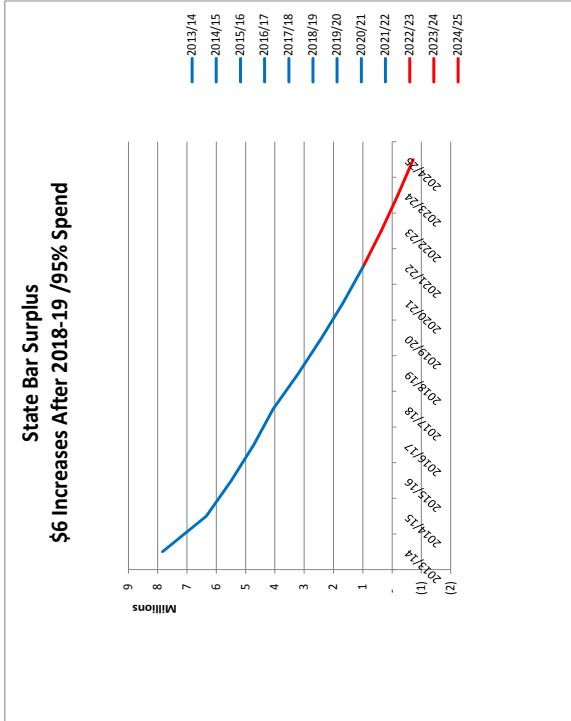
Pro Forma	Robin	Buck	Patrise	Bob	Pat	Buck	?	?	?	?	?	?	?	?
95% Budget Spend	2017/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2023/24	?
\$6 Annual Dues Increases after 2018-19	\$240	\$244	\$248	\$248	\$248	\$248	\$248	\$254	\$260	\$266	\$272	\$278	\$278	?
Utilize Bar Center Operating Surplus														
Revenue	10,380,463	10,806,373	11,061,075	11,191,220	11,408,910	11,593,879	11,793,144	12,255,628	12,741,087	13,241,092	13,735,121	14,253,436	14,253,436	
Expenses	10,824,527	11,512,099	12,335,737	12,335,737	13,494,991	13,899,841	14,316,836	14,746,341	15,188,731	15,644,393	16,113,725	16,597,137	16,597,137	
Expenses @ 95%		(705,726)	(1,223,813)	(1,144,517)	(1,411,332)	(1,610,970)	(1,807,850)	(1,753,396)	(1,688,207)	(1,621,081)	(1,572,918)	(1,519,843)	(1,519,843)	
Operating Gain (Loss) @ 95%	(444,064)	1,775,540	1,302,445	631,159	843,979	1,150,000	1,150,000	1,150,000	1,150,000	1,150,000	1,150,000	1,150,000	1,150,000	
Bar Center Gain (Loss)														
Unrestricted Surplus (Operating) - Ending **	1,264,454	528,431	(1,372,036)	(2,857,563)	(4,488,885)	(6,287,705)	(8,287,705)	(10,241,101)	(12,129,308)	(13,950,389)	(15,723,307)	(17,437,150)	(17,437,150)	
Unrestricted Surplus (Bar Center) - Ending **	5,528,817	7,305,701	7,715,225	8,346,384	9,190,363	10,340,363	11,490,363	12,640,363	13,790,363	14,940,363	16,090,363	17,240,363	17,240,363	
Total Unrestricted Surplus All Sources	6,793,271	7,834,132	6,343,189	5,488,831	4,721,478	4,060,508	3,202,658	2,399,262	1,661,055	989,974	367,056	(198,787)	(198,787)	

**Program Assumptions**  
 No significant changes to existing programs for members or the public  
 No new programs will be added after 2014-15 without a dues increase  
 No existing programs will be deleted

**Revenue Assumptions**  
 Revenue from 2016-17 budget plus membership growth  
 Revenue increase is based on 850 NET new members each year (675 active and 175 inactive)

**Expense Assumptions**  
 Expense increases for 2017-18 Bar Year and beyond based on 3% inflation

Dues to Cover Expenses @ 95% in 2016-17	265.26
Dues to Cover Expenses @ 95% in 2021-22	279.51
Dues to Cover Expenses @ 95% in 2023-24	288.88



## MOTION

1. That the President be authorized to secure a blanket fidelity bond to cover all officers, employees and other persons handling State Bar funds as is required by Article V, Section 8 of the Bylaws.
2. That the State Bar of Georgia and related entities open appropriate accounts with such banks in Georgia, but excluding any bank that does not participate in the IOLTA Program, and other such depositories as may be recommended by the Finance Committee, and designated by the Executive Committee of the Board of Governors of the State Bar of Georgia, and that the persons whose titles are listed below are authorized to sign an agreement to be provided by such banks and customary signature cards, and that the said banks are hereby authorized to pay or otherwise honor any check drafts, or other orders issued from time to time for debit to said accounts when signed by two of the following: the Treasurer, the Secretary, the President, the Immediate Past President, the President Elect, the Executive Director, the Office Manager and the General Counsel provided either the President, the Secretary or the Treasurer shall sign all checks or vouchers and that said accounts can be reconciled from time to time by said persons or their designees. The authority herein given is to remain irrevocable so as said banks are concerned until they are notified in writing of such revocation of authority and in writing, acknowledge receipt thereof.
3. That Mauldin & Jenkins be designated as the independent auditing firm to audit the financial records of the State Bar of Georgia for the fiscal year 2015-2016.

**State Bar of Georgia  
2017 Election Schedule  
(Tentative)**

**2016**

- August 12            Deadline for submission of election schedule for publication in October issue  
*Georgia Bar Journal*
- October             Official Election Notice, October Issue *Georgia Bar Journal*
- December 1        Nominating petition package mailed to incumbent Board of Governors  
Members and other members who request a package

**2017**

- January 5 - 7      Nomination of Officers at Midyear Board Meeting, The Ritz Carlton Buckhead,  
Atlanta, GA
- January 27         Deadline for receipt of nominating petitions for incumbent Board Members  
including incumbent nonresident (out of state) members
- Feb 24             Deadline for receipt of nominating petitions for new Board Members  
including new nonresident (out of state) members
- March 10          Deadline for write-in candidates for Officer to file a written statement (not less  
than 10 days prior to mailing of ballots (Article VII, Section 1 (c))
- March 10          Deadline for write-in candidates for Board of Governors to file a written  
statement (not less than 10 days prior to mailing of ballots (Article VII, Section  
2 (c))
- March 27          Ballots mailed
- April 28            11:59 p.m. Deadline for ballots to be cast in order to be valid
- May 5              Election service submits results to the Elections Committee
- May 12             Election results reported and made available

MEMORANDUM FOR: Board of Governors of the State Bar of Georgia

FROM: Norman E. Zoller, attorney coordinating the  
Military Legal Assistance Program

DATE: May 17, 2016

SUBJECT Status of the Military Legal Assistance Program

**Background and Overview of Work:** The main objective of the State Bar of Georgia's Military Legal Assistance Program (MLAP) has been and remains to connect lawyers with service members and veterans who need legal assistance. Thus far, 1,668 service members or veterans have been so connected as shown below. Here are additional highlights since the report to the Board of Governors earlier this month:

**A Realization:** In studying some data of the past 6 1/2 years since MLAP began, a remarkable statistic emerges. It is this . . . .

As it has turned out, 76 months after the Program began operations in December 2009, 1,668 service members and veterans have been connected with a lawyer. When one considers that there are 20 work days each month, that means slightly more than one service member or veteran is connected *each day* with a lawyer ( $76 \times 20 = 1,520$ .)

I recall when (then Bar President) Jeff Bramlett, Buck Ruffin, Cliff Brashier, and I first spoke about this Program, I asked what would be considered *success* of the program. At that time Jeff said *even if one* service member or veteran were connected with a lawyer, the program would be a success.

We still have about 700 lawyers who have volunteered to provide the legal assistance, and I suggest that is also a success in and of itself.

I respectfully note that the idea for a program like MLAP first advanced by Jay Elmore (who had recently returned from a DoD fact finding mission to the Middle East) and Jeff Bramlett and then securing its authorization from the Board of Governors implemented by Jeff, Buck, and others has, and continues to be, a gem in the crown of the State Bar of Georgia.

- 1) **Legal Clinics at Georgia Law Schools.** Along with Professor Charles Shanor, Lane Dennard, and Drew Early at Emory University; and Dean Steve Kaminshine, Associate Dean Roy Sobelson, Patricia Shewmaker, and Steve Shewmaker at Georgia State University, helped facilitate establishment of legal clinics in the law schools at Emory (February 2013 [**Attachment A**]) and Georgia State (November 2014 [**Attachment B**]). Similar clinics are also being planned or considered at the University of Georgia and at Mercer University.
  
- 2) **Legal Assistance Clinics at VA Medical Facilities.** In addition to the MLAP, legal assistance clinics are operating at the following VA medical facilities: VA Medical Centers (VAMC) at Augusta and Decatur, VA medical facilities at Carrollton, Fort McPherson, and now Rome, which began operations in August 2015. Other legal clinics remain under consideration for the Dublin VAMC and at the VA medical facility in Athens, Macon, and Savannah.
  
- 3) **Veterans' Courts.** Veterans' courts are organized and remain operational in nine judicial circuits representing 19 counties. Recidivism rates are about 11%. According to recent VA data, there are reportedly 264 Veterans courts operating nationwide in 37 states. Reportedly, the cost of such diversion programs is about \$19 per person compared to \$69 a day for someone incarcerated.
  
- 4) **VA Accreditation.** A CLE program concerned with Georgia Military Law and VA Accreditation is scheduled for October 13, 2016. This full-day program will qualify lawyers to become accredited initially or to renew accreditation to practice before the U.S. Department of Veterans Affairs.
  
- 5) **Possible Travel to Europe in Fall 2017, re: 100<sup>th</sup> Anniversary of WW I.** Together with the MLAP Committee, the Military and Veterans Law Section is planning to conduct a Law Section-sponsored trip in the Fall of 2017 to Western and Central Europe with a CLE program commemorating the 100<sup>th</sup> Anniversary of various World War I battle sites, memorials, and related events (**Attachment C**). As a result of a survey circulated by ICLE in Georgia, 90 lawyers have expressed potential interest in such a trip. Further, a Request for Proposal has been circulated to 17 destination management companies (DMC) soliciting proposals about the nature and scope of such a trip. These are scheduled to be received by June 10, 2016, after which they will be analyzed and a DMC selected to prepare a brochure detailing the nature of the trip, costs, insurance, and other related travel

information. This brochure will be widely circulated to State Bar of Georgia members.

- 6) **ABA National Legal Network Summit.** In collaboration with the MLAP Committee, a representative of the Military and Veterans Law Section is scheduled to participate in an ABA-sponsored National Legal Network Summit to be held June 23-24, 2016, in Washington, D.C. (**Attachment D**). It is expected that representatives from all or most all states will be invited to take part.
- 7) **Cases Processed.** Below is a summary of the number and types of requests for legal assistance cases received and referred to lawyers under the State Bar's Military Legal Assistance Program. Under the program, **a total of 1,668 cases have been processed.** Further, a total of 41 additional cases are in process (i.e., in the pipeline), awaiting agreement authorizations from potential clients (37) or agreements from attorneys (4) to accept a case. Further, although the program does not handle criminal cases directly, about 335 inquiries have been received from veterans or service members seeking help on a criminal law matter (which are referred to the applicable county public defender or to a local bar association).
- 8) **A summary of cases processed by the MLAP by category follows:**
- |                              |     |                             |
|------------------------------|-----|-----------------------------|
| Family Law                   |     | 851 (including 59 previous) |
| Contested Divorce            | 340 |                             |
| Uncontested Divorce          | 17  |                             |
| Divorce Enforcement          | 16  |                             |
| Child Support                | 111 |                             |
| Guardianship/Adoption        | 85  |                             |
| Visitation                   | 35  |                             |
| Child Custody                | 188 |                             |
| Consumer Law                 |     | 107                         |
| Housing/Property             |     | 99                          |
| Foreclosure                  |     | 25                          |
| Veterans Benefits/Disability |     | 234                         |
| Wills/Estates/Probate        |     | 91                          |
| Employment/USERRA/SCRA       |     | 45                          |
| Bankruptcy                   |     | 23                          |
| Insurance                    |     | 20                          |



Personal Injury	37
Property Damage	3
Worker's Compensation	2
Contract	7
Medical Malpractice	6
Toxic Substances	5
Other	<u>113</u>
	1,668

Attachments:

- A) Report from Emory Law Clinic Volunteer for Veterans, May 6, 2016.
- B) Report from Legal Clinic at Georgia State University, April 29, 2016.
- C) Flyer concerning Military and Veterans Law Section sponsored-trip, Fall 2017. to Europe for 100<sup>th</sup> Anniversary of WW I battle sites, memorials, and commemorative events.
- D) ABA National Legal Network Summit, June 23-24, 2016, Washington, D.C.



**Joint Meeting of the Executive Committees of the Military Legal Assistance Program and the Military/Veterans Law Section of the State Bar of Georgia**

**Date: May 6, 2016**

A. Summary of Cases and Involvement by Attorney Mentors and Student Volunteers

1. 150 Cases/Matters.
2. 27 Favorable Dispositions. Roughly \$3.7 million in projected economic benefits obtained, including backpay, estimated future economic benefits, and projected educational benefits.
3. Over 100 Student Volunteers have participated at this point (including nine summer interns from 2014–2016).
4. 72 Lawyers volunteered for participation; 51 have participated at this point.

B. Referral sources

1. Cases coming in directly to the Clinic (Fellow: Mallory Ball) (new e-mail address and phone number for the Clinic: 404-727-0605; [lawveteransclinic@emory.edu](mailto:lawveteransclinic@emory.edu))
2. Cases referred by the Military Legal Assistance Committee of the State Bar
3. Veterans Consortium Pro Bono Program in Washington
4. Legal Clinic at the VA Hospital
5. Atlanta Legal Aid
6. DeKalb County Community Development Board
7. Cobb County Veterans Court
8. Military Mondays with Starbucks

C. Work accomplished since January 1, 2016

1. Roughly 118 veterans have been assisted, either through intake or substantial filings on behalf of the veteran.
2. Received roughly \$135, 373.15 in backpay for veterans during this quarter. These veterans can expect to receive \$1,278,241.75 in estimated total future economic benefits.
3. Partnered with Starbucks to begin Military Mondays. We provide on-site legal advice, document review, and legal intake at the Glen Iris Starbucks every other Monday from 1pm to 5pm. Our next Military Monday is May 16th.
4. Presentations before meetings of both the Blind Veterans Association and Jewish War Veterans.

D. Recent Publicity/Activities

1. Runner-Up for the American College of Trial Lawyer's 2016 Gumpert Award.
2. The Marietta Daily Journal published an article concerning the recently established Military Monday with Starbucks.
3. The Atlanta Journal and Constitution recently interviewed Legal Fellow Mallory Ball concerning the establishment of Military Monday.

E. Disposition in Cases Since January 1, 2016:

1. We secured TDIU benefits for one Vietnam veteran. He will receive \$8,105.95 in backpay and \$236,953.13 in estimated future economic benefits over the course of his life.
2. For another Vietnam veteran, he received a 100% service-connected disability rating for anxiety. He originally was only receive the non-service connected pension. He will receive backpay in the amount of \$34,592.34 and \$441,636.53 in estimated future economic benefits over the course of his life.
3. Another Vietnam veteran was able to receive a 70% service-connected rating for PTSD. He will receive \$37,101.54 in backpay and \$306,798.70 in estimated future economic benefits over the course of his life.
4. An increase in combined service-connected disability rating from 10% to 40% was secured for another Vietnam veteran. He will receive \$3,633.52 in backpay and for the next year will receive \$112,657.29 in estimated future economic benefits.
5. For another Vietnam veteran, service-connection was granted for right leg sciatic and surgical scars. He will receive \$51,939.80 in backpay and \$180,196.10 in estimated future economic benefits.

6. In another case, an Iraq War veteran was able to get his ability to drive back. This veteran suffered from undiagnosed, service-connected PTSD. This veteran lost his ability to drive after pleading guilty to homicide by vehicle and receiving a special condition of probation that he not sit in the front seat of any vehicle. A motion to modify probation was filed and a hearing held. The judge eventually granted an exception to the condition allowing the veteran to drive and operate a motorcycle or scooter.
7. Other veterans were assisted with powers of attorney and advanced medical directives as needed.

#### F. Recent Developments

1. Hired 3 interns for the summer: Adrienne Wimberley, Jeffrey Domoziak and Matthew Randazzo.

#### G. Challenges for the future

1. Maintain and increase student and attorney volunteer interest.
2. Find new sources of cases for our increased staff capacities. This includes our desire to expand our test case footprint and involvement with county veterans courts.
3. Fund raising.

#### J. Summary

The Clinic had a robust beginning in terms of number of cases and had a good mix of cases. There has been very active student participation but the need currently exists to recruit more outside attorney/mentors to work with the students. Those interested can contact Christopher Pitts at [christopher.pitts@emory.edu](mailto:christopher.pitts@emory.edu) or 404-727-0605.

Reference material – Attorney/mentors should have access to the Veterans Benefit Manual by Stichman & Abrams; Federal Veterans Laws, Rules and Regulations, 2014 edition; and the Veterans Benefits Manual and Related Laws and Regulations on CD-ROM, all published by Lexis-Nexis.

The Nation should “care for him who shall have borne the battle and for his widow, and his orphan.” – Abraham Lincoln, Second Inaugural Address (March 4, 1865).

GEORGIA STATE UNIVERSITY VOLUNTEER LEGAL CLINIC FOR VETERANS  
Report to the Military/Veterans Law Section of the State Bar  
and Military Legal Assistance Program (MLAP)

Patty and Steve Shewmaker

A. Background. The clinic was set up as a joint effort between the State Bar, Georgia State University College of Law, and the Georgia State University ROTC Department to provide legal assistance to veterans enrolled at Georgia State University. The clinic provides legal assistance to qualified veterans in all areas of the law.

B. Summary of Cases and Involvement by Attorney Mentors and Student Volunteers:

1. 28 cases/matters.
2. 32 attorney mentors.
3. Approximately 70 plus law students expressed interest in being volunteers.

C. Cases and Matters by Type. (Note - several veterans have more than one legal issue to address)

1. VA Disability cases and claims: 9
2. Family law matters (i.e. divorce, child custody, child support): 10
3. General civil matters (i.e. HOA, payment dispute, business loan issue): 6
4. Military administrative (i.e. discharge upgrade): 1
5. Landlord/Tenant: 1
6. Criminal: 1
7. Probate: 2

D. Recent Developments and Opportunities/Challenges for the Future.

The Clinic has been only minimally operational this semester as Georgia State and Georgia Perimeter work through the integration of the two schools following their merger. Additionally, Dean Sobelson has stepped down as Dean of Students at the Georgia State College of Law. The plan is to re-energize the clinic over the summer in preparation for the fall semester including a plan to extend the program to the Georgia Perimeter veterans as well as considering extending the program to veterans who are not enrolled students.

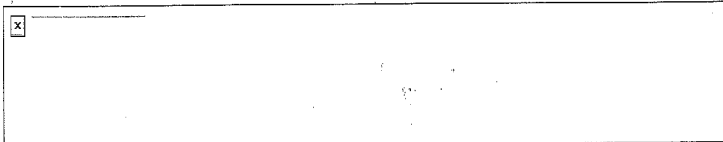
ATTACHMENT-B

Norman Zoller

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**From:** State Bar of Georgia <derricks@gabar.org>  
**Sent:** Friday, March 11, 2016 2:20 PM.  
**To:** Norman Zoller  
**Subject:** Military and Veterans Law Section: 2017 Proposed Trip to Europe

If this email does not display properly, please view our [online version](#).  
To ensure receipt of our email, please add [derricks@gabar.org](mailto:derricks@gabar.org) to your address book.  
Please do not reply to this automatic e-mail.



**From: Eric Ballinger, Chair, Military Legal Assistance Program Committee; Cary King, Chair, Military and Veterans Law Section; and Steve Harper, Executive Director, ICLE in Georgia**

**Subject: Military and Veterans Law Section of the State Bar of Georgia Plans Trip to Europe and Historic World War I Battlefields and Events in Belgium, France, and Germany: Fall 2017**

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Chateau Thierry, Verdun, Belleau Wood, Flanders Field, Ypres, Paris - these are but a few of the likely places in Central Europe the Military and Veterans Law Section is planning to visit in the Fall of 2017, commemorating the 100<sup>th</sup> Anniversary of the First World War.

In this spirit and on the occasion of the Centennial Anniversary of The Great War, this trip likely will be 7-9 days and will include a CLE program. We plan to visit and learn about the historic sites and tour the trenches and grounds of the grim battles of WWI. We will walk the battlefields, the cemeteries and the villages, and we will visit with the people. There is the possibility that some of this travel may be scheduled aboard a river cruise, with CLE on board. The cost will be about \$3,500 per person, exclusive of airfare, and any optional travel some might want to make; for example, to Italy and visits to historic WWII invasion sites; e.g., Anzio, Monte Cassino, Salerno, Sicily.

Are you interested? If so, in order we may make plans about the scope of this trip and that would help hold down costs, please report your tentative interest by **April 15, 2016**, to Derrick Stanley, Section Liaison at [derricks@gabar.org](mailto:derricks@gabar.org). More information will follow once we have an idea about how many are interested. Of course, spouses and guests will be welcome.

When you respond, please indicate whether your preference for travel would be:

1. if possible, with some or all that travel aboard a river cruise. Typically, these ships carry about 160 passengers; or
2. without travel aboard a river cruise.

Hosted by ICLE in Georgia, a CLE seminar addressing legal topics related to the purpose of the tour will be offered as part of the selected trip package.

You may recall that this Section planned and carried out an extraordinary and memorable visit in May 2014 to Normandy, France, commemorating the 70<sup>th</sup> Anniversary of the D-Day Landings (highlighted in

the June 2014 issue of the *Georgia Bar Journal*).

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Please reply to this email, completing the information below.

TO: Derrick Stanley, Law Section Liaison, State Bar of Georgia

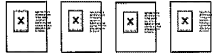
\_\_\_\_\_ I am tentatively interested in this trip.

\_\_\_\_\_ I favor all or some of this travel aboard a river cruise.

\_\_\_\_\_ I do not favor a river cruise.

\_\_\_\_\_ (Your Name)

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**Norman Zoller**

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**Subject:** ABA Summit on Creating a National Legal Network for Servicemembers, Veterans, Their Families, Caregivers and Survivors

**Importance:** High

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**From:** Colman, Annette [mailto:Annette.Colman@americanbar.org]

**Sent:** Friday, May 13, 2016 4:41 PM

**To:** Colman, Annette

**Subject:** Summit on Creating a National Legal Network for Servicemembers, Veterans, Their Families, Caregivers and Survivors

**Importance:** High

...

**A Summit on Creating a National Legal Network For Service Members, Veterans, Their Families, Caregivers and Survivors**

*sponsored by the Bob Woodruff Foundation  
in association with  
the American Bar Association and Army OneSource  
and with the support of Jones Day*

**WHEN:** Thursday, June 23 at 8:00am to Friday, June 24 at 3:00pm

**WHERE:** Jones Day, 300 New Jersey Avenue, NW, Washington, DC, 7<sup>th</sup> Floor

**SUMMIT PURPOSE:**

This summit will seek to produce the minimum guidelines and aspirational vision for the creation of a synchronized network of legal service providers, self-help, data and other resources to once and for all eliminate legal barriers between those who have sacrificed for our country and their due legal protections, benefits and services.

Over the past decade and more, communities have reoriented much of their work to contemplate the needs of servicemembers and veterans, and many new projects have emerged focused on their legal needs. Even so, despite these laudable initiatives creating a national patchwork of services, the needs of many continue to go unmet.



Some legal assistance providers specialize in only one or two types of legal issues or only a specific area of law. Some communities are sufficiently remote that there may not be a law office for several hours drive in any direction. Many programs have income limits and all programs have capacity issues. The result has been some of the most deserving people seeking help in even the most resource rich cities can still be turned away in their hour of need.

We believe there is a solution to connect servicemembers, veterans, their families, caregivers and survivors to the legal help they need by fostering collaboration with existing services, better connecting the inspiring network of existing providers, and developing new ones where they do not currently exist. This summit represents a first, critical step along this path, to bring together a wide array of providers and experts—both legal and non-legal—to discuss the challenges, how their communities currently address the needs, and together develop a plan towards standing up a national pilot in the fall of 2016.

We look forward to collaborating with you in Washington this June.

# Georgia Bar Foundation Report to the State Bar Board of Governors

June 16-19, 2016

## Introduction

As most of you know, the Georgia Bar Foundation is a 501(c)(3) charity named by the Supreme Court of Georgia in 1984 to be the recipient of IOLTA (Interest On Lawyer Trust Account) revenues. Its first revenue source, however, was the Fellows Program created by State Bar leadership at birth of the State Bar of Georgia. The old Georgia Bar Association's charter was modified to become what today is the Georgia Bar Foundation. After interest rates plummeted at the beginning of the Great Recession, State Bar leadership picked up the funding of the BASICS Program, Mock Trial, Law-Related Education in association with the Carl Vinson Institute, and the Georgia Appellate Practice and Educational Resource Center. The Board of Trustees of the Georgia Bar Foundation is grateful for the extraordinary rescue of the programs that began in the Presidency of Jeff Bramlett and continues to this day under the leadership of President Kauffman and President-Elect Pat O'Connor, keeping these programs alive and thereby improving the lives of thousands of Georgians.

Within the last two years, the State Bar also pitched in to help the Georgia Bar Foundation and the Supreme Court of Georgia in hunting for new revenue sources to continue funding for access to justice. The State Bar of Georgia under the leadership of Buck Ruffin created a task force to explore new revenue sources for the Georgia Bar Foundation. This coming together of the Georgia Bar Foundation leadership and State Bar leadership under the guidance of the Supreme Court created pro hac vice as a new resource to expand the Foundation's ability to assist civil indigent legal services in Georgia. Today pro hac vice is now providing more than \$200,000 to the Foundation annually. Thank you, State Bar, and thank you, Supreme Court of Georgia.

The Bar Foundation is working to return IOLTA revenues to the point where, prior to the Great Recession, we were approaching \$1 million per month in IOLTA revenues. Unlike revenues approximating only about \$55,000 per month through February 2016, March revenues climbed to almost \$100,000, signaling what we all hope is the beginning of a return to normalcy. Whether the recovery in IOLTA revenues is robust for the long term or a temporary tease, State Bar leaders and Georgia Bar Foundation leaders are taking no chances. President Kauffman and President Elect O'Connor are working with Georgia Bar Foundation President Bobby Chasteen and the Board of Trustees of the Georgia Bar Foundation to grow every program we have. What we are seeing is an unprecedented closeness between the Bar and the Foundation with the enthusiastic support from the Supreme Court of Georgia. While there is a lot of work to be done, the enthusiasm of the State Bar President and President Elect combined with the enthusiasm of the President and Vice President of the Georgia Bar Foundation generates a new hope for significant expansion of the eleemosynary capabilities of the Georgia Bar Foundation.

## Bank of America Settlement Funds

Last year, the Georgia Bar Foundation received round 1 funding of \$878,787.40 as part of a settlement agreement between the United States Department of Justice and the Bank of America. The money needed to be used for foreclosure legal assistance and for community redevelopment assistance. As round 2 funding in the same agreement between the United States Department of Justice and the Bank of America, the Georgia Bar Foundation this year received \$12,991,167 for foreclosure legal assistance and for community redevelopment assistance. The Settlement Funds Committee of the Georgia Bar Foundation, led

by Kitty Cohen and with Bill Harvard and Derek White as other members, is working on revising last year's RFP to take into account the magnitude of the corpus and the obligations that go with it as part of the settlement agreement. Should the RFP specify a multi-year limit to any proposal? How best can creativity be encouraged in soliciting proposals? This is the single largest transmission of funds to the Georgia Bar Foundation in our history, and the Committee is hard at work defining all the parameters that need to be expressed in the new RFP. Due to the need to study what other states are doing and over what time period, the Committee has not yet decided when it will be issuing the new RFP or the time period of making proposals. The new RFP will likely be available on the State Bar's website by the fall if not earlier.

### **IOLTA Revenues**

After too many years of what seemed like flatlining, IOLTA revenues for Georgia are edging upward. Bar Foundation and State Bar leaders are working together to encourage banks to be more supportive of the Foundation and the many programs we seek to fund. While our primary purpose is funding civil indigent legal services, the recent growth in revenues is leading some to call for at least some modest funding for other law-related entities. This year's grant cycle had 16 applicants requesting \$1,193,200. The grant decision meeting will be in July 2016. If the economy continues to move in the right direction, we may be able to expand Foundation support to a few other organizations the Foundation lacked the resources to support during the Great Recession.

### **The Fellows Program**

The Fellows Program of the Georgia Bar Foundation is undergoing serious reexamination by the Georgia Bar Foundation's Board of Trustees. Thanks again to suggestions from State Bar President Bob Kauffman and President-Elect Pat O'Connor, with additional thoughts from YLD President Jack Long, and the Board of Trustees of the Foundation, the Fellows Program is being recreated. Under the watchful eye of Foundation President Chasteen, several new announcements will be forthcoming soon. Just as creativity is the word for efforts to increase Bar Foundation revenue, creativity will soon be evident in growing the Fellows Program.

### **Pro Hac Vice**

The Supreme Court of Georgia has funneled significant pro hac vice fees to the Foundation to support access to justice in Georgia. It is so significant that it is the equivalent of creating a new IOLTA program. In fact, in the early years of IOLTA in Georgia, the voluntary IOLTA program did not generate as much money as pro hac vice is now generating in Georgia because of our Court. Our Court cannot walk on water or raise the Federal Funds Rate, but it made pro hac vice a new, significant funding source for the Georgia Bar Foundation. Already in this fiscal year, pro hac vice revenues to the Foundation exceed \$200,000! We thank our Court for making this happen.

### **Bank Support for IOLTA**

With the enthusiastic support of State Bar President Kauffman, State Bar President-Elect Pat O'Connor, Georgia Bar Foundation President Bobby Chasteen, i.e., Hon. Robert Chasteen, Superior Court, Cordele Judicial Circuit, and the entire Board of Trustees of the Foundation, a new effort is being made to increase bank support for IOLTA throughout the state. You will be learning more about this effort over the next several months. The impact of the Supreme Court's new IOLTA rate comparability rule that took effect on January 1, 2016 will grow as the Federal Reserve raises the Federal Funds Rate again and again to deal with a growing economy.

As always, your comments and suggestions are much appreciated.

Len Horton  
Executive Director



**Our Vision**      **Lawyers Serving the Public and the Justice System**

**Our Mission**      The purposes of the State Bar of Georgia are:

- To foster among the members of the bar of this State the principles of duty and service to the public
- To improve the administration of justice
- To advance the science of law

**Our Positioning Statements**  
*Positioning statements describe how the organization will respond to key trends impacting its success.*

**Regulation of Practice**  
**We believe** that an effective disciplinary process is important to both the profession and the public. **Therefore**, in order to improve and promote our ability to discipline ourselves and to make the system more effective and efficient, **we will**:

- Continue to review the entire disciplinary process and implement recommended improvements;
- Support adequate funding and resources to carry out these recommendations; and
- Develop a non-disciplinary system for intervention with respect to mentally impaired lawyers.

**Access to Justice**  
**We believe** that there is a lack of access to justice for many people and that we, as a profession, have an obligation to provide and promote access. **Therefore, we will** analyze options the Bar can utilize to provide funding and delivery of services to achieve access by:

- Enhancing the use of technology to serve people in areas with unmet legal needs;
- Continuing to explore private and public funding options; and
- Encouraging members to provide pro bono services and contribute to legal services organizations.

**Lawyer Wellness**  
**We believe** that too many lawyers are experiencing high levels of stress and are unhealthy and unhappy, adversely affecting their personal lives and their effectiveness as lawyers. **Therefore we will**:

- Promote health and wellness among our members and staff;
- Increase awareness of existing Bar programs, such as the Lawyer Assistance Program, Law Practice Management and Suicide Prevention, to help lawyers recognize when they (or others) are in need of help;
- Develop a progressive diversion and non disciplinary system for intervention with respect to aging and impaired lawyers;
- Develop more CLEs on work/life balance; and
- Consider a mandatory one-hour CLE on overall wellness issues.

**Integrating New Delivery Methods**  
**We believe** that the delivery of legal services is changing and more people are relying on self-help services. **Therefore we will** assist our members and the public to adapt to the changing climate for the practice of law by:

- Informing the public of the benefits of using lawyers and the risks of some alternatives;
- Embracing technology and other delivery methods; and
- Integrating the effective use of technology.

**The Importance of Our Role**  
**We believe** that we need to promote the importance of a mandatory Bar and its programs to both the public and our members. **Therefore, we will** educate the public about the State Bar of Georgia and what we do, and provide and/or eliminate programs as appropriate/relevant for a mandatory bar/members.

## Our Goals

## Our Objectives

NA – Not available  
TBD – To be determined

		Base	1st Year	3rd Year	
<b>A. Regulation of Practice</b>	1	Decrease the median amount of time between the receipt of a grievance and resolution of the grievance.	TBD	100% of base	90% of base
	2	Increase the public's and lawyers' perception that the disciplinary system is fair as measured by:	NA	Baseline	20% ↑ base
		• Bi-annual survey of the public	NA	Baseline	20% ↑ base
	3	Decrease the number of grievances filed annually.	1997 Filed FY '14-'15	5% ↓ base	10% ↓ base
		• Bi-annual survey of members	TBD	5% ↑ base	10% ↑ base
5	Increase % of identified UPL cases resolved annually.	TBD	5% ↑ base	10% ↑ base	
<b>B. Access</b>	1	Decrease the number of people annually with legal needs that are not being served (those unqualified /unable to serve due to lack of resources), as measured by numbers provided by GLSP and ALAS.	TBD	10% ↓ base	20% ↓ base
		Increase the number of people annually served by GLSP and ALAS.	TBD	10% ↑ base	20% ↑ base
	2	Increase the number of hours volunteer lawyers provide annually on pro bono matters as measured by reporting and/or member surveys.	TBD	10% ↑ base	20% ↑ base
		Increase the number of lawyers annually who provide pro bono service as measured by reporting and/or member surveys.	TBD	10% ↑ base	20% ↑ base
	3	Increase the awareness and availability of court or bar provided self-help legal resources in courthouses/public libraries throughout the state as measured by the numbers received from court and library personnel.	TBD	5% ↑ base	10% ↑ base
		Increase awareness of the importance of access to justice issues through educational and lobbying efforts aimed at bar members, the public and the legislature, as measured by:	TBD	10% ↑ base	20% ↑ base
	4	• Increased member funding for access programs	8%	12%	16%
		• Increased member participation in funding access programs	TBD	5% ↑ base	10% ↑ base
		• Increased public funding for access programs	TBD	5% ↑ base	10% ↑ base
		• Increased legislative funding for access programs	TBD	5% ↑ base	10% ↑ base
<b>C. Member Services</b>	1	Increase % of lawyers indicating, by a survey, that our services and resources have:	NA	Base	10% ↑ base
		• Enhanced their professional lives	NA	Base	10% ↑ base
	2	Increase number of people participating in the following key programs who indicate a professional and personal enhancement:	TBD	5% ↑ base	10% ↑ base
		• LPM	TBD	5% ↑ base	10% ↑ base
		• CLEs	TBD	5% ↑ base	10% ↑ base
		• LAP	NA	Base	10% ↑ base
	3	• Wellness	NA	Base	5% ↑ base
		Increase satisfaction with being a lawyer, as measured by survey.	NA	Base	5% ↑ base
	4	Decrease # of known lawyer suicides annually.	NA	Base	5% ↓ base
	<b>D. Reputation</b>	1	Increase % of public with a positive view of the legal system as measured by a bi-annual survey.	TBD	5% ↑ base
Increase the positive perception of the legal profession through the media as measured by the number of positive exposures -			TBD	10% ↑ base	15% ↑ base
2		• Identified by the Communications Department.	TBD	10% ↑ base	15% ↑ base
		• Originated by the Communications Department.	TBD	5% ↑ base	10% ↑ base
3	Increase % of Bar members who have a positive view of the State Bar as measured by an annual survey of Bar members.	TBD	5% ↑ base	10% ↑ base	
4	Increase the public's awareness that the State Bar is diligently and proactively prosecuting lawyers who violate the public trust as measured by bi-annual surveys of the public.	TBD	5% ↑ base	10% ↑ base	
<b>E. Lawyer Competency</b>	1	Increase # of section-sponsored CLE's and the % of section members who annually attend them.	TBD	5% ↑ base	10% ↑ base
	2	Improve technology training and provide CLE credit.	TBD	+1	+2
	3	Increase # of members who utilize LPM resources.	TBD	5% ↑ base	10% ↑ base
	4	Increase % of CLEs that contain a wellness component.	TBD	10% ↑ base	20% ↑ base
	5	Require all Section-sponsored CLEs to have one hour of ethics for every 6-hours of instruction.	TBD	5% ↓ base	10% ↓ base

## Our Critical Success Factors and Barriers

## Our Strategies

Priority

CSFs & Barriers

- Adequate staffing for investigations
- High awareness of disciplinary process
- Lack of transparency in discipline process
- Lack of effective education for lawyers about the nature of grievance
- Lack of adherence to the law
- Lack of lawyers to serve people
- Lack of enforcement of rules

<b>A1</b>	Support disciplinary rules committee in their efforts to revise rules to streamline the process and to address transparency and implement <u>appropriate recommendations</u> .
<b>A2</b>	Publicize outcome of successful UPL cases to inform the public and increase public awareness of UPL.
<b>A3</b>	Develop a non-disciplinary system for intervention with respect to mentally impaired lawyers.

CSFs & Barriers

- Significant funding for servicing needs
- Adequate # of service providers committed to pro bono
- Appropriate means of communicating availability of services
- Willingness to house resources
- High participation in CLE and learning
- Higher awareness of the value of receiving higher education
- Lack of awareness of the problem by the public, legislature and lawyers

<b>B1</b>	Promote increased state and federal funding for criminal and civil legal access programs.
<b>B2</b>	Encourage reporting of annual pro bono hours.
<b>B3</b>	Establish Bar-supported self-help legal resources in each circuit to increase access to information.
<b>B4</b>	Encourage the incorporation of the importance of access to justice as part of CLE in general.
<b>B5</b>	Promote and develop additional access to justice initiatives in addition to the recommendations of the Civil Legal Services Task Force.

CSFs & Barriers

- High awareness of service availability and the benefits
- Better coordination with law schools on setting expectations for our lawyers
- Better awareness of the reality of practicing and balancing life
- High stress, life imbalance, over extension
- Lack of perspective on expectations
- Lack of control over the practice
- Unwillingness to talk about weaknesses

<b>C1</b>	Develop recommended programs and services to better enhance members' professional and personal lives.
<b>C2</b>	Educate members about services and resources which can enhance their professional practice.
<b>C3</b>	Educate future lawyers about expectations of being lawyers.
<b>C4</b>	Encourage wellness programming to improve work/life balance.
<b>C5</b>	Recommend an approach for adapting to changes in the delivery of legal services.

CSFs & Barriers

- More competent lawyers
- Perception that we are adequately policing our own
- High awareness of our good work
- High awareness of the perception lawyers' actions have on the public's perception
- Lawyers behaving badly
- Low public perception of lawyers
- Perceived bias that we are self-serving in addressing this
- Lack of ability to be open about disciplinary matters (confidentially)

<b>D1</b>	Promote the positive role of lawyers and the value of the legal system through various media
<b>D2</b>	Improve communications with the public about the disciplinary system and its outcomes.

CSFs & Barriers

- High participation in CLE and learning
- Higher awareness of the value of receiving higher education
- Lack of evaluation of learning
- Low expectation of value
- "Know-it-all" attitude
- Inability to accurately measure competency

<b>E1</b>	Work with the Sections to increase awareness, visibility and value of Section CLEs.
<b>E2</b>	Educate members thru CLE how to avoid common ethical complaints.

*\*Additional sub-strategies appear in the Appendix document)*

<b>Our Priorities</b>	
<b>Priority Strategy</b>	<b>Who</b>
A1. Support disciplinary rules committee in their efforts to revise rules to streamline the process and to address transparency and implement appropriate recommendations.	Bob Kauffman
A2. Publicize outcome of successful UPL cases to better inform public.	UPL
B1. Promote increased state and federal funding for criminal and civil legal access programs.	ACL
B4. Encourage the incorporation of the importance of access to justice as part of CLE in general.	Sections, Nicki Vaughan
B5. Promote and develop additional access to justice initiatives in addition to the recommendations of the Civil Legal Services Task Force.	Bob Kauffman, Pat O'Connor
C1. Develop recommended programs and services to better enhance members' professional and personal lives.	Jeff Kuester, Wellness Taskforce, LAP
C2. Educate members about services and resources that can enhance their professional practice.	Communications
C5. Recommend an approach for adapting to changes in the delivery of legal services.	TBD
D2. Improve communications with the public about the disciplinary system and its outcomes.	TBD
E1. Work with the Sections to increase awareness, visibility and value of Section CLEs.	Sections, Communications

<b>When</b>	<b>Our Monitoring Plan</b>
<b>Executive Committee</b>	<b>Are we doing what we said we were going to do?</b> The Executive Committee will review the strategic plan at each meeting to ensure continued progress.
<b>Quarterly</b>	<b>Are we getting the results we want to get?</b> The Board will review each priority strategy and updates on any objectives for which information is available.
<b>Annually</b>	<b>What adjustments do we need to make to our targets and our priorities?</b> The plan will be updated and an annual report provided at the annual meeting.

**STATE BAR OF GEORGIA  
EXECUTIVE COMMITTEE  
MINUTES  
April 15-16, 2016  
Mansion on Forsyth Park/Savannah, GA**

Members Participating:

Robert J. Kauffman, President; Patrick T. O'Connor, President-elect and Treasurer; Brian D. (Buck) Rogers, Secretary; John R.B. Long, YLD President; Jennifer Campbell Mock, YLD President-elect, Thomas R. Burnside, III; Elizabeth Louise Fite (by phone); Kenneth B. Hodges, III; Phyllis Holmen; David S. Lipscomb; and Nicki Vaughn.

Members Absent:

Patrise M. Perkins-Hooker, Immediate Past President; and V. Sharon Edenfield, YLD Immediate Past President.

Staff Participating:

Sharon Bryant, Chief Operating Officer; Jeff Davis, Executive Director; Paula Frederick, General Counsel; Steve Laine, Chief Financial Officer; Bill NeSmith, Deputy General Counsel, and Thomas Worthy, Director of Governmental Affairs.

Future Meetings Schedule

President Bob Kauffman reviewed the Future Meetings Schedule.

Executive Committee Minutes

The minutes of the February 10 and March 4, 2016 meetings of the Executive Committee were approved by unanimous voice vote.

Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee, by unanimous voice vote, approved the following resignation requests: Peter R. Roberts-608825; Charles David Lee-325191; John T. Sanders IV-625705; John B. Brewer III-080305; Bryan C. Ng-765201; Karl G. Blume-064513; Philip Dailey Morgan-522879.

Members Requesting Disabled Status

Pursuant to State Bar Rule 1-202, the Executive Committee, by unanimous voice vote, approved the following requests for disabled status: John William Rhyne Jr.-602460; Rachel Duggan-Caputo-108944; Lisa Dionne Wright-268781; Jerry Boykin-073250; Charles Walker Ingraham-383125.

Member Request: Appeal to Waive Exam/Failure to Register (David Wagner Jones, Jr.)

The Executive Committee, by unanimous voice vote, granted a request by David Wagner Jones, Jr., to waive the retaking of the bar exam, but required him to submit to Fitness, pay active dues from 2012 forward, including assessments and late fees, complete the



Transition into Law Practice Program in lieu of completing any other CLE requirements, and that Membership reflect his effective enrollment date-as the date he registers with the Membership Department.

Approval of the 2016-2017 State Bar Budget (and Dues Recommendation)

Following a report by President-elect and Treasurer Patrick T. O'Connor, the Executive Committee, by unanimous voice vote, approved and recommended to the Board of Governors the 2016-2017 Proposed (2<sup>nd</sup> Draft) State Bar and Bar Center Budgets (Exhibit A). The budgets reflect:

1. Dues maintained at \$248 for active members and \$124 for inactive members, which reflects no dues increase; and
2. Section dues to be reflected on the dues statement ranging from \$10-\$35; and
3. Continuation of assessments required by Bar Rules regarding the Clients' Security Fund (\$100 @ \$25/year) and Bar Center Facility (\$200 @ \$50/year); and
4. Continuation of a \$100 opt-out contribution for the Legislative and Public Education Fund; and
5. A suggested \$300 opt-in provision for individual contributions and a \$100 opt-in provision for young lawyers' contributions, for the Georgia Legal Services Program.

Treasurer's Report

Treasurer Patrick T. O'Connor reported on the Bar's finances and investments. The Executive Committee received copies of the Operations and Bar Center Consolidated Revenues and Expenditures Report as of February 29, 2016; Income Statement YTD for the Eight Months Ended February 29, 2016; Bar Center Revenues and Expenditures Summary for the Eight Months Ended February 29, 2016; State Bar Balance Sheet for February 29, 2016; Summary of Dues and Voluntary Contributions at February 29, 2016; Investment Performance Comparison 2006-2016, and Legislative Fund and Cornerstones of Freedom Fund Activity Reports through February 29, 2016.

President-elect and Treasurer O'Connor referred the Executive Committee members to the minutes of the February 12, 2016 meeting of the Audit Committee wherein the Committee recommended that the State Bar conduct background checks (credit report and criminal history report) on all current Bar employees serving in a fiduciary capacity, and that the State Bar conduct background checks on all new Bar employees who will serve in a fiduciary capacity as part of the hiring process.

The Executive Committee received a copy of the minutes of the 1) March 23, 2016 Investment Committee meeting, 2) February 25 and March 25, 2016 Finance Committee meetings, and 3) February 12, 2016 Audit Committee meeting.

#### Approval of Mauldin & Jenkins Audit Report

Following a report by President-elect and Treasurer Patrick T. O'Connor, the Executive Committee, by unanimous voice vote, approved and recommended to the Board of Governors the State Bar's audited financial statements from Mauldin & Jenkins for the year ended June 30, 2015.

#### Committee to Promote Inclusion in the Profession

Derrick Pope, Co-chair of the Committee to Promote Inclusion in the Profession, reported on the Committee's Legacy Initiative that involves the establishment of a permanent exhibit at the National Center for Civil and Human Rights (NCCHR) devoted to the role of the legal profession in the civil rights movement. The Committee will announce this initiative at its 2016 Commitment to Equality Awards Program on May 12. This is a multi-year project that will involve 1) creating a Content Council that will identify appropriate leaders and a timeline, 2) developing the content and nature of the exhibit, working with a NCCHR curator, and 3) raising funds for and marketing the exhibit. He also reported that The Atlanta Hawks Foundation has expressed the possibility of a partnership in this endeavor.

#### Other Funding Requests

The Executive Committee received special event funding requests from the following organizations: Southern Center for Human Rights (\$2,500); Georgia Appleseed (\$2,500); GABWA 2016 Glitter Gala (\$3,000); Georgia Asian Pacific American Bar Association (\$3,000); and Urban League (\$2,000). The Executive Committee also received a copy of the General Ledger of the Conference Sponsorship Account for the period of July 1-March 31, 2016 reflecting a balance of \$1,700. In order to stay within the budgeted line item, the Executive Committee, by majority voice vote, approved funding the Southern Center for Human Rights request at \$1,000 and the Georgia Appleseed request at \$700. The Executive Committee directed Jeff Davis to draft a policy on the proper use of members' dues for sponsorship requests.

#### Proposed New Section: Security and Privacy Section

President Bob Kauffman and Jeff Davis reported on a request for the creation of a new Security and Privacy Section. When a copy of the bylaws was sent to all sections for comment, the Technology Law Section's (TLS) Executive Committee commented that the new section would be a direct overlap of the TLS's focus and proposed to make concerted efforts to develop more privacy and data security topics and events in its offerings. These efforts would include changing the Section's bylaws to wrap privacy and security into the Section, changing the name of the Section to be inclusive of privacy, security and technology, restructuring the TLS's Executive Committee to have a

permanent member who has a primary focus on privacy and security, and developing more CLE programming on security and privacy issues. The Executive Committee took no action on the request so as to allow time, for at least one year, for the TLS to address the privacy and security issues and to see how the measures work under a new mediated settlement.

#### Business Court Expansion

Following a report by Bill NeSmith, the Executive Committee, by unanimous voice vote, approved recommending to the Board of Governors proposed Atlanta Judicial Circuit Rule 1004 (Exhibit B), Metro Atlanta Business Case Division, which gives other counties the ability to join the expanded multi-county Metro Atlanta Business Court upon approval of the joining court and the Business Case Division. Gwinnett County seeks to be the first Adopting Metro Court to join the Business Court Program.

#### Bar Staff Credit Card Request

Following a report by Jeff Davis, the Executive Committee, by unanimous voice vote, approved providing the Section Liaison access to a State Bar corporate credit card with a \$10,000 limit.

#### Judicial Qualifications Commission (JQC) Appointment

President Bob Kauffman opened up the floor for a discussion on the legislative bill and constitutional amendment reconstituting the JQC and what specific measures, if any, the State Bar may want to take moving forward. Options could include a hard or soft media campaign in opposition of the constitutional amendment to a more measured approach. In the meantime, he plans to explore various options and costs, and to meet with key legislators before the issue is discussed at the May Board of Governors meeting. He reported that this issue will be a topic of discussion at tomorrow's Executive Committee/Supreme Court joint meeting.

President Kauffman discussed the names of lawyers who have been suggested for an appointment to the JQC to replace the position formerly held by Lester Tate.

#### Executive Committee Session

Following a motion and second, the Executive Committee went into Executive Session to discuss the Distinguished Service and the Employee of the Year Awards. Thereafter, the Executive Committee moved out of Executive Session by unanimous voice vote.

#### Strategic Plan

President Bob Kauffman reviewed the priority strategies of the Strategic Plan. The review of the disciplinary system is underway and Paula Frederick will be reviewing some of the proposed revisions at the Executive Committee/Supreme Court joint meeting. Thomas Burnside is going to discuss with the UPL Standing Committee how better to inform the public about the successful outcomes of UPL cases. President Kauffman

reported that the Georgia Legislature restored grants to civil legal services providers for victims of domestic violence to pre-recession level of \$2.5 million and that President-elect and Treasurer Pat O'Connor and Thomas Worthy will be attending the annual ABA Day in Washington to support LSC funding and access to justice in general. Nicki Vaughan reported that the State Bar's Access to Justice Committee is looking at developing short videos to be shown before CLE programs on the positive impact of pro bono services that will inspire volunteers to engage in advocacy programs. It already has one video proposal, but is seeking a second. Paula Frederick reported that innovation in the delivery of legal services is a topic of the upcoming Convocation on Professionalism. President Kauffman reported that the Attorney Wellness Task Force is focusing on members' better enhanced personal and professional lives. Improving communications with the public about the disciplinary system and its outcomes is still a work in progress as the disciplinary system is under review. Derrick Stanley, Section Liaison, is working with the Sections to make sure they continue to provide CLE's and other services that benefit their members.

#### YLD Report

YLD President Jack Long reported on the activities of the Young Lawyers Division. He announced that the YLD raised \$135,000 for Camp Lakeside through its annual Signature Fundraiser. The Legal Food Frenzy kicks off on April 18 with a goal of 1.3 million pounds of food, hoping to make a cumulative total of 5 million pounds of food in the first five years of the program. He is in the process of planning a 2-day regional summit that will take place in June in Atlanta. It will be attended by YLD leaders from the bordering states to share ideas and programs. The YLD received a \$3,000 grant from the ABA to help defray the costs.

#### Executive Director's Report

Jeff Davis reported on a recent security scare at the State Bar when a suspicious letter was sent to the Consumer Assistance Program. Having already received a recommendation from the Insurance Committee that the State Bar look at enhancing its security, and with Executive Committee approval, the State Bar has received two proposals in response to an RFP. He reported that the Bar's tenants will be consulted before the Bar moves forward with any security enhancements.

#### Office of General Counsel Report

Paula Frederick reported on the activities of the Office of General Counsel. She announced that Bill Smith will be retiring on December 31.

#### Executive Session

Following a motion, second, and unanimous voice vote, the Executive Committee went into Executive Session to discuss pending litigation. Thereafter, the Executive Committee moved out of Executive Session by unanimous voice vote.

### Legislative Report

Thomas Worthy provided a recap of the 2016 Legislative Session.

### Lawyers for Equal Justice

The Executive Committee received a copy of a letter from Lawyers for Equal Justice acknowledging the State Bar's \$85,000 donation towards the incubator program, and a *Daily Report* article titled *Bar's Incubator for New lawyers Launches, Gets Pro Bono Director*.

### 2017 Election Schedule

The Executive Committee received a copy of the State Bar of Georgia 2017 Election Schedule.

### ABA Resolution 105 – Model Regulatory Objectives for the Provision of Legal Services

The Executive Committee received a copy of an ABA resolution on Model Regulatory Objectives for the Provision of Legal Services.

### ABA Resolution 109 – Uniform Bar Examination

The Executive Committee received a copy of an ABA Resolution urging the bar admission authorities in each state and territory to adopt expeditiously the Uniform Bar Examination.

### ABA Journal Articles

The Executive Committee received a copy of an *ABA Journal* article titled *This law school will accept the GRE from applicants; will other follow?*

### Daily Report Articles

The Executive Committee received copies of article from the 1) *Daily Report* titled *Study: Drinking Is a Problem for 1 in 3 Lawyers*, 2) *The New York Times* titled *High Rate of Problem Drinking Reported Among Lawyers*, and 3) *American Society of Addiction Medicine* titled *The Prevalence of Substance Use and Other Mental Health Concerns Among American Attorneys*.

### Old Business

There was no old business.

### New Business

There was no new business.

### Adjournment

There being no further business the meeting was adjourned.

Executive Committee/Supreme Court Retreat

The Executive Committee and Justices of the Supreme Court of Georgia conducted a joint meeting on April 16, 2016 to discuss pending issues and developments affecting the administration of justice and the regulation of the legal profession. Those present for the meeting from the Supreme Court of Georgia were Chief Justice Hugh P. Thompson, Justice Carol W. Hunstein, Justice Harold D. Melton, Justice David E. Nahmias, Justice Keith R. Blackwell, and Therese “Tee” Barnes, Clerk of Court. All members of the Executive Committee were present except for Immediate Past President Patrise Perkins-Hooker and YLD Immediate Past President Sharri Edenfield. Bar staff in attendance included Sharon Bryant, Jeff Davis, Paula Frederick, Steve Laine, Bill NeSmith, and Thomas Worthy.



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Brian D. (Buck) Rogers, Secretary

Approved:



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Robert J. Kauffman, President

**ANNUAL REPORT OF THE OFFICE OF THE GENERAL COUNSEL**  
**FOR BAR YEAR 2015-2016**

By: Paula J. Frederick, General Counsel

I hope that you will review the Annual Report of the Office of the General Counsel when it is posted to the Bar's website later this month. It includes reports from the Investigative and Review Panels of the State Disciplinary Board, the Clients' Security Fund, the Formal Advisory Opinion Board, the *Pro Hac Vice* program, and the Trust Account Overdraft Notification Program. It also includes a summary of this year's changes to the Bar Rules. Following the reports is a list of the Supreme Court Orders issued in disciplinary cases between May 1, 2015 and April 30, 2016; for access to an order simply click on the lawyer's name in the Member Directory. If you have any questions about the work of the Office feel free to contact me.

You and other dedicated Bar volunteers work along with the staff of the Office of the General Counsel each year to ensure that the disciplinary process operates smoothly. The Office is indebted to each of you, and to every Georgia lawyer who volunteers his or her time in service to the legal profession.

***Staff***

The staff of the Office of the General Counsel continues to be its greatest asset. Former General Counsel Bill Smith, who continues to work with the office as Ethics Counsel, has announced that he will retire at the end of 2016. You will have the opportunity to celebrate Bill and mark his tenure as General Counsel during the midyear meeting in January.

Deputy Bar Counsel William “Bill” NeSmith is responsible for drafting changes to the Bar Rules, staffing the Clients’ Security Fund, and managing the Bar Counsel unit. Paralegal Betty Derrickson conducts the initial review of Clients’ Security Fund files and coordinates the work of the Fund. Senior Assistant General Counsel John Shiptenko acts as staff liaison to the Formal Advisory Opinion Board and handles insurance, contractual and employment matters for the Bar. Deloise Mathews provides secretarial support to the Bar Counsel unit.

Deputy General Counsel Jenny Mittelman continues to serve in the managing attorney role for the OGC. She handles a disciplinary caseload in addition to supervising the lawyers who handle disciplinary cases. Senior Assistant General Counsel Jonathan Hewett supervises the grievance counsel and prosecutes disciplinary cases. Assistant General Counsel Becky Hall, Tina Petrig and William “Bill” Cobb continue to serve as ethics and disciplinary counsel to the Bar assisted by investigators Lamar Jackson and Dean Veenstra.

Grievance Counsel Wolanda Shelton conducts the preliminary investigation of the grievances which the office receives each year with assistance from paralegal Len Carlin and legal secretary Cathe Payne. Connie Henry, Clerk of the State Disciplinary Board, continues to coordinate the activity of the disciplinary boards. Regina Putnam Kelly serves as Trust Account Overdraft Notification Coordinator. Paralegals Carolyn Williams and Kathy Jackson, legal secretaries Deborah Grant and Bobbie Kendall, and Receptionist Jessica Oglesby round out the OGC staff.



### ***Lawyer Helpline***

The Office of the General Counsel operates a Lawyer Helpline for members of the State Bar of Georgia to discuss ethics questions on an informal basis with an Assistant General Counsel. The Helpline averages 21 calls, letters or email requests each weekday.

### ***Continuing Legal Education***

As always, the Office of the General Counsel provides staff counsel to speak at CLE seminars and to local bar groups upon request. OGC lawyers participated in more than 60 CLE presentations again this year.

### ***Committees***

OGC staff also worked with the Wellness Task Force, the Disciplinary Rules and Procedures Committee, the Advisory Committee on Legislation, the Insurance Committee, the Task Force on E-Discovery, ITLS, and the Elections Committee.

### ***Thanks***

The staff and I remain committed to serving each member of the State Bar of Georgia with efficiency and professionalism. Please call upon us whenever we can be of help to you.

**Year-to-Date Report on Lawyer Regulation  
May 1, 2014 through April 30, 2015**

Grievance forms requested and sent to public .....	3,224
Grievance forms sent back to Office of General Counsel for screening .....	1,997
Grievances pending as of 4/30/2014.....	<u>403</u>
TOTAL .....	2,400
Grievances referred to State Disciplinary Board members.....	207
Grievances being screened by Grievance Counsel (GC) .....	349
Grievances closed by Grievance Counsel.....	1,808
Grievances moved to moot status by GC after attorney was disbarred.....	<u>36</u>
TOTAL .....	2,400

**Regulatory Action May 1, 2014 through April 30, 2015**

	<u>Attorneys</u>	<u>Cases</u>
Letters of Admonition Accepted	18	19
Investigative Panel Reprimands Administered	16	19
Review Panel Reprimands	8	11
Public Reprimands	4	7
Suspensions	26	32
Disbarments/Voluntary Surrenders	<u>22</u>	<u>35</u>
	94	123
Reinstatements Granted	8	
Reinstatements Denied	0	



## **Insurance Committee Annual Report for 2015-2016**

**May 17, 2016**

### Insurance Committee Mission:

The Insurance Committee (hereinafter “committee”) acts in accordance with Article VIII, Section 2 of the State Bar of Georgia (hereinafter “State Bar”) Bylaws, at the direction of the President of the State Bar. The committee shall serve as an advisory committee to the State Bar’s Executive Committee, Officers, Executive Director, and General Counsel. Subject to the purposes established for this committee by the State Bar President, this committee is expected to review the State Bar’s insurance coverage, and offer input and recommendations to the Executive Director and Executive Committee regarding best practices, coverage types, liability amounts, protection and risk management considerations, insurance broker retention, State Bar policies concerning insurance and liability, and other related matters the committee believes the State Bar should consider.

### Committee Members & Staff:

Members: Sharon W. Ware, Chair; Elizabeth L. Fite; Paul L. Groth; Charles Minor McDaniel, Jr.; Brian DeVoe Rogers, Executive Committee Staff Liaison

Staff: Jeff Davis, Executive Director; William D. NeSmith, III, Deputy General Counsel; John J. Shiptenko, Senior Assistant General Counsel; Deloise Mathews, Legal Assistant

### Summary of Recommendations

#### **Insurance Broker**

The committee from State Bar year 2014-2015 recommended to the Executive Director that the State Bar evaluate the services provided by its insurance broker at least every five years, beginning in 2015. The recommendation was accepted by the Executive Director. In September 2015, the committee approved a Request for Proposal (RFP) that was published on September 28, 2015. The State Bar received three proposals; one from Alden and Associates, one from Manry & Heston, and one from Greyling Insurance Brokerage. On December 14, 2015, the

committee conducted interviews and recommended to the Executive Committee that the State Bar hire Greyling Insurance Brokerage to serve as the State Bar's insurance broker.

### **Insurance Committee Internal Operating Rules of Procedure**

Proposed internal operating rules of procedure have been drafted and are under consideration by the committee. The committee will review and discuss the proposed internal rules at the next meeting, and if agreed upon will submit them to the Executive Committee for review and final approval.

### **Bar Center Security**

The committee recommended to the Executive Committee that the State Bar consider hiring a security consultant to review the current security measures and protocol of the Bar Center (Atlanta office). The recommendation was accepted by the Executive Committee. In February 2016, the committee approved a Request for Proposal (RFP) that was published on March 10, 2016. The State Bar received two proposals; one from Global Managed Risk Professionals and one from Security Options Consulting. On May 4, 2016, the committee conducted interviews and recommended that the Executive Committee not hire a security consulting firm at this time. Instead, the State Bar of Georgia should utilize its internal resources, which include staff investigators with military and security backgrounds, in coordination with the State Bar's building management company, Cushman & Wakefield, and the State Bar's security officer services company, AlliedBarton, to assess the State Bar's security infrastructure, technology, policy, and training needs. Once their assessment is complete, they should report their findings and suggestions to the Executive Director who will share the report with appropriate State Bar personnel and committees, thereby allowing the State Bar to determine at a later date whether the services of a security consulting firm are needed.

### **Insurance Renewals**

Greyling Insurance Brokerage will present their insurance renewal proposal to the Committee at its June 2016 meeting. The committee will review the proposal and make a recommendation regarding renewal to the Executive Director. The State Bar's insurance policy coverage period is from July 1 to June 30 each year.

### **Conclusion**

The committee worked diligently with the State Bar staff to help procure the services of an insurance broker that will assist the State Bar in securing comprehensive insurance coverage and developing risk management and insurance solutions that protect State Bar assets and minimize

risks. The committee continues to evaluate the security needs of the State Bar and take steps to make sure a valuable assessment of existing infrastructure, technologies, and policies is conducted so that security vulnerabilities and limitations are identified. Thank you to each member of the committee and each participating staff member for their time, diligence, and thoughtfulness in these efforts.

Sharon W. Ware  
Chair, 2015-2016  
State Bar of Georgia Insurance Committee  
[Sharon.w.ware@statefarm.com](mailto:Sharon.w.ware@statefarm.com)  
(404) 728-5400

**CONSUMER ASSISTANCE PROGRAM**  
**STATE BAR OF GEORGIA**

April 5, 2016

The Consumer Assistance Program (CAP) continues to serve both the public and members of the Bar, as it has since 1995. So far during the last calendar year CAP has handled around 11,259 new or “unique” contacts (calls, letters, emails, faxes and rare walk-ins). This does not include repeat calls, letters, emails, or follow-up contacts. CAP itself has handled 79.32% of these contacts. The remaining 20.68% have been referred to the Office of General Counsel (OGC) for investigation by way of grievances sent to persons complaining about alleged violations of the Georgia Rules of Professional Conduct. It is beyond the scope of CAP’s responsibility to investigate or handle allegations of such violations and ethical misconduct.

CAP’s staff consists of three administrative assistants and two attorneys. CAP directly answers “live” about 97% of the calls received. The CAP Helpline is used when no one is available to answer calls live or for calls that come in after business hours. Calls that are not answered live are returned within the same or the next working day. CAP’s response to the voluminous mail, emails, and faxes, is usually within one day.

CAP’s two attorneys often contact members of the Bar by telephone, fax, or letter, at the request of clients. It is often helpful for attorneys to receive a confidential, non-disciplinary courtesy call, letting the attorneys know that their clients have contacted the Bar with various concerns or complaints. In order to facilitate communication between clients and attorneys, CAP notifies attorneys that their clients wish to hear from them, do not understand what is happening on their cases, need updates on case status, or, in the case of former clients, need their files. Realizing that CAP has heard only one side of the situation, CAP does not presume to advise attorneys on how to practice law or assert the client’s position is true and correct. Each CAP call is just a “heads-up” or courtesy call to the attorney. None of CAP’s actions in this regard reach attorneys’ permanent records, and all are confidential.

CAP is the contact point of the Bar for persons complaining about attorneys who are delinquent in paying their court ordered child support. Under OCGA 19-6-28.1 an attorney obligated to pay child support can be administratively suspended from the practice of law, if the custodial parent submits a certified copy of an order verifying the arrearage. The suspension is lifted once certain requirements are met in accordance with the O.C.G.A. and Bar rules. There have been no such cases during this year.

CAP is also a contact point for the Judicial District Professionalism Program (JDPP). This involves inquiries from lawyers or judges concerning unprofessional conduct and incivility among peers. This program is private, confidential, voluntary, and non-disciplinary in nature. Its purpose is to open channels of communication by the informal use of local peer influence. There have been no JDPP cases during this time period.

CAP remains within its annual budget of \$566,563, and it is anticipated that it will continue to do so.

*THIRTY-SIXTH ANNUAL REPORT TO*  
*THE HONORABLE JUSTICES OF THE SUPREME COURT*  
*AND THE HONORABLE MEMBERS OF THE BOARD OF*  
*GOVERNORS*  
*OF THE STATE BAR OF GEORGIA*

*BY*  
*THE COMMITTEE ON THE ARBITRATION OF ATTORNEY FEE*  
*DISPUTES*

The Committee on the Arbitration of Attorney Fee Disputes is privileged to submit the following report concerning the Fee Arbitration Program's thirty-sixth year of operation.

*1. Committee Membership.*

Ms. Judy C. King, a lawyer in Lawrenceville, was re-appointed to a three year term and served on the Committee as its Chairperson. Mr. David S. Lipscomb, a lawyer from Lawrenceville, was appointed for a two year term to fill an unexpired term. Mr. Stanley W. Levitt, a lawyer from Marietta, was re-appointed for a three year term. The lawyer members returning to serve on the Committee were Mr. John M. DeFoor, a lawyer with The Griffin Law Firm, P.C., in Snellville, Ms. Rosalind A. Rubens-Newell, a lawyer with Invest Atlanta, in Atlanta and Mr. Randy Scott Slater, a lawyer with Slater and Wilensky, LLC, in Atlanta. Ms. Iris Rice, from Smyrna, was re-appointed as a public member for a three year term. The public members returning to serve were Mr. Alan Granath, from Dunwoody, and Ms. Jacquelyn C. Poole, from Marietta.



## 2. Participation.

Interest by the public and the profession continued during the Program's thirty-sixth year. Twelve hundred and eighty five (1,285) parties requested and were mailed information regarding the Fee Arbitration Program during the year. Referrals by the Consumer Assistance Program accounted for 69% of the inquiries, while 30% of the inquiries were direct calls to the Fee Arbitration staff from the parties involved in the dispute. Referrals from the Office of General Counsel accounted for less than 1% of the inquiries. Many more telephone calls were received, and a number of fee disputes were resolved informally by the Fee Arbitration staff without the filing of a Petition. Copies of the Program's Rules and a Petition form were sent to all persons who requested further information. An informational brochure was also provided to aid them in understanding this service of the State Bar. In addition, the parties were encouraged to initiate settlement communications prior to returning the completed Petition. The staff furnished consultation time in each case to explain the Fee Arbitration process. Under the Rules, the State Bar administers the Program in a neutral, rather than representative, capacity. Therefore, no advice was rendered on the merits of the matter in issue.

## 3. Current Activity.

Today 565 cases are in process. Approximately 107 new disputes over attorney fees are reported to the Fee Arbitration Program each month. The Committee, its staff, and the parties are able to resolve a majority of these without the necessity of the full arbitration process. Approximately 25 hearings are

scheduled each month, but due to last minute settlements, hearings and awards to conclude the disputes are required in about 10 cases per month. Amounts in controversy vary widely from nominal sums to fees as high as \$4,000,000, with the average case involving \$14,235. Many fields of law are involved, but the areas of criminal law at 34% and family law at 28% produce the most cases.

#### **4. Hearings.**

The cases were heard by our Arbitrators who volunteered to be on a panel an entire day to hear as many as five cases for the Fee Arbitration Program. Each arbitrator who served received a lapel pin in appreciation and recognition of their volunteer service to the Bar through the Fee Arbitration Program. Each arbitrator also received a letter of appreciation from the Supreme Court of Georgia.

**5. Rules Changes.** The Committee is considering possible rules changes that would provide enforcement of the fee arbitration award when a lawyer does not agree to be bound by the decision of the arbitration panel.

#### **6. Appreciation.**

The Committee wishes to take this opportunity to thank and express its appreciation to Chief Justice Hugh P. Thompson, as well as all the other members of the Supreme Court, for their overall support and assistance in establishing rosters of volunteer arbitrators throughout Georgia and for their dedication in acknowledging with letters of appreciation to those lawyers and public members who serve voluntarily to the Program.

Appreciation also goes to the arbitrators who volunteered, many of whom have served since the inception of the Program thirty six years ago. The success of

the Program has resulted to a great extent from the dedicated efforts and sound judgment of these volunteers.

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The Fee Arbitration Program is an effective system and one of the most utilized of all the public service programs operated by the State Bar in furtherance of its goal to improve the administration of justice in Georgia. It now serves as a model for other jurisdictions implementing similar programs.

The Committee hopes that all those who read this report will encourage other qualified attorneys and public members to volunteer as arbitrators for future cases. This important service benefits our profession and the public whom we serve. The Committee is most appreciative of your continued assistance in informing potential arbitrators of this method of illustrating the professionalism of the members of the State Bar of Georgia.

*Respectfully submitted, this  
17<sup>th</sup> day of May, 2016,  
Committee on the  
Arbitration of Attorney Fee  
Disputes*



*Judy C. King  
Chairperson*

## LAW-RELATED EDUCATION ("LRE") PROGRAM

Following are some of the LRE Program's 2015-16 highlights:

1. The Virtual Museum of Law: The Virtual Museum of Law ([www.thelawmuseum.org](http://www.thelawmuseum.org)) is designed to offer the same experience as the Bar Center's third-floor Museum of Law, for those who cannot travel to Atlanta. Like the physical Museum, the Virtual Museum has four "walls": Freedom's Call: The March for Civil Rights; An Independent Judiciary; Cruel and Unusual Punishment; and Famous Georgia and U.S. Trials. Each wall covers several significant cases (30 in all) from *Dred Scott* and *Brown v. Board of Education*, to *Marbury v. Madison*, to *Furman v. Georgia*, to Leo Frank and the Scopes ("Monkey") trial.

The Virtual Museum is not just a recreation of the physical Museum, however. Over the course of five years, short animated videos exploring each case in greater detail, hosted by the Bar's very own Professor Gloria McGee and her sidekick Striker, will be added to six case pages per year. The videos for 2015-2016, all of which will be posted by the end of May, are *Brown v. Board of Education* (civil rights), *Marbury v. Madison* (independent judiciary), *Furman v. Georgia* and *Gregg v. Georgia* (cruel and unusual punishment), and the Leo Frank Trial and the Lincoln Assassination (famous trials). Visitors can "tour" each wall to see the cases covered on that wall or can click on a wall name to go directly to that wall's cases.

All 30 cases are also currently supported by teacher-access-only LiveBinders, containing lesson plans, links to current events, and other resources related to that case and the key legal issues it raises. The civil rights, independent judiciary, and cruel and unusual punishment walls also have their own general LiveBinders. The LiveBinders are updated on a regular basis to reflect new developments and thus serve as a terrific starting point for teachers exploring legal themes in their classrooms. In addition, each video added to the site will be accompanied by a brief online quiz, with which teachers can assess their students' understanding and members of the public can test their knowledge.

2. Journey Through Justice ("JTJ") and Journey Through Justice On The Road Field Trip: The last JTJ for the 2015-16 school year will be on June 13, at which time approximately 11,400 students in grades 4-12 will have participated in JTJ this year. We will have conducted 153 Journeys, 27 of which were "On The Road," *i.e.*, held on the school's campus rather than at the Bar Center. Demand for JTJ continues to grow; we have more than a dozen schools on our waiting list

at any given time, and schools start reserving their JTJ dates as far as five years in advance. As of the writing of this report, there are 134 Journeys already scheduled for the 2016-17 school year.

3. Teacher Workshops: We conducted nine teacher workshops, serving 648 teachers. One of those workshops was held in Philadelphia as part of the American Bar Association's National LRE Conference and was one of only four sessions featured in Philly.com's article on the conference, a copy of which is attached. The teacher resource materials for that workshop, entitled "Hands Up, Don't Shoot! Free Press or Fair Trial?," have been posted on the Internet since October ([www.livebinders.com/play/play/1678908](http://www.livebinders.com/play/play/1678908)) and have received more than 3,300 views.

4. Teacher-Access-Only Course and Subject LiveBinders: We have created and regularly update additional online LiveBinders on a variety of legal topics, as well as course-specific LiveBinders for Legal Environment of Business, Essentials of Legal Services, Applications of Law, Legal Administrative Services, and 6<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> grade social studies. As with the Virtual Museum, each LiveBinder contains lesson plans, links to current events, and other resources related to that topic or course. The available LiveBinders can be viewed at <http://www.livebinders.com/shelf/custom/175847?show=Teacher+Access+Only+LiveBinders>.

5. Civics & Law Honor Roll: We have laid the necessary groundwork to launch the ABA Civics & Law Honor Roll for Georgia high school students in August. The Civics & Law Honor Roll recognizes secondary school students from throughout the United States who have demonstrated a commitment to civic learning and engagement. Created by the ABA Commission on Civic Education in the Nation's Schools, its purpose is to create enthusiasm for and reward academic and community volunteer achievements in civic education and engagement. To be eligible for recognition, students must not only demonstrate scholarship in civic education, but also spend a minimum of six hours participating in a community citizenship activity, such as attending a trial or volunteering in a candidate's election campaign for public office.

## Linking new age to ageless rights



Jeffrey Rosen, National Constitution Center president and CEO, said the conference aims to spark discussion on "teaching" and "helping the way we apply" the Bill of Rights. (AP/Chris Wedel)



GALLERY: Jeffrey Rosen, National Constitution Center president...

By John Timpone, Inquirer Staff Writer

POSTED: October 28, 2015

I'm rude, sunbathing in my backyard.

Szzz ... here comes your drone, taking a good, long look.

Have you just violated my constitutional rights?

A police officer shoots a black man. The white-walibled, internetted world instantly knows all about it. Can the officer possibly get a fair trial anywhere?

You really hate your high-school principal. So, in your own bedroom, you post on social media to call out his luscious, ugly stretch. Should your school be able to suspend you? Or would that trample your right to free speech?

I'm a police officer in a drug raid, and I catch you as the deal goes down. What's this? Why, your cellphone! Phone numbers, photos, email, evidence - but can I open it without a warrant?

James Madison could never have imagined our digital world. Yet we live by the Bill of Rights he helped create. The document shields personal liberties, limits the power of government, and sorts out the rights of states and state governments. Can those hallowed amendments be sustained against the plangent chorus of the 24/7 info-saturated world?

On Thursday and Friday, experts, teachers, and lawyers will gather at the National Constitution Center to ask just that question, when the American Bar Association hosts "The Bill of Rights in a Digital Age."

It's the group's annual National Law-Related Education Conference.

Keynotes include Philadelphia's Police Commissioner Charles H. Ramsey, who also joins civil-rights lawyer David Rudovsky, documentalist Spencer Platt, and others on a panel titled "Law Enforcement and Individual Rights in a Digital Age," and former Pennsylvania Gov. Ed Rendell, speaking on "Education for Democracy."

Part of the mission is to connect classrooms and courthouse. Among the preconference programs is one in which high-school



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#### Linking new age to ageless rights - Philly archives

city's teachers visit the federal courthouse to learn more about how the courts work. Harry Johnson of Whitford, Taylor & Preston LLP, in Baltimore chairs the committee organizing those events. "The whole point of what we do is education," he says. "We want civics teachers to take what they learn right back to their classrooms."

No one's talking about teaching the Bill of Rights. Rather, it's how we apply it to the world we have. It's a cliché that the Internet or Facebook or the communications age has "changed everything." But the law is where we take stock of what's really happening in our world, where we decide what we allow, what we don't, when we limit, when we punish - and when we do nothing. The Bill of Rights - it turns 225 late next year - encodes our values and aspirations, which each new technological wave challenges us to renew.

"It's not a question of transforming the Bill of Rights, but of articulating it, shaping the way we apply it," says Jeffrey Rosen, president and CEO of the Constitution Center. "Ours is an age of the mobile phone, the cloud, DNA mapping, surveillance cameras, Google Glass, genetic testing, facial recognition technology, and GPS tracking, all of which raise issues of privacy, surveillance - which is everywhere - and free speech. Google and Facebook have more power over millions more considered personal and private than any government. Police body cameras raise issues of policing, the common good, and public access. Drones are ubiquitous, with some police departments using them to track suspects. The challenge is to uphold and preserve what we have always valued in these new settings."

"Technology is changing at a pace that outstrips our ability to understand its implications," says Neelan Chutkan of the Constitutional Rights Foundation in Chicago. His session Friday is titled "Surveillance and Privacy in the 21st Century."

"The law always is playing catchup. We have to maintain our old ideas of rights and privacy while grappling with concepts such as virtual identity and semiautonomous capabilities of algorithms."

Thanks to the all-access Web, personal info is bought and sold on a global market in ISP providers, governments, businesses, and insurers. "We need to teach our children well. Our children live in a world," Chutkan says, "where their e-profile is open to all three public and private entities."

"Search and Seizure: The Marvel of New Technology" is a Thursday session on the Fourth Amendment with Seth Nadler of Eisenberg & Blum LLP, in New York. He's the one who brings up cellphones and warrants. "We teach these matters by looking at live movies and other popular media that film them," he says. "What happens when police raid a citizen job or track your cellphone? Cameras are getting smaller, drones are more and more prevalent. Even the Apple Watch raises Fourth Amendment issues."

Deborah Crayler of the State Bar of Georgia will host a presentation titled "Hands Up, Don't Shoot! Free Press or Fair Trial?" She will do a "what if?" in which Police Officer Darren Wilson is to be tried for the shooting of Michael Brown in Ferguson, Mo. (Her title includes the slogan among free demonstrators in Ferguson.) The question is: Could Wilson possibly get a fair trial?

Crayler will explore the collision between that right (the Sixth Amendment) and the right to a free press (the First Amendment). "At least since the trial of Bruno Hauptmann in the Lindbergh case, through the O.J. Simpson trial and others," she says, "media saturation has complicated fair-trial rights. In the digital age, all information is instantly available everywhere. Every locale is the same locale. How can we find an unbiased jury of peers? What can we do to preserve the right of defendants and maintain public confidence in the judicial system?"

Analysis Gogal of the Boston-based court education project Discovering Justice will conduct "First Amendment, High School Students, and Social Media: When Is Speech Not Free?" on Thursday.

"At the outset, our students believe that free speech is all-encompassing and cannot be limited," Gogal says. "But as they work through cases, they realize the reasons for the qualifications that can attach to free speech."

That's where that social media story comes into play. Gogal will discuss two cases with different outcomes. In the 2006 circuit court case *Layshock v. Hermitage School District*, a student sued a Pennsylvania district that punished him for creating a home online parody of his principal. In the 2011 case *Kowalski v. Berkeley County Schools*, a student sued her West Virginia high school for expelling her after she made a MySpace page ridiculing another student. The first student won, the second didn't. Why? What were the differences? "Students can discuss these cases," Gogal says, "and understand that their rights are important but also subject to some limitations."

Constitutionally, the sense seems to be, as Chutkan says, that "the Bill of Rights can stand up under the onslaught of change." Our job as citizens, he says, is to "balance the facts of our world and the common goods we hold dear." Rosen calls it a "creative but very necessary exercise we do and must keep doing every day."

But we have to do the work and teach the kids. As Chutkan puts it: "It's like the Netherlands. There's the dikes and there's the sea. You'd better pay attention to one, or the other will be on top of you."

[j@phillynews.com](http://phillynews.com)

215-654-4036@j@news

John Teapare will live-broadcast sessions from the Constitution Center on Thursday and Friday.

You May Like

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[MarkBee@emil.ly by Mark](#)

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[40degrees](#)

## Law Practice Management Program

(Abbreviated report for the 2015-2016 Bar Year)

This is a summary of program events scheduled and completed during the period July 1, 2015-May 13, 2016.

### Consultation Report

# of Consultations by City		# of Consultations by Firm Size		# of Consultations by Consultation Type	
Athens	1	Newnan	1	1 Attorney	20
Atlanta	12	P'tree Corners	1	2-4 Attorney	10
Decatur	3	Roswell	3	5-8 Attorney	1
Douglas	1	Statesboro	1	9-15 Attorney	0
Douglasville	5	Valdosta	1	16+ Attorneys	0
Marietta	2				
				<b>General</b>	17
				<b>Technical</b>	14
				<b>Grand Total</b>	<b>31</b>

### Office Visits

LPM distributed **349** *Starting Your Georgia Law Practice* booklets as requested by attorneys. There were **74** startup discussions conducted by the Program via office visits.

### Resource Library

Our lending library has a grand total of **1,439** books, CDs, and DVDs for checkout to members and their staff with an option to pick up materials at the Bar Center or to be mailed. During this period, there were a total of **385** checkouts by **120** patrons.

### Software Library

The Program has a Software Library that consists of complete, working copies of software applications. Many of these products are legal specific, and require more guidance when being demonstrated than general applications. During this period, there was **5** office visits made to look at software programs in the Software Library.

### Speaking Engagements

There are a total of **33** completed and scheduled programs during this period. The Program's staff has given **31** continuing legal education and special presentations to Georgia lawyers and other related groups. These presentations have been held in various local and national venues. **2** programs are scheduled for future dates.

July 17-18, 2015      Georgia's 2015 Solo and Small Firm Institute and Technology Showcase (sponsored), *Disaster Planning: What to Do in a Small Law Office* (Natalie Kelly); *Plenary: 60 Tips, Sites, and Apps in 60 Minutes* (Natalie Kelly, Patricia Yevics, Reid Trautz, and Charity Anastasio); *Time Management and Productivity* (Natalie Kelly); and *Fastcase* (Sheila Baldwin), Georgia Bar Conference Center, Atlanta, Georgia, **168 attendees**.

August 18, 2015      TILPP Group Mentoring CLE, *Strategies for Increasing Productivity-Model Mentoring Plan A & C* (Natalie Kelly), Georgia Bar Conference Center, Atlanta, Georgia, **130 attendees**.



- August 20, 2015 Atlanta Bar Association Sole Practitioner & Small Firm Breakfast CLE, *Disaster Planning: What to Do in a Small Law Office* (Natalie Kelly), Buckhead Club, Atlanta, Georgia, **27 attendees**.
- September 23, 2015 Dougherty Circuit Bar Association, *Law Practice Management and Hot Topics* (Natalie Kelly), Albany, Georgia, **50 attendees**.
- September 25, 2015 GABWA Solo and Small Firm Symposium: Tools of the Business and Practice of Law, *Software for Firm Management* (Natalie Kelly), Georgia Bar Conference Center, Atlanta, Georgia, **38 attendees**.
- October 22, 2015 ABA Lead Law Conference/ABA Law Practice Fall Meeting, Ask the Experts Panel CLE, *Finance* (Natalie Kelly) and *30 Tips in 30 Minutes* (Natalie Kelly, Sharon Nelson, Tom Mighell, and John Simek), Hyatt Regency Greenville, Greenville, South Carolina, **100 attendees**.
- October 29, 2015 Nuts & Bolts of E-Discovery CLE, *Legal Practice Technology for Small Firms* (Natalie Kelly and Michael R. Dunham), Georgia Bar Conference Center, Atlanta, Georgia, **54 attendees**.
- November 5, 2015 John Marshall Law School Solo Boot Camp, *Technology for Law Firms* (Natalie Kelly), The Blackburn Center, Atlanta, Georgia, **30 students**.
- November 12, 2015 Atlanta Technical College Paralegal Studies Class, *Fastcase* (Sheila Baldwin), Atlanta Technical College Campus, Atlanta, Georgia, **9 attendees**.
- November 24, 2015 ABA Law Practice Institute Series Webinar CLE Online Course, *Case Management for Lawyers: How to Organize the Chaos and Make More Time for You!* (Natalie Kelly and Bryan Sims), **17 attendees**.
- January 7, 2016 State Bar of Georgia's Midyear Meeting, *Law Practice Management CLE: Managing the New Normal: Tips for New and Seasoned Lawyers (sponsored)*, Legacy Lodge Lake Lanier, Buford, Georgia, **16 attendees**.
- February 22, 2016 TILPP Beginning Lawyers Program CLE, Georgia Bar Conference Center, Atlanta, Georgia, **330 attendees**.
- March 1, 2016 Emory University Law School, *Technology in Law Practice* (Natalie Kelly), Atlanta, Georgia, **20 attendees**.
- March 2, 2016 ABA Webcast CLE, *Are you Plugged In? The Ethical Dangers of Technology in the Legal Practice* (Moderator: Mindy Rattan; Panelists: Natalie Kelly, Katrin Rothgery, and Robert Ambrogi), **17 attendees**.
- March 8, 2016 TILPP Mentoring Program CLE, Georgia Bar Conference Center, *Organizing and Managing Your Time-Model Mentoring Plan A, E, H* (Natalie Kelly), Atlanta, Georgia, **89 attendees**.

- March 14, 2016 University of Georgia (UGA) Law School, Law Office Management, Athens, Georgia, **39 students**.
- March 16, 2016 ABA Bar Leadership Institute CLE, *Managing Technology* (Natalie Kelly, Catherine Sanders Reach, and Jim Calloway), Chicago Marriott Downtown Magnificent Mile Hotel, Chicago, Illinois, **100+ attendees**.
- March 16-19, 2016 ABA TECHSHOW 2016, *Effective Practice Management Systems Yield Focused Lawyering* and *Android and iOS Apps: Common Grounds* (Moderator: Natalie Kelly), Chicago Hilton Hotel, Chicago, Illinois, **100+ attendees**.
- March 23, 2016 LPM Lunchbox Basics CLE, Trust Accounting Basics, Bar Center, Atlanta, Georgia, **4 attendees**.
- April 1, 2016 LPM Lunchbox Basics CLE, *Apps for Lawyers* (Natalie Kelly), Bar Center, Atlanta, Georgia, **2 attendees**.
- April 5, 2016 Lawyers for Equal Justice Training, *Your Office Toolbox* and *Your Marketing Toolbox* (Natalie Kelly), Atlanta, Georgia, **12 attendees**.
- April 6, 2016 LPM Lunchbox Basics CLE, Trust Accounting Basics (Natalie Kelly), Bar Center, Atlanta, Georgia, **0 attendees**.
- April 8, 2016 LPM Lunchbox Basics CLE, *Basic Computer Skills* (Natalie Kelly), Bar Center, Atlanta, Georgia, **0 attendees**.
- April 19, 2016 LPM Lunchbox Basics CLE, *How to Build a Website in 1 Hour* (Natalie Kelly), Bar Center, Atlanta, Georgia, **4 attendees**.
- April 20, 2016 LPM Lunchbox Basics CLE, Trust Accounting Basics (Natalie Kelly), Bar Center, Atlanta, Georgia, **8 attendees**.
- April 22, 2016 Georgia State University (GSU) Law School Solo Practice Workshop, *Office Technology* (Natalie Kelly), Atlanta, Georgia, **39 attendees**.
- April 22, 2016 GAWL Leadership Academy Session IV: Dare to Lead! Leading Wholistically: Connecting & Aligning Strengths, Passions and Vision, *Productivity and Efficiency in Leadership* (Natalie Kelly), Womble Carlyle, Atlanta, Georgia, **14 attendees**.
- April 25, 2016 Virginia State Bar Association TECHSHOW, *60 Tech Tips in 60 Minutes*, (Natalie Kelly, Jim Calloway, Tom Mighell, Sharon Nelson, and Debbie Foster); and *Using Tech to Do More Legal Work in Less Time* (Natalie Kelly and Reid Trautz) Richmond Convention Center, Fairfax, Virginia, **550 attendees**.
- April 27, 2016 LPM Lunchbox Basics CLE, *Apps for Lawyers* (Natalie Kelly), Bar Center, Atlanta, Georgia, **3 attendees**.

- April 29, 2016 LPM Lunchbox Basics CLE, *Online Legal Research with Fastcase* (Natalie Kelly), Bar Center, Atlanta, Georgia, **3 attendees**.
- May 13, 2016 ABA LPM Spring Meeting, *The Future of Law and How to Future Proof Your Firm* (Natalie Kelly and Jim Calloway); and *60 Tech Tips in 60 Minutes* (Natalie Kelly, Jim Calloway, Tom Mighell, Sharon Nelson, and Debbie Foster); Frenchman's Reef & Morning Star Marriott Beach Resort, St. Thomas, Virgin Islands.

Upcoming Speaking Engagements

- May 18, 2016 Tea & Technology CLE, *Technology and Apps* (Natalie Kelly), Nelson, Mullins, Riley, & Scarborough, LLP, Atlanta, Georgia.
- July 15-16, 2016 Georgia's 2016 Solo and Small Firm Institute and Technology Showcase (*sponsored*), Georgia Bar Conference Center, Atlanta, Georgia. Visit the conference website at <http://bit.ly/SSFInstitute>.

**Fastcase Report**

During this period, a grand total of **42** members and **2** law firm staff persons have attended Fastcase CLE seminars.

Since the decision was made to transition to Fastcase, **1,474** attorneys and **69** staff members have attended Fastcase live training. Others have taken advantage of webinar training.

**Fastcase Partner Usage Report for State Bar of Georgia  
July 1, 2015 – April 30, 2016**

	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total
First Time Logins	168	104	110	128	146	141	154	186	206	97	1,440
Total Logins	18,441	19,561	19,227	18,498	15,995	15,104	18,258	19,711	21,009	18,826	184,630
Total Users Who Logged In	4,068	4,054	4,020	3,926	3,774	3,615	4,005	4,207	4,343	3,968	39,984
Searches Conducted	102,641	108,582	104,349	101,586	82,106	82,258	98,809	103,379	109,190	98,077	990,977
Documents Viewed	149,344	157,466	157,045	147,992	122,997	122,453	144,708	150,096	162,300	146,148	1,460,549
Documents Printed	14,718	16,384	14,851	16,608	13,349	13,857	15,105	15,500	16,787	14,096	151,355
Total Transactions	289,380	306,151	299,602	288,738	238,367	237,428	281,043	293,179	313,835	281,212	2,828,935

Fastcase Reported Problems	
Member Reported Issue(s)	Fastcase Response / Resolutions
<p><b>7/30/15</b>  <b>Member Reported:</b> 18 members called to notify us that FC was not working.</p>	<p><b>7/30/15</b>  <b>FC Response:</b> FC programmers were working on the system and got it back up within an hour.</p>
<p><b>9/8/15 and 9/9/15</b>  <b>Member Reported:</b> Member called to notify us about the continued malfunction in the Ga Code browse mode.</p>	<p><b>9/9/15</b>  <b>FC Response:</b> Fastcase discovered the problem and corrected it and reached out to the member.</p>
<p><b>11/25/15</b>  <b>Member Reported:</b> OCGA 44-13-100 not current in FC.</p>	<p><b>11/25/15</b>  <b>FC Response:</b> It can be found in the 2015 Acts. <i>I personally looked and SB 65 is not found which is the bill listed in History that applies.</i></p>
<p><b>12/04/15</b>  <b>Member Reported:</b>  Ga. Code not current. FC has version 2014. "Three different support personnel all give the same info and it does not get me to the 2015 version of the Georgia code", concerns OCGA 42-8-66.</p>	<p><b>12/5/15</b>  Fastcase reps tell me that if they view in the 2015 Acts it will show the most recent version however that is not my experience. This is consistent with search of OCGA 44-13-100 on 11/25/15.  <b>12/11/15</b>  Nina is checking into this for us. She agrees it is incorrect.</p>
<p><b>12/10/15</b>  <b>Member Reported:</b>  Case summaries not available.</p>	<p><b>12/10/15</b>  FC developers said that there's been an ongoing issue with matching the summaries to our cases. This problem should be resolved in the short term and the summaries should begin attaching again soon.</p>
<p><b>12/11/15 to 12/31/15</b>  Follow up Emails to Fastcase about the outdated code.</p>	<p><b>1/4/16</b>  Fastcase response: The 2015 Code is up today. We still need to write the catchlines, so you'll notice that there are no section headers.</p>
<p><b>3/11/16</b>  Member reported missing cases and sometimes has trouble finding statutes. FC help desk verified that sometimes cases are missing the regional reporter pagination and they are working with vendors to improve.   Also was unable to find a statute, due diligence showed it to be repealed but no notice given in FC.</p>	<p><b>3/11/16</b>  FC response: Missing regional reporter pagination does exist; have had several rounds of updates to improve our database.   No editorial decisions are made such as completely removing a statute; those are made at the official publisher's discretion. Best practice is to search both the statutes and Acts to find repealed or replaced.</p>



COMMITTEE TO PROMOTE INCLUSION IN THE PROFESSION

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Derrick Alexander Pope

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Phyllis J. Holmen

STATE BAR STAFF LIAISON

Sharon L. Bryant, Chief Operating Officer

MEMORANDUM

To: Robert J. "Bob" Kauffman  
President, State Bar of Georgia

Executive Committee and Board of Governors  
State Bar of Georgia

From: Joyce Gist Lewis  
Derrick Alexander Pope  
Co-Chairs, Committee to Promote Inclusion in the Profession

Date: May 18, 2016

Re: 2015 – 2016 Annual Report

It is with great pride that we submit this Annual Report for the Committee to Promote Inclusion in the Profession. As you gather in the beautiful environs of Amelia Island, you will find the enclosed information relates to many of the important issues you will address during the 2016 annual meeting.

In reviewing this report, you will see that we have carefully selected our programs to both further the mission of our Committee and to support the Bar's long-term goals of increasing the percentage of the public having a positive perception of lawyers. Each of our activities, rooted in service and education, are the direct result of a dedicated membership and the outstanding work of Bar staff. We are especially appreciative for all the assistance and support provided by Sharon Bryant.

We are excited about the work we have accomplished over the last twelve months and our plans for the upcoming year offer even more promise. We are always interested in any ideas you may have to improve the work that we do on behalf of the State Bar of Georgia and the legal profession and we thank you for your continued support of the Committee to Promote Inclusion in the Profession.

With kindest regards,

*Joyce Gist Lewis*  
Joyce Gist Lewis  
Co-Chair

*Derrick Alexander Pope*  
Derrick Alexander Pope  
Co-Chair

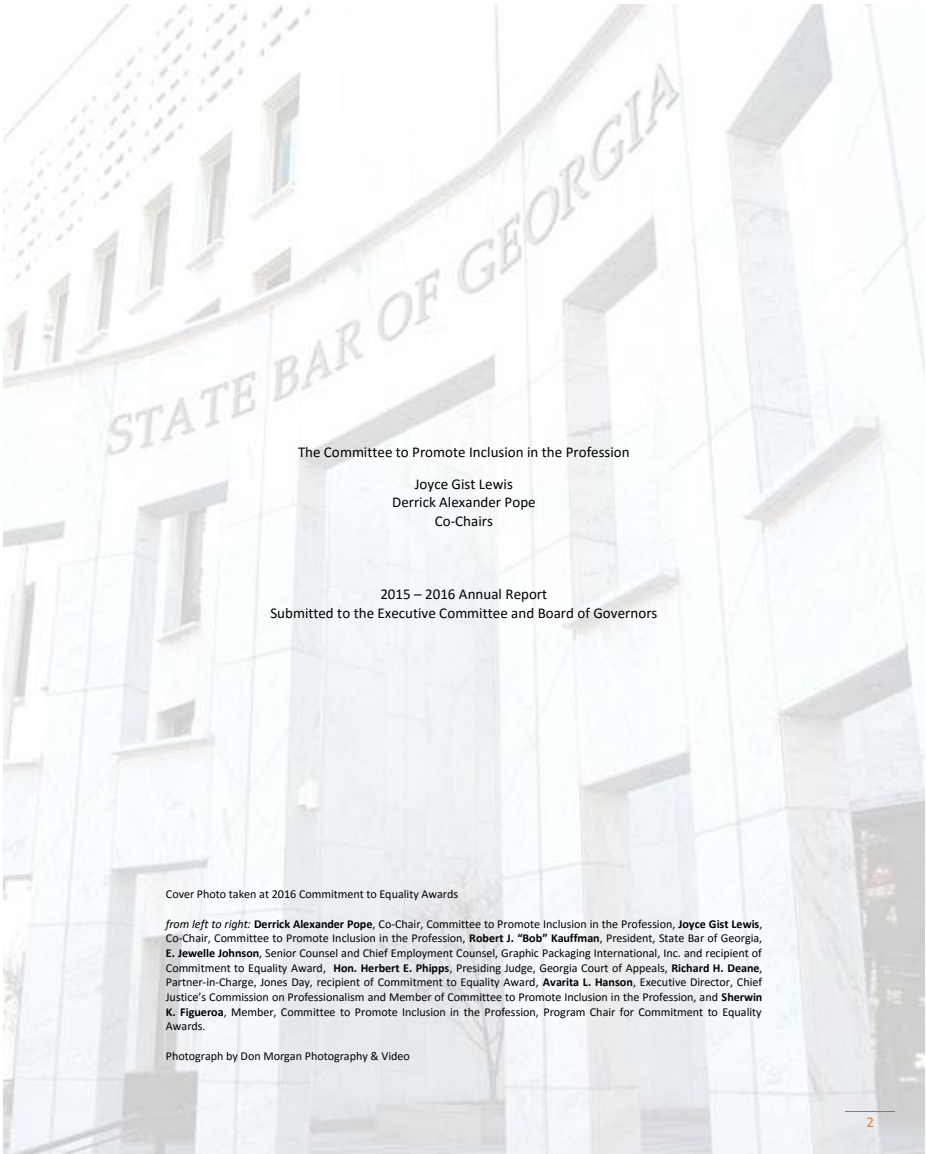
The Committee to Promote Inclusion in the Profession



# ANNUAL REPORT of the Committee to Promote Inclusion in the Profession

Presented to the Board of Governors

May 18, 2016



# STATE BAR OF GEORGIA

## The Committee to Promote Inclusion in the Profession

Joyce Gist Lewis  
Derrick Alexander Pope  
Co-Chairs

2015 – 2016 Annual Report  
Submitted to the Executive Committee and Board of Governors

Cover Photo taken at 2016 Commitment to Equality Awards

*from left to right: Derrick Alexander Pope, Co-Chair, Committee to Promote Inclusion in the Profession, Joyce Gist Lewis, Co-Chair, Committee to Promote Inclusion in the Profession, Robert J. "Bob" Kauffman, President, State Bar of Georgia, E. Jewelle Johnson, Senior Counsel and Chief Employment Counsel, Graphic Packaging International, Inc. and recipient of Commitment to Equality Award, Hon. Herbert E. Phipps, Presiding Judge, Georgia Court of Appeals, Richard H. Deane, Partner-in-Charge, Jones Day, recipient of Commitment to Equality Award, Avarita L. Hanson, Executive Director, Chief Justice's Commission on Professionalism and Member of Committee to Promote Inclusion in the Profession, and Sherwin K. Figueroa, Member, Committee to Promote Inclusion in the Profession, Program Chair for Commitment to Equality Awards.*

Photograph by Don Morgan Photography & Video

## MISSION

At the urging of former State Bar President, James Elliot, the Bar established in 1989 a Special Committee on the Involvement of Women and Minorities in the Profession, whose focus was to reverse “the perception that black and women lawyers were not welcome” in the activities of the Bar. In 2011, to reflect the advanced views on gender and diversity, the name of the committee was changed to the Committee to Promote Inclusion in the Profession.

As a standing committee, its purpose is to facilitate, analyze, and present for consideration initiatives and programs which increase participation, retention, and representation of diverse attorneys in the legal profession in Georgia that accurately reflects the makeup of our State. In this effort, the Committee will work towards inclusion of lawyers who have been historically underrepresented. It shall advise the Executive Committee and Board of Governors with regards to those interests. Our goals are to (1) *Ensure that students from underrepresented populations are prepared to pursue a legal career;* (2) *Increase the number of law school graduates from underrepresented populations, and* (3) *Increase the retention and the advancement of lawyers from underrepresented populations.*

The Committee meets six (6) times a year on a bi-monthly basis, and sub-committees meet as needed to plan the various activities and events of the Committee. All meetings are held at the State Bar of Georgia.



## ACTIVITIES and EVENTS

Over the past year, we have made a concentrated effort to hold seminars throughout the state. This deliberate act accomplishes two (2) objectives. First, it acknowledges that many of our members reside outside of the metropolitan-Atlanta area and are not able to attend or participate with the degree of desired frequency in our programs. In addition, we gain an expanded understanding of, and emphasis on, the complex factors that affect diversity and inclusion within the legal profession. To this end, we have conducted two (2) seminars related to career development and diversity and we have plans for a third in fall 2016.

In addition to our activities, we have lent our support to the worthwhile endeavors of others. In October 2015, we made a financial contribution to Auburn Avenue Films, Inc. in support of its production of "Maynard" a documentary about the person and legacy of Maynard Holbrook Jackson, Jr.

### The Value of Diversity in the Legal Profession (Augusta, Georgia - February 13, 2016)

In February, we held a diversity symposium, at which several dozen college students in and around the Augusta area were educated on the various types of careers within the legal profession. Our panelists included the *Hon. David D. Watkins*, Judge, Richmond County State Court, *Edward J. Tarver*, U.S. Attorney for the Southern District of Georgia (Savannah), *Kellie K. McIntyre*, Solicitor General, Augusta-Richmond County, and *Omeeka P. Laggins*, President, Augusta Bar Association. The program, which also offered CLE credit, was chaired by Laverne Gaskins Lewis, Senior Legal Advisor at Augusta University.



### The Value of Diversity in the Legal Profession (Savannah, Georgia - March 26, 2016)

In March we held a diversity symposium at Savannah Law School. This symposium addressed diversity in large law firms, in the judiciary, and in the corporate in-house counsel setting. Our panelists included *Patrick O'Connor*, President-elect, State Bar of Georgia, *Hon. Louisa Abbott*, Superior Court Chatham County, and *Hon. Lisa Colbert*, Juvenile Court, Savannah. The program was chaired by Gwendolyn S. Fortson Waring.



## COMMITMENT TO EQUALITY AWARDS (Atlanta, Georgia - May 12, 2016)

The 13th Annual Commitment to Equality Awards honored E. Jewelle Johnson and the Atlanta law office of Jones Day with Commitment to Equality Awards and the Hon. Horace T. Ward received posthumously the 2016 Randolph Thrower Lifetime Achievement Award. The event, chaired by Sherwin K. Figueroa, was held in the Marjorie and Ralph Knowles Conference Center at the College of Law at Georgia State University.



Award Recipient - Jones Day



Hon. Horace T. Ward  
Randolph Thrower Lifetime Achievement Award  
(posthumously)



Award Recipient - E. Jewelle Johnson

## ANNUAL MEETING CLE (Amelia Island, Florida – June 17, 2016)

Our CLE program, held in conjunction with the State Bar Annual Meeting focused on racial profiling and national security. The program, entitled *The Lawyer's Role in Preserving Constitutional Liberty, Fostering Better Policing, and Achieving National Security*, featured a reenactment of the trial of 63 Japanese Americans who resisted being drafted after the internment of Japanese citizens, addressed racial and religious profiling since 9/11 and the incident in Ferguson, Missouri, and closed with a point/counter-point discussion on the use of profiling as a law enforcement and homeland security measure. Panelists included the Hon. Denny Ching, Judge U.S. Court of Appeals for the Second Judicial Circuit (New York), the Hon. Lisa Godbey Wood, Chief Judge of the U.S. District Court, Southern District of Georgia, Edward J. Tarver, U.S. Attorney for the Southern District of Georgia (Savannah). The Georgia Association of Black Women Attorneys (GABWA, Janet Scott, President) and the Georgia Asian Pacific American Bar Association (GAPABA) were co-sponsors. The program was chaired by Gwendolyn S. Fortson Waring.

*on the horizon...**Diversity and Inclusion Program  
Macon, Georgia (Fall 2016)*

This program will focus on hiring and interviewing in the legal marketplace, differences in the workplace culture, building a professional identity, the nuts-and-bolt of applying to law school, and a special luncheon for college students who are the first in their families to attend college and who may not be immediately comfortable interacting in elite spaces such as law schools, law firms, corporate legal departments.

*Full Court Press  
Atlanta, Georgia (October 2016)*

In conjunction with the Fulton County My Brother's Keeper Task Force and The Atlanta Hawks, we will host a seminar to demonstrate to college and high-school students the myriad legal career options available to students with academic backgrounds or interests in science, technology, engineering, the arts, or mathematics.

*M.O.S.A.I.C.  
Atlanta, Georgia (January 2017)*

In 2016, the Atlanta Hawks held its inaugural M.O.S.A.I.C. event. MOSAIC stands for the *Model of Shaping Atlanta through Inclusive Conversation*. It is envisioned that MOSAIC will become an annual event to be a part of the Hawks' focus on black history. Discussions have begun to have the second program focus on the impact the legal profession has had in securing and protecting diversity in the civic affairs of Atlanta.

*Legacy Initiative to Establish Exhibit at  
The National Center for Civil and Human Rights*

We are launching an effort to have established at the National Center for Civil and Human Rights (NCCHR) an exhibit that will honor the role of the legal profession in the preservation of civil and human rights in the United States of America. The initiative will begin with the establishment of a content council, whose responsibility will be to determine the scope and extent of the exhibit and its corresponding narrative. A companion blog/website will be developed to simultaneously chronicle and market the progress of the project. In addition, in partnership with the NCCHR, we have been asked to co-host select events educating select elementary and high school students on the importance of human rights. Lastly, we will sponsor a series of educational events that highlight purpose of the project that may qualify for CLE credit.





## MEMBERS

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### CO-CHAIRS

Joyce Gist Lewis, *Atlanta*  
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Denise Lorraine Allen, *Atlanta*  
Michelle Arrington, *Atlanta*  
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Laverne Lewis Gaskins, *Augusta*  
Avarita L. Hanson, *Atlanta*  
Amanda Nicole Heath, *Augusta*  
R. Javoyne Hicks White, *Stone Mountain*  
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Robert M. Lewis, Jr., *Atlanta*  
Hon. Dax Eric Lopez, *Decatur*  
Shaton Cecilia Menzie, *Atlanta*  
Stephanie Woods Miller, *Macon*  
Adwoa Ghartey-Tagoe Seymour, *Macon*  
Donna Coleman Stribling, *Decatur*  
Gwendolyn S. Fortson Waring, *Savannah*  
Brianna Ethereal Williams, *Atlanta*

### EXECUTIVE COMMITTEE LIAISON

Phyllis J. Holmen, *Atlanta*

### STATE BAR STAFF LIAISON

Sharon L. Bryant, *Atlanta*



STATE BAR OF GEORGIA  
COMMISSION ON CONTINUING LAWYER COMPETENCY



## TRANSITION INTO LAW PRACTICE PROGRAM

Michelle E. West, Director

John T. Marshall, Chair  
Standards of the Profession Committee

### TILPP DIRECTOR'S REPORT TO BOARD OF GOVERNORS

Prepared On May 19, 2016 for 2016 Annual Meeting (Fiscal Year 2015 – 2016)

I am pleased to present this annual update on the Transition Into Law Practice Program (“TILPP”). Please find a summary of TILPP events from the fiscal year 2015 – 2016.

#### TILPP Overview

TILPP is the mandatory CLE requirement, consisting of both mentoring and CLE, for lawyers newly admitted to the State Bar of Georgia, unless exempted. Newly admitted lawyers can be exempted if they are inactive, admitted 2 years or more in another U.S. jurisdiction or choose to exempt during their judicial law clerkship.

#### A. Statistics of TILPP Participation (Lawyers & Mentors)

TILPP will complete its **tenth (10th) full year** of operation this year. Currently, **919** Beginning Lawyers are enrolled in TILPP. To date, **9667** Beginning Lawyers have completed the program. The Supreme Court of Georgia has appointed **5086** Mentors since TILPP's inception on January 1, 2006. I am pleased to report that we continue to have sufficient Mentors for all Beginning Lawyers in both Outside and Inside Mentoring.

There are three Mentoring designations: **Inside** (Beginning Lawyer works in the same office with his or her Mentor); **Outside** (Beginning Lawyer is a sole practitioner and is paired one-on-one with his or her Mentor); or, **Group Mentoring** (Beginning Lawyer is either unemployed or employed in a non-legal setting).

**B. Compliance Rate for Beginning Lawyers**

The compliance rate for Beginning Lawyers with a TILPP deadline of December 31, 2015 was excellent. According to our records, an estimated 95% of Beginning Lawyers complied by the end of the grace period.

**C. TILPP Program Within Budget Each FY Since Inception in 2006**

Our department has continued its track record of operating within budget since TILPP's inception. We expect to finish fiscal year 2016 within budget as well.

**D. Group Mentoring Events Held on August 18, 2015, March 8, 2016 and May 10, 2016**

A newly admitted attorney who is unable to find a job faces many challenges in the current economic climate. Our Group Mentoring events represent a proactive response by the State Bar of Georgia to these challenges. TILPP provides Group Mentoring sessions three times annually in March, May and August.

Our August 18, 2015 Group Mentoring seminar, the third of such events held during 2015, had 130 new lawyers in attendance. The session presented beginning lawyers with the opportunity to hear from TILPP's Director, Evan L. Kaine, Natalie R. Kelly and Gwinnett county Judges Melodie Snell Connor, Pamela South and Kristina Hammer Blum on the following topics:

- Overview on Group Mentoring
- Considerations When Starting a Law Practice
- Strategies for Increasing Productivity
- Perspectives from the Bench

Our first Group Mentoring event of 2016 was held on March 8 with 88 attorneys attending in person and 44 via webstream. New attorneys had the opportunity to attend sessions presented by TILPP's Director, Elaine Levine, Stephanie Everett, Michael Lucas, Natalie Kelly, and Judge Christopher Ward on the following topics:

- *TILPP Overview*
- *Identifying Mentoring Relationship Opportunities*
- *Georgia's Incubator Opportunity*
- *Professional Value of Pro Bono*
- *Organizing and Managing Your Time*
- *Practical Aspects of Professionalism*

The second Group Mentoring seminar of the calendar year was held on May 10, with an estimated 107 in attendance. May Group Mentoring consisted of six interactive discussion groups centered around the Model Mentoring Plan. The discussion groups were comprised of 6 – 20 new lawyers and were led by 2 experienced attorneys who provided practice, professionalism and mentoring tips. The attorney volunteers that served as faculty were Valentia Alleyne, Todd Ashley, Safiya Byars, Douglas C. Dumont, Damon Elmore, Janet W. Hankins, Evan Kaine, L. Thomas Kaine Jr., Marcus G. Keegan, Cheryl Legare, Eun Yun Park, Daryl A. Robinson and Robert G. Wellon.

The efforts of the volunteer speakers and ICLE in facilitating the Group Mentoring events are much appreciated. Copies of all past Group Mentoring event agendas mentioned are attached hereto for reference.

**E. Beginning Lawyers Program (BLP) Held on October 15, 2015, February 22, 2016 and March 22, 2016**

On October 15, 2015 TILPP presented a rebroadcast of the February 23, 2015 BLP where TILPP's Director spoke on the program, CLE requirements, and pro bono opportunities. As in years past, the Executive Director, Jeff Davis, along with members of the bar staff provided information about the State Bar of Georgia as a resource. Specifically, Rita Payne, Director of Fee Arbitration, provided information on the State Bar Center and available resources. Natalie Kelly, Director of Law Practice Management, provided information on practice resources. Additional speakers were Patrice M. Perkins-Hooker, V. Sharri Edenfield, Henry M. Quillian III, P. Michael Freed, Hon. James G. Bodiford, Dick Donovan, Seth D. Kirschenbaum and Leah Zammit. TILPP's Director co-chaired the program with Patrick Longan. Longan, Bootle Chair in Ethics and Professionalism of Mercer University's Walter F. George School of Law,

continued to do a wonderful job as co-chair of the BLP CLE. There were 192 new lawyers in attendance.

TILPP's Director, along with State Bar President Robert Kauffman and YLD President John R.B. Long, welcomed 380 (80 viewed by web stream) newly admitted attorneys at the Beginning Lawyer's Program on February 22, 2016. TILPP's Director spoke on the program, CLE requirements, and pro bono opportunities. As mentioned previously, the Executive Director, Jeff Davis, along with members of the bar staff, provided information about the State Bar of Georgia as a resource. The program featured amazing and committed speakers that presented on other introductory topics. The program also consisted of break-out sessions, which allowed the participants to choose from topics such as, *Starting a Lawsuit; Crime, Punishment & Implications; Making Your Mark in a Transaction Practice; Acting for Your Client; How to Succeed as an Associate and ESQuasi – How Non-Traditional Legal Careers Can Work for You*. A rebroadcast of this program was shown on March 22, 2016 for new lawyers who were unable to attend. There were 96 beginning lawyers who attended the BLP rebroadcast. There will also be a final rebroadcast on October 5, 2016 for new attorneys who were unable to attend the previously scheduled seminars.

I appreciate the efforts of our volunteer speakers as well as ICLE in facilitating the BLP. The agendas for all BLP programs referenced above are attached hereto as reference.

**F. Speaking Invitations from Local, State and National Organizations**

TILPP's Director received numerous speaking invitations from various organizations during the 2015 – 2016 fiscal year. Please note, events marked with an \* occurred during the 2014 – 2015 fiscal year, but subsequent to the printing of the year-end report, and are included herein for reference.

<b>Date</b>	<b>Speaking Event and Topic</b>	<b>Section</b>
May 22, 2015*	YLD Leadership Academy – Presented on <i>Leadership through Service</i>	F1
June 12, 2015*	Fulton County Swearing In - presented on TILPP	F2
June 18, 2015*	Pro Bono Showcase CLE	F3
July 17 -18, 2015	<i>Power Up</i> – Solo and Small Firm Institute and Technology Showcase – panelist	F4
July 28 – August 1, 2015	National Association of Bar Executives Meeting – led Peer to Peer Discussion on New/Young Lawyer	F5



<b>Date</b>	<b>Speaking Event and Topic</b>	<b>Section</b>
	<b>Mentoring</b>	
August 15, 2015	Savannah Law School Orientation: served as a group leader for professionalism hypotheticals	F6
November 13, 2015	Connecticut Bar Foundation – panelist for <i>Mentoring of New Lawyers Symposium</i>	F7
November 20, 2015	Gwinnett County Bar Association Luncheon – presented on <i>TILPP &amp; Update on State Bar Resources</i>	F8
January 22, 2016 April 8, 2016	GAWLedu - presented on <i>Maximizing Mentoring Relationships</i>	F9
March 18, 2016	Georgia Association for Women Lawyers (GAWL) Leadership Academy: <i>Lead through Mentoring</i>	F10
April 20, 2016	University of Georgia – presented on <i>Making the Transition: Law School to Law Practice</i>	F11
April 21, 2016	Mercer University – presented on <i>Making the Transition: Law School to Law Practice</i>	F11
May 5 - 7, 2016	National Legal Mentoring Consortium – panelist for <i>Blueprint for Successful Mentoring Programs</i> (panelist); discussion facilitator for <i>Mentoring for Resilience and Success in the Future Practice of Law</i>	F12

**F1. YLD Leadership Academy:**

On May 22, 2015, TILPP’s Director presented at the YLD Leadership Academy session on pro bono and community service opportunities available in the profession and community at large. The discussion progressed to concepts of wellness while serving, which is in line with the State Bar’s wellness initiative.

**F2. TILPP’s Director Attended Fulton County Swearing In**

TILPP’s Director spoke briefly at the Fulton County Swearing In on June 12, 2015 about the requirements of the program. Approximately 70 new attorneys were present and sworn in at the ceremony. TILPP’s Director remained on site after the swearing in to meet new attorneys and answer questions regarding the program.

**F3. Pro Bono Showcase: Eureka Moments – Pro Bono Attorneys Tell All**

TILPP’s Director joined numerous attorneys who presented their inspiring stories on pro bono service at the annual State Bar of Georgia meeting on June 18, 2015. The panel was truly dynamic and the stories brought true meaning to the notion of pro bono.

**F4. Power Up – The Solo Small Firm Institute and Technology Showcase**

The *Power Up* program, chaired by Natalie Kelly, Law Practice Management Director, was held at the State Bar of Georgia headquarters on July 17 – 18, 2015. TILPP's Director moderated and participated as a panelists on the topic of *Solo and Small Firm Success: What It Takes to Get There and What Can Get in the Way*. Ronne G. Kaplan and Evan Kaine took part in this dynamic panel as well.

**F5. TILPP's Director Attended National Association of Bar Executives (NABE) Conference**

The NABE annual meeting was held from July 28 – August 1, 2015 in Chicago, Illinois. The 2015 theme was *Form Follows Function: Architecture for the Evolving Bar*. Some of the session topics included were:

- *NABE Talks – Our House is a Very, Very, Very Fine House: Internal Perspectives*
- *NABE Chat Rooms: Peer-to-Peer Discussion Groups*
- *Press Play: Making Videos to Inform Members of the Bar and the Public*
- *Look Who's Inside...Understanding and Responding to Implicit Bias*

TILPP's Director facilitated a Peer-to-Peer Discussion Group on New/Young Lawyers where she spoke on mentoring.

**F6. TILPP's Director Assists with Law School Orientation on Professionalism at Savannah Law School**

On August 15, 2015, as part of the State Bar Committee on Professionalism, TILPP's Director assisted students at the Savannah Law School orientation with professionalism hypotheticals. There were numerous attorney volunteers there to assist with the program. The students were receptive to the program and were engaged as they worked through various hypothetical scenarios.

**F7. TILPP's Participation at Connecticut Bar's Mentoring of New Lawyers Symposium**

The Connecticut Bar Foundation held a symposium on November 13, 2015 in Hartford, Connecticut at the State Legislative Office Building. The symposium focused on the implementation and visibility of mentoring programs. TILPP's Director, along with John E.

Montgomery from the University of South Carolina School of Law, Jayne Reardon from Illinois Supreme Court's Commission on Professionalism and Lori Keating from the Ohio Supreme Court's Commission on Professionalism participated as a panelist during two sessions of the program on the following topics:

- *Mentoring: An Essential Part of Every New Lawyer's Transition into Practice. What Role Do Statewide Mentoring Programs Play?*
- *The Elements of a Highly Successful Mentoring Program: Insights from the Experts*

**F8. Gwinnett County Bar Association (GCBA) Luncheon Presentation:**

On November 20, 2015, TILPP's Director was the featured speaker at the GCBA luncheon. The presentation topic centered around TILPP and updates on the State Bar of Georgia's resources and services. The crowd was amazed by the program and the offerings available from the State Bar of Georgia.

**F9. GAWLedu Presentation to Young Attorneys**

GAWLedu is a Georgia Association of Women Lawyers low cost boot camp for new lawyers, which was conceptualized by Elaine Levine, Barbara Alexander and TILPP's Director. The program, the content of which is both practical and substantive, consists of twelve, 4 hour monthly sessions. New lawyers have the opportunity to hear from 30 plus female attorneys on various relevant topics. TILPP's Director spoke to the group twice this year, January 22, 2016 and April 8, 2016, on the topic of Maximizing Mentoring Relationships.

**F10. Georgia Association of Women Lawyers (GAWL) Leadership Academy**

TILPP's Director presented on Friday, March 18, 2016 at the GAWL Leadership Academy session. The session's theme was *Professional Leadership* and TILPP's Director spoke on the topic of mentoring formally and informally. The Academy consisted of 16 attorneys from the metro area who have practiced for six 6 years or more. TILPP acquired new mentors from the session. Thanks to GAWL for its interest and commitment to the profession.

**F11. TILPP's Director Travels with Lawyers for Equal Justice (LEJ) to Law Schools**

TILPP's Director, along with LEJ Director, Stephanie Everett, traveled to the University of Georgia on April 20, 2016 and Mercer University on April 21, 2016 to speak with law students about their respective programs. TILPP's Director is an ex officio Board member of the LEJ and has been working with the organization to develop a compliance protocol for its new lawyers.

**F12. Mentoring at 5,250 Feet**

TILPP's Director participated in the National Legal Mentoring Consortium (NLMC) conference in Denver, Colorado on May 5 – 7, 2016. The theme of the conference was *Mentoring: Now More Important than Ever*. The conference consisted of large plenary sessions and small discussion groups. TILPP's Director participated on the *Key Ingredients* (of a successful mentoring program) panel, as well as facilitated two discussion group break-out sessions on the topics of *Format, Structure and Recruiting* and *Mentoring for Resilience*. The American Bar Association President, Paulette Brown, joined as the keynote speaker on opening night. The conference proved very engaging and insightful on the topic of mentoring.

**G. National Association of Bar Executives (NABE) Conference**

TILPP's Director attended the NABE midyear meeting, which was held from February 2 – 6, 2016 in San Diego, California. The 2016 theme was *Waves of Change*. There were numerous concurrent workshops, plenary programs and chat sessions that focused on leadership, value proposition and the effective running of bar programs. Some of the session topics included were:

- *Effective Leadership: Charting the Future for Smooth Sailing*
- *Effective Leadership: Charting the Course and Maximizing the Crew*
- *NABE Talks: HR Strategies, Substance Abuse, Cognitive Decline*
- *Looking Below the Surface: The Neuroscience of Leadership and Decision-Making in the Bar*

**H. TILPP's Director Assists with Planning of Convocation on Professionalism**

TILPP's Director attended planning committee meetings on April 12 and May 10, 2016

to assist with the Convocation on Professionalism, *The New Normal for Delivery of Legal Services*. The convocation is scheduled to take place on Tuesday, August 30, 2016.

**I. Outside Bar Associations and Other Organization Inquiries**

TILPP has had various inquiries into its implementation and operating procedures this fiscal year.

**May 2015**

- TILPP received a follow-up inquiry and invitation from Louis Pepe, Partner, at *McElroy, Deutsch, Mulvaney & Carpenter, LLP*. Pepe, past president of the Connecticut Bar Association (CBA) and current chair of the CBA Standing Committee on Professionalism, inquired about potential strategies for taking their pilot mentoring program statewide. The Connecticut Bar Foundation, where he also serves, was looking for speakers to assist with a symposium on the topic of mentoring. The symposium's focus was on the implementation and visibility of mentoring programs. TILPP's Director accepted an invitation for the *Mentoring of New Lawyers Symposium* held on November 13, 2015. Final information on the conference is referenced in paragraph F6.

**January 2016**

- TILPP received a request from Louis Pepe, Partner, at *McElroy, Deutsch, Mulvaney & Carpenter, LLP*, referenced above:
  - TILPP participated on a conference call with Connecticut stakeholders concerning the state's pilot mentoring program.
  - Pepe requested job descriptions for TILPP's Director and Administrative Assistant positions.

**April 2016**

- TILPP's Director was invited by the National Legal Mentoring Consortium to appear on a panel and to facilitate small group discussions at the conference referenced in paragraph F12.

- The Gate City Bar President, Cheryl Turner, conferenced with TILPP’s Director to discuss how the Gate City Bar Association could assist its members who are in TILPP.
- Tamika Sykes, a board member of the State Bar of Georgia Labor and Employment section, inquired as to the workings of the program due to the section interest in starting a mentorship academy for young lawyers participating in the section.

**J. Progress Reports For Georgia Organizations**

Several oral and/or written reports were submitted to the following committees and/or organizations during fiscal year 2015- 2016:

Commission on Continuing Lawyer Competency (“CCLC”)

**October 13, 2015**

**April 27, 2016**

Chief Justice’s Commission on Professionalism and State Bar Committee on Professionalism

**September 10, 2015**

**February 1, 2016**

**May 19, 2016**

State Bar of Georgia Board of Governors

**May 2016**

**K. Upcoming 2016 Events:**

Law School Orientation Professionalism Seminar: August 2016

NABE Annual Meeting: August 2 - 4, 2016

Group Mentoring Event: August 16, 2016

Beginning Lawyers Program: October 5, 2016 (rebroadcast)

Mentor Orientation CLE: November 17, 2016

**Summary**

Mentoring programs for newly admitted attorneys are underway in various forms and stages throughout the United States. This momentum was triggered by the vision, leadership and service of the Standards of the Profession Committee, CCLC, State Bar of Georgia leadership, and the Supreme Court of Georgia. These trailblazers should feel proud of having initiated a mandatory mentoring movement that is changing the legal profession in a positive manner. As always, please contact me with any questions or comments.

END OF REPORT  
(Attachments Follow)

**Contact Information:**  
**Michelle E. West Esq.**  
**Direct Line: 404.527.8703**  
**Email: michellew@gabar.org**

TUESDAY • AUGUST 18, 2015

# AUGUST 2015 GROUP MENTORING

**NOTE:** This event is for newly admitted lawyers in Georgia who are enrolled in the *Group Mentoring component of the Transition into Law Practice Program (TILPP)*. Do **NOT** register for this event if you are not enrolled in TILPP, or if you are a prosecutor, solicitor, public defender, or if you are enrolled in Inside Mentoring or Outside Mentoring.

TILPP consists of two (2) components: a continuing legal education ("CLE") component and a mentoring component. Successful completion of TILPP satisfies your mandatory CLE requirements for the calendar year of your admission and the next succeeding calendar year. (State Bar Rule 8-104 (B)(1)).

*Attendance at this Group Mentoring event satisfies a portion of the Mentoring component requirement; it does not satisfy any portion of the CLE component requirement—No CLE credit is given for this event.*

Co-sponsored by:  
**Transition into Law  
Practice Program (TILPP)  
State Bar of Georgia**

## Components of the Transition into Law Practice Program

**1. CLE Component (Regulation (1)(C)(i) to State Bar Rule 8-104 (B)):** You must attend mandatory CLE activities. The exact activities depend upon your practice setting. Prosecutors or Solicitors should contact their supervisor or the Prosecuting Attorneys Council of Georgia for applicable CLE activities; Public Defenders should contact their supervisor or the Georgia Public Defender Standards Council for applicable CLE activities. All other Program participants (i.e.—Beginning Lawyers who are neither prosecutors nor public defenders) must complete a minimum of twelve (12) CLE hours, consisting of the Beginning Lawyers Program (6 CLE hours of credit) and six (6) additional CLE hours of their choice. **You will receive information on dates and times of the Beginning Lawyers Program** at the address you have on file with the State Bar of Georgia.

**2. Mentoring Component (Regulation (1)(C)(ii) to State Bar Rule 8-104 (B)):** For Group Mentoring participants: each Group Mentoring event generally consists of 3 hours, and you must complete two (2) Group Mentoring events during your assigned Mentoring Period. Generally, those Beginning Lawyers who are admitted after passing the February Bar Examination have their mentoring period tracked beginning the start of the next FISCAL YEAR (July 1–June 30); and, those Beginning Lawyers who are admitted after passing the July Bar Examination have their mentoring period tracked beginning the next CALENDAR YEAR (January 1–December 31). **You will receive information on dates and times of Group Mentoring events** at the address you have on file with the State Bar of Georgia.



### CANCELLATION POLICY

Cancellations reaching ICLE by 5:00 p.m. the day before the seminar date will receive a registration fee refund less a \$15.00 administrative fee. Otherwise, the registrant will be considered a "no show" and will not receive a registration fee refund. Program materials will be shipped after the program to every "no show." Designated substitutes may take the place of registrants unable to attend.

### SEMINAR REGISTRATION POLICY

Early registrations must be received 48 hours before the seminar. ICLE will accept on-site registrations as space allows. However, potential attendees should call ICLE the day before the seminar to verify that space is available. All attendees must check in upon arrival and are requested to wear name tags at all times during the seminar. ICLE makes every effort to have enough program materials at the seminar for all attendees. When demand is high, program materials must be shipped to some attendees.

## Seminar will be held at these locations:

### IN PERSON:

#### STATE BAR OF GEORGIA HEADQUARTERS

104 Marietta Street NW  
Atlanta, Georgia 30303

FOR DIRECTIONS PLEASE VISIT  
[HTTP://WWW.GABAR.ORG](http://WWW.GABAR.ORG)

### VIA VIDEO CONFERENCE:

#### COASTAL GEORGIA State Bar of Georgia

18 E. Bay Street  
Savannah, Georgia 31401

SPACE LIMITED TO 30 ATTENDEES

### VIA VIDEO CONFERENCE:

#### SOUTH GEORGIA State Bar Of Georgia

244 E. Second Street  
Tifton, Georgia 31794

SPACE LIMITED TO 30 ATTENDEES



# AGENDA

The registration fee for all seminars held at the State Bar of Georgia has been reduced by ICLE in recognition of the Bar's service to Georgia attorneys.

Presiding: **Michelle E. West**, Director, Transition Into Law Practice Program, State Bar of Georgia, Atlanta

**8:15 REGISTRATION AND CONTINENTAL BREAKFAST** (All attendees must check in upon arrival. A jacket or sweater is recommended.)

**8:45 WELCOME, REMARKS AND PROGRAM OVERVIEW**  
*Michelle E. West*

**9:00 CONSIDERATIONS WHEN STARTING A LAW PRACTICE (Model Mentoring Plan A, C & D)**  
*Evan L. Kaine*, Kaine Law, LLC, Atlanta

**10:00 BREAK**

**10:15 STRATEGIES FOR INCREASING PRODUCTIVITY (Model Mentoring Plan A & C)**  
*Natalie R. Kelly*, Director, Law Practice Management Program, State Bar of Georgia, Atlanta

**11:00 PERSPECTIVES FROM THE BENCH (Model Mentoring Plan A, D, & H)**  
*Hon. Melodie Snell Connor*, Chief Judge, Gwinnett County Superior Court, Lawrenceville  
*Hon. Pamela South*, Chief Judge, Gwinnett County State Court, Lawrenceville  
*Hon. Kristina Hammer Blum*, Chief Judge, Gwinnett County Magistrate Court, Lawrenceville

**12:00 ADJOURN**

*Attendance at this Group Mentoring event satisfies a portion of the Mentoring component requirement; it does not satisfy any portion of the CLE component requirement—No CLE credit is given for this event.*

**THREE WAYS TO REGISTER:** check the ICLE schedule on the web at [www.iclega.org](http://www.iclega.org)  
**Mail:** ICLE • P.O. Box 1885 • Athens, GA 30603-1885 (make check payable to ICLE)  
**Fax:** 706-354-4190 (credit card payment must accompany fax to be processed)  
**Online:** [iclega.org](http://iclega.org) (credit card payment only)

**Duplicate registrations may result in multiple charges to your account. A \$15 administrative fee will apply to refunds required because of duplicate registrations.**

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**Questions? Call ICLE Atlanta Area: 770-466-0886 • Athens Area: 706-369-5664 • Toll Free: 1-800-422-0893**

## AUGUST 2015 GROUP MENTORING • August 18, 2015 • 8939

**EARLY REGISTRATION:** \$95  
**ON-SITE REGISTRATION:** \$125

**I WILL ATTEND:**

- ATLANTA (IN PERSON)
- SAVANNAH (VIDEO CONFERENCE)
- TIFTON (VIDEO CONFERENCE)

NAME \_\_\_\_\_ GEORGIA BAR # \_\_\_\_\_

FIRM/COMPANY \_\_\_\_\_ OFFICE PHONE \_\_\_\_\_

EMAIL \_\_\_\_\_

*(To receive seminar notification and registration confirmation by email only)*

MAILING ADDRESS \_\_\_\_\_ ZIP + 4 \_\_\_\_\_

STREET ADDRESS \_\_\_\_\_ ZIP + 4 \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_

- I am sight impaired under the ADA and I will contact ICLE immediately to make arrangements.
- I have enclosed a check in the amount of \$ \_\_\_\_\_ (See fees at left)
- I authorize ICLE to charge the amount of \$ \_\_\_\_\_ (See fees at left) to my  MASTERCARD  VISA  AMERICAN EXPRESS\*

Credit Card Verification Number: A three-digit number usually located on the back of your credit card; \*AmEx is four-digits on the front of the card.

Account #:     /

**Early registrations must be received 48 hours before the seminar.**

Expiration Date:

Signature:

TUESDAY • MARCH 8, 2016

# MARCH 2016 GROUP MENTORING

**NOTE:** This event is for newly admitted lawyers in Georgia who are enrolled in the *Group Mentoring component of the Transition into Law Practice Program (TILPP)*. Do **NOT** register for this event if you are not enrolled in TILPP, or if you are a prosecutor, solicitor, public defender, or if you are enrolled in Inside Mentoring or Outside Mentoring.

TILPP consists of two (2) components: a continuing legal education (CLE) component and a mentoring component. Successful completion of TILPP satisfies your mandatory CLE requirements for the calendar year of your admission and the next succeeding calendar year. (State Bar Rule 8-104 (B)(1)).

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Co-sponsored by:  
**Transition into Law  
Practice Program (TILPP)  
State Bar of Georgia**

## Components of the Transition into Law Practice Program

**1. CLE Component (Regulation (1)(C)(i) to State Bar Rule 8-104 (B)):** You must attend mandatory CLE activities. The exact activities depend upon your practice setting. Prosecutors or solicitors should contact their supervisor or the Prosecuting Attorneys Council of Georgia for applicable CLE activities; Public Defenders should contact their supervisor or the Georgia Public Defender Standards Council for applicable CLE activities. All other Program participants (i.e.—Beginning Lawyers who are neither prosecutors nor public defenders) must complete a minimum of twelve (12) CLE hours, consisting of the Beginning Lawyers Program (6 CLE hours of credit) and six (6) additional CLE hours of their choice. **You will receive information on dates and times of the Beginning Lawyers Program** at the address you have on file with the State Bar of Georgia.

**2. Mentoring Component (Regulation (1)(C)(ii) to State Bar Rule 8-104 (B)):** For Group Mentoring participants: each Group Mentoring event generally consists of 3 hours, and you must complete two (2) Group Mentoring events during your assigned Mentoring Period. Generally, those Beginning Lawyers who are admitted after passing the February Bar Examination have their mentoring period tracked beginning the start of the next FISCAL YEAR (July 1–June 30); and, those Beginning Lawyers who are admitted after passing the July Bar Examination have their mentoring period tracked beginning the next CALENDAR YEAR (January 1–December 31). **You will receive information on dates and times of Group Mentoring events** at the address you have on file with the State Bar of Georgia.



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### IN PERSON:

#### STATE BAR OF GA HEADQUARTERS

104 Marietta Street NW  
Atlanta, Georgia 30303

### DIRECTIONS:

[HTTP://WWW.GABAR.ORG](http://www.gabar.org)

### VIA VIDEO CONFERENCE:

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18 E. Bay Street  
Savannah, Georgia 31401

### SPACE IN SAVANNAH

LIMITED TO 30 ATTENDEES

### VIA VIDEO CONFERENCE:

#### SOUTH GEORGIA STATE BAR OF GA

244 E. Second Street  
Tifton, Georgia 31794

### SPACE IN TIFTON

LIMITED TO 30 ATTENDEES

### VIA WEB STREAM:

This program will also be available via a live web stream for those who choose to register for the online option. Once you have registered for the program, you will receive a link in your confirmation email with instructions on **accessing the program on March 8**. You will receive Self-Study CLE Credit for the course.

# AGENDA

The registration fee for all seminars held at the State Bar of Georgia has been reduced by ICLE in recognition of the Bar's service to Georgia attorneys.

Presiding: *Michelle E. West*, Program Chair, Director, Transition into Law Practice Program, State Bar of Georgia, Atlanta

- 8:15 **REGISTRATION AND CONTINENTAL BREAKFAST** (All attendees must check in upon arrival. A jacket or sweater is recommended.)
- 8:45 **WELCOME AND REMARKS**  
*Michelle E. West*
- 9:00 **IDENTIFYING MENTORING RELATIONSHIP OPPORTUNITIES (A, B, E & H)**  
*Elaine G. Levine*, Koufman, Levine & Greiner, LLP, Atlanta  
*Michelle E. West*
- 9:50 **GEORGIA'S INCUBATOR OPPORTUNITY (MODEL MENTORING PLAN A, B & D)**  
*Stephanie A. Everett*, Lawyers for Equal Justice, Georgia State University College of Law, Atlanta

- 10:10 **BREAK**
- 10:25 **PROFESSIONAL VALUE OF PRO BONO (MODEL MENTORING PLAN A, B, E & H)**  
*Michael K. Lucas*, Atlanta Volunteer Lawyers Foundation, Atlanta
- 10:50 **ORGANIZING AND MANAGING YOUR TIME (MODEL MENTORING PLAN A & C)**  
*Natalie Kelly*, Director, Law Practice Management Program, State Bar of Georgia, Atlanta
- 11:30 **PRACTICAL ASPECTS OF PROFESSIONALISM (MODEL MENTORING PLAN A, E & H)**  
*Hon. Christopher Evan Ward*, Chief Judge, Atlanta Municipal Court, Atlanta
- 12:00 **ADJOURN**

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## MARCH 2016 GROUP MENTORING • March 8, 2016 • 9164

**EARLY REGISTRATION:** \$75  
**ON-SITE REGISTRATION:** \$105

**I WILL ATTEND:**

- ATLANTA (IN PERSON)
- SAVANNAH (VIDEO CONFERENCE)
- TIFTON (VIDEO CONFERENCE)
- WEB STREAM (ONLINE)

NAME \_\_\_\_\_ GEORGIA BAR # \_\_\_\_\_  
 FIRM/COMPANY \_\_\_\_\_ OFFICE PHONE \_\_\_\_\_  
 EMAIL \_\_\_\_\_  
(To receive seminar notification and registration confirmation by email only)  
 MAILING ADDRESS \_\_\_\_\_ ZIP + 4 \_\_\_\_\_  
 STREET ADDRESS \_\_\_\_\_ ZIP + 4 \_\_\_\_\_  
 CITY \_\_\_\_\_ STATE \_\_\_\_\_

- I am sight impaired under the ADA and I will contact ICLE immediately to make arrangements.
- I have enclosed a check in the amount of \$ \_\_\_\_\_ (See fees at left)
- I authorize ICLE to charge the amount of \$ \_\_\_\_\_ (See fees at left) to my  MASTERCARD  VISA  AMERICAN EXPRESS\*

Credit Card Verification Number: A three-digit number usually located on the back of your credit card; \*AmEx is four-digits on the front of the card.

Account #:     /

**Early registrations must be received 48 hours before the seminar.**

Expiration Date:

Signature:

TUESDAY • MAY 10, 2016

# MAY 2016 GROUP MENTORING

**NOTE:** This event is for newly admitted lawyers in Georgia who are enrolled in the *Group Mentoring component of the Transition into Law Practice Program (TILPP)*. Do **NOT** register for this event if you are not enrolled in TILPP, or if you are a prosecutor, solicitor, public defender, or if you are enrolled in Inside Mentoring or Outside Mentoring.

TILPP consists of two (2) components: a continuing legal education (CLE) component and a mentoring component. Successful completion of TILPP satisfies your mandatory CLE requirements for the calendar year of your admission and the next succeeding calendar year. (State Bar Rule 8-104 (B)(1)).

*Attendance at this Group Mentoring event satisfies a portion of the Mentoring component requirement; it does not satisfy any portion of the CLE component requirement—No CLE credit is given for this event.*

Co-sponsored by:

## Transition into Law Practice Program (TILPP) State Bar of Georgia

### Components of the Transition into Law Practice Program

**1. CLE Component (Regulation (1)(C)(i) to State Bar Rule 8-104 (B)):** You must attend mandatory CLE activities. The exact activities depend upon your practice setting. Prosecutors or solicitors should contact their supervisor or the Prosecuting Attorneys Council of Georgia for applicable CLE activities; Public Defenders should contact their supervisor or the Georgia Public Defender Standards Council for applicable CLE activities. All other Program participants (i.e.—Beginning Lawyers who are neither prosecutors nor public defenders) must complete a minimum of twelve (12) CLE hours, consisting of the Beginning Lawyers Program (6 CLE hours of credit) and six (6) additional CLE hours of their choice. **You will receive information on dates and times of the Beginning Lawyers Program** at the address you have on file with the State Bar of Georgia.

**2. Mentoring Component (Regulation (1)(C)(ii) to State Bar Rule 8-104 (B)):** For Group Mentoring participants: each Group Mentoring event generally consists of 3 hours, and you must complete two (2) Group Mentoring events during your assigned Mentoring Period. Generally, those Beginning Lawyers who are admitted after passing the February Bar Examination have their mentoring period tracked beginning the start of the next FISCAL YEAR (July 1–June 30); and, those Beginning Lawyers who are admitted after passing the July Bar Examination have their mentoring period tracked beginning the next CALENDAR YEAR (January 1–December 31). **You will receive information on dates and times of Group Mentoring events** at the address you have on file with the State Bar of Georgia.



#### CANCELLATION POLICY

Cancellations reaching ICLE by 5:00 p.m. the day before the seminar date will receive a registration fee refund less a \$15.00 administrative fee. Otherwise, the registrant will be considered a "no show" and will not receive a registration fee refund. Program materials will be shipped after the program to every "no show." Designated substitutes may take the place of registrants unable to attend.

#### SEMINAR REGISTRATION POLICY

Early registrations must be received 48 hours before the seminar. ICLE will accept on-site registrations as space allows. However, potential attendees should call ICLE the day before the seminar to verify that space is available. All attendees must check in upon arrival and are requested to wear name tags at all times during the seminar. ICLE makes every effort to have enough program materials at the seminar for all attendees. When demand is high, program materials must be shipped to some attendees.

## STATE BAR OF GEORGIA HEADQUARTERS

104 Marietta Street NW • Atlanta, Georgia

FOR DIRECTIONS PLEASE VISIT [HTTP://WWW.GABAR.ORG/](http://WWW.GABAR.ORG/)

#### To make hotel room reservations, call:

Embassy Suites phone: 1-800-Hiltons • The Glenn phone: 404-521-2250

Hilton Garden Inn phone: 404-577-2001 • The Omni phone: 404-818-4323

**Ask for the State Bar of Georgia's negotiated corporate rate.**

# AGENDA

The registration fee for all seminars held at the State Bar of Georgia has been reduced by ICLE in recognition of the Bar's service to Georgia attorneys.

Presiding: *Michelle E. West*, Program Chair, Director, Transition Into Law Practice Program, State Bar of Georgia, Atlanta

- 8:15 **REGISTRATION AND CONTINENTAL BREAKFAST**  
(All attendees must check in upon arrival. A jacket or sweater is recommended.)
  
- 8:45 **WELCOME AND REMARKS**  
*Michelle E. West*
  
- 8:50 **INTRODUCTION OF MENTORING BREAKOUT GROUP LEADERS (Model Mentoring Plan A, C, D & H)**  
*Valentia P. Alleyne*, The Allenye Law Firm, LLC, Atlanta  
*Todd H. Ashley*, Prosecuting Attorneys' Council of Georgia, Morrow  
*Safiya W. Byars*, The Byars Firm, Atlanta  
*L. Thomas Cain, Jr.*, Tom Cain, Attorney at Law, Lawrenceville  
*Doug C. Dumont*, Ausband & Dumont, Atlanta & Stockbridge  
*Damon E. Elmore*, Nowell Sparks LLC, Atlanta  
*Janet Willy Hankins*, Conflict Defender, Georgia Public Defender Council, Stone Mountain Judicial Circuit, Decatur  
*Evan L. Kaine*, Kaine Law, LLC, Atlanta  
*Marcus G. Keegan*, Keegan Law Firm, LLC, Atlanta  
*Cheryl B. Legare*, Legare, Atwood & Wolfe, LLC, Atlanta  
*Eun Y. Park*, Park Law Group, P.C., Duluth  
*Daryl A. Robinson*, State Law Department, Atlanta  
*Robert G. Wellon*, Attorney & Counselor at Law, Atlanta

- 8:55 **BREAK**  
(Proceed to First Breakout Group of Your Choice)
  
- 9:00 **MENTORING BREAKOUT GROUPS SESSION ONE**  
(Choose One)
  
- 9:50 **BREAK**
  
- 10:00 **MENTORING BREAKOUT GROUPS SESSION TWO**  
(Choose One)
  
- 10:50 **BREAK**
  
- 11:00 **MENTORING BREAKOUT GROUPS SESSION THREE**  
(Choose One)
  
- 12:00 **ADJOURN**

*Attendance at this Group Mentoring event satisfies a portion of the Mentoring component requirement; it does not satisfy any portion of the CLE component requirement—No CLE credit is given for this event.*

**THREE WAYS TO REGISTER:** check the ICLE schedule on the web at [www.iclega.org](http://www.iclega.org)  
**Mail:** ICLE • P.O. Box 1885 • Athens, GA 30603-1885 (make check payable to ICLE)  
**Fax:** 706-354-4190 (credit card payment must accompany fax to be processed)  
**Online:** [iclega.org](http://iclega.org) (credit card payment only)

**Duplicate registrations may result in multiple charges to your account. A \$15 administrative fee will apply to refunds required because of duplicate registrations.**

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**Questions? Call ICLE Atlanta Area: 770-466-0886 • Athens Area: 706-369-5664 • Toll Free: 1-800-422-0893**

## MAY 2016 GROUP MENTORING • May 10, 2016 • 9236

**EARLY REGISTRATION:** \$65  
**ON-SITE REGISTRATION:** \$95

**I would like program materials:**

- In print only
- On USB drive only

- I am unable to attend. Please send ICLE program materials and bill me for the cost of materials only.

**Early registrations must be received 48 hours before the seminar.**

NAME \_\_\_\_\_ GEORGIA BAR # \_\_\_\_\_

FIRM/COMPANY \_\_\_\_\_ OFFICE PHONE \_\_\_\_\_

EMAIL \_\_\_\_\_

*(To receive seminar notification and registration confirmation by email only)*

MAILING ADDRESS \_\_\_\_\_ ZIP + 4 \_\_\_\_\_

STREET ADDRESS \_\_\_\_\_ ZIP + 4 \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_

- I am sight impaired under the ADA and I will contact ICLE immediately to make arrangements.**
- I have enclosed a check in the amount of \$ \_\_\_\_\_ (See fees at left)
- I authorize ICLE to charge the amount of \$ \_\_\_\_\_ (See fees at left) to my  MASTERCARD  VISA  AMERICAN EXPRESS\*

Credit Card Verification Number: A three-digit number usually located on the back of your credit card; \*AmEx is four-digits on the front of the card.

Account #:           /

Expiration Date:

Signature:

# BEGINNING LAWYERS PROGRAM

Co-sponsored by:

**Transition into Law Practice Program (TILPP)**  
State Bar of Georgia

**RECORDED MONDAY, FEBRUARY 23, 2015**

**PARTICIPANTS IN THE TRANSITION INTO LAW PRACTICE PROGRAM PLEASE NOTE:**

To fulfill initial CLE requirements, lawyers who are newly admitted to the State Bar of Georgia are required to take this seminar and any other six-hour CLE course of their choosing during the year in which they are admitted or the following calendar year. **This program is not required for prosecutors, solicitors and public defenders. Each of these groups has its separate mentoring and CLE programs.**

**REFER TO THE REGISTRATION FORM AND CHECK THE REBROADCAST LOCATION YOU PLAN TO ATTEND.**

- |   |   |
|---|---|
| <b>Athens</b> ..... ICLE, A.G. Cleveland Bldg, 248 Prince Ave.  | <b>Kennesaw</b> ..... Kennesaw State University—Continuing Education, 3333 Busbee Drive, South Entrance, FYI: Room number will be posted in lobby |
| <b>Atlanta—Ga. Bar</b> ..... Georgia Bar Center, 104 Marietta Street NW (Corner of Marietta and Spring)               | <b>Savannah</b> ..... State Bar of Georgia, Coastal GA Office, 18 E. Bay St.  |
| <b>Augusta</b> ..... Augusta State University—Washington Hall, Rm 116, 2500 Walton Way                                | <b>Tifton</b> ..... State Bar of Georgia, South Georgia Office, 244 E. 2nd St. NW   |
| <b>Columbus</b> ..... Columbus State Univ.—Elizabeth Bradley Turner Ctr., corner of E. Lindsey & College Dr., Rm 216A | <b>Valdosta</b> ..... Valdosta State University—Regional Ctr. for Continuing Education, 903 N. Patterson St., Rm 222 (Park in Rear)               |
| <b>Dalton</b> ..... NW Georgia Trade & Convention Ctr, 2211 Dug Gap Battle Rd.  |   |

**THREE WAYS TO REGISTER:** check the ICLE schedule on the web at [www.iclega.org](http://www.iclega.org)

**Mail:** ICLE • P.O. Box 1885 • Athens, GA 30603-1885 (make check payable to ICLE)

**Fax:** 706-354-4190 (credit card payment must accompany fax to be processed)

**Online:** [iclega.org](http://iclega.org) (credit card payment only)

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**Questions? Call ICLE Atlanta Area: 770-466-0886 • Athens Area: 706-369-5664 • Toll Free: 1-800-422-0893**

**BEGINNING LAWYERS PROGRAM • REBROADCAST • October 15, 2015 • 8958**

NAME \_\_\_\_\_ GEORGIA BAR # \_\_\_\_\_

FIRM/COMPANY \_\_\_\_\_ OFFICE PHONE \_\_\_\_\_

EMAIL \_\_\_\_\_ (To receive seminar notification and registration confirmation by email only.)

MAILING ADDRESS \_\_\_\_\_ ZIP + 4 \_\_\_\_\_ - \_\_\_\_\_

STREET ADDRESS (for UPS) \_\_\_\_\_ ZIP + 4 \_\_\_\_\_ - \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ **REGISTRATION FEE: \$95**

**TO REGISTER CHECK LOCATION:** (see above for address)

- |                                   |   |                                  |                                   |                                 |
|-----------------------------------|---|----------------------------------|-----------------------------------|---------------------------------|
| <input type="checkbox"/> ATHENS   | <input type="checkbox"/> ATL./GA BAR CENTER | <input type="checkbox"/> AUGUSTA | <input type="checkbox"/> COLUMBUS | <input type="checkbox"/> DALTON |
| <input type="checkbox"/> KENNESAW | <input type="checkbox"/> SAVANNAH           | <input type="checkbox"/> TIFTON  | <input type="checkbox"/> VALDOSTA |                                 |

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- I authorize ICLE to charge the registration fee to my  MASTERCARD  VISA  AMERICAN EXPRESS\*
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- I am unable to attend. Please send written materials and bill me for the cost of materials only. Sorry, no phone orders!

**I WOULD LIKE PROGRAM MATERIALS:**

- in print only  on usb drive only

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

Signature: \_\_\_\_\_

## AGENDA

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Presiding: *Michelle E. West*, Program Co-Chair, Director, Transition Into Law Practice Program, State Bar of Georgia, Atlanta  
*Jeffrey R. Davis*, Program Co-Chair, Executive Director, State Bar of Georgia, Atlanta  
*Prof. Patrick E. Longan*, Program Co-Chair, Bootle Chair in Ethics and Professionalism, Walter F. George School of Law, Mercer University, Macon

- |   |   |
|---|---|
| <p>7:30 <b>REGISTRATION</b><br/>         (All attendees must check in upon arrival. A removable jacket or sweater is recommended.)</p> <p>8:00 <b>WELCOME TO THE STATE BAR OF GEORGIA</b><br/> <i>Patrise M. Perkins-Hooker</i>, President, State Bar of Georgia; Atlanta Beltline, Inc., Atlanta</p> <p>8:15 <b>GREETINGS FROM THE STATE BAR'S YOUNG LAWYERS DIVISION</b><br/> <i>V. Shari Edenfeld</i>, President, Young Lawyers Division, State Bar of Georgia; Edenfeld, Cox, Bruce &amp; Cassens, P.C., Statesboro</p> <p>8:30 <b>LAUNCH YOUR CAREER WITH THE ASSISTANCE OF THE STATE BAR</b></p> <ul style="list-style-type: none"> <li>• TILPP</li> <li>• CLE Opportunities</li> <li>• Pro Bono Training &amp; Opportunities</li> </ul> <p><i>Michelle E. West</i></p> <p>8:50 <b>PRACTICE RESOURCES AVAILABLE FROM THE STATE BAR</b></p> <ul style="list-style-type: none"> <li>• Law Practice Management</li> <li>• Fast Case</li> <li>• Member Benefits</li> </ul> <p><i>Natalie Kelly</i>, Director, Law Practice Management Program, State Bar of Georgia, Atlanta</p> <p>9:10 <b>HOW THE STATE BAR WORKS TO PROTECT YOUR LICENSE</b></p> <ul style="list-style-type: none"> <li>• Unauthorized Practice of Law</li> <li>• Consumer Assistance Program</li> <li>• Fee Arbitration</li> <li>• Lawyers Assistance Program</li> </ul> <p><i>Rita Payne</i>, Director, Fee Arbitration, State Bar of Georgia, Atlanta</p> <p>9:30 <b>THE STATE BAR AT WORK FOR YOU</b></p> <ul style="list-style-type: none"> <li>• Membership</li> <li>• State Bar Center</li> <li>• Legislative Advocacy</li> </ul> <p><i>Jeffrey R. Davis</i></p> <p>9:50 <b>WAYS TO GET INVOLVED WITH STATE BAR SECTIONS AND PROGRAMS</b></p> <ul style="list-style-type: none"> <li>• Military Legal Assistance Program</li> <li>• Pro Bono Program</li> <li>• Family Section</li> <li>• General Practice &amp; Trial Section</li> </ul> <p><i>Norman Zoller</i>, Attorney Coordinator, Military Legal Assistance Program, State Bar of Georgia, Atlanta<br/> <i>Michael L. Monahan</i>, Director, Pro Bono Program, State Bar of Georgia, Atlanta<br/> <i>Rebecca Crumrine Rieder</i>, Chair, Family Law Section, State Bar of Georgia; Hedgepeth, Heredia, Crumrine &amp; Morrison LLC, Atlanta<br/> <i>Nicholas J. Pieschel</i>, Chair, General Practice &amp; Trial Section, State Bar of Georgia; Moorman Pieschel LLC, Atlanta</p> | <p>10:20 <b>BREAK</b></p> <p>10:30 <b>STARTING A LAWSUIT: THE WHYS AND WHEREFORES OF REQUIRED PROCEDURES AND DOCUMENTS</b><br/> <i>Henry M. Quillian, III</i>, Taylor English Duman, LLP, Atlanta</p> <p>11:30 <b>LUNCH</b> (on your own)</p> <p>12:30 <b>GREETINGS FROM THE GEORGIA SUPREME COURT</b><br/> <i>Hon. Hugh P. Thompson</i>, Chief Justice, Supreme Court of Georgia, Atlanta</p> <p>12:50 <b>HOW TO AVOID BAR COMPLAINTS &amp; MALPRACTICE</b><br/> <i>Paula J. Frederick</i>, General Counsel, State Bar of Georgia, Atlanta<br/> <i>P. Michael Freed</i>, Lewis, Brisolis Bisgaard &amp; Smith LLP, Atlanta</p> <p>1:50 <b>BREAK</b></p> <p>2:00 <b>ACTING FOR YOUR CLIENT</b><br/> <b>Moderator:</b> <i>Patrick E. Longan</i><br/> <b>Panelists:</b><br/> <i>Hon. James G. Bodiford</i>, Former Judge, Superior Court, Cobb Judicial Circuit, Marietta<br/> <i>Donald R. "Dick" Donovan</i>, District Attorney, Paulding Judicial Circuit, Dallas<br/> <i>Seth D. Kirschenbaum</i>, Davis, Zipperman, Kirschenbaum &amp; Lotito, Atlanta<br/> <i>Leah J. Zammit</i>, Zammit Law LLC, Marietta</p> <p>3:00 <b>ADJOURN</b></p> |
|---|---|



### CANCELLATION POLICY

Cancellations reaching ICLE by 5:00pm, the day before the seminar date will receive a registration fee refund less a \$15.00 administrative fee. Otherwise, the registrant will be considered a "no show" and will not receive a registration fee refund. Program materials will be shipped after the program to every "no show." Designated substitutes may take the place of registrants unable to attend.

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Early registrations must be received 48 hours before the seminar. ICLE will accept on-site registrations as space allows. However, potential attendees should call ICLE the day before the seminar to verify that space is available. All attendees must check in upon arrival and are requested to wear name tags at all times during the seminar. ICLE makes every effort to have enough program materials at the seminar for all attendees. When demand is high, program materials must be shipped to some attendees.

MONDAY • FEBRUARY 22, 2016

# BEGINNING LAWYERS PROGRAM

Co-sponsored by:

**Transition into Law Practice Program (TILPP)**  
State Bar of Georgia

## PARTICIPANTS IN THE TRANSITION INTO LAW PRACTICE PROGRAM PLEASE NOTE:

To fulfill initial CLE requirements, lawyers who are newly admitted to the State Bar of Georgia are required to take this seminar and any other six-hour CLE course of their choosing during the year in which they are admitted or the following calendar year.

**This program is not required for prosecutors, solicitors and public defenders. Each of these groups has its separate mentoring and CLE programs.**

## ADDRESSES FOR VIEWING LOCATIONS

### IN PERSON:

#### STATE BAR OF GA

#### HEADQUARTERS

104 Marietta Street NW

Atlanta, Georgia 30303

**NO SPACE LIMITATION**

**DIRECTIONS:**

[HTTP://WWW.GABAR.ORG](http://www.gabar.org)

### VIA VIDEO CONFERENCE:

#### COASTAL GEORGIA

#### STATE BAR OF GA

18 E. Bay Street

Savannah, Georgia 31401

**SPACE LIMITED TO**

**30 ATTENDEES**

### VIA VIDEO CONFERENCE:

#### SOUTH GEORGIA

#### STATE BAR OF GA

244 E. Second Street

Tifton, Georgia 31794

**SPACE LIMITED TO**

**30 ATTENDEES**

### VIA WEB STREAM:

This program will also be available via a live web stream for those who choose to register for the online option. Once you have registered for the program, you will receive a link in your confirmation email with instructions on **how to access the program on February 22.**

**THREE WAYS TO REGISTER:** check the ICLE schedule on the web at [www.iclega.org](http://www.iclega.org)

**Mail:** ICLE • P.O. Box 1885 • Athens, GA 30603-1885 (make check payable to ICLE)

**Fax:** 706-354-4190 (credit card payment must accompany fax to be processed)

**Online:** [iclega.org](http://iclega.org) (credit card payment only)

**Duplicate registrations may result in multiple charges to your account. A \$15 administrative fee will apply to refunds required because of duplicate registrations.**

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Questions? Call ICLE Atlanta Area: 770-466-0886 • Athens Area: 706-369-5664 • Toll Free: 1-800-422-0893

## BEGINNING LAWYERS PROGRAM • February 22, 2016 • 9129

NAME \_\_\_\_\_ GEORGIA BAR # \_\_\_\_\_

FIRM/COMPANY \_\_\_\_\_ OFFICE PHONE \_\_\_\_\_

EMAIL \_\_\_\_\_ (To receive seminar notification and registration confirmation by email only.)

MAILING ADDRESS \_\_\_\_\_ ZIP + 4 \_\_\_\_\_ - \_\_\_\_\_

STREET ADDRESS (for UPS) \_\_\_\_\_ ZIP + 4 \_\_\_\_\_ - \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ REGISTRATION: \$95

### TO REGISTER CHECK LOCATION:

ATLANTA       SAVANNAH       TIFTON       ONLINE (SELF-STUDY)

I have enclosed a check for the registration fee.

I authorize ICLE to charge the registration fee to my  MASTERCARD  VISA  AMERICAN EXPRESS\*

I am sight impaired under the ADA, and I will contact ICLE immediately to make arrangements.

Account #     /

Credit Card Verification Number: A three-digit number usually located on the back of your credit card; \*AmEx is four-digits on the front of the card.

Expiration Date:

Signature:



## AGENDA

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Presiding: *Michelle E. West*, Director, Transition Into Law Practice Program, State Bar of Georgia, Atlanta  
*Jeffrey R. Davis*, Executive Director, State Bar of Georgia, Atlanta  
*Prof. Patrick E. Longan*, Bootle Chair in Ethics and Professionalism, Walter F. George School of Law, Mercer University, Macon

7:30 **REGISTRATION AND CONTINENTAL BREAKFAST**  
 (All attendees must check in upon arrival. A removable jacket or sweater is recommended.)

8:15 **WELCOME TO THE STATE BAR OF GEORGIA**  
*Robert Kauffman*, President, State Bar of Georgia; Hartley, Rowe & Fowler, P.C., Douglasville

8:30 **GREETINGS FROM THE STATE BAR'S YOUNG LAWYERS DIVISION**  
*John R.B. "Jack" Long*, President, Young Lawyers Division, State Bar of Georgia; John R.B. Long, P.C., Augusta

8:45 **LAUNCH YOUR CAREER WITH THE ASSISTANCE OF THE STATE BAR**

- TILPP
- CLE Opportunities
- Pro Bono Training & Opportunities

*Michelle E. West*

9:05 **PRACTICE RESOURCES AVAILABLE FROM THE STATE BAR**

- Law Practice Management
- Fast Case
- Member Benefits

*Natalie Kelly*, Director, Law Practice Management Program, State Bar of Georgia, Atlanta

9:25 **HOW THE STATE BAR WORKS TO PROTECT YOUR LICENSE**

- Unauthorized Practice of Law
- Consumer Assistance Program
- Fee Arbitration
- Lawyers Assistance Program

*Rita Payne*, Director, Fee Arbitration, State Bar of Georgia, Atlanta

9:45 **THE STATE BAR AT WORK FOR YOU**

- Membership
- State Bar Center
- Legislative Advocacy

*Jeffrey R. Davis*

10:05 **WAYS TO GET INVOLVED WITH STATE BAR SECTIONS AND PROGRAMS**

- Military Legal Assistance Program
- Pro Bono Program
- Section Liaison

*Norman Zaller*, Attorney Coordinator, Military Legal Assistance Program, State Bar of Georgia, Atlanta  
*Michael L. Monahan*, Director, Pro Bono Program, State Bar of Georgia, Atlanta  
*Derrick W. Stanley*, Section Liaison, State Bar of Georgia, Atlanta

10:35 **BREAK**

10:45 **BREAKOUT SESSIONS**

**STARTING A LAWSUIT: THE WHYS AND WHEREFORES OF REQUIRED PROCEDURES AND DOCUMENTS**  
 (This breakout session is available for the live & video conference locations & webstream)  
*Henry M. Quillian, III*, Taylor English Duma LLP, Atlanta

**CRIME, PUNISHMENT & IMPLICATIONS**  
 (This breakout session is available for the live location only)  
*Robert D. James*, District Attorney, Stone Mountain Judicial Circuit, Decatur  
*Patricia A. McKenzie*, Law Office of Patricia A. McKenzie, Lawrenceville

**MAKING YOUR MARK IN A TRANSACTIONAL PRACTICE**  
 (This breakout session is available for the live location only)  
*Timothy W. Bratcher*, Greenberg Traurig, LLP, Atlanta

11:45 **LUNCH** (Included in registration fee)

12:15 **PROFESSIONALISM AND REPUTATION**  
*Avarita L. Hanson*, Executive Director, Chief Justice's Commission on Professionalism, Atlanta

12:45 **HOW TO AVOID BAR COMPLAINTS & MALPRACTICE**  
*Paula J. Frederick*, General Counsel, State Bar of Georgia, Atlanta  
*P. Michael Freed*, Lewis Brisbois Bisgaard & Smith LLP, Atlanta

1:45 **BREAK**

2:00 **BREAKOUT SESSIONS**

**ACTING FOR YOUR CLIENT**  
 (This breakout session is available for the live & video conference locations & webstream)  
**Moderator:** *Patrick E. Longan*  
**Panelists:**  
*Hon. Dean C. Bucci*, Judge, Superior Court, Paulding Judicial Circuit, Dallas  
*Donald R. "Dick" Donovan*, District Attorney, Paulding Judicial Circuit, Dallas  
*Seth D. Kirschenbaum*, Davis, Zipperman, Kirschenbaum, & Lotito, Atlanta  
*Leah J. Zammitt*, Zammit Law LLC, Marietta

**HOW TO SUCCEED AS AN ASSOCIATE**  
 (This breakout session is available for the live location only)  
**Moderator:** *Ryan Walsh*, Jones Day, Atlanta  
**Panelists:**  
*Carol V. Clark*, Law Office of Carol V. Clark, Atlanta  
*Jeanine G. Garvie*, Attorney at Law, Atlanta  
*Carmen R. Toledo*, King & Spalding LLP, Atlanta

**ESQuasi—HOW NON-TRADITIONAL LEGAL CAREERS CAN WORK FOR YOU**  
 (This breakout session is available for the live location only)  
**Moderator:** *Cristen W. Dutcher*, Clinical Assistant Professor, Coles College of Business, Kennesaw State University, Kennesaw  
**Panelists:**  
*Damon E. Elmore*, Nowell Sparks, LLC, Atlanta  
*Megan T. Hodgkiss*, Legal Consultant & Project Coordinator, Georgia News Lab, Atlanta  
*John Trotti*, Senior Manager, Contracts, Iron Mountain Intellectual Property Management, Inc., Norcross  
*Joann M. Yoon Kang*, Centers for Disease Control & Prevention, Atlanta

3:00 **ADJOURN**



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Co-sponsored by:

**Transition into Law Practice Program (TILPP)**  
State Bar of Georgia

**RECORDED MONDAY, FEBRUARY 22, 2016**

**PARTICIPANTS IN THE TRANSITION INTO LAW PRACTICE PROGRAM PLEASE NOTE:**

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- |  |   |
|--|---|
| <b>Athens</b> .....ICLE, A.G. Cleveland Bldg., 248 Prince Ave.   | <b>Kennesaw</b> .....Kennesaw State University—Continuing Education,<br>3333 Busbee Drive, KC Bldg, Bldg 33, Room Number<br>Posted in Lobby |
| <b>Atlanta—Ga. Bar</b> .....Georgia Bar Center, 104 Marietta Street NW<br>(Corner of Marietta and Spring)  | <b>Savannah</b> .....State Bar of Georgia, Coastal GA Office, 18 E. Bay St.   |
| <b>Augusta</b> .....Augusta University, 2500 Walton Way, Washington<br>Hall, The Towers 4th Floor  | <b>Tifton</b> .....State Bar of Georgia, South Georgia Office,<br>244 E. 2nd St. NW   |
| <b>Columbus</b> .....Columbus State Univ.—Elizabeth Bradley Turner<br>Ctr., corner of E. Lindsey & College Dr., Rm 216A,<br>4225 University Ave. | <b>Valdosta</b> .....Valdosta State University—Regional Ctr. for<br>Continuing Education, 903 N. Patterson St. (Park in<br>Rear), Rm 222    |
| <b>Dalton</b> .....NW Georgia Trade & Convention Ctr,<br>2211 Dug Gap Battle Rd.   |   |

**THREE WAYS TO REGISTER:** check the ICLE schedule on the web at [www.iclega.org](http://www.iclega.org)

**Mail:** ICLE • P.O. Box 1885 • Athens, GA 30603-1885 (make check payable to ICLE)

**Fax:** 706-354-4190 (credit card payment must accompany fax to be processed)

**Online:** [iclega.org](http://iclega.org) (credit card payment only)

**Duplicate registrations may result in multiple charges to your account. A \$15 administrative fee will apply to refunds required because of duplicate registrations.**

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**Questions? Call ICLE Atlanta Area: 770-466-0886 • Athens Area: 706-369-5664 • Toll Free: 1-800-422-0893**

**BEGINNING LAWYERS PROGRAM • REBROADCAST • March 22, 2016 • 9204**

NAME \_\_\_\_\_ GEORGIA BAR # \_\_\_\_\_

FIRM/COMPANY \_\_\_\_\_ OFFICE PHONE \_\_\_\_\_

EMAIL \_\_\_\_\_ (To receive seminar notification and registration confirmation by email only.)

MAILING ADDRESS \_\_\_\_\_ ZIP + 4 \_\_\_\_\_ - \_\_\_\_\_

STREET ADDRESS (for UPS) \_\_\_\_\_ ZIP + 4 \_\_\_\_\_ - \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ REGISTRATION FEE: \$95

**TO REGISTER CHECK LOCATION:** (see reverse side of brochure for the address of each location)

- |                                   |   |                                  |                                   |                                 |
|-----------------------------------|---|----------------------------------|-----------------------------------|---------------------------------|
| <input type="checkbox"/> ATHENS   | <input type="checkbox"/> ATL./GA BAR CENTER | <input type="checkbox"/> AUGUSTA | <input type="checkbox"/> COLUMBUS | <input type="checkbox"/> DALTON |
| <input type="checkbox"/> KENNESAW | <input type="checkbox"/> SAVANNAH           | <input type="checkbox"/> TIFTON  | <input type="checkbox"/> VALDOSTA |                                 |

- I have enclosed a check for the registration fee.
- I authorize ICLE to charge the registration fee to my  MASTERCARD  VISA  AMERICAN EXPRESS\*
- I am unable to attend. Please send written materials and bill me for the cost of materials only. Sorry, no phone orders!
- I am sight impaired under the ADA, and I will contact ICLE immediately to make arrangements.

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Expiration Date: \_\_\_\_\_ Signature: \_\_\_\_\_

## AGENDA

Presiding: *Michelle E. West*, Director, Transition Into Law Practice Program, State Bar of Georgia, Atlanta

*Jeffrey R. Davis*, Executive Director, State Bar of Georgia, Atlanta

*Prof. Patrick E. Longan*, Bootle Chair in Ethics and Professionalism, Walter F. George School of Law, Mercer University, Macon

7:30 **REGISTRATION**

(All attendees must check in upon arrival. A removable jacket or sweater is recommended.)

8:15 **WELCOME TO THE STATE BAR OF GEORGIA**

*Robert Kauffman*, President, State Bar of Georgia; Hartley, Rowe & Fowler, P.C., Douglasville

8:30 **GREETINGS FROM THE STATE BAR'S YOUNG LAWYERS DIVISION**

*John R.B. "Jack" Long*, President, Young Lawyers Division, State Bar of Georgia; John R.B. Long, P.C., Augusta

8:45 **LAUNCH YOUR CAREER WITH THE ASSISTANCE OF THE STATE BAR**

- **TILPP**
- **CLE Opportunities**
- **Pro Bono Training & Opportunities**

*Michelle E. West*

9:05 **PRACTICE RESOURCES AVAILABLE FROM THE STATE BAR**

- **Law Practice Management**
- **Fast Case**
- **Member Benefits**

*Natalie Kelly*, Director, Law Practice Management Program, State Bar of Georgia, Atlanta

9:25 **HOW THE STATE BAR WORKS TO PROTECT YOUR LICENSE**

- **Unauthorized Practice of Law**
- **Consumer Assistance Program**
- **Fee Arbitration**
- **Lawyers Assistance Program**

*Rita Payne*, Director, Fee Arbitration, State Bar of Georgia, Atlanta

9:45 **THE STATE BAR AT WORK FOR YOU**

- **Membership**
- **State Bar Center**
- **Legislative Advocacy**

*Jeffrey R. Davis*

10:05 **WAYS TO GET INVOLVED WITH STATE BAR SECTIONS AND PROGRAMS**

- **Military Legal Assistance Program**
- **Pro Bono Program**
- **Section Liaison**

*Norman Zaller*, Attorney Coordinator, Military Legal Assistance Program, State Bar of Georgia, Atlanta

*Michael L. Monahan*, Director, Pro Bono Program, State Bar of Georgia, Atlanta

*Derrick W. Stanley*, Section Liaison, State Bar of Georgia, Atlanta

10:35 **BREAK**

10:45 **STARTING A LAWSUIT: THE WHYS AND WHEREFORES OF REQUIRED PROCEDURES AND DOCUMENTS**

*Henry M. Quillian, III*, Taylor English Duma LLP, Atlanta

11:45 **LUNCH** (on your own)

12:15 **PROFESSIONALISM AND REPUTATION**

*Avarita L. Hanson*, Executive Director, Chief Justice's Commission on Professionalism, Atlanta

12:45 **HOW TO AVOID BAR COMPLAINTS & MALPRACTICE**

*Paula J. Frederick*, General Counsel, State Bar of Georgia, Atlanta  
*P. Michael Freed*, Lewis Brisbois Bisgaard & Smith LLP, Atlanta

1:45 **BREAK**

2:00 **ACTING FOR YOUR CLIENT**

*Moderator: Patrick E. Longan*

**Panelists:**

*Hon. Dean C. Bucci*, Judge, Superior Court, Paulding Judicial Circuit, Dallas

*Donald R. "Dick" Donovan*, District Attorney, Paulding Judicial Circuit, Dallas

*Seth D. Kirschenbaum*, Davis, Zipperman, Kirschenbaum, & Lotito, Atlanta

*Leah J. Zammit*, Zammit Law LLC, Marietta

3:00 **ADJOURN**



### CANCELLATION POLICY

Cancellations reaching ICLE by 5:00pm, the day before the seminar date will receive a registration fee refund less a \$15.00 administrative fee. Otherwise, the registrant will be considered a "no show" and will not receive a registration fee refund. Program materials will be shipped after the program to every "no show." Designated substitutes may take the place of registrants unable to attend.

### SEMINAR REGISTRATION POLICY

Early registrations must be received 48 hours before the seminar. ICLE will accept on-site registrations as space allows. However, potential attendees should call ICLE the day before the seminar to verify that space is available. All attendees must check in upon arrival and are requested to wear name tags at all times during the seminar. ICLE makes every effort to have enough program materials at the seminar for all attendees. When demand is high, program materials must be shipped to some attendees.

**STATE BAR OF GEORGIA FORMAL INVESTIGATIONS REGARDING  
THE UNLICENSED PRACTICE OF LAW**

Reporting period May 1, 2015, through April 30, 2016

**Statistics**

Formal Investigations Initiated 100

Nature of Investigation:

Paralegal/Document Preparation Service	46
Regular UPL	33
Disbarred/Suspended/Inactive Lawyer	9
Out of State Lawyer	8
Lawyer	3
Collection Agency	1

Source of Investigation:

State Bar of Georgia	51
Lawyer	18
Public (Individual)	11
Judge	11
Public (Corporation)	6
State Agency	3

Judicial Districts:

District 1	6
District 2	0
District 3	5
District 4	16
District 5	29
District 6	14
District 7	14
District 8	0

District 9	11
District 10	5
Formal Investigations Pending	121
Formal Investigations Closed	128
Disposition:	
Subject agreed to comply	94
Subject referred to prosecutor	12
Further action unnecessary	10
Subject warned of investigation	9
Subject not found	2
Complainant to contact prosecutor	1



# Committee on Professionalism



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## MEMORANDUM

To: President Robert “Bob” Kauffman, Executive Committee, Board of Governors

Re: **State Bar of Georgia, Committee on Professionalism  
ANNUAL REPORT 2015-2016**

From: Elizabeth L. Fite, Chair  
Nicole Iannarone, Vice Chair

Date: May 13, 2016

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We have had the honor and pleasure to serve as the Chair and Vice Chair of the State Bar’s Committee on Professionalism (COP) which has had a successful and productive 2015-2016 year. Please find below a summary of this year’s activities and programs.

### COMMITTEE MISSION

This standing committee shall consider and make recommendations to the Executive Committee and Board of Governors necessary to advance professionalism in the practice of law. It shall concern itself with the various facets of professionalism including knowledge, technical skill, integrity in relations with both clients and courts, dedication to the law and public good, and ultimately the providing of competent legal services to the public.

### MEETINGS

The COP holds three (3) full committee meetings each year. It met on September 16, 2015 and February 3, 2016. It will hold its last meeting of the year on Wednesday, May 25, 2015. The COP also holds subcommittee meetings for discussion and review of the law school orientation hypotheticals and Law Day outreach.

### MEMBERS

The 2015-2016 members included in addition to the Chair Elizabeth Fite and Vice-Chair Nicole Iannarone the following attorneys: David Winston Adams, Jennifer Alewine, Kent Edward Altom, Robert Louis Arrington, Jr., Enjolique Dion Aytch, Bruce W. Bennett, Joshua I. Bosin, David Scott Crawford, Jana J. Edmondson-Cooper, Gary Stuart Freed, William C. Gentry, Nekia Shantel Hackworth, Cathy Hampton, John Walter Kraus, Joy Lampley-Fortson, Robert M.

Lewis, Jr., William Harold Pinson, Jr., LaKeisha Renata Randall, Cherri Latoya Shelton, James Darren Summerville, Sharon W. Ware, Gwendolyn S. Fortson Waring, Erica LaTange Woodford. It is fortunate to have advisors including: Dean A. James Elliott, Prof. Patrick E. Longan, Dean Kellyn O. McGee and Dean Roy M. Sobelson. Its Staff Liaison is Prof. Avarita L. Hanson of the Chief Justice's Commission on Professionalism.

## **PROGRAMS**

The COP Programs are as follows:

1. Law School Orientations on Professionalism
2. Law Day Outreach Initiative
3. Connect With a Colleague Program
4. Other Initiatives

## **LAW SCHOOL ORIENTATIONS ON PROFESSIONALISM**

The COP worked with the Chief Justices' Commission on Professionalism ("CJCP") in planning and executing eight (8) Law School Orientations on Professionalism. The first series of six programs were held for more than 1000 entering, transfer and LL.M. students in August of 2015 at all six (6) law schools in Georgia (Atlanta's John Marshall, Emory, Georgia, Georgia State, Mercer and Savannah). The second set of two (2) different programs were held in January of 2016 and include a second part of orientation for Emory students and for entering students at Atlanta's John Marshall. These programs engage more than 200 attorneys, judges and law school administrators as group leaders.

The COP Hypotheticals Committee met to create and discuss hypos for the Law School Orientations that will occur at Georgia's six law schools in August of 2016. As in prior years, the COP Chair challenged all COP members to serve as Group Leaders for the Law School Orientations. We expect to have another great season of Law School Orientations in August 2016.

## **LAW DAY OUTREACH INITIATIVE**

The 2016 ABA Law Day theme is: *Miranda: More than Words*. The COP Law Day Outreach Committee contacts all bar associations across Georgia to encourage them to host Law Day programs in April and May. In so doing, we ask each bar association president to inform the COP of the association's Law Day events and to then post those events on the American Bar Association Law Day webpage (lawday.org). This initiative has been successful in the past five (5) years to capture the breadth and concepts of Law Day celebrations around Georgia and we expect the same result this year.

## **CONNECT WITH A COLLEAGUE PROGRAM**

The COP began the Connect with A Colleague Program in 2013 and it was a great success. The Connect With a Colleague Program was not held last summer. Should a Committee

member volunteer to assume leadership, the Connect with a College Program will take place this summer of 2016. The Program encourages attorneys to share a meal, coffee or beverage with a colleague in an effort to improve professionalism and civility in the legal profession. The Committee has asked the State Bar for a small amount of funds to support this program.

### **OTHER INITIATIVES**

The COP proudly served as one of the sponsors of the Chief Justice's Commission on Professionalism's Convocation on Professionalism that occurred on November 14, 2014 at the historic Carter Center. The Convocation addressed the theme: *Aging in the Law: It's More Than a Senior Moment*. The event, planned by Avarita Hanson, her staff, and Committee Vice Chair Nicole Iannarone was excellent and very well-attended. As a result, the Commission, Bar and Committee are focusing attention on issues relative to aging in the law with the development of policies, educational and other programs to address those issues. The COP was pleased to be a part of this great event.

As a consequence, the COP is co-sponsoring the Chief Justice's Commission on Professionalism's 2016 Convocation on Professionalism which will explore the theme: *The New Normal for Delivery of Legal Services*. The COP has asked the Bar for financial support for the 2016 Convocation. The issues to be presented are at the core of the legal profession and intrinsic to professionalism and this special event is worthy of Bar support. Several members of the Committee on Professionalism are serving on the 2016 Convocation Planning Committee, Co-Chaired by Professor Nicole Iannarone, Professor Timothy Floyd, Dean Rita Sheffey and Avarita Hanson. This all-day CLE program will take place on Tuesday, August 30, 2016 at the Bar Center in Atlanta and will feature ABA President, State Bar of Georgia Past President and Atlanta attorney Linda Klein as its luncheon speaker.

### **CLOSING REMARKS**

The final COP meeting for the 2015-2016 bar year will take place on Wednesday, May 25, 2016 at 12:00 noon at the State Bar Center. Many thanks to Vice-Chair, Nicole Iannarone, for her leadership and contributions to this Committee's efforts this year. Much thanks to the Commission on Professionalism staff for its excellent support of this committee's work. We welcome your input, feedback, suggestions and support for the important work of the Committee on Professionalism.

Respectfully submitted,

Elizabeth L. Fite, Chair  
Nicole Iannarone, Vice-Chair





# CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM

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## MEMORANDUM

The Honorable Hugh P. Thompson (Chair)  
Chief Justice, Supreme Court of Georgia  
Atlanta, Georgia

Professor Frank S. Alexander  
Emory University School of Law  
Atlanta, Georgia

Professor Nathan S. Chapman  
University of Georgia School of Law  
Athens, Georgia

Professor Clark D. Cunningham  
Georgia State University College of Law  
Atlanta, Georgia

The Honorable David P. Darden  
State Court of Cobb County  
Marietta, Georgia

Jennifer M. Davis  
Georgia Defense Lawyers Association  
Atlanta, Georgia

J. Antonio DelCampo  
DelCampo Weber & Grayson, LLC  
Atlanta, Georgia

Gerald M. Edenfield  
Edenfield, Cox, Bruce & Classens, PC  
Statesboro, Georgia

Associate Dean A. James Elliott  
Emory University School of Law  
Atlanta, Georgia

The Honorable Steve C. Jones  
U.S. District Court, Northern District  
Atlanta, Georgia

Robert J. Kauffman  
Hartley, Rowe & Fowler  
Douglasville, Georgia

C. Joy Lampley-Fortson  
U.S. Department of Homeland Security  
Atlanta, Georgia

John R. B. Long  
John R. B. Long, PC  
Augusta, Georgia

Professor Patrick E. Longan  
Mercer University School of Law  
Macon, Georgia

The Honorable Kellie K. McIntyre  
Office of the Solicitor General  
Augusta, Georgia

The Honorable Carla W. McMillan  
Court of Appeals of Georgia  
Atlanta, Georgia

Dean Malcolm L. Morris  
Atlanta's John Marshall Law School  
Atlanta, Georgia

Wanda M. Morris  
The Home Depot  
Atlanta, Georgia

The Honorable Kathy S. Palmer  
Middle Judicial District Superior Court  
Swainsboro, Georgia

Claudia S. Saari  
DeKalb County Public Defender's Office  
Decatur, Georgia

Lynne E. Scroggins  
Atlanta, Georgia

R. Kyle Williams  
Williams Testink, LLC  
Decatur, Georgia

Avarita L. Hanson  
Executive Director

Terie Latala  
Assistant Director

Naska Harris-Daniel  
Administrative Assistant

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**TO: President Robert J. "Bob" Kauffman, Executive Committee, Members, Board of Governors**

**FROM: Avarita L. Hanson, Executive Director**

**DATE: May 19, 2016**

**SUBJECT: Annual Meeting Update**

It is my pleasure to update you on the activities of the Chief Justice's Commission on Professionalism ("CJCP"), concluding its third year under Chief Justice Hugh Thompson's leadership. Our report for the Spring Board of Governors meeting was quite extensive. This report will, therefore, highlight the Commission's two major activities scheduled for the beginning of the 2016-2017 bar year over the summer.

### I. SPRING UPDATE: OVERVIEW

The Chief Justice's Commission on Professionalism is guided by its mission, stated as follows:

The mission of the Chief Justice's Commission on Professionalism is to support and encourage lawyers to exercise the highest levels of professional integrity in their relationships with their clients, other lawyers, the courts, and the public and to fulfill their obligations to improve the law and the legal system and to ensure access to that system.

### II. LAW SCHOOL ORIENTATION PROGRAMS

In partnership with the State Bar's Committee on Professionalism and Georgia law schools, for the twenty-fourth year the CJCP will present law school orientations on Professionalism in **August of 2016** at all 6 Georgia law schools (Atlanta's John Marshall, Emory, Georgia State, Mercer, UGA, Savannah). More than 200 judges, attorneys and legal educators will serve as group leaders in discussions with groups of incoming (entering, transfer and visiting) students to address professionalism and ethical challenges affecting law students and professionals. Students will discuss professionalism issues from hypothetical situations written, reviewed and updated by the Committee. The timely and relevant situations encourage students to learn an appropriate response to ethical challenges in law school and in practice. Students will hear keynote addresses from prominent professionals. BOG members are invited to participate in the orientations. Please complete and return the form calling for participants that includes the *tentative dates* for the programs.

Report to State Bar of Georgia President,  
Executive Committee, Board of Governors  
May 19, 2016  
page 2

### **III. CONVOCAATION ON PROFESSIONALISM - Tuesday, August 30, 2016 – The New Normal for Delivery of Legal Services**

Whether you are a 35+ year attorney like I am, or you just received your Georgia Bar card yesterday, you will have a lot to learn from the Commission's upcoming Convocation on Professionalism. The timely theme is relevant to all ages of lawyers and all types of practices: "The New Normal for Delivery of Legal Services." Scheduled for Tuesday, August 30, 2016, this full-day CLE program will feature ABA President and Past State Bar of Georgia President Linda Klein in a special conversation over lunch. Program Chairs include Timothy Floyd, Avarita Hanson, Nicole Iannarone and Rita Sheffey, supported by a large, inclusive and diverse planning committee. This gathering will look at issues including: "Lawyering Today and Opportunities for the Future," "Evolving Models for Legal Services," "Entrepreneurs for Change – Public, Private, the Academy, and the Georgia Showcase," "Meeting the Needs of All Consumers of Legal Education," and "Lawyers Living Well." Please check your emails from the Bar and ICLE, as well as other communications, for more information and to register.

### **XI. CLOSING**

It is these programs – orientations, convocations and the like, that demonstrate why the Georgia Supreme Court started what has become such a successful international professionalism movement among the judiciary, organized bar and law schools to support and encourage conduct that strengthens the dignity, honor and integrity of the legal profession. Our reputation for collaboration and civility for more than twenty-seven years remains widely known and highly regarded and continues to receive accolades for its thoughtful, excellent innovative programs. Please make plans to participate in these important programs.

With the continued help our of Bar leadership and members, the Commission will continue to contribute to uplift legal professionalism in Georgia and elsewhere. Please do not hesitate to call upon the Commission members, me and our very dedicated and capable staff members, whenever we can assist you in advancing this important cause. Thank you.

ALH/tml

Attachments



Chief Justice's Commission on Professionalism

## **Convocation on Professionalism: The New Normal for Delivery of Legal Services**



- Lawyering Today and in the Future
- Evolving Models for Legal Services
- Entrepreneurs for Change: Public, Private, and the Academy
- Lunch: A Conversation with Linda Klein, President American Bar Association
- Meeting the Needs of all Consumers of Legal Services
- Lawyers Living Well

**SAVE THE  
DATE**  
**Tuesday**  
**August 30, 2016**  
Georgia Bar Center  
Atlanta

## 2015-16 Media Report

PUBLISHED ARTICLES			Headline	Circulation
Date	Newspaper			
6/13/2015	Waycross Journal-Herald		Kay Carter Wins Praise	7,244
6/14/2015	Henry Daily Herald, McDonough		Kudos to Henry County Bar Association	2,352
6/17/2015	Chariton County Herald, Folkston		Congratulates Carter	1,970
6/17/2015	North Fulton Neighbor, Alpharetta		Congratulations to Northview mock trial team for placing second in the nation	17,739
6/17/2015	Rockdale Citizen, Conyers		Meyers' appointment a benefit to all of Rockdale County	3,091
6/17/2015	Newton Citizen, Covington		Meyers' appointment a benefit to all of Rockdale County	2,353
6/18/2015	Macon Telegraph		Lifetime of Service	29,220
6/24/2015	Gwinnett Daily Post, Lawrenceville		David Lipscomb Re-Elected to Executive Committee of State Bar of Georgia	67,746
6/24/2015	Savannah Morning News		Savannah attorney named treasurer of Ga. State Bar	37,597
6/24/2015	Augusta Chronicle		Augusta attorney installed as president of young lawyers' group	47,177
6/25/2015	Madison County Journal, Danielsville		Georgia legal community mourns loss of Judge Lindsay Tise	2,983
6/25/2015	Hartwell Sun		Judge Tise mourned	5,271
6/27/2015	Houston Home Journal, Perry		Houston Co. Bar Association honored by State Bar	7,744
6/27/2015	Gwinnett Daily Post, Lawrenceville		Yari Lawson reinstalled as State Bar Young Lawyers Division newsletter co-editor	67,746
6/27/2015	Albany Herald		Appeals Court Chief Judge Herbert Phipps given Marshall and Thrower awards	11,524
6/28/2015	Marietta Daily Journal		Cobb County Bar Association honored	13,393
6/30/2015	Statesboro Herald		Mock, Edenfield lead Georgia Young Lawyers	7,200
6/30/2015	Brunswick News		District Court judge receives award	13,929
7/1/2015	Commerce News		Piedmont Circuit Bar Association honored	1,415
7/1/2015	Jackson Herald, Jefferson		Piedmont Circuit Bar Association honored by State Bar of Georgia	4,514
7/1/2015	Rockdale Citizen, Conyers		Covington attorney elected to State Bar's Board of Governors	3,091
7/1/2015	Rockdale Citizen, Conyers		Brian Rogers named secretary of State Bar	3,091
7/1/2015	Savannah Herald		Atty. Lester Johnson Receives State Bar of Georgia Professionalism Award	8,000
7/2/2015	Courier-Herald, Dublin		Dubin attorney appointed to Board of Governors of State Bar of Georgia	9,460
7/2/2015	Augusta Chronicle		Elected to serve in State Bar post	47,177
7/2/2015	Newton Citizen, Covington		Gregory Pope elected to policy-making position with State Bar	2,353
7/2/2015	Newton Citizen, Covington		Covington resident named to officer position on State Bar of Georgia	2,353
7/3/2015	Douglas County Sentinel, Douglasville		Kaufman installed as organization's president	2,516
7/3/2015	Atlanta Business Chronicle		Achievements: Mary McAfee	37,000
7/3/2015	Atlanta Business Chronicle		Honors & Awards: Linda Klein	37,000
7/4/2015	Albany Herald		Business Portfolio: Joe Dent	11,524
7/4/2015	Gwinnett Daily Post, Lawrenceville		Gwinnett County Bar Association honored by State Bar	67,746
7/5/2015	Savannah Morning News		Johnson receives professionalism award	37,597
7/6/2015	Macon Telegraph		Macon attorneys honored by State Bar of Georgia	29,220
7/6/2015	Daily Report		Congratulations to New Chief Judge of Court of Appeals	3,247

## 2015-16 Media Report

7/7/2015	Daily Report	Georgia Legal Community Mourns Loss of Rawson Foreman	3,247
7/8/2015	Houston Home Journal, Perry	Congratulations to Judge Turner	7,744
7/8/2015	Early County News, Blakely	Congratulations to Judge Bishop	2,438
7/8/2015	Barrow Journal, Winder	Piedmont Circuit Bar Association honored by State Bar of Georgia	2,154
7/9/2015	Columbus Ledger-Enquirer	Well done	24,932
7/9/2015	Southern Tribune, Cuthbert	Congratulations to Judge Bishop on state appointment	1,200
7/12/2015	Covington News	Covington attorney elected to Board of Governors of State Bar of Georgia	5,500
7/24/2015	Atlanta Business Chronicle	Facing the challenge of lawyer wellness	37,000
7/26/2015	Albany Herald	Albany attorneys, judges chosen for State Bar positions	11,524
7/27/2015	Athens Banner-Herald	ACC attorneys, judges named to State Bar of Georgia committees	12,129
7/27/2015	Islander, St. Simons Island	Local attorneys named to State Bar Committees	3,435
7/28/2015	Herald-Gazette, Barnesville	Georgia legal community mourns loss of Judge Thomas	4,956
7/29/2015	Northeast Georgian, Cornelia	Cornelia attorney named to State Bar Advisory Committee on Legislation	7,370
7/29/2015	Baxley News Banner	Johnson named to State Bar's Children and the Courts Committee	4,600
7/29/2015	Monroe County Reporter, Forsyth	Jenkins appointed to State Bar Committee	4,199
7/29/2015	Calhoun Times	State Bar names Calhoun attorney to UPL Committee for District 7	4,359
7/29/2015	Dodge County News, Eastman	Eastman attorney is named to two State Bar of Georgia committees	4,693
7/29/2015	Dade County Sentinel, Trenton	Congratulations to Judge Ellis	5,700
7/29/2015	Pelham Journal	Congratulations to new Pelham Municipal Court judge	2,500
7/29/2015	Douglas Enterprise	Douglas Attorney Named to State Bar of Georgia Member Benefits Committee	7,432
7/30/2015	Dallas New Era	Dallas Attorney Named to State Bar of Georgia Committees	3,084
8/1/2015	Gwinnett Daily Post, Lawrenceville	Twenty-seven Gwinnett attorneys, judges named to state bar committees	67,746
8/1/2015	Atlanta Inquirer	R. Gary Spencer Elected to Board of Governors of State Bar of Georgia	61,082
8/1/2015	Atlanta Inquirer	Jones Receives State Bar of Georgia Leadership Award	61,082
8/1/2015	Atlanta Inquirer	Johnson Receives State Bar of Georgia Professionalism Award	61,082
8/2/2015	Times, Gainesville	5 Gainesville attorneys join State Bar committees	5,000
8/4/2015	Johnson Journal, Wrightsville	Summer appointed to serve on Board of Governors of State Bar of Georgia	1,181
8/4/2015	Clayton Neighbor	Clayton County attorneys named to Georgia Bar Association committee	38,400
8/4/2015	Henry Daily Herald, McDonough	Henry County attorneys named to Bar committee	2,352
8/5/2015	Northside Neighbor, Atlanta	Congratulations to attorney on national office	16,619
8/5/2015	Towns County Herald, Hiawassee	Dehrer ready for new challenge	3,846
8/5/2015	Milton Herald, Alpharetta	North Fulton attorneys appointed to Georgia Bar committees	8,500
8/5/2015	Daily Report	Congratulations to New JQC Director and Former Bar President	3,247
8/6/2015	Pickens County Progress, Jasper	Jasper Attorneys, Judge Named to State Bar of Georgia Committees	6,040
8/6/2015	Revue & News, Alpharetta/Roswell	NF attorneys appointed to Georgia Bar committees	28,000
8/7/2015	Daily Report	Young Georgia Lawyers Win Top ABA Honors	3,247
8/12/2015	Forsyth Herald, Cumming	North Fulton attorneys named to Georgia Bar committees	17,000

## 2015-16 Media Report

8/12/2015	Newton Citizen, Covington	Covington Attorney Named to State Bar of Georgia Committees	2,353
8/12/2015	Milton Herald, Alpharetta	North Fulton attorneys named to Georgia Bar committees	8,500
8/12/2015	Fayette Citizen, Fayetteville	Attorneys named to bar committees	5,000
8/12/2015	Rockdale Citizen, Conyers	Covington Attorney Named to State Bar of Georgia Committees	3,091
8/12/2015	Fayette County News, Fayetteville	Fayette attorneys named to State Bar committees	2,473
8/12/2015	Camilla Enterprise	Judge Bell Named to State Bar of Georgia Advisory Committee on Legislation	1,418
8/12/2015	Pelham Journal	Judge Bell Named to State Bar of Georgia Advisory Committee on Legislation	2,500
8/13/2015	Revue & News, Alpharetta/Roswell	North Fulton attorneys named to Georgia Bar committees	28,000
8/13/2015	Revue & News, Alpharetta/Roswell	Roswell attorney appointed to board of governors of State Bar of Georgia	28,000
8/13/2015	Daily Report	3 Young Georgia Lawyers Chosen for ABA Mentoring	3,247
8/13/2015	Donalsonville News	Judge Bell named to Advisory Committee	3,925
8/13/2015	Daily Report	Georgia Legal Community Mourns Loss of Judge Harris Adams	3,247
8/14/2015	Columbus Ledger-Enquirer	Loss for state, legal profession (Morton Harris)	24,932
8/14/2015	Atlanta Business Chronicle	State Bar of Georgia's Young Lawyers Division Earns Top Awards	37,000
8/14/2015	Daily Report	Congratulations to New ABA President-Elect Linda Klein	3,247
8/17/2015	Macon Telegraph	Macon attorneys named to State Bar committees	29,220
8/18/2015	Statesboro Herald	Six Statesboro attorneys named to State Bar posts	7,200
8/19/2015	Meiter Advertiser	Gross named to State Bar committee	2,033
8/26/2015	Gwinnett Daily Post, Lawrenceville	Ga. State Bar remembers Gene Reeves	67,746
9/1/2015	Ft. Lauderdale (FL) Sun Sentinel	People on the Move: Enjolie Aytch (committees)	163,728
9/3/2015	Macon Telegraph	Congratulations (Tomeika Daniel)	29,220
9/10/2015	Daily Report	Congratulations to Legal Aid Director Steven Gottlieb on National Award	3,247
9/14/2015	Savannah Morning News	We are grateful for Sage Brown's lifetime of service	37,597
9/16/2015	Savannah Herald	Georgia Legal Community Mourns Loss of Sage Brown	8,000
9/18/2015	Daily Report	Georgia Legal Community Mourns Loss of Chuck Rice	3,247
9/23/2015	Marietta Daily Journal	7 to serve in YLD Leadership	13,393
9/23/2015	Sandersville Progress	Sandersville attorney named to serve in YLD leadership	4,074
9/24/2015	Daily Report	Congratulations to Perkins-Hooker on Receiving Diversity Award	3,247
9/24/2015	Summerville News	Summerville Attorney Named to Serve in YLD Leadership	6,034
9/26/2015	Gwinnett Daily Post, Lawrenceville	Liburn attorney named to serve in YLD Leadership	67,746
9/26/2015	Clayton News Daily, Jonesboro	Letter to the Editor: Judge Teske	1,688
9/27/2015	Albany Herald	Business Portfolio: Je'Nita Lane	11,524
9/27/2015	Athens Banner-Herald	Local attorneys named to State Bar Committees	12,129
9/28/2015	Macon Telegraph	Five Macon attorneys named to YLD leadership	29,220
9/30/2015	Clinch County News, Homerville	Georgia legal community mourns loss of Chuck Rice	1,448
9/30/2015	Cherokee Ledger News, Woodstock	Congratulations on appointment	40,000
9/30/2015	Savannah Herald	Congratulations to Judge LeRoy Burke on his State Appointment	8,000

## 2015-16 Media Report

10/1/2015	Cobb Business Journal	Seven to serve in YLD Leadership	5,000
10/6/2015	Savannah Morning News	Congratulations to Judge Burke on state appointment	37,597
10/8/2015	Dallas New Era	Congratulations to District Attorney's Office on Work-Based Learning Success	3,084
10/15/2015	Georgia Asian Times	Georgia's first South Asian female judge officially appointed	20,000
10/18/2015	LaGrange Daily News	Courtroom portrait appropriate honor for Judge Keeble	3,837
10/20/2015	Daily Report	(State Bar honors four lawyers and a firm)	3,247
10/20/2015	Clayton News Daily, Jonesboro	Congratulations to local attorney on state appointment	1,688
10/21/2015	Commerce News	Commends public defender on appointment to standards council	1,415
10/21/2015	Jones County News, Gray	Bar president congratulates new DA Bradley	4,175
10/21/2015	Banks County News, Homer	Commends public defender on appointment to standards council	2,073
10/21/2015	Jackson Herald, Jefferson	Governor appoints Seagraves to state (council)	4,514
10/22/2015	Eatonton Messenger	Congratulations to Bradley on appointment as new DA	5,679
10/22/2015	Herald Journal, Greensboro	Congratulations to new Ocmulgee Circuit District Attorney	4,579
10/22/2015	Morgan County Citizen, Madison	Congrats Bradley	4,490
10/22/2015	Monticello News	Congrats! (Stephen Bradley)	2,700
10/23/2015	Lake Oconee News, Greensboro	Congratulations to new Ocmulgee Circuit DA	3,975
10/28/2015	Cairo Messenger	State Bar head congratulates Attorney Conger	6,120
10/29/2015	Savannah Tribune	Mance elected Port City Bar Association President	10,000
10/29/2015	Toccoa Record	Mance praised for lawyer post	4,893
11/1/2015	Savannah Morning News	Congratulations to new Port City Bar Association President	37,597
11/1/2015	Union Recorder, Milledgeville	Congratulations to Stephen Bradley on his appointment	5,162
11/12/2015	Clayton Tribune	Congratulations to Brian Rickman	5,123
11/12/2015	Henry Daily Herald, McDonough	State Bar honors life of attorney	2,352
11/15/2015	Coastal Courier, Hinesville	Legal community mourns loss of Gary Bacon	5,500
11/19/2015	Madison County Journal, Danielsville	Congratulations to Madison Co. native named to Court of Appeals	2,983
11/19/2015	Tribune & Georgian, St. Marys	State bar thanks Bacon for service	5,382
11/26/2015	Savannah Morning News	Congratulations to local attorney on state appointment	37,597
11/26/2015	Marietta Daily Journal	Georgia legal community mourns loss of Jack Mallard	13,393
12/1/2015	Daily Report	Georgia legal community mourns loss of Hal Clarke	3,247
12/7/2015	Savannah Morning News	Jurist in Residence program an appropriate honor for Judge Edenfield	37,597
12/8/2015	Athens Banner-Herald	UGA Jurist in Residence program is fitting honor to Edenfield	12,129
12/9/2015	Berrien Press, Nashville	Berrien County Courthouse included in New UGA Novel	4,221
12/13/2015	Statesboro Herald	An appropriate honor for Judge Edenfield	7,200
12/16/2015	Daily Report	On Behalf of the State Bar the Legal Community Mourns Loss of Harry Cashin	3,247
12/30/2015	Times Herald, Newnan	Kudos to Skandalakis	9,007
1/4/2016	Daily Report	State Bar President Congratulates Newly Selected Federal Magistrate Judge	3,247
1/6/2016	Calhoun Times	Letter to the Editor: Rex Garner	4,359



## 2015-16 Media Report

1/11/2016	Daily Report	Georgia Legal Community Mourns Loss of Robert Forry, Bar President Writes	3,247
1/15/2016	Daily Report	Georgia Legal Community Mourns Loss of Jack Turner, Bar President Says Letter to the Editor: Judge Rowland	3,247
1/19/2016	Johnson Journal, Wrightsville	Georgia Legal Community Mourns Loss of Michael Egan, Bar President Writes	1,181
1/20/2016	Daily Report	Congratulations to Dennis	3,247
1/23/2016	Valdosta Daily Times	Georgia's legal community mourns loss of attorney Summer	12,256
1/28/2016	The Times, Gainesville	Congratulations (Walter Gordon)	5,000
2/4/2016	Hartwell Sun	Attorneys attend YLD academy	5,027
2/6/2016	Houston Home Journal, Perry	Business Portfolio: YLD Leadership Academy	7,822
2/7/2016	Albany Herald	Congratulations, Judge Cavender	10,793
2/10/2016	Coastal Courier, Hinesville	Pooter resident receives prestigious honor	5,500
2/10/2016	Savannah Morning News	Your View: Judge Cavender	30,841
2/11/2016	Tattnall Journal, Reidsville	Bar congratulates Judge Cavender	3,803
2/11/2016	Bryan County News, Richmond Hill	News-makers in business (Leadership Academy)	5,000
2/14/2016	The Times, Gainesville	Loss to city, legal profession	21,789
2/18/2016	Columbus Ledger-Enquirer	Letter to the Editor: Judge Gillis	9,555
2/18/2016	Lincoln Journal, Lincolnton	YLD contributes \$131,699 toward camp renovations	3,000
2/18/2016	Bryan County News, Richmond Hill	Bar congratulates new superior court judge	2,000
2/19/2016	Northeast Georgian, Cornelia	Congratulations to newly appointed district attorney	6,827
2/20/2016	CrossRoads News, DeKalb	Baranco, Thurmond to get Benham Awards for service	1,000
2/20/2016	Waycross Journal-Herald	Local Attorneys Praised	6,828
2/21/2016	Coastal Courier, Hinesville	Bar congratulates new superior court judge	5,500
2/24/2016	Brunswick News	Georgia mourns passing of legal leader Henson	12,988
2/24/2016	Claxton Enterprise	Congratulations to new Superior Court Judge	4,156
2/25/2016	Clayton Tribune	Congratulations to new district attorney	4,981
2/26/2016	The Champion, Decatur	Local judge, two attorneys receive community service award	527
3/2/2016	Daily Report	Legal Community Mourns Rudolph Patterson, Past President of State Bar	3,055
3/5/2016	Macon Telegraph	Macon attorney recognized with award	29,220
3/11/2016	Clayton News Daily, Jonesboro	Former Clayton Co. District Attorney Wallace led a distinguished career	1,688
3/11/2016	CrossRoads News, DeKalb	Lopez receives Benham Award	1,000
3/11/2016	The Champion, Decatur	Saluting Judge Seeliger for donations to nonprofit groups	527
3/12/2016	Macon Telegraph	Patterson a legal leader	29,220
3/15/2016	Columbus Ledger-Enquirer	Outstanding Event	21,789
3/18/2016	Atlanta Jewish Times	Mourning Judge Feldman	6,553
3/18/2016	Henry Daily Herald, McDonough	Local attorney, judge receive award for community service	2,352
3/19/2016	Savannah Morning News	Juvenile judge gets state appointment	30,841
3/23/2016	Soperton News	Judge Ellington recognized with Justice Benham Award for Community Service	1,139

## 2015-16 Media Report

4/2/2016	Macon Telegraph	Attorney Hope recognized with award for service	29,220
4/24/2016	Times Herald, Newnan	Georgia legal community mourns loss of Gus Lewis Wood III	9,551
4/27/2016	Daily Report	Georgia legal community mourns loss of Judge Horace Ward	3,055
5/3/2016	Columbus Ledger-Enquirer	Well done (Law Day)	21,789
5/4/2016	Times Courier, Ellijay	New judges congratulated	5,988
5/6/2016	Douglas County Sentinel, Douglasville	Lithia attorney recognized for service to community	2,428
5/12/2016	Rockdale Citizen, Conyers	Congratulations on Judge Johnson's appointment	2,705
5/13/2016	Albany Herald	Judge Herbert E. Phipps honored as Guardian of Justice	10,793
5/13/2016	Brunswick News	Congratulations to local attorneys for observance	12,988
5/13/2016	Times Herald, Newnan	Congratulations to new Superior Court Judge	9,551
5/14/2016	Covington News	Congratulations to Judge Johnson on election to statewide post	5,500
5/14/2016	Valdosta Daily Times	Congratulations to new president of Georgia Trial Lawyers Association	10,290
5/18/2016	Herald Leader, Fitzgerald	Letter to the Editor: Bradford Rigby	4,827
		<b>TOTAL CIRCULATION</b>	<b>2,667,461</b>

# Memo

To: All Members of the State Bar of Georgia  
From: Alan Armstrong  
Date: May 18, 2016  
Re: Annual Report of the Aviation Section of the State Bar of Georgia

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## I.

### **Introduction and Overview**

The Aviation Section of the State Bar of Georgia is composed of lawyers who practice or have an interest in aviation law. Although not officially recognized by the Georgia Bar as a “specialty,” aviation law is extremely specialized and requires an informed and intricate knowledge of the Federal Aviation Regulations, Air Traffic Control Procedures, the fundamentals of airport ownership and management, aircraft insurance policies, Federal Aviation Grant Agreements and Obligations, certification of airmen, medical certification of airmen, the doctrines of express and implied preemption as relates to federal occupation of the field, and a host of other specialized disciplines and areas of knowledge that are unique to the aviation law practitioner. In the remainder of this memorandum, a brief outline will be given with respect to the activities and accomplishments of the Aviation Law Section during calendar year 2016.

## II.

### **The Annual Meeting**

The Annual Meeting of the Aviation Law Section was conducted on Friday, January 8, 2016, at 12:00 p.m., at the 57<sup>th</sup> Fighter Group Restaurant. The Chair gave his Annual Report. At that time, the Aviation Section had 158 members and \$19,310.60 in its account. During the course of the meeting, the undersigned was nominated and elected Chair. Lisa McCrimmon, Esq. was nominated and elected as Vice-Chair. Keith Wood, Esq. was nominated and elected as Secretary. The significant contributions of Arthur Park, Esq. as the Newsletter Editor for the Aviation Section were recognized at this meeting. Also Todd Westfall, Esq., was recognized for his work in conjunction with the ListServ Account of the Aviation Section. During the course of the Annual Meeting, there was discussion about the content of an Aviation Law Seminar then scheduled for April 22, 2016. There were also informal discussions about crafting a script for a Public Service Announcement dealing with the introduction of unmanned aerial vehicles (UAVs) into the National Airspace System.

### III.

#### Filming of the Public Service Announcement

Lydia Hilton Esq. and the undersigned crafted a script for a Public Service Announcement dealing with the opportunities and challenges presented by the introduction of unmanned aerial vehicles into the National Airspace System. With the coordination and assistance of Section Liaison of Derek Stanley of the State Bar of Georgia, the filming was accomplished at State Bar Headquarters in the Courtroom on April 4, 2016. In essence, the message of the Public Service Announcement was two-fold: (1) the undersigned, as an active pilot, advanced the position that the introduction of UAVs into the National Airspace System presents hazards for manned aircraft because unmanned aerial vehicles do not currently “communicate” electronically with the pilots of manned aircraft nor with Air Traffic Control. Due to their size, unmanned aerial vehicles will not be seen by the pilot of a manned aircraft before impact. Accordingly, a need to separate unmanned aerial vehicle operations from manned aircraft operations is paramount in the interest of safety. (2) Lydia Hilton, Esq. addressed the benefits of unmanned aerial vehicle operations as relates to aerial surveillance, film productions, and a host of activities that can more economically be achieved by unmanned aerial vehicles as opposed to manned aircraft. She also discussed at length the regulatory structure in place as imposed by the Federal Aviation Regulations that is designed to separate unmanned aerial vehicles from manned aircraft. As of the writing of this Memorandum, the Public Service Announcement has been placed on YouTube and is being circulated to members of the public to make people appreciate the responsibilities associated with the operation of unmanned aerial vehicles.

### IV.

#### The Aviation Law Seminar

The Aviation Law Section conducted a Seminar at State Bar Headquarters that was sponsored by the Institute of Continuing Legal Education on April 22, 2016. The speakers and topics were as follows:

- a. William D. Nesmith, III, Deputy General Counsel for the State Bar of Georgia, gave a presentation on Ethical Issues for Aviation Attorneys. The presentation was extremely detailed and discussed a myriad of issues that confront the aviation practitioner including competence, conflicts of interests, and related topics.
- b. Donald R. Andersen, Esq. discussed recent developments in aviation law. A substantial amount of Mr. Andersen’s time was devoted to cases relating to federal preemption both express and implied.
- c. Arthur J. Park, Esq. presented a paper written by Arthur Mozley, Esq. concerning Daubert Challenges in Air Crash Litigation. Because of the technical nature of air crash litigation and the need for expert testimony, this presentation on Daubert challenges was extremely meaningful and helpful to lawyers who must advance Daubert challenges and lawyers who must defend such challenges.
- d. Charles R. Manning, III, P.E., a licensed professional engineer who holds a Master Degree in Materials Engineering with a Minor in Mechanical Engineering, and who has been involved in 35 years of forensic evaluations gave a presentation on air crash litigation. Methods employed in surveying and documenting the debris field, “signatures” that are apparent from physical examination of aircraft components, and a host of other topics were covered during the course of the presentation of Mr. Manning. Mr. Manning, aided by the undersigned, also gave a presentation

on a trial in which he aided as an expert witness in litigation surrounding alleged counterfeit aircraft parts.

- e. James S. Strawinski, Esq. gave a presentation on professionalism. The remarks from Mr. Strawinski drew participation by members of the audience in terms of their impressions about the appropriate behavior to be exhibited by trial lawyers both inside and outside of the courtroom.
- f. John McClune, Esq., of the firm of Katzman, Lampert and McClune in Troy, Michigan, gave a presentation on the Decision of the United States Court of Appeals for the Third Circuit in the Case of *Sikkelee v. Precision Airmotive, et al*, Case No. 14-4193, the Third Circuit Decision having been handed down earlier during the same week as the seminar. The Third Circuit reversed a trial court grant of summary judgment to a manufacturer of aircraft components based on the premise that compliance with Federal Aviation Regulations “preempted” the aircraft manufacturer from civil liability. The Third Circuit Court of Appeals reversed the decision of the trial court and remanded the case for further proceedings consistent with its opinion.

In addition to the presentation made by the speakers during the course of the Aviation Law Seminar, the Public Service Announcement was available for viewing during the course of the lunch break during the seminar.

## V.

### Conclusion

Although a small section, the Aviation Section of the State Bar of Georgia is active and its members enjoy a spirit of comarderie and fellowship due in large measure in their abiding interest and enthusiasm for aviation in general and aviation law in particular. The author of this Memorandum appreciates this opportunity to apprise the Bar of the activities undertaken by the Aviation Section during calendar year 2016.

## Child Protection and Advocacy Section

### Annual Report, 2015-16

The Child Protection and Advocacy Section (“Section”) is concluding its fourth year of operation. The membership of the Section represents the broad spectrum of the lawyers who practice and judges who preside in Juvenile Courts throughout Georgia, as well as lawyers who develop policy and who provide services to children and families. At the close of this fourth year of existence, the Section has grown to a body of 423 members.

During the 2015-16 State Bar year, the Child Protection and Advocacy Section continued to focus and build upon the successful projects begun during the past year, working to strengthen *pro bono* activities of Bar members to meet the unmet needs of children and children’s services, fostering growth and implementation of civics in the classroom, and encouraging involvement of junior section members. With the development and passage of the Strategic Plan of the State Bar in mid-year, the Section responded by focusing on those priorities of the plan that most affected our membership, access to justice and increasing awareness, visibility, and value of Section CLE programs.

Initially focusing on the priority of promoting and developing Access to Justice Initiatives, Section leadership strengthened the partnership it had developed in the past year with ICLE to provide additional *pro bono* opportunities to represent foster care children facing school disciplinary tribunals. Although the 2015 Juvenile Code provides that all children in Juvenile Court proceedings have legal counsel, Georgia law does not provide for legal assistance for such representation in school tribunals, as they are only quasi-legal. However, it is critical for these children to have legal representation in a proceeding that can drastically affect their lives by being suspended or expelled from school.

Building on the success of last year’s CLE training in Atlanta, which has resulted in a program involving 120 volunteer lawyers who are qualified to represent foster care children in Fulton and DeKalb Counties, the Section hosted with Georgia Appleseed and ICLE a full-day CLE in Savannah in February that was attended by 39 lawyers and was enthusiastically received. This CLE program included the specific training for school tribunal representation, as well as several presentations on other topics related to juvenile law practitioners, including a professionalism hour presented by Chief Judge of the Chatham County Juvenile Court, Leroy Burke. The video-recorded program of the school tribunal representation program that ICLE produced last year continues to be available from the State Bar for self-study CLE or for a scheduled presentation, as the *pro bono* school tribunal representation program grows to other counties adopting the program.

The State Bar Strategic Plan priority of increasing awareness, visibility, and value of Section CLE programs has always been a focus of the Child Protection and Advocacy Section. The vast majority of the Section’s budget is committed to scholarships for Continuing Legal

Education. The Section has held annual full-day CLE programs since its inception. This year, the CLE was held January 28, 2016, and received very favorably by the 128 attendees. The Section gave a full scholarship to every member who requested one. For the first time, the program provided a presentation on Immigration Law, as it pertains to a growing number of children in Georgia, as well as an ethics presentation by the always-popular team of General Counsel Paula Frederic and Randee Waldman of the Barton Clinic at Emory University Law School, and professionalism, presented by Avarita Hanson, Director of the Chief Justice's Commission on Professionalism, and Chief Judge of the Douglas County Juvenile Court, Peggy Walker. The Annual Meeting was conducted during the lunch break at the CLE program with proper notice was given. By unanimous vote, the presented slate of officers was passed: Nicki Vaughan, Chair, Karlise Grier, Vice-Chair, Elizabeth Bradley, Secretary, and Randee Waldman, Treasurer.

The Section also co-sponsored a half-day CLE-accredited program and workshop on the growing topic of School Drop-out Pipeline to Prison, along with the Southern Center on Human Rights, Georgia Applesseed, and Georgia Legal Services, held in conjunction with the Southern Regional Alpha Phi Alpha Fraternity Convention in Atlanta. The program focused on the long-range effects of both dropping out of high school and of participating in certain dating behaviors that teenagers don't realize could have life-altering criminal consequences. The latter topic related to last year's Section project of designing and disseminating the "Know Your Rights/Collateral Consequences" posters, a state-wide collaborative project with the State Bar's Office of Law-Related Education to educate eighth-grade civics students in Georgia's public schools about the long-term collateral consequences of involvement in and adjudication of delinquency in Juvenile Court. This program was attended by lawyers and other successful businessmen members of the Alpha Phi Alpha Fraternity, as well as by bus-loads of students brought to the seminar to learn and be mentored by these outstanding citizens. It was a very inspiring event to everyone present, and Section member Ira Foster, Managing Attorney at the Georgia Legal Services Program in Macon, who has spear-headed the School Dropout Pipeline to Prison program in Georgia, is to be highly-praised for his hard work in organizing the program.

The Section has continued to participate and support educational efforts of other legal and child-serving organizations. This year the Section co-sponsored, through financial contributions and member participation, CLE programs offered by the Georgia Association of Counsel for Children and the Georgia Public Defender Council, which hosted its first state-wide Juvenile Defender Training May 18-20, 2016. The Section also offers three scholarships a year to enable members to attend out-of-state CLE programs such as the National Juvenile Defender Center Annual Meeting, provided that the attendees share the information they have learned through writing an article for the Section newsletter sharing so that more people can benefit from the experience and information learned.

At the CLE programs and other presentations the section was involved with, the “Know Your Rights/Collateral Consequences” posters that were developed and printed last year were on prominent display, with many attendees taking posters home to distribute in their local communities. Because of a recent shift in policy of the Georgia Department of Education, the Seven Deadly Sins program that the State Bar Law-Related Education had been providing around the state as part of the Civics curriculum has been moved to the Health curriculum, which makes the topic optional, rather than mandatory. Consequently, the Section has changed the focus of the distribution of the “Know your Rights/Collateral Consequences” posters from the schools to community-based child-serving agencies. A committee of the Section has been successful in distributing posters throughout the state through the Family Connections Program, which has a local office in every county in Georgia. The committee continues to find other sources of distribution, so that the very important information can be disseminated to children throughout the state.

In an effort to encourage the inclusion of younger lawyers in Section activities, the Executive Committee continues to have a dedicated Executive Committee position for a representative of the YLD Juvenile Law Committee. In addition, a second annual Mixer and Holiday Gift Drive to benefit foster care children was held jointly with the YLD Juvenile Law Committee at Manuel’s Tavern in December. Lawyers, young and older, and judges enjoyed an evening of good conversation, food, and drink, in addition to contributing gifts that will bring joy to many children in foster care.

As a service to Juvenile Court practitioners and judges, the Section negotiated with Lexis-Nexis last year to print a paper-back stand-alone Juvenile Code book, which they offered for sale at a reasonable price. When the Section received positive feedback from users of this book, it encouraged Lexis-Nexis to publish the book on an annual basis, and they agreed. Additionally, the Section has advocated for ICLE to develop an additional, juvenile law-focused mini-code book in its “The Code” series of user-friendly, easily-transported mini-codes. It is our understanding that ICLE has contracted with one of the Section’s members to author this book.

The Section drafted two bills that were approved by the State Bar Advisory Committee on Legislation for inclusion in the State Bar’s Legislative Agenda for the 2016 Legislative Session. Although these bills were on clear pathways to passage, they were caught in an end-of-the-session diversion, and they did not pass. The Section intends to make efforts to have these bills re-introduced next session.

As has been customary, the Section was a co-sponsor of the VOICES for Georgia’s Children 2015 Legislative Reception in February, 2016. A large number Section members attended, using the opportunity to talk with legislators, Georgia’s First Lady, Sandra Deal, child-serving agency representatives, lobbyists, policy-makers, and other members of the community who deal with children and children’s issues. State of Georgia Guardian ad Litem Ashley Wilcott, a Section member, was honored at the event. During the legislative session, Section



members were involved with the State Bar's legislative representatives in drafting and supporting legislation of interest to children and children's services. The Section was asked by the State Bar lobbyists to comment on various bills during the session and did so when it was appropriate. Regular updates were posted on the Section Web Page, as well as through emails to the membership.

As has become a tradition, the Section also is a sponsor of the 2015 State Bar Annual Meeting Opening Night festivities. Section members who attend the meeting generally try to spread the word about the Section, as well as take advantage of the opportunity to discuss issues with legislators and others in attendance.

The Section continues to publish a quarterly newsletter, "Kids Matter," emailed to the members and also available on the Section Web Page on the State Bar website. The newsletters contain valuable information and thought-provoking articles contributed by lawyers, judges, service providers and others in the field of juvenile law. The editorial staff has been successful this year in providing articles on a wide range of specific and general topics of interest to the membership, ranging from innovative measures being implemented in the Department of Juvenile Justice's Youth Development Centers to LGBT children in foster care to Children in Need of Services (CHINS) diversion programs to utilization of various federal laws that could assist in advocating for disabled children and parents in child welfare cases. The newsletters also provide information on upcoming events and activities of interest to Section members.

The Section is proud of its growth and activity for the year and has begun to develop plans to continue to increase its support of the community of child-serving lawyers in the coming year. A new committee has been formed to work on improving the Section's Web Page on the State Bar website and improve the accessibility to information regarding the various sub-sections for "Resources," "News," and "Links" to numerous articles and manuals, notices of ABA materials, policy statements, and notices of upcoming training, and related websites. The "Newsletters" section contains copies of the Section's past and present newsletters, and a "Legislation" section provides information on pending and recently-passed legislation, as well as a direct link to the State Bar's Legislative Tracking page to facilitate access to all legislation affecting the State Bar and its members.

Submitted this 16<sup>th</sup> day of May, 2016.

Nicki Noel Vaughan, Chairperson

EMINENT DOMAIN SECTION  
STATE BAR OF GEORGIA  
ANNUAL REPORT  
2015-2016

The purpose of the Eminent Domain Section is to promote education relating to the issues surrounding the exercise of eminent domain by the government and its agents, as well as the rights of property owners when they are affected by the power of eminent domain. In addition, the Section seeks to encourage cooperation and professionalism among the attorneys practicing in this area of the law and to promote communication with the government representatives and professionals (such as engineers and appraisers) who are involved in the eminent domain process around the State of Georgia.

The membership of the Section has grown to 148, from last year's membership of 139. The budget is sufficient thanks to the large membership of the Eminent Domain Section. The Section's fund balance, as of the last report, was \$56,077.71.

**ANNUAL MEETING:** The annual meeting to the Eminent Domain Section was held on February 25, 2016 at the State Bar Headquarters. At this meeting, the 2016 Charles N. Pursley Award to recognize professionalism and commitment to the practice of eminent domain law was presented to 2014-2015 Chair of the Eminent Domain Section, Andrea Cantrell Jones. Ms. Jones could not attend the meeting, but the Award was presented to her law partner, who appeared on her behalf. This award is named in honor of one of the founding members of the Section to recognize significant contributions in the field and/or practice of Eminent Domain law in Georgia. Ms. Jones has had a long and successful career in the field of eminent domain and is well respected both personally and professionally as a litigator.

The 2015-2016 officers of the Eminent Domain Section were as follows:

Chair:

Jason P. Wright  
Lewis Brisbois Bisgaard & Smith LLP  
1180 Peachtree Street, N.E. Suite  
2900  
Atlanta, GA 30309  
Phone: (404) 348-8585  
Fax: (404) 467-8845  
Email:  
[Jason.Wright@lewisbrisbois.com](mailto:Jason.Wright@lewisbrisbois.com)

Secretary/Treasurer:

Ivy N. Cadle  
Baker Donelson Bearman Caldwell &  
Berkowitz PC  
PO Box 5047  
Macon, GA 31208 5047  
Phone: (478) 750-0777  
Fax: (478) 750-1777  
Email: [icadle@bakerdonelson.com](mailto:icadle@bakerdonelson.com)

Vice-Chair:

Kenneth L. Levy  
Zachary & Segraves, P.A.  
1000 Commerce Drive  
Decatur, GA 30030  
Phone: (404) 373-1685  
Fax: (404) 373-1938  
Email: [kennethlevy\\_99@gmail.com](mailto:kennethlevy_99@gmail.com)

Immediate Past Chair:

Andrea Cantrell Jones  
The Galloway Law Group, LLC  
3500 Lenox Road, N.E., Suite 760  
Atlanta, GA 30326  
Phone: (404) 965-3680  
Fax: (404) 965-3670  
Email: [andrea@glawgp.com](mailto:andrea@glawgp.com)

At the annual meeting, the membership elected the following new officers for the 2016-2017 fiscal year:

Chair	Kenneth L. Levy
Vice-Chair	Ivy N. Cadle
Sec./Treasurer	Melissa J. Perignat Holt Ney Zatcoff & Wasserman LLP 100 Galleria Parkway, Suite 1800 Atlanta, GA 30339 Phone: (770) 956-9600 Fax: (770) 956-1490 Email: <a href="mailto:mperignat@honzw.com">mperignat@honzw.com</a>

CONTINUING LEGAL EDUCATION: Also on February 25, 2016, the Eminent Domain Section presented a CLE Seminar in conjunction with ICLE in Georgia at the State Bar Headquarters in Atlanta. The seminar was conducted as excerpts of a mini-mock trial of an eminent domain case called "The Trial of an Eminent Domain Case from Start to Finish." The following topics covered included:

Pre Trial Matters: Motions in Limine, Motions to Compel, Sanctions,  
Motions to Exclude, Professionalism/Ethics Integrated on Discovery Abuse

Opening

Direct and Cross of Condemnee Real Estate Appraiser

Direct and Cross of Engineer

Case Update

Direct and Cross of Condemnee Business Evaluator

Motion for Directed Verdict on Uniqueness, Charge Conference

Closing

The presentation received strong attendance with 135 participants, as compared to 96 in the prior year (though impacted by inclement weather in 2015) and very positive feedback. Thanks is owed to the numerous and talented presenters, who gave so generously of their time. Special recognition should be given to the efforts of Chair-Elect, Ken Levy, and Vice-Chair Elect, Ivy Cadle, for the exceptional hours of preparation and planning for this event.

Respectfully Submitted,  
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STATE BAR OF GEORGIA  
ENVIRONMENTAL LAW SECTION  
ANNUAL REPORT

The Environmental Law Section held its Annual Kick-Off Luncheon on March 17, 2016. The Luncheon was attended by over 60 members. The speaker was Dr. Tara Stoinski, Executive Director of the Dian Fossey Gorilla Fund International, which is based in Atlanta. Dr. Stoinski spoke about the extreme conservation measures being utilized in Rwanda to preserve the habitat of the Mountain Gorilla and the efforts to also preserve the Grauer's Gorilla in the Democratic Republic of Congo. Her remarks were both interesting and well-received by the attendees.

At the Luncheon the Section presented its annual award for Excellence in Environmental Law to Laurie Fowler of the University of Georgia. The Section also awarded \$500 scholarships to the outstanding student in environmental law to a student at each of Georgia's law schools where environmental law is taught – Georgia, Georgia State, Emory and Mercer.

The Section will hold a cocktail reception in June for Section members to converse and engage in conviviality.

The Section will hold its Annual Summer Seminar on Environmental Law on July 29<sup>th</sup> – 30<sup>th</sup> at the King and Prince Resort on St. Simon's Island. The program is set and the likely Keynote Speaker will be the outgoing Director of the Environmental Protection Division, Jud Turner.

The Section also plans on hosting a Lunch and Learn in September on a subject yet-to-be-determined.

Finally, the Annual Holiday Party will be held by the Section in December 2016.

Richard A. Horder,  
Chair, Environmental Law Section  
State Bar of Georgia

May 18, 2016

Robert J. "Bob" Kauffman, Esq, President  
Members of the Board of Governors of the State Bar of Georgia  
Members of the Section of the Year Committee  
Mr. Derrick Stanley, Section Liaison  
State Bar of Georgia  
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ANNUAL REPORT OF THE FAMILY LAW SECTION

STATE BAR OF GEORGIA

2015-2016

Colleagues:

During the 2015-2016 Bar year, I have been honored to serve as Chair of the Family Law Section of the State Bar of Georgia. The Section has a long-standing tradition of service to the profession and to the public. However, my Executive Committee this year has built on traditions and a proud historical record of service to create an impressive body of work deserving of Section of the Year. The details are contained in the Annual Report of the Section's activities for the period beginning July 1, 2015 and ending June 30, 2016 which follows.

I. Non-Metro Outreach.

The Family Law Section Executive Committee prioritized specific and purposeful outreach to all 49 judicial circuits in Georgia this year. To this end, every member of the Executive Committee selected and/or was assigned several judicial circuits. As an initial matter, letters of introduction were sent to the Chief Judge of the assigned circuit, which in part served the dual purpose of notification of the launch of the Child Support Worksheet Helpline as described below. [Tab 1]. Similar notification was provided to juvenile court judges in the assigned circuit and the Clerks of Superior Courts. [Tab 2]. As a result, the

Child Support Helpline flyer is posted on the websites of Superior Court Clerks and courts all across Georgia.

In addition, some members of the Executive Committee sponsored specific events for family law attorneys within the judicial circuits. Scot Kraeuter (Secretary-Elect and outgoing Editor of the Family Law Review) hosted a Child Support Training Session by the Administrative Office of the Courts in Savannah for a capacity crowd of attorneys and support staff in the Atlantic Circuit, the Eastern Circuit and the Ogeechee Circuit. [Tab 3]. There were 58 attendees on January 22, 2016. [Tab 4]. The Chair joined forces with Western Judicial Circuit Family Law Section Chair (and now Superior Court Judge) Eric Norris to organize Child Support Training for Western Circuit and Northern Circuit attorneys and support staff which included a discussion panel of recent cases with Western Circuit Superior Court Judges Lawton E. Stephens and H. Patrick Haggard. [Tab 5]. There were 38 attendees on August 14, 2015. Training and extensive training materials were provided at no cost, together with a low cost option to obtain CLE credit. [Tab 6].

Michelle Jordan, an attorney with Atlanta Legal Aid who serves on the Executive Committee, made a presentation to the Clayton County Bar Association on November 19, 2015 on Recent Developments in Custody and Child Support. The positive response of the members resulted in her command performance at the Annual Clayton Bar CLE on February 12, 2016.

Finally, a letter from the Chair was sent to Judge Brenda Weaver, President of the Council of Superior Court Judges and distributed to judges across the state via the Superior Court Listserv, SideBar. [Tab 7]. The communication included a letter from the Chair of the 2016 Family Law Institute providing details about participation by trial judges.

## II. Child Support Worksheet Helpline.

The Family Law Section launched the Child Support Worksheet Helpline on September 1, 2015 to serve unrepresented litigants of moderate means outside of metro Atlanta. Volunteer family law attorneys assist litigants in preparing worksheets for pending litigation free of charge. [Tab 8]. The volunteer attorney screens the call and completes and returns a completed Child Support Worksheet to eligible pro se litigants with an accompanying letter of instruction. The Child Support Helpline serves the dual purpose of encouraging pro bono work and advancing the commitment to equal justice for all. The Helpline has handled 274 callers as of May 15, 2016. Income eligibility requirements allow help for those who make within 110% or less of the federal poverty guidelines.

The Helpline currently is manned by 40 volunteers and many attorneys continue to express interest. Executive Committee member Tera Reese-Beisbier of Cumming coordinates the Helpline, assisted by Leigh Cummings of Atlanta. The Helpline has 2 volunteers to serve the needs of Spanish speaking parents. Call volume has increased monthly

## III. Continuing Legal Education Programs.

The Family Law Section provides important CLE programs each year. One of the principal activities of our Section is providing meaningful and comprehensive education and training to our members, particularly on new developments in domestic relations. To that end, the 2015-2016 year featured the following CLE programs available to lawyers throughout the state:

Family Law Institute. In May 2016, the Section held its 34<sup>th</sup> Annual Family Law Institute at the Jekyll Island Convention Center with approximately 568 attendees. The Institute is the Section's most important annual function and represents the culmination of hundreds of hours of work by dozens of our section members. Section leadership made a strategic investment in Georgia, as the Institute returned to the state for the first time in two



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Members of the Section of The Year Committee  
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decades. In "Bringing it Back to Georgia," the event showcased Jekyll Island, the expanded state of the art convention center and the new Westin Jekyll Island Resort.

The 2016 Institute was filled with "firsts" and the overall program was outstanding. Attached is a copy of our 2016 Institute brochure for your reference [Tab 9]. The historic "first" and centerpiece of the Institute was a session of three oral arguments by the Court of Appeals as part of the agenda. Presiding Judge Anne Elizabeth Barnes, Judge Michael P. Boggs, and Judge Brian M. Rickman provided a valuable experience for the attorneys in attendance, especially the many who had never seen such an argument. The oral arguments were augmented by a presentation by Judge Stephen Louis A. Dillard and Judge William M. Ray, II (moderated by former Chief Justice Leah W. Sears) which highlighted upcoming jurisdictional shifts for alimony and divorce cases from the Supreme Court to the Court of Appeals changes resulting from the "Appellate Jurisdiction Reform Act of 2016" and other important family law appellate issues. Judge John J. Ellington was in attendance to support his colleagues and is a regular attendee of and participant in the Institute.

The Institute is no longer a well-kept secret with total attendance of 632 in 2015 and 619 in 2014. This one-of-a-kind experience allows practitioners, experts and judges to interact in a seminar filled with equal parts complex family law topics and insights from the bench into the actual practice of law through judges panels and the active participation of judges in the program. Lawyers learning from judges, judges learning from lawyers and both learning from recognized experts. The VIP/Speakers Dinner and the Thursday Welcome Reception are unique social events, but the Section Reception on Friday features the most unique attribute of all: a band comprised of family lawyers and judges, The Specific Deviations. The versatile 2016 set list included songs in tribute to Glenn Frey, Merle

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<sup>1</sup>Vic Valmus (lead guitar and backing vocals), Roy Finch (rhythm guitar and lead vocals), Judge LaTain Kell (lead vocals), Steve Steele (keyboards), Hannibal Heredia (bass guitar and backing vocals), and Jeremy Abernathy (drums). The Specific Deviations were the 2012 winners of the Fulton Daily Report Law Jam. The name of the band is

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Haggard, David Bowie and a rendition of Purple Rain which would've made Prince proud. In short, there is no other single event from any Section which rivals the Institute.

Nuts & Bolts of Family Law. In August and September 2015, our Nuts & Bolts of Family Law Seminar, chaired by Gary P. Graham, of Atlanta, was held in Savannah and Atlanta, with attendance of 74 and 129, respectively [Tab 10][Tab 11]. The seminar is geared toward an attorney fairly new to the practice of domestic relations. Executive Committee members are among featured speakers and the quality of the educational component of the seminars rivals the Institute. See attached ICLE evaluation summations [Tab 12].

Annual Meeting Seminar. The Section offered a one (1) hour CLE in conjunction with the State Bar Mid-Year Meeting, "The Newly Divorced Game: Answers from the Bench and behind the Bench". This program featured a panel of three metro Atlanta judges and their respective staff attorneys answering family law-related questions in a game show format. There were 112 attendees.

Following the seminar, the Section held its Annual Meeting for the election of 2016-2017 officers. The Annual Meeting and Reception were held in the Sky Lounge on the rooftop at the Glenn Hotel with over 125 Section members in attendance. The Nominating Committee Report was presented by H. William "Bill" Sams, Jr. of Augusta, a family law practitioner for 53 years (and counting) and Chair of the section from 1999-2000.

Co-Sponsored Programs. In addition to the Family Law Institute, the annual Nuts & Bolts seminars, and the annual meeting program, on October 16, 2015, the Family Law Section co-sponsored the 11<sup>th</sup> Annual Family Law Seminar with the Augusta Bar Association [Tab 14], and on December 4, 2015, the Section co-sponsored with the Georgia Chapter of

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derived from Schedule E of the Child Support Worksheet and that portion of the Georgia Child Support Guidelines which allows the trier of fact to deviate from the presumptive amount of child support.

American Academy of Matrimonial Lawyers a seminar entitled, "Family Law Seminar " [Tab 15]. Past and present section leadership participated in these seminars and such programs represent contributions by our Section to the legal profession in Georgia. The Section also co-sponsored "Same Sex Legal Issues" on March 17, 2016, the annual "Convocation on Professionalism" on March 23, 2016, the Gary Christy Georgia Trial Skills Clinic at the University of Georgia on June 23, 2016, and "Urgent Legal Matters" on September 4, 2015 in St. Simons.

#### IV. Family Law Review

Another significant activity of the Section is the publication of the Family Law Review ("FLR"), a quarterly magazine and newsletter. The publication keeps members apprised of developing case law and legislative issues facing family lawyers. In addition, Georgia judges are regularly featured.

An important regular feature of the FLR is the case law update, highlighting significant cases which have been issued since the last publication. The publication of a summary of such cases is beneficial to members and judges across the state. This year for the first time, a limited number of advance copies of the Spring 2016 issue was distributed to attendees of the Family Law Institute in advance of the general mailing.

Editor Scot Kraeuter of Savannah has continued a tradition of publishing thought-provoking and well-researched contributions from section members and others outside of Georgia on a variety of topics relevant to the practice of family law. Another frequent feature of the Family Law Review are interviews of Superior Court Judges by our members. These interviews offer insights into the judicial philosophies and personal stories of our judges. Judges featured this year were Chief Judge R. Rucker Smith (Southwestern Judicial Circuit), Judge Todd Markle (Atlanta Judicial Circuit), Chief Judge Kathy S. Palmer (Middle Judicial Circuit) and then newly appointed Judge J.P. Boulee (Stone Mountain Judicial Circuit). In

addition, the Spring 2016 issue included profiles of the three (3) new members of the Court of Appeals which was a strategic complement to the historic oral arguments the Court of Appeals conducted as part of the program for the Institute at Jekyll Island. An issue may be accessed in full once archived at

[www.gabar.org/committeesprogramssections/sections/familylaw/newsletter/cfm](http://www.gabar.org/committeesprogramssections/sections/familylaw/newsletter/cfm)

V. Contributions to the Georgia Child Support Commission.

The staff attorney for the Georgia Commission Child Support, Patricia Buondono, JD, appeared before the Executive Committee on July 30, 2015 and on behalf of the Commission specifically requested Family Law Section support of SB 64 which had failed to gain passage in the 2015 Georgia General Assembly. The Executive Committee immediately initiated a formal request that SB 64 be added to the legislative initiatives of the State Bar of Georgia for the 2016 legislative session. [Tab 16]. The request was approved by the Board of Governors and SB 64 was signed by Governor Deal on April 26, 2016. A summary of the measure and its importance to the profession is attached. [Tab 17]. Passage was secured with a Conference Committee report and much work by the State Bar of Georgia lobbying team and Section leadership on Sine Die.

The Commission and the Administrative Office of the Courts were provided the opportunity to hold two separate breakout sessions at the Institute to demonstrate the new version of the online child support worksheet, conduct preliminary training on the new features and obtain crucial feedback from private practitioners prior to launch of the system and the elimination of the existing Excel worksheet which has been utilized since 2007.

Executive Committee members continue to advise the Commission about possible statutory revisions and frequently attend Commission meeting and provide testimony, if needed. The Family Law Section expects to continue its involvement in the future revisions to the child support guidelines, and to offer any services Commission members may require.

VI. Monitoring and Drafting Legislation

Each year our Section leadership pays close attention to legislative developments before and during the legislative session, drafting significant family law legislation in the past and this year as well.

The Section drafted House Bill 403 in an effort to modernize and harmonize statutory provisions related to prenuptial agreements. Section Leadership drafted the bill and submitted it to the Bar, and the Board of Governors who approved the measure as part of the 2015 legislative package. Section Leadership testified at four different legislative hearings concerning the bill. Unfortunately, this measure did not pass in either 2015 or 2016. However, Section leadership and the legislative committee were instrumental in the final version of HB 229, working with Rep. Brian Strickland throughout 2015 to ensure that efforts to expand the grandparents visitation statute to other family members were both constitutional and practical. Effective July 2016, great-grandparents and siblings of parents may seek visitation by intervention in a pending action. Importantly, the clear and convincing evidence standard long-required by case law has now been codified directly because of the efforts of the Section.

Section Legislative Liaison, Pilar Prinz of Lawler Green Prinz, LLC, kept members apprised of key legislation that might impact our practice. She enlisted the service of Executive Committee members as well as members of the Section generally to serve as a legislative committee. The Section leadership also watched closely certain proposed legislation that did not pass. Legislative developments both in Georgia and other jurisdictions are communicated through the Family Law Review and other means. For the first time this year, a written legislative update was provided as a "bonus" at the Institute. [Tab 18].

VII. Younger Lawyers Family Law Section.

The YLD Family Law Committee has been extraordinarily active this year. On October 22, 2015, the tenth annual Supreme Cork fundraiser was held at the 5 Seasons Brewing Company in West Midtown. The fundraiser featured a beer and wine tasting along with a silent auction. The event raised over \$10,000.00 for the Atlanta Volunteer Lawyers Foundation's (AVLF) Guardian ad Litem Program and Domestic Violence Program. The Family Law Section of the Young Lawyer's Division Committee Co-Chairs Katie Kiihnl, of Boyd Collar Nolen & Tuggle, LLC, and Jonathan Brezel, of the Ordway Law Group, LLC, attribute the overwhelming success of this event to the organization and service of the AVLF staff. The service and dedication of committee members also played a major role in mobilizing the legal community in support of this worthy cause.

In addition, the YLD Family Law Committee hosted several events for its members and the Bar. In the Fall, the Committee organized a "Meet the DeKalb County Judges Event," which is the third in the committee's series of "Meet the Judges" events. The event was attended by members of the DeKalb Superior and State Court judiciary, as well as members of the State Bar YLD and the DeKalb County YLD. The judges introduced themselves and gave the young lawyers "hot tips" about what to do (or not to do) in the courtrooms.

Finally, the YLD Family Law Committee co-sponsored a CLE with members of the Atlanta Bar Association and GABWA. The CLE, entitled "Navigating the Fulton County Family Division" featured panels of judges, judicial officers, staff attorneys and lawyers, who focused on the rules and procedures in the Fulton County Family Division.

To round off the year, the YLD Family Law Committee hosted a beach party at the Institute. The party was sponsored by The Holder Group and IAG Forensics and featured a corn hole tournament and good fellowship with attorneys, judges and friends of the Section.

VIII. Service to the Judiciary.

This year for the first time, the Section formed a committee of Executive Committee members with three subcommittees by subject matter to examine both Pattern and Non-Pattern Jury Charges. The subcommittees additionally include general members, including many past chairs. A roundtable panel discussion was conducted via a break-out session at the 2016 Institute by Leigh Cummings of Atlanta who will Chair this committee and oversee its work. In particular, the Pattern Jury Charges on Child Support have not been updated since the statute's 2008 effective date. Problems and issues associated with the child support charges were addressed as a presentation on the agenda at the Institute by Hon. Jane C. Barwick of the Atlanta Judicial District and Executive Committee members Gary P. Graham and Marvin L. Solomiany.

The Section continues to assist the Judiciary with regard to feedback and amendments to the Uniform Superior Court Rules and with annual training upon request.

Approximately 40 judges participated in the 2016 Family Law Institute with expenses for their training and education paid by the Section.

IX. Encouraging Pro Bono.

The Family Law Section again awarded scholarships to encourage Pro Bono representation through Georgia Legal Services. The State Bar Family Law Section offered scholarships to five Family Law Section members to attend the 2016 Family Law Institute in Jekyll Island May 19-21. Each Scholarship pays \$1,000 towards the ICLE registration costs for seminar, accommodations for three nights during the seminar at conference room rate and mileage at the IRS rate incurred in traveling to and from Jekyll Island.

The goal of the scholarship is to provide funds for lawyers from around the State who otherwise could not afford to attend the seminar and to encourage Section members to provide pro bono services. In exchange for receiving the scholarship, the applicants chosen

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Members of the Section of The Year Committee  
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will be required to attend the 3 day seminar and accept one Pro Bono domestic violence and/or divorce case referral from the Georgia Legal Services Program before December 31, 2016. The Georgia Legal Services program provides representation to low-income clients around the State who cannot afford to pay a lawyer.

2016 Family Law Institute Scholarship Recipients were:

- Jennifer Adams, Atlanta
- Nazish Ahmed, Stockbridge
- Lori Anderson, Atlanta (Atlanta Legal Aid)
- Nilu Abdi-Tabari, Atlanta (Atlanta Volunteer Lawyers Foundation)
- Angelyn Tinsman, Savannah

The Child Support Helpline serves the dual purpose of encouraging pro bono work and advancing the commitment to equal justice for all as outlined in Section II.

**X. Service to Fellow lawyers and Promoting Diversity in the Profession.**

In addition to the CLE programs and other work of Section members described in this Report, our Section has made another specific financial contribution in the 2015-2016 term on behalf of our fellow attorneys. As in the past, the Section is providing sponsorship of a scholarship for attendance of a family lawyer at the Gary Christy Memorial Trial Skills Clinic held at the University of Georgia School of Law.

Likewise, the Diversity Committee under the leadership of Executive Committee member Michelle H. Jordan has served fellow attorneys with specific outreach this year. The goal of the Diversity Committee is to promote inclusion, diversity, and participation of all members from all perspectives and to promote understanding of diverse issues (income, race, religion, geographic area, language, gender, family structure, etc.) in the family law area. As such, we have built a coalition of lawyers and judges who are interested in promoting inclusion in the section and meeting the needs of diverse members of the community as it relates to family law. There were three committee meetings this year



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including one at the Institute. The first meeting was held in conjunction with the Georgia Association of Black Women Attorneys CLE on October 23, 2015. The group discussed ways to promote diverse speakers at section CLEs and the proposal (based on member feedback) of launching a mentorship program. There was great participation from a variety of attorneys. The Committee also meet in conjunction with the Annual Section Meeting/Mid-year Bar Meeting, on January 7, 2016. Speaker, Katie Connell discussed the Child Support Commission's work regarding gender neutrality and related issues in regards to the child support worksheets. The group also discussed parenting plans in light of these issues. The meeting was well attended by various attorney and judges. The Committee then officially launched the mentorship program on March 9, 2016, and there are 32 attorney currently participating as mentors or mentees. The project is coordinated by Thad Woody and Dawn Smith. [Tab 19].

**XI. Section Membership, Finances, and Organization.**

The Family Law Section website includes materials helpful to members such as:

- \* Every Family Law Review from November/December 2001 through the Winter 2016 Edition. Each copy can be downloaded as a pdf.
- \* Program agendas for each Family Law Institute beginning with the first Institute in 1983 through the 33<sup>rd</sup> Institute in 2015. This enables the viewer to access archives for topics discussed and presenters for each Institute.
- \*News updates are posted on the website providing current information on the constantly changing practice of family law and the Resources page gives links to other websites that are helpful on many topics.

According to statistics maintained by the State Bar, our Section's official membership presently stands at 1,931 with annual dues set at \$35.00. The financial condition of our Section is sound. A review of the most recent financial statement reflects a substantial fund

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Members of the Section of The Year Committee  
May 18, 2016  
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balance (\$78,553.91 as of 5/16/16). There is substantial continuity in the annual sponsored programs and the past two (2) years in particular have seen increases to our membership. Importantly, the Section continues to raise substantial voluntary contributions to pay expenses associated with the Family Law Institute which now has an operating budget in excess of \$100,000.00. In fact, the 33<sup>rd</sup> Annual Family Law Institute in 2015 generated more than \$37,000.00 for the Section. Attendance at the Institute continues to increase as well, growing from 381 paid attendees in 2007 to 518 paid attendees in 2015.

The Section is blessed with strong leaders equally willing to sacrifice time and to share expertise. The current Executive Committee is comprised of the following individuals representing both metro Atlanta and non-metro circuits:

Chair:	Regina M. Quick - Athens
Vice-Chair:	Marvin L. Solomiany - Atlanta
Secretary:	Gary P. Graham - Atlanta
Immediate Past Chair:	Rebecca Crumrine Rieder - Atlanta
Editor of FLR :	R. Scot Kraeuter - Savannah
Legislative Liaison:	Pilar J. Prinz - Atlanta
YLD Representative:	Katie A. Kihnl - Atlanta
At-large members:	Dan A. Bloom - Atlanta
	Kelly O'Neill-Boswell-Albany
	ivory t. brown - Atlanta
	Tera L. Reese-Beisbier - Cumming
	Leigh F. Cummings - Atlanta
	B. Lane Fitzpatrick - Danielsville
	Robert W. "Bert" Guy, Jr. - St. Mary's
	Michelle H. Jordan - Atlanta
	Kyla Lines - Atlanta

The Executive Committee met ten (10) times during this Bar year.

The Section held its annual meeting in January 2016 in conjunction with the Mid-Year Meeting of the State Bar. A new slate of officers was elected, to take effect after the Family Law Institute in May 2016.

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Members of the Section of The Year Committee  
May 18, 2016  
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Incoming Chair Marvin L. Solomiany has been active in the Family Law Section for many years and is himself a past editor of the Family Law Review. All the members of the Executive Committee bring a tremendous amount of experience, organization and productivity to the Section and the State Bar of Georgia.

XII. Conclusion.

In closing, the Family Law Section reports an active, exciting and successful year. We are especially proud of specific outreach to non-metro Atlanta Circuits and the accompanying increase in membership. The high quality experiences provided by our Continuing Legal Education seminars are unparalleled and provide invaluable guidance to both bench and bar, best evidenced by ever increasing attendance numbers and stellar program reviews. The body of work of the Section for 2015-2016 stands out for both high quality and large quantity.

We made significant contributions to the profession, to the public, and to the State Bar of Georgia and had a very good time in the process. I wish to formally thank my fellow members of the Executive Committee for allowing me to serve and for supporting my term as Chair. I respectfully urge the State Bar of Georgia to recognize the Family Law Section as "Section of the Year."

Submitted this 18<sup>th</sup> day of May, 2016.

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Regina M. Quick, Chair  
Family Law Section  
State Bar of Georgia 2015-2016

cc: Executive Committee of the Family Law Section (via e-mail)

## FIDUCIARY LAW SECTION ANNUAL RETURN 2015-16

The Fiduciary Law Section has had an active and successful year as highlighted by the information referenced below. We are appreciative of the assistance provided by the staff of the State Bar as well as appreciative of the leadership provided by the officers and Board of Governors of the State Bar of Georgia.

### Members

The Fiduciary Law Section has 898 members.

### Account Balance

The current balance of our operating account is \$149,020.89.

### Continuing Education

The section holds three programs annually, two institutes and one seminar, in conjunction with ICLE. The programs are chaired by officers of the Section.

*Basic Fiduciary Practice.* This program is held twice annually, once in Atlanta (at the State Bar Headquarters) in March and once outside Atlanta (this year at Mercer Law School, Macon) in October. The program at each location is identical and both were chaired by Blake Melton and Lee Wisely. There were 31 participants at the October, 2015 program in Macon and 177 participants at the Atlanta program in March, 2016.

*Estate Planning Institute.* This program is held in February of each year in Athens, and the 2016 Institute was the sixty-first event. The 2016 Institute was chaired by Mary Galardi and had 270 participants.

*Fiduciary Law Institute.* This program is held in July of each year at the King and Prince Beach Resort on St. Simons Island. The July 2015 Institute was the fifty-second event and was chaired by Hillary Stringfellow with 449 participants.

In total, there were 927 participants in Section sponsored continuing education.

### Leadership

The Section is led by four officers (chair, vice chair, secretary and assistant secretary) which are Hillary Stringfellow, Jeremy Ware, Mary Galardi and Blake Melton.

This year the Section appointed formal committees – a forms committee, chaired by Ann Salo, a legislative committee, chaired by Nick Djuric, a programs committee, chaired by Rusty Love, and an executive committee that is comprised of the officers and then includes six at large members serving staggered three year terms. To provide for continuity, the committee appointments (except for the at large members of the executive committee) are for two-years with the current chairs and members serving through June 30, 2017.

#### Achievements

Primary accomplishments, separate from the continuing education programs held, of the Section this year include:

1. *Trust Code Revision Committee.* The Section, through the Chair, formally appointed a committee to review and propose changes to the 2010 Revised Trust Code of Georgia (Title 53, Chapter 12 of the Official Code of Georgia). This committee is chaired by Nick Djuric and is meeting at least monthly to carry out its charge and work.
2. *Legislative Involvement.* At the request of the State Bar and involved legislators, the Section, through the legislative committee, provided input on three proposed pieces of legislation. HB954 was signed into law by Governor Deal inclusive of the changes and input provided by the Section.
3. *Online Community.* The Section has established an online community for the section as a whole and for each of its committees so as to facilitate online communication and sharing of information. This new platform has great potential to provide for continuing education, dissemination of new and announcements, and to allow all members of the Section to fill connected to the ongoing work of the Section. This project will continue next year.
4. *Annual Meeting.* The Section holds its annual business meeting at the Estate Planning Institute in Athens in February. The meeting was well-attended and included the election of officers for 2016-17 as well as the appointment of the trust code revision committee and an update on Section information.

Respectfully submitted, this May 6, 2016,

Hillary S. Stringfellow  
Chair, Fiduciary Law Section

THE GENERAL PRACTICE AND TRIAL SECTION  
OF THE  
STATE BAR OF GEORGIA  
ANNUAL REPORT AS OF MAY 19, 2016

The General Practice and Trial Section is pleased to submit this report to the Board of Governors to introduce new projects the Section has undertaken as well as projects this Section has supported for many years. The Section continues to draw members from all over the State who are networking their ideas, concerns, referrals and expertise to make this truly “Georgia’s Largest Law Firm”.

Our current membership is 2037 active members. Section and continues to have programs and send mail-outs to potential members. We try to cover every aspects of interest to the General Practitioner in our seminar programs and magazine as well as our broadcast e-mails to the membership. We have a membership table at many ICLE seminars held in the metro area and as a result have signed up many new members with our handouts at these programs.

**Calendar Call**, the Section’s full sized magazine offers “how to” instruction, up to date articles, legislative updates and how they affect the General Practitioner. The magazine is published 3 times a year and sent out to members as well as Judges. We also have each magazine published on our website.

**Audio and Videotape Library** containing a variety of audio and videotapes on virtually all aspects of trial practice and support training. These tapes are available to all members of the Bar for a minimal fee with a half price discount for members. It continues to be popular and generate revenues for the Section. It is especially popular now that CLE and TRIAL credit hours are available for home study.

**ICLE SEMNARS** sponsored by the Section have played to sell-out crowds. Jury Trials is always a great success. We have sponsored and co-sponsored 30 seminars this year. We have just concluded our, “15th” Annual General Practice and Trial Section Institute”, at the Amelia Island Plantation in Florida. This most successful program included a variety of topics of interest to all general practitioners and was chaired by Nicholas Pieschel, Immediate

Past Chair of the section. Attendance was the highest to date and continues grows each year. The location draws lawyers from all over Georgia and Florida.

**High School Mock Trial Competition.** This Section is a founding member and continuing supporter of the program. This year, our commitment put us in the Crystal level for the finals being held in Atlanta. Thousands of high school students have participated. Many of our Section members participate and mentors and coaches in this most important program. Through Section dues each member is a supporter of this worthwhile endeavor.

**Tradition of Excellence Award** are given each year by the Section to three outstanding lawyers and one judge who have shown a lifetime of achievement in the law and service to the public and Bar. The tradition of the award has influenced many lawyers' lives and inspired the Bar. The awards are presented at the Section breakfast and later celebrated at a reception held in honor of the recipients at the State Bar Annual Meeting. This year the recipients are: John S. Dickerson, Atlanta, (Defense), William S. Stone, Blakely, (Plaintiff), Judge Michael L. Murphy, Buchanan (Judicial) and John W. Timmons, Athens, (General Practice). The breakfast is always a sell-out to hear the introduction and acceptance speeches which are always uplifting and fun.

**Bar Liaisons:** We are keeping up with the American Bar Association, other Sections of the State Bar of Georgia and the Metro Area Bar Council to keep members informed of programs of interest. Many of our Officers are highly involved in the ABA and keep us abreast of the latest happenings

**Community Service:** The Section each year participates together with the Georgia Legal Service in "Ask-a-Lawyer" Day each October. When were able to set up locations in 22 counties and served close to 300 low income families in rural Georgia who do not have access to legal services.

**LEGISLATIVE:** Our legislative committee reviews any legislative proposals that affect the General Practitioner and submits recommendations to the Advisory Committee on Legislation.

Together with the Law Practice Management division of the State Bar, the General Practice and Trial Section co-sponsor the Solo and Small Firm Institute and Technology Showcase. The program was a huge success and we will continue to co-sponsor that event.

The General Practice and Trial Section has always aspired to help the State Bar and other organizations when needed. Our first concern is to inform, help and guide our membership any way we can through our magazine, seminars and broadcast emails to keep them advised and informed about issues that are of interest to General Practitioners. The section is in good shape to grow and continue for many years to come



**STATE BAR OF GEORGIA  
HEALTH LAW SECTION**

**2015-2016 ANNUAL REPORT**

The Health Law Section fulfilled its mission of promoting and enhancing professionalism, excellence and camaraderie in the Health Care Bar in the State of Georgia during the 2015-2016 State Bar fiscal year in a variety of ways, some old, some new.

**GOVERNANCE**

The Section expanded the size of its Executive Committee this year to add diversity and depth to the Committee. Current officers of the Section are as follows:

Chair:	Daniel Mohan
Vice-Chair:	Keith Mauriello
Secretary:	Brian Stimson
Immediate Past-Chair:	Mark Kashdan

In addition to the above, eleven (11) health lawyers serve on the Executive Committee, representing private practice, in-house attorneys, government agencies and healthcare-related trade groups. In addition, a faculty member from each of the Georgia State, Mercer and the University of Georgia law schools participate as “*ex officio*” members of the Executive Committee.

**MEMBERSHIP**

State Bar records indicate that 741 licensed Georgia attorneys have registered as members of the Health Law Section. The Bar currently holds \$65,103.42 in Section funds on deposit.

**SEMINARS AND MEETINGS**

The Section again sponsored two ICLE coordinated and CLE-approved seminars: the annual Advanced Health Law Section Seminar on October 30, 2015, and the annual Fundamentals in Health Law Seminar held on March 4, 2016.

The Advanced Health Law Seminar was held at the Four Seasons Hotel and accommodated an over-flow crowd, achieving the highest attendance figures in the history of the seminar. The Section sponsored a cocktail party for Section members at the conclusion of the meeting.

The Fundamentals in Health Law Seminar was also extremely well-attended, as long-time Section member and former leader Rod Meadows put together another excellent program for new health law attorneys.

This year the Section also initiated a new series of informal, “Lunch ‘n Learn” presentations. The inaugural Lunch ‘n Learn was held on October 14, 2015. Our friend,

colleague and former Executive Committee Chair Alan Rumph gave an insightful presentation on the *Tuomey* case out of South Carolina. The second Lunch 'n Learn presentation was scheduled for May 27, 2016. Tara Adyanthaya led a panel discussion of ethical and legal issues at the End of Life. This presentation earned 1.0 hour of Ethics CLE credit. Both of these presentations were free to Section members, and the Section provided lunch for all registered attendees. In addition, the Executive Committee arranged for May 2016 Lunch 'n Learn to be simulcast in Savannah, so Section members in the Savannah area were able to gather and enjoy the presentation together.

### **NEWSLETTERS**

As is its tradition, the Executive Committee coordinated the publication of two very informative, timely and well-received newsletters addressing topics of interest to the Health Law Bar. The Executive Committee solicits articles for the newsletter via a "Call for Authors" to all Section members, which has greatly expanded the opportunity for Section members to write for the newsletter.

### **LAW SCHOOL SCHOLARSHIPS**

The Section made cash awards in the amount of \$1,000 to each of Georgia State, Emory, Mercer and UGA law schools, which each school presented to the third year law student recognized by the faculty as the school's outstanding health law student.

### **SOCIAL ACTIVITIES**

The Executive Committee is in the advanced planning stages of its first ever after-hours Health Law Section social event, to be held in June 2016. The Section will partner with a local healthcare-related nonprofit organization, so the Section social will promote a community service purpose as well as an opportunity to get together as a Section in a purely social environment.

### **CONCLUSION**

The Executive Committee continues to work to provide a variety of opportunities for members of the Health Law Section together in educational and social settings to enhance and promote professionalism, ethics, excellence and collegiality in the Health Law Section of the Bar.



## GOALS

We challenged ourselves to build upon the Section’s outstanding past accomplishments, and to continue its tradition of exceptional leadership. Our goals this year aligned on the common theme of *service to others*, and we developed initiatives that provided:

- improved service to our membership and peers in the legal community, *and*
- increased service outside the legal community to the general public.

## LEADERSHIP TEAM

Section meetings were held monthly, alternating in-person or teleconference. Section Chairs and Vice-Chairs participated in monthly planning alongside the Leadership Team. The Leadership Team was comprised of a wonderfully diverse group of volunteer leaders with expertise in a variety of IP-related fields, and includes in-house, law firm, and consulting group practitioners, and included:

### *Executive Team*

Section Chair	Lauren Fernandez
Section Chair-Elect	Brent Bellows
Section Vice Chair	Suzanne Werner
Section Secretary	Jim Johnson
Section Treasurer	Virginia Carron
Section Liaison	Derrick Stanley
Section Immediate Past Chair	Brad Groff

### *Section Committees*

Section Chairs and Vice-Chairs were self-nominated during a membership-wide call for volunteer leadership, and represent extraordinary diversity across several law firms and in-house practitioners. A newly created two-tiered committee governance structure not only created transparency and encouraged involvement in leadership, but also ensured a smooth transition and continuity for next years’ Executive Team. A specially appointed in-house liaison was tasked with collecting feedback from and encouraging involvement of in-house counsel, particularly during our CLE events.

More than seventy Section members stepped forward to serve under the focused and dedicated leadership of our dedicated volunteer Committee Chairs:

Chair, <i>Communications</i>	Chris Glass
Vice Chair, <i>Communications</i>	Alan White
Chair, <i>Community Outreach</i>	Rivka Monheit
Vice Chair, <i>Community Outreach</i>	Rich Miller
Chair, <i>Copyright</i>	Katie Bates
Vice Chair, <i>Copyright</i>	Pete Duitsman
In-House Liaison	Matthew Smith
Chair, <i>Patent</i>	Chris Lightner
Vice Chair, <i>Patent</i>	Chris Curfman
Chair, <i>Trademark</i>	Michael Hobbs
Vice Chair, <i>Trademark</i>	Auma Reggy

## SERVICE TO OUR MEMBERSHIP

After a 2015 mid-year push to improve the diversity of our membership, the Section has 1207 members which includes a number of practitioners in a diverse range from in-house to students new to practice, from small practice to large firms, and represented nearly every law firm with a dedicated IP practice, dozens of corporations and other organizations. The Section maintains a financial balance of over \$176,645.19, the result of accumulated member dues as well as over \$60,000 in sponsorship fundraising this past year.

This year our former Website and Newsletter Committees joined to form a single Communications Committee, with the goal of providing centralized coordination and control over newsletter, website and email delivery of Section content. The Committee succeeded in improving the efficiency of communications with members: creating streamlined CLE email notices; hosting video content, articles and a centrally posted calendar on our website [georgiaip.org](http://georgiaip.org); and produced three of our quarterly newsletters containing information about upcoming events, Committee Reports and other news.

## SERVICE TO OUR MEMBERSHIP & PEERS: MAJOR EVENTS, CLE AND OTHER EVENTS

### *21st Annual IP Institute – Fall 2015*

The Section was pleased to host over 75 attendees from seven states at the Omni on Amelia Island. The three-day event allowed the exchange of ideas and updates from experts, and for the first time held an IP Bootcamp, a 3-hour CLE for new practitioners (or practitioners outside of IP) looking to learn more about the basics of IP and practical tips. Highlights of the event included a lively mock oral argument that was presided over by Chief Judge Sharon Prost and Judge Kimberly Moore Judge Moore of the CAFC, and moderated by Emory Law Professor Tim Holbrook. We were also delighted to once again host Chief Judge Thomas Thrash of the Northern District of Georgia, and to welcome for the first time Chief Administrative Judge Gerard Rogers of the Trademark Trial and Appeals Board. In addition to these views from the bench, the Institute's two panel tracks included representatives from both in-house and private practice, each providing their own unique insights.

## *4<sup>th</sup> Annual Judicial Gala – Spring 2016*

Over 250 people attended our fourth IP Gala at the Georgia Aquarium, *IP Under the Sea*. Funded with generous support from local sponsors, the evening allowed our membership to network and honored the members of the judiciary who support the practice of IP. The event was well-attended by members of the Federal Circuit, including Chief Judge Sharon Prost, as well as members of the judiciary from the 11<sup>th</sup> Circuit, and District Courts of Georgia.

### *Atlanta Area CLEs*

Our Committees took on our challenging goal of improved service and communication to our membership, and successfully hosted an Atlanta-area CLE nearly every month (except for in months where we hosted a Major Event). Some examples include:

- “The Trademark Office: An Insider’s View”*
- “Practical Tips and Guidance for Post-Grant Proceedings at the USPTO”*
- “How to Recover Attorneys’ Fees in an IP Case”*
- “Annual Update from the U.S. Register of Copyrights”*
- “Trademark Preliminary Injunction Hearings”*
- “Protecting Your IP Overseas: A Review of WIPO Services and Initiatives”*

### *Other Events*

This year we hosted a networking *Summer “Welcome Back” Social* to welcome the new members of our Leadership Team and give our Section membership a chance to unwind and network in an informal setting. Hosted at 5 Seasons Brewing in West Midtown, the event was very well received and attended by over 200 people.

Our *Annual 2015 Holiday Party* was again hosted at the 4 Seasons Atlanta and was attended by over 100 people who graciously donated their food items and financial support of the Atlanta Community Food Bank. *As a result, a donation was made for over \$500 to the ACFB on behalf of the Section.*

## **SERVICE TO THE PUBLIC & OTHER SECTIONS, GROUPS AND ASSOCIATIONS**

Under the leadership of our reformatted Community Outreach Committee we coordinated co-hosted events with other Sections of the State Bar, and provided our members with greater exposure with worthwhile volunteer and CLE opportunities. Our Section hosted a CLE event for the Clayton County Bar Association where expert volunteer members of our Section gave a presentation to the County Bar membership on basic IP Law concepts. Based on the success of this event, a similar invitation is currently extended to all other County Bar Association for free IP CLE from our volunteer committee members.

We also solidified our strategic partnerships with other members of Georgia’s IP Community, such as Pro Bono Partnership of Atlanta, where we renewed annual financial and volunteer support. We created outreach to non-legal entities as well, such as the entrepreneurship group General Assembly, ensuring greater professional

exposure for Section members while facilitating IP education to the general public. Through our Patents Committee, we also created a volunteer push to support the GA Patents Program, providing pro bono services to indigent patent inventors across the state.

## CONCLUSION

The Section continues to promote the highest standards of excellence in the practice of Intellectual Property. In service to others, we have not only maintained this standard to our membership but to our peers in the legal community and the public at large.

## **ANNUAL SUMMARY FOR INTERNATIONAL LAW SECTION FOR 2015-16 YEAR**

### **International Law Section Executive Committee**

Chair: Gregg Stuart Notte

Vice-Chair: Anna Patricia Marcucci

Treasurer: Elizabeth H. Eason

Secretary: Lorie Ann Mason

Immediate Past Chair: James "Jim" Nobles

Members-At-Large: Gregory K. Cinnamon, Betsy Cross Griswold, Scott Edward Moran, Robert Allan West, Birgit Gerdes Nomura, Glenn P. Hendrix, Amanda Margaret Witt, Constance Elise Rodts and Robert John Lystad

**Number of Members: 246**

### **CLEs/Programs/Sponsorships**

Sponsorship of luncheon CLE on Thursday, September 17, 2015 on International movement of goods: treaties, infrastructure and data. One CLE hour.

Co-sponsorship of the International Trade Conference at the Mercer University Atlanta campus on October 8, 2015.

Sponsorship of luncheon CLE on Thursday, November 5, 2015. Post safe harbor data protection and privacy issues in an international context. One CLE hour.

Co-sponsorship of CLE breakfast on international arbitration with the Atlanta International Arbitration Society and American Law Institute at the Atlanta Center for international arbitration and mediation at the Georgia State University College of Law on February 26, 2016. One CLE hour.

Sponsorship of luncheon CLE on March 24, 2016. Safe Harbor's Troubled Waters: Transferring Data from Europe following Safe Harbor's Demise. One CLE hour.

## ANNUAL REPORT

### **Local Government Law Section State Bar of Georgia 2015-2016**

The Local Government Law Section exists to provide a forum for attorneys representing local governments to exchange ideas, experiences, and to provide timely and relevant continuing legal education opportunities. Our section currently has 593 members.

Our annual meeting will be held this year at the Georgia Center for Continuing Education in Athens, September 15<sup>th</sup> and 16<sup>th</sup>. As is our custom, the program will provide two full days of continuing legal education, including specialty hours. We held our annual planning meeting Monday, May 9, 2016, at the State Bar Headquarters.

Our second program during the year rotates between a “Nuts and Bolts” seminar and an opportunity geared toward metro local government attorneys.

Our current officers are as follows:

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Fax: 706-310-0003  
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Bryan Andrew Downs, Past Chair  
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Daniel C. Haygood, Chair  
Local Government Law Section  
State Bar of Georgia 2015-2016

## Lawyers for Equal Justice 2016 Update to the Board of Governors

The Lawyers for Equal Justice, Inc.'s ("L4EJ") Incubator Program is off and running! It was created last year with the support from the State Bar of Georgia, the five accredited Georgia law schools, the Georgia Supreme Court and numerous legal services entities. It began operations in January 2016 with its first Executive Director, Stephanie Everett, and its 501(c)(3) status in place. It is located on the 4<sup>th</sup> Floor in the International Tower in Peachtree Center. For those of you who are familiar with this building, the office is on the same floor and adjacent to the office of the Atlanta Bar Association.

I am happy to report that we did receive the \$25,000 committed from each law school. We have also used the \$85,000 donated by the State Bar for rent and office leasehold improvements. The members of the board represent all of the various stakeholders who have invested in the project, as well as the entities through whom our participants have been providing pro bono services. The program is working and our initial class of 8 young lawyers has already begun providing pro bono and low bono services, while learning how to practice law efficiently.

Along the way, we have been met with a phenomenal amount of support from both nonprofit organizations and law firms. Here is a summary of several highlights from our first year of operation:

### **Our First Big Grant:**

Bucky Askew worked with Michael Monahan and Phyllis Holmen of Georgia Legal Services, to submit a grant application to the Legal Services Corporation for a Pro Bono Innovation grant to hire a pro bono coordinator who would work with L4EJ. The grant was for \$194,000 for two years and we won it. As a result, Georgia Legal Services has provided a paid staff attorney, Sarah Babcock, to work on identifying pro bono projects for the participants in the incubator, tracking the amount of time that they spend on each project, and arranging for substantive training to ensure the participants can handle the pro bono cases. We were fortunate to have received the grant and thank Georgia Legal Services for their willingness to allocate the staff person to L4EJ.

### **Our Executive Director:**

L4EJ is proud to have Stephanie Everett agree to take the leadership reins for the organization. Stephanie has the perfect set of skills to help develop and shepherd the participants through the incubator. She graduated in 2002 from Georgia State University's Law School, and she

helped grow a small law firm into a firm with 20 lawyers and staff in only seven years. She is an adjunct professor at Emory School of Law teaching a course on how to operate a law firm; coached law students at Georgia State College of Law through the career services office; and she served as a private consultant to law firms with financial, personnel or operational issues. Stephanie has done an excellent job getting us set up in the office and selecting our first class.

**Partners in our Success:**

In addition to the financial support received from the State Bar, the law schools and Georgia Legal Services, L4EJ has been the recipient of numerous in-kind donations of services, furniture, technological and computer support and consulting services. A list of all of the in-kind contribution donors who have provided over \$244,000 in services and materials is attached to the end of this report. L4EJ thanks all of these individuals and entities. Without the generous donation of the office furniture from Parker Hudson, our office would not have been able to have thirty office desks and reception area furniture for use by our participants and Executive Director.

**Our Participants:**

We had 17 total applicants for our first class: We declined to accept 7 participants because they did not meet our eligibility requirements. Two additional participants were invited to join the program, but declined the invitation in order to accept jobs with a firm.

We are very excited to announce the members of the first L4EJ class! This dynamic group of individuals has been participating in the program since April 1<sup>st</sup>.

Gregory Clement, Emory 2011

JoAnna Smith, Emory 2014

Candace Sneed, GSU 2013

Alicia Mack, GSU 2013

Charles Wardlaw, John Marshall 2015

Tamora Buchanan, Mercer 2013

Erwin Mark Stevens, Mercer 2015

Christopher Bruce, UGA 2012

**Program Highlights:**

**1) Professional Development/Business Training**

In the first two months, the participants have received 29.5 hours of training on professional development and business topics. These trainings focused on a wide variety of topics such as creating a vision and mission statement; organizing a law practice and incorporation issues; marketing and self-promotion; keeping clients happy; IOLTA trust accounting; low bono fee structures; engagement issues; and ethical considerations.

Guest speakers have included Nancy Chorpenning (C-Suite Advisors), Debby Stone (Novature Partners), Natalie Kelly (State Bar of Georgia), Jeremy Pritchard (State Bank), Jonathan Hawkins (Krevolin and Horst), Cass Brewer (GSU), Colin Blalock (CPA), Paula Frederick (State Bar of Georgia), and Jennifer Romig (Emory University).

## **2) Substantive Law Training**

In order to prepare the participants to handle pro bono and low bono cases, the participants have participated in over 25 hours of substantive training in areas of the law needed for these types of matters. Topics included eviction defense, securing a temporary protective order, adoptions, custody law in Georgia, ethics of limited scope engagement, record restriction, and Chapter 7 bankruptcy training.

We have been fortunate that so many of our pro bono legal services partners have facilitated these trainings including Atlanta Volunteer Lawyers Foundation, Atlanta Legal Aid Society, Georgia Legal Services Program, and Georgia Justice Project.

## **3) Pro Bono Director:**

Sarah Babcock officially started with L4EJ on Monday, March 21. Sarah, an Emory Law graduate and former Alston & Bird associate, is responsible for coordinating all aspects of the L4EJ participants' pro bono commitment, including organizing poverty law trainings, placing pro bono referrals with L4EJ participants, and providing support and mentorship on individual pro bono cases.

## **4) Office:**

We moved into our new office space at Peachtree Center in March. The space includes offices for the L4EJ staff, 30 work stations for our participants, a large training room, and several private offices for client meetings. The office was primarily furnished with donated furniture from Parker Hudson Rainer and Dobbs; Heyman and Sizemore; and Fort McPherson.

We were very grateful for the IT team at Kilpatrick Townsend, who guided us through the process of setting up the technology in the office.

## **5) LEJ Conflict Policy:**

Our program is designed to encourage collaboration among the participants and with LEJ's staff. They will not just share office space; they will be encouraged to discuss their cases (while maintaining client confidences) and to seek advice from one another and the director. As a result, we decided to ask each participant to agree to treat all of the participants like a single firm for conflict purposes only. In other words, we will not allow one participant to represent the husband and another to represent the wife in the same divorce case. This policy was included in the Participation Agreement that each participant signed.

## **6) Lawyers for Equal Justice In Action by the numbers:**

In the first two months of the incubator program, the participants have:

- Accepted 24 pro bono referrals from 3 legal aid partners (Atlanta Legal Aid, Atlanta Volunteer Lawyers Foundation, and Georgia Legal Services)
- Provided pro bono representation to clients in DeKalb, Fayette, Floyd, Fulton, Gordon, Henry, Newton, and Rockdale counties
- Received over 25 hours of substantive pro bono training, including 3 court observations
- Achieved 4 victories in dispossessory court and secured 2 Temporary Protective Orders
- Provided pro bono representation in 9 substantive areas of law

In May, L4EJ began accepting referrals for potential clients who do not qualify for legal aid services. During this one month, L4EJ received over 250 calls from potential clients seeking low bono representation. To date, L4EJ's participants have conducted over 225 consultations with these potential clients. Approximately 20 have been directed to self-help resources and approximately 20 have engaged participants in the incubator to represent them. Many of these representations have taken the participants outside of the Metro-Atlanta area, including one representation in Muscogee County and one in Macon.

## **7) Next steps:**

We anticipate accepting applications for the next class in the fall with an early November start date. Stephanie and the participants visited several law schools last semester to speak about the program and received a great response. Students are already expressing their desire to join us in the fall!

Overall, this has been a phenomenal first year for L4EJ and the incubator. It has exceeded all of the expectations of its founders and is moving forward to add another group of talented lawyers to the incubator in the fall. We appreciate all of the support this program has received from every source. It has made L4EJ a national model to which other states look to emulate.

If you want to donate to or find out more information about Lawyers for Equal Justice, Inc., please check out our website at [www.lawyersforequaljustice.org](http://www.lawyersforequaljustice.org), email us at [info@L4EJ.org](mailto:info@L4EJ.org) or call us at: 404-474-7447.

### **Officers and Members of our Board of Directors:**

Hewlett (Bucky) Askew	Chair	Supreme Court Appointee
Justice Carol Hunstein	Vice Chair	Supreme Court Appointee
Patrise Perkins-Hooker	Treasurer	State Bar of Georgia Appointee
Michael Lucas	Secretary	Atlanta Volunteer Lawyers Foundation Appointee

Shatorree Bates- State Bar of Georgia Appointee

Clark Cunningham- Georgia State University Law School Appointee

Tony Del Campo- Chief Justice's Commission on Professionalism Appointee

Damon Elmore- State Bar of Georgia Appointee

Tim Floyd- Mercer Law School Appointee

Steve Gottlieb- Atlanta Legal Aid Society Appointee

Phyllis Holmen- GLSP/State Bar Pro Bono Appointee

Malcom Morris- John Marshall Law School Appointee

Rita Sheffey- Emory Law School Appointee

Darrell Sutton- State Bar- Young Lawyers Division Appointee

Kenny Tatum- University of Georgia Law School Appointee

Rob Wellon- Atlanta Bar Association/Solo Section Appointee

#### **Ex Officio:**

Stephanie Everett, Executive Director of L4EJ

Avarita Hanson- Chief Justice Commission on Professionalism

Michelle West- State Bar of Georgia Transition into Law Practice Program

Natalie Kelly- State Bar of Georgia Law Practice Management

Mike Monahan State Bar of Georgia Pro Bono Director

Doug Ashworth Institute of Continuing Legal Education

## Pro Bono and In-Kind Contributions to LEJ (Year 1)

**As of May 1, 2016**

<b>Donor / Partner</b>	<b>Professional Services Donated</b>	<b>Value (year 1)</b>
Brian Smith, Arnall Golden Gregory	Lease negotiations	\$ 9,135.00
Cass Brewer, Georgia State College of Law	IRS 501c3 application	\$ 43,200.00
Pro Bono Partnership	Drafting of bylaws	\$ 8,750.00
Damon Elmore	Employment law services	\$ 300.00
TechBridge	Initial technology consulting	\$ 495.00
Parker Hudson Rainer and Dobbs	Furniture moving expenses	\$ 6,000.00
Tyler Askew	Branding/logo options	\$ 30,000.00
Kilpatrick Townsend	IT Services	Need to confirm value
<b>Total Donated Professional Services</b>		<b>\$ 88,745.00</b>

<b>Donor / Partner</b>	<b>In-Kind Donation of Materials</b>	<b>Value</b>
Parker Hudson Rainer and Dobbs	Furniture	\$ 62,684.59
Heyman and Sizemore	Furniture	\$ 5,000.00
Legal.IO	Technology platform*	\$ 30,000.00
Ranstaad	Copiers	\$ 4,000.00
Clio	Free access to all participants**	\$ 21,384.00
MyCase	Free access to all participants**	\$ 8,424.00
ICLE	Free CLEs from ICLE***	\$ 3,200.00
Lexis Nexis	Free accounts for all participants****	\$ 21,000.00
Kilpatrick Townsend	IT Hardware	?
Fort McPherson	Business Chairs	?
<b>Total Donated Materials</b>		<b>\$ 155,692.59</b>

\* Legal IO's costs would be \$30K per year and their donation has no set end-date at this point.

**Total Donated Materials/Services**      **\$ 244,437.59**

\*\* MyCase and Clio's donation would be valued at \$14,976 and \$38,016 respectively once LEJ is at its 30-participant capacity. Neither has set any end-date for the contribution.

\*\*\*Free CLE is valued at \$320/year. \$3,200 represents that donation for 10 participants in the first year. At full census, this value will be \$9,600.

\*\*\*\*Free Lexis Nexis is valued at \$175/month. \$21,000 represents that donation for 10 participants in the first year. At full census, this value will be \$63,000 per year.

**Estimated value at full 30-participant census:**      **\$ 317,361.59**