

STATE BAR OF MONTANA

2023 Committee and Section Annual Reports

Committees

CLE Institute

Sara Sexe, Chair

Budget Overview

The CLE Institute sponsored or co-sponsored the continuing legal education set forth in the attached lists.

The CLE Institute Budget numbers are as follows:

FY22: Budgeted Revenue - \$*** (net)	Actual Revenue - \$*** (net)
FY23: Budgeted Revenue - \$*** (net)	Actual Revenue - \$*** (net)
FY24: Budgeted Revenue - \$***0 (net)	Actual Revenue -

The CLE Institute continues to control expenses associated with providing CLE by utilizing various methods, including offering in-person CLE seminars via electronic participation. The CLE Institute continues to emphasize the availability of these hybrid CLEs, to offer seminars at reasonable costs to a wider an audience, as we noted that after the pandemic, tourist leisure travel increased, combined with hotel staffing shortages, and inflated room costs. We thus offered in hybrid format the Real Estate CLE at Fairmont, the St. Patrick's Day CLE in Butte, and the Bucking Horse CLE in Miles City. The State Bar and UM Law school also offered again the International CLE in Cork, Ireland. Unfortunately, because of the unavailability of the Big Sky Location, in 2023 the CLE & Ski seminar was not offered but will be in 2024. The Bench-Bar CLE continued with ** attendees, and the State Bar's annual meeting in the fall of 2022 had 311 attending.

The CLE Institute also sponsored or co-sponsored webinars, which continue to be a popular option for CLE. All webinars are recorded then promoted and sold on the State Bar website for self-study CLE credit. Webinars are cost effective to organize, promote, and deliver and are especially practical. We plan to continue to use or enhance the number of webinar offerings to our members each year.

The Institute strives to provide quality CLE seminars at reasonable prices to most benefit a large cross-section of the State Bar membership. Benefits of being a member of the Institute include the opportunity to shape continuing legal education in Montana, networking with other Montana attorneys, and earning free CLE credits for moderating seminars. Former CLE Institute member Toni Tease is the Board of Trustees Liaison. State Bar staff remain extremely helpful to the CLE Institute and the Bar, while still performing many other job duties.

Judicial Relations Committee

Stuart Segrest, Co-Chair

The Judicial Relations Committee put on our annual Bench Bar CLE on April 14 in Missoula. The CLE was well attended, both in person and remotely. Topics included updates from state and federal judges. See the CLE agenda/program for more details. During the debrief call after the CLE, Stuart Segrest stepped down as co-chair of the JRC. Judge Rod Souza replaced Stuart as co-chair; Eric Nord remains co-chair. Montana (tribal, state, and federal).

Justice Initiatives Committee

Morgan Dake and Ellie Webster, Co-Chairs

The Justice Initiatives Committee (JIC) rescheduled its monthly meetings to occur via Zoom at 11:00 a.m. the first Wednesday of the month.

Current JIC members are:

- Justice Jim Shea, Montana Supreme Court
- Judge John Parker, Eighth Judicial District Court
- Stuart Segrest, Christensen & Prezeau, PLLP
- Patty Fain, State Bar of Montana
- Bill Bronson, William O. Bronson, P.L.L.P.
- Kayre Chatellier, Resolve It Now
- Hannah Cail, Department of Revenue

- E. Lars Phillips, Crowley Fleck PLLP
- Ellie Webster, Montana Legal Services Association
- Meri Althausser, Forward Legal, PLLC
- Niki Zupanic, Upper Seven Law
- Morgan Dake, Crowley Fleck PLLP
- Merle Raph, Toole County Attorney's Office

State Bar Liaison: Ann Goldes-Sheahan

JIC has continued to define its unique role in Montana without duplicating the important work already being done by Montana Legal Services Association, the Access to Justice Commission, and other organizations in this State. JIC continues to believe that its primary focus should be limited to increasing pro bono participation among State Bar members.

Current issues/projects in the works with JIC:

1. Refine and revise the Pro Bono Policy Toolkit originally developed by JIC in 2013
2. Encourage law firms to become signatories to a commitment to adopt pro bono policies
3. Develop regular content promoting pro bono opportunities in the Montana Lawyer

Law-Related Education Committee

Anna Conley, Chair

This year LREC debriefed regarding Fall 2022's Citizens Law School, then created a new curriculum, identified speakers, scheduled them, and is preparing for the Fall 2023 Citizens Law School, which will include the following 8 zoom sessions:

Oct. 11 - AI and the law - Anna Conley - Anna Conley

October 18 - A Day in the life of a Montana lawyer and judge - David Steele and Judge Berger

October 25 - Small business and employment law - Amy Christensen

Nov. 1 - Montana Constitution's bill of rights – Judge Johnstone

Nov. 8 - Water, Property and Public Land - Hertha Lund

Nov. 15 - Criminal law – Ed Hirsh, Nate Holloway & Brian Smith

Nov. 29 - 2023 legislative changes that impact Montanans – Kristen Juras, Todd Everts, Julie Johnson, Jaret Coles

Dec. 6 - Family Law - Sara Berg

The Montana State Bar also obtained a grant from the ABA to assist with the committee's work. We are hoping to provide a small stipend to speakers and looking forward to increased advertising from the bar and increased attendance by the public.

The committee is also considering two additional projects, including updating the Know Your Rights brochure for Montanans turning 18, as well as considering options for engaging in high schools throughout Montana.

Professionalism Committee

Tanis Holm, Chair

In September of 2023, the Professionalism Committee in collaboration with Mike Larson, the Deputy Director & Assistant General Counsel of the State Bar Association, organized and will put on the New Lawyer's Workshop at the State Bar Annual Meeting in Billings, Montana. The purpose of the New Lawyers Workshop is to connect newer attorneys with each other and experienced practitioners and judges in a small group format that is designed to facilitate various topic discussions regarding the practice of law. The Professionalism Committee has been committed to this workshop for many years and continues to be involved in the organization and facilitation of the program. The Professionalism Committee is also looking to reignite the road show CLEs to reach bar members in smaller communities and hopes to accomplish this in the 2024 year.

Technology Committee

Dana Hupp, Chair

The following is the Technology Committee's annual report regarding its activities this last year.

- **January Zoom Meeting:** The Committee met via Zoom in January 2023 to discuss its goals for the year and meeting schedule. The Committee decided to have a May in-person meeting. Additionally, it discussed asking the Board to consider having a "technology presentation" each annual meeting versus having a stand-alone technology CLE.
- **May In-Person Meeting:** The Committee met in-person on May 16. Attached is a copy of the agenda from that meeting. The Committee spent a significant amount of time discussing AI and the implications for the legal community. Scott Kelly provided a one-hour presentation on the basics of AI. The Committee met with representatives of Fischer's Technology regarding its Managed IT and other services it provides statewide. The Committee received a product demonstration from NetDocuments.
- **Annual Meeting:** The Committee provided support in identifying speakers regarding AI for the annual meeting.

- **Fall Zoom Meeting:** The Committee plans on scheduling a Zoom call prior to the end of the calendar year where it will likely receive another product demonstration.

Also attached for the Bar's records is an updated list of Committee members with their contact information.

Please let the Committee and/or me know if the Board or you have any questions or if there are areas that the Committee can further support the Board Leadership and/or the Montana legal community.

Thank you for the opportunity to support the State Bar's efforts.

Sections

Animal Law Section

Lindsay Abernethy, Chair

I stepped up as Chair of the Animal Law Section last spring. I organized a CLE with the Animal Legal Defense Fund on May 16th. It was held via zoom and had roughly 13 attendees. I am in the process of planning an annual meeting, most likely in late October or early November.

Dispute Resolution Section

Patrick Quinn, Co-Chair

No activities since the last report.

Family Law Section

Amy Lord, Chair

CLE

- The Family Law Section strives to organize and sponsor two CLE seminars each year, one addressing family law generally and the other diving into more advanced and complicated topic areas.

Elected Officers

- The following people continue to serve as officers of the Section:
 - o Amy Lord, Chair
 - o Ryan Phelan, Vice Chair
 - o Kay Lynn Lee, Secretary/Treasurer
- We are going to host an annual meeting, in part, to elect new officers and select committee chairs.

Committees

- The Legislative Action Committee did not offer legislative changes this session.
- The Handbook Committee is still working on a family law handbook
- The outreach committee is working on fielding questions or concerns from Section members and planning and hosting events
- The CLE committee works on the two large CLE seminars, periodic webinars, and identifying topics and speakers for future events.

Goals and Projects

The Family Law Section remains actively engaged in improving (or attempting to improve) the practice of family law for practitioners and pro se litigants. The section works to establish relationships with members, to encourage engagement, to provide peer support, and professional development.

Federal Practice Section

Jordan Crosby, Chair

Since the last report, the Federal Section has been inactive, but we have tried in the last few months to have a more active presence. At the end of June 2023, we held a meeting with members to discuss various matters related to the section, including granting a funding request by the Federal Court (see meeting minutes previously provided). On September 6, we are holding a joint CLE with the Montana Chapter of the Federal Bar Association. We have 55 participants signed up and a full CLE agenda planned with both criminal and civil federal practice components, including a 1-hour Q&A with all federal judges participating. Because we did not have enough Federal Section participants, we are unable to hold our annual meeting during lunch at the CLE. We will plan to hold a separate annual meeting soon to address officer appointments as well as revisions to the section by-laws.

Intellectual Property Law Section

Shane Coleman, Chair

Officers and Council Members

	<u>2022-2023</u>	<u>2023-2024</u>
Immediate Past Chair	Sarah Rhoades	Shane Coleman
Chair	Shane Coleman	To be elected
Chair Elect	Open	To be elected
Treasurer (2 years)	Judd Jensen	Judd Jensen
Secretary (2 years)	Dash DeJarnatt	To be elected
Council A (1 year)	Lisa Griffin	To be elected
Council B (2 year) elected even years	Martin Rogers	Martin Rogers
Council C (2 year) elected odd years	Toni Tease	To be elected
Council D (2 year) elected even years	Quinton King	Quinton King
Council E (1 year)	Mariah Johnson	To be elected

Membership

The IP Section presently has 41 members, including a handful of student members.

Primary Initiatives

The Section’s primary initiative has been the annual “IP Day in Montana” event, which typically invites not only lawyers but also general members of the public. Last year’s IP Day occurred last fall in Bozeman at the MSU campus. This year, IP Day will return to the spring at the UM Law School.

Finances

The IP Section’s finances are described in the attached income statement.

Income Statement by Class - Intellectual

Generated On: 9/7/2023 10:17:10 AM 9ST Ending Date: 08/2023

Months: 5

Budget: FY24 Budget_Aproved Class: z_Sections

Include Excluded Data: N

Account Income	Aug-23 Actual	Aug-23 Budget	Monthly Variance	YTD Actual	YTD Budget	YTD Variance	Annual Budget	Remaining
4574 Intellectual Law Section Revenue	-	-	-	1,050	1,230	-180	1,230	180
Total Income	-	-	-	1,050	1,230	-180	1,230	180
Net Gain/Loss	-	-	-	1,050	1,230	-180	1,230	180

Section Beginning Balance - FYE23	3,845
Net Gain/Loss	1,050
Section Ending Balance - FYE24	<u>4,895</u>

Natural Resources, Energy, & Environmental Law Section

John Meyer, Chair

2023 Annual Report

The Natural Resources, Energy & Environmental Law Section (“Section”) submits its annual section report for 2023 to the State Bar of Montana Board of Trustees as follows:

Activity from last year:

Annual CLE: The Section held its seventh straight annual CLE on April 13, 2023. The Section elected to present the conference in person and via a live, remote platform (Zoom). The CLE was well attended (65 participants) and brought in a variety of speakers and attendees practicing in the areas of natural resources, environmental, and energy law. The CLE was organized by the Section’s Council members with assistance from the State Bar. We would like to thank the State Bar’s IT personnel for their assistance in making this program a success. We are currently working with the State Bar’s IT to offer the recorded CLEs for sale on the website.

Annual Meeting: A general meeting of the Section was held August 3, 2022.

At the conclusion of the meeting, the Section Council was as follows:

- John Meyer, Chair (term out 2024)
- Lara Guercio, Vice Chair (term out 2024)

STATE BAR OF MONTANA TECHNOLOGY COMMITTEE MEETING

May 16, 2023

- 9:15 am to 9:45 am: **Participants Arrive, Coffee & Pastries**
- 9:45 am to 10:45 am: ***General Primer on AI in the Legal Space***
Scott Kelly, Production Manager NetDocuments
- 10:45 am to 11:00 am: **Break**
- 11:00 am to 12:00 pm: ***Services Fischer's Technology (formerly Alter Enterprises) Provides to MT Attorneys/Law Firms***
Shannon Sanden, General Manager Fisher's Technology
- 12:00 pm to 1:00 pm: **Lunch**
Soup Farm (Local Missoula Restaurant)
Menus provided in the morning.
- 1:00 pm to 2:00 pm: ***NetDocuments Overview***
(Document Management Tool)
Kyle Taylor, NetDocuments
- 2:00 pm to 2:15 pm: ***Worden Thane P.C.'s Experience Transitioning to NetDocuments***
Alyssa Sutton, Network Administrator Worden Thane, P.C.
- 2:15 pm to 2:30 pm: **Break**
- 2:30 pm to 3:00 pm: ***Report on ABA Technology Show***
Andy Davis, Baldwin Law PLLC
- 3:00 pm to 3:15 pm: ***Legislative Update***
Cort Jensen, Chief Attorney MT Department of Agriculture
- 3:15 pm to 3:30 pm: **Other Business**
Confirm Volunteers Willing to Speak at State Bar Annual Meeting, "Technology Hour," September 14 or 15?

Next meeting: Fall Zoom meeting?; Topic?
- 3:30 pm to 4:30 pm: **Social Hour**
Cranky Sams

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