

**RECOMMENDATIONS OF THE VIRGINIA STATE BAR**  
**PRACTICE MANAGEMENT TASK FORCE**

November 4, 2021

---

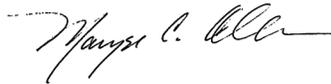
To the Officers, Members of Bar Council, and Staff Leadership of the Virginia State Bar:

In February, 2021, Virginia State Bar President Brian Buniva convened a task force to recommend whether the Virginia State Bar should create a Practice Management Assistance (PMA) program. The Task Force recommends in this report that the Virginia State Bar create a Practice Management Assistance program within the State Bar and implement it with a new staff position dedicated full time to the work.

This report will briefly present:

	Page
<b>I. An introduction</b>	<b>2</b>
<b>II. The history of practice management nationally</b>	<b>2</b>
<b>III. The history of practice management in Virginia</b>	<b>4</b>
<b>IV. Current practice management operations in other state bars</b>	<b>6</b>
<b>V. Comments by local bar leaders around Virginia</b>	<b>6</b>
<b>VI. Why the Task Force recommends a VSB-supported PMA service</b>	<b>7</b>
<b>VII. Job description, salary and expense budget recommendations</b>	<b>10</b>
<b>VIII. Implementation recommendations</b>	<b>10</b>
<b>IX. An appeal for action</b>	<b>11</b>
<b>Appendices: Job Description</b>	<b>12</b>
Survey of PMA Programs	15
Survey of Local Bar Leaders	64

Respectfully submitted, the Task Force members:



Maryse C. Allen



Graham K. Bryant



Eugene N. Butler,



Douglas R. Kay



David B. Neumeier, chair



Kellam T. Parks

## **I. An introduction**

In February 2021, Virginia State Bar President Brian Buniva appointed the six attorneys listed above to investigate and recommend to the State Bar whether the Virginia State Bar should create a Practice Management Advisor position or service within the VSB for the benefit of VSB members. He appointed David Neumeyer as chair of the task force due to David's previous advocacy for such a position, and the other members due to their prior volunteer service to the bar and knowledge of practice management. The task force met regularly and reported to President Buniva and Bar Council in April and in June on its investigations and findings to date. We also gained additional assistance, for which we are grateful, starting in June from volunteer VSB member Barbara Anderson and VSB Assistant Ethics Counsel Emily Hedrick, our staff liaison. The Task Force is unanimous in recommending the following.

## **II. The history of practice management nationally**

According to the *Planning Guide To Starting A Bar-Sponsored Practice Management Assistance Program*, Second Edition,<sup>1</sup> published by the ABA Law Practice Management Section Practice Management Advisors Committee in 2000,

a PMAP is a not-for-profit program to which specific resources (full or part-time, employees or consultants) have been allocated over a period of time to provide free or low-cost practice management assistance to lawyers, and is sponsored by a state, county or local bar association in the United States or a law society in Canada. On the other hand, a Program may be the offering of periodic or sporadic presentations on practice management topics, whether by an outside consultant or by one or more members of a bar association or law society. PMAPs provide on-going assistance in many areas while Programs provide assistance and advice on targeted topics. Existing advisors believe that PMAPs are of great value and this Guide focuses on them. However, all advisors support any efforts by bar associations or law societies to meet lawyers' needs for management information, even if limited.

The evolution of PMAPs has occurred in response to growing evidence that:

- Many, and perhaps most, complaints to discipline authorities and malpractice claims against lawyers are caused, at least in part, by poor practice management;
- improving practice management skills can play an important role in reducing the number and dollar value of malpractice claims and improving the public perception of lawyers;
- professionalism, sound management and effective leadership are inherently intertwined and dependent one upon the other; and

---

<sup>1</sup> [bit.ly/ABA\\_PMA\\_Guide](https://bit.ly/ABA_PMA_Guide) ; see also [LPM programs: an inside look \(americanbar.org\)](https://www.americanbar.org/lpm-programs-an-inside-look)

- solo and small firm practitioners are not receiving necessary assistance with law office management and technology issues within the existing law school and CLE framework.

The teaching of practice management skills to lawyers has been haphazard over the years because most law schools have not and do not consider it part of their mandate to educate their students in these matters and no other effective teaching forum exists. Some bar associations have responded to their members' needs for help in these areas by adopting a systematic approach now known as PMAPs.

Existing PMAPs share these common objectives:

- 1) assisting lawyers in improving efficiency and effectiveness in the delivery of legal services;
- 2) assisting lawyers in implementing systems and controls to reduce risk and improve quality in the delivery of legal services;
- 3) assisting lawyers in client relations; and
- 4) assisting lawyers and their office personnel in using emerging technologies to improve the delivery of legal services.

These objectives, when met, enhance professionalism and competency.

Id. at 2-3.

The first bar association in the United States to actually hire an individual as a law practice management advisor was the Florida Bar in 1979, when the board of governors was looking at funding an additional prosecutor for the bar's disciplinary staff. An analysis of the types of issues bringing errant lawyers into the disciplinary system revealed that the preponderance of problems emanated from a lack of education on how to effectively and efficiently run a practice. The board ultimately decided to devote some funds toward educating lawyers rather than spending additional funds on prosecuting them—an interesting shift in funding that proved to take bar associations throughout the country in an entirely new direction.

Indeed, some of the PMAs reported that one of their main objectives is to help solo and small firm lawyers steer clear of the disciplinary problems that can result from simple oversight or ignorance. The Louisiana State Bar Association's Law Office Management Assistance Program was established last year to "help lawyers increase the quality of legal services they provide to their clients as well as avoid potential disciplinary problems stemming from poor law office management," notes Eric K. Barefield, deputy practice assistance counsel.

"LPM programs: an inside look"; *Bar Leader*, American Bar Association July-August 2006, [bit.ly/BarLeaderJuly2007](http://bit.ly/BarLeaderJuly2007) .

We attempted to obtain an authoritative count from the American Bar Association of the current number of practice management programs across the country, but Dan Mills of the DC Bar PMAP told us that the ABA no longer has a staff person supporting PMA work following the ABA's significant staff downsizing of 2018, and does not track this number. He did obtain a number for state bars with in-house, live PMAPs, 24, from Roberta Tepper, Lawyer Assistance Programs Director for the State Bar of Arizona, and active in the national network. Our own telephone interviews and surveys of states with PMAs appears in an appendix to this report; we particularly focused on states with unified bars, and talked to eleven bars, identified in the survey, with PMA services.

### **III. The history of practice management in Virginia**

#### **A. Prior Virginia State Bar Consideration**

A member of the task force interviewed former VSB executive director Tom Edmonds about the history of practice management assistance in Virginia. Tom stated that Bar Council voted down a Law Office Management Assistance Program (LOMAP) championed by then-VSB-president Bob Altizer in the mid 1990's over concerns about cost and mission; the proposal would have cost a couple hundred thousand dollars and was not, in the view of some, related to lawyer regulation (a view with which Tom disagreed.) The Florida Bar's successful program<sup>2</sup> was the model, Tom noted, and was documented to have cut down on bar complaints.<sup>3</sup>

Tom added that the vote took place on the heels of a Joint Legislative Audit & Review Commission (JLARC) study of whether the VSB was exceeding its authority. The VSB came out of it beautifully, Tom said, with the report stating that it was operating within mission and that there were only two things it did that the voluntary bars should do: the Cambridge summer educational program, which the Virginia Trial Lawyers Association was willing to take over and ran for several more years, and the personal insurance program, which was offered to the Virginia Bar Association but not accepted. The VSB then obtained the agreement of ALPS to provide a risk management advisor, John Brandt, available to consult by phone. John is helpful, in Tom's view, but is focused on risk management from an insurance perspective and not on keeping lawyers out of the disciplinary system, though there is some overlap.

#### **B. Virginia Bar Association**

The Task Force has also been following the Virginia Bar Association's ongoing effort to establish a practice management advisor program. Called VBA Practice Management Advisor, this program is a partnership between Affinity Consulting and the VBA's Law Practice Management Division. In the VBA's view, the program serves three purposes: (1) fill a key gap among statewide legal organizations by providing a full practice management service to members, (2) provide a member benefit encouraging membership growth and retention, and (3) generate non-dues revenue (VBA

---

<sup>2</sup> See the history of the Florida Practice Resource Center at [bit.ly/FloridaPracticeResourceCenter](https://bit.ly/FloridaPracticeResourceCenter)

<sup>3</sup> The Task Force was unable to locate a copy of the 1990s proposed budget presented to Bar Council or the 1990s Florida Bar published information.

members receive a ten percent discount on any paid Affinity services, and the VBA retains a portion of any fees paid to Affinity that originated through the VBA). The VBA's goals in a practice management program differ significantly from the VSB's goals, but the VBA's experience to date is nevertheless instructive.

Once its rollout is complete, VBA Practice Management Advisor will offer VBA members at no additional cost: (1) unlimited (for now) 30-minute consultations with an Affinity practice management advisor; (2) access to "Affinity Insight", Affinity's library of training videos on practice-management issues (a \$500 value); (3) a curated library of materials such as white papers, checklists, and product comparisons on topics such as opening a firm, winding down a firm, work-life balance, law firm products and services, security, and building a practice; and (4) a library of Virginia-specific materials such as CLE presentations and management guides tailored for the VBA's particular audience.

At this point, however, only the first two aspects are available for members. Development appears to have been hampered by the effects of the COVID-19 pandemic on the VBA as a voluntary organization, including high staff turnover, the need to focus attention and resources to more pressing projects, and the process of securing Yvonne Cockram's replacement as Executive Director.

VBA Practice Management Advisor had its beginnings at the VBA's July 2020 Summer Meeting. The Law Practice Management Division had been contemplating some form of practice management advising program as part of the VBA's overall strategic plan for some time, but the idea began to take form in Summer 2020. According to VBA leaders, the VBA had seen where successful examples of both mandatory and voluntary bar associations had successfully partnered with Affinity Consulting, specifically pointing to Arkansas as an inspiration, and determined that Affinity was cost-effective in a way a dedicated staff member would not be. After many meetings and refinements, the VBA and Affinity entered into a contract in December 2020. The VBA had hoped to have the program fully online by the 2021 Summer Meeting, but instead, for the reasons above, progress has been slowed in 2021.

The 2021 Summer Meeting provided valuable insight into the VBA's progress. Jeffrey Schoenberger, Esq., Senior Consultant and manager of Affinity's Practice Management Advisory Program, attended the Summer Meeting in person, and we interviewed him in detail about the VBA's program. The key takeaway is that the VBA is not effectively marketing this program.

Mr. Schoenberger manned an Affinity booth, not a VBA Practice Management Advisor booth, throughout the meeting, which led many attendees to confuse his presence with the other vendors. Although he was offering free, in-person 30-minute consultations throughout the meeting, no one had participated when we spoke with him late in the Meeting. He said that since the consultations began being offered earlier in the year, only a handful took place each month with well under 50 total consultations for the year in late July. The VBA Practice Management Advisor website was not yet up. Although some handouts about VBA Practice Management Advisor were available and it received a high-profile mention during the banquet, the VBA's promotional efforts were understated at best.

We recently received an update from the VBA Law Practice Management Division indicating that “test” pages from the final VBA Practice Management Advisor website were planned to be available for internal review in mid-November. The VBA has graciously agreed to allow us to review those work-in-progress pages once they become available. Their goal is to have a soft launch of the final website on January 1, 2022. Assuming these benchmarks are met, we anticipate the VBA will have significantly improved marketing efforts at the late January 2022 Annual Meeting.

The bottom line from our study of the VBA’s progress is that marketing remains a paramount challenge for any type of practice management advising program. Most lawyers do not know what such programs are or how that could benefit from them, even though the vast majority of lawyers struggle with issues that practice management advisors can assist with. Effective marketing of not only the “what,” but also the “why” of a prospective VSB practice management advising program will be essential to its success.

#### **IV. Current practice management operations in other state bars**

Early in the Task Force’s establishment, members talked with leaders from all unified bars that have PMAPs<sup>4</sup>, several key voluntary bars with notable PMAP programs<sup>5</sup>, and other stakeholders in the field. These PMAP leaders provided valuable insight into the world of PMAPs, tips on how to develop a successful program from the ground up, and practical guidance—such as budget spreadsheets and job descriptions—for establishing a program. The enthusiastic consensus of these PMAP leaders is that a PMAP program is a valuable asset in any state, particularly for solo and small firm attorneys. They offered to assist Virginia as much as possible in establishing a program and helping any staff engaged for this project become involved in the nationwide practice-management advisor community, which they emphasized was essential to success.

Details regarding the PMA leaders we spoke with and the comments we received appear in the appendix to this report.

#### **V. Comments by local bar leaders around Virginia**

Task Force members have also talked with over thirty leaders of local and regional bar associations in Virginia to gauge how a Virginia State Bar PMAP’s target audience would perceive the program. Reception was positive, with 62 percent saying they thought their members would use such a program,<sup>6</sup> but with cautions about lack of usage by small bars whose members are mostly older and experienced, general unfamiliarity with how a PMAP could help, and resistance to

---

<sup>4</sup> State Bars of Arizona, Georgia, Michigan, Oklahoma, Oregon, South Carolina, Texas, Washington, Wisconsin, and the DC Bar

<sup>5</sup> North Carolina Bar Association, Illinois State Bar Association, American Immigration Lawyers Association, and the American Bar Association’s Law Practice Management Division.

<sup>6</sup> Eighteen percent said they thought members would not use the program, and 26 percent were unsure or did not know.

anything that would require a dues increase. Although less significant, a few bar leaders expressed hesitation about a program that would involve telling the bar about practice challenges or inviting the bar into their law offices. This concern echoed the fear of “the big, bad bar” that many PMAP leaders in states with unified bars had to overcome.

Details regarding the bar leaders we spoke with and the comments we received appear in the appendix to this report.

## **VI. Why the Practice Management Task Force recommends VSB-supported Practice Management Assistance**

Our April 8 report to the Executive Committee and Bar Council included the following principles on which the Task Force had already reached consensus related to establishing a VSB PMAP:

- **Attorneys need practice-management assistance.** Law schools do not teach core business-operations skills needed to run a successful practice. The need is especially acute for solo and small-firm attorneys, who cannot afford to take time to research practice-management issues. Jim Leffler of Virginia Judges and Lawyers Assistance Program (VJLAP) told us that:
  - he thinks that practice management assistance is “really important” because a lot of lawyers do not know what they are doing in practice management and that is a source of mental health problems.
  - With the lawyers he helps, he sees chaos in practices with no clear business model and no real systems to collect or bill for fees and expenses. Trust account problems often happen because people are disorganized and don’t have a system.
  - At least 50% of the solo practitioners he works with would really benefit from practice management assistance, and he would even put into PMA into his contracts to require that they learn the minimums.
  - He would hope to partner with our practice management advisor on a lot of his referrals and for CLEs, and sees this in the same role as legal education, as much as bar of the Bar’s job as CLE provision. Communication, records and trust management are all simple skills that can be taught, and he would like to see someone doing this.
- **Offering practice-management assistance protects the public.** Assisting lawyers in operating their practices benefits the public by promoting efficient financial management, facilitating effective software solutions that prevent cases or deadlines from falling through the cracks, and enabling attorneys to focus on the practice of law. Many of the Practice Management Advisors we have talked to in other states work closely with their bars’ disciplinary arms to educate, train, and support individual lawyers in avoiding common problems involving practice management, including trust accounting, client communications, and procedural defaults.

William Atwill, chair of the VSB Committee on Lawyer Discipline (COLD), states that COLD has never discussed practice management services; he as a “limited government”

person believes that the Bar should have passive learning resources such as website information and videos, but that lawyers in remediation in the disciplinary process should pay themselves for remedial services. He also believes that mentoring in practice management is important and worthy of being pursued by the bar, that practice management courses should be a required part of a law school curriculum, and that the 12 hour MCLE requirement could include an hour of Law Office Practice Management. Bar Counsel Renu Brennan states that she concurs.

- **The VSB is an appropriate entity to offer a PMAP.** A VSB-offered PMAP advances three of the four components of the VSB mission: (1) to protect the public, (3) to advance access to legal services, and (4) to assist in improving the legal profession and the judicial system. We have learned that PMAPS in multiple states have cooperative relationships with their bars' disciplinary authorities, providing consulting, training and mentoring to attorneys struggling with problems such as calendar management, trust fund accounting, and maintaining regular communication with clients. Similar to the Virginia Judges and Lawyers Assistance Program, whose enthusiastic response we have described above, assistance by a Practice Management Advisor program "helps prevent disciplinary problems for the lawyer, protects the client, supports the lawyer's family and professional associates, as well as strengthens the profession."
- **The most effective way to establish a VSB PMAP is to hire a qualified, in-house practice management advisor with broad discretion to develop the program.** All the PMAP leaders interviewed by Task Force members agreed that an in-house advisor who is thoroughly connected to the nationwide PMAP community and has discretion to develop a nascent PMAP is the best approach to creating a strong program. Attendance at the ABA TechShow and membership in the ABA's Law Practice Division were cited as essential to a successful practice-management advisor.

We also believe that the Practice Management Advisor needs support and guidance from professional and volunteer leaders in the form of an existing VSB committee such as the Standing Committee on Legal Ethics, a new committee devoted to Practice Management, or an independent platform such as inclusion in or following the model of the VJLAP, which exists as a 501c3 with funding from VSB fees, ALPS, and other sources. We will be glad to explore each of those avenues.

We believe now, at the beginning of November, that the time for implementation has arrived. The elements of study and of increased marketing of existing resources we spoke of in April and June have not materialized:

- **The only knowledge we have gained from the VBA's experience is the importance of marketing.** The most distinguishing features of the VBA effort to date are slowness to implement and failure to market. We cannot predict when the VBA will actually have a functioning Practice Management service operating, and see no value in awaiting further VBA implementation; we have already confirmed the value of a Practice Management

Advisor and know that VSB members will not have access to the VBA service unless they pay dues to the VBA.

- **We are leveraging existing VSB practice-management resources and increasing visibility of practice-management issues, but more needs to be done.** We noted in April and in June that VSB members already receive risk-management consultations and written resources from ALPS, and said that “[p]romoting these services and emphasizing that ‘risk management’ includes practice-management issues, most of which involve business or professional risk, would be a practical way to use the resources the VSB already has while promoting awareness of practice-management issues without increasing expenditures or undertaking a new project.” Though VSB staff has worked to increase the visibility of existing services this year as documented in our June report, much remains to be done:
  - ALPS has continued but not increased its marketing of PM services this year;
  - the size of the Virginia Lawyer ad promoting VSB member and risk management advisor John Brandt’s services has returned this fall to the small pre-2021 level;
  - information about PM on VSB.org continues to appear on the *Insurance and Risk Management* page, now under the subtitle *Practice Management & Claims Prevention* but requiring a scroll down the page to see that information.
  - The Solo and Small Firms CLE presentation by the Conference on Local and Specialty Bar Associations attended by one task force member in October included one verbal mention but no written material about Brandt and no mention of ALPS services.
  - Chris Newbold, executive vice president of ALPs, comments:
    - The central focus of ALPS’ risk management efforts have resided in its popular annual Fall Ethics and Professionalism Tour, which is the largest CLE event of its kind in the Commonwealth ordinarily, attracting 2,000 Virginia private practitioners annually at no cost to VSB members. That focus, driven by the Virginia State Bar’s Special Committee on Lawyer Insurance, has come at the detriment to a more service-oriented, risk management consultative model. Add those two offerings together, and the VSB would position a more robust, attractive member benefit offering;
    - In the limited scope that ALPS currently invests in such services as John Brandt and marketing, member engagement has been limited, averaging 8.5 hours / month or 2 hours a week, unchanged this year;
    - Work remains to reimagine a law practice management resources repository on VSB.org, and the timing for that is prime with a projected website redesign slated for rollout in early 2022.
- **Obtaining MCLE credit for practice-management programming does not seem laden with difficulty, but presenters would benefit from guidance.** We have not seen any recent evidence that MCLE credit is especially difficult for Practice Management programming, but believe that a Practice Management Advisor can serve as a navigator for presenters about the CLE approval process, providing information and resolving problems.

## VII. Job description, salary and expense budget recommendations

### Job Description:

Attached as the first appendix is our recommendation for a job description. It is adapted from the job description of the North Carolina State Bar practice management advisor.

### Expense items:

- **Salary:** We asked Randy Webne, the VSB's human resource director, what salary or range would be appropriate for a mid-career attorney in a nonpracticing position within the State Bar. She recommended between \$90,000 and \$100,000 depending on experience as necessary to interest qualified professionals in the Richmond market.
- **Benefits** at the VSB are 45% of salary, so the benefit range for such a salary would be \$40,500 to \$45,000.
- **Salary and benefits combined** would therefore fall between \$130,500 and \$145,000.
- **Offsets:** Salary and benefits could be offset at least in part by contributions from ALPS and other potential sources interested in advancing law practice management or marketing related products and services.
- **Expenses:** The cost of expenses such as training and travel would, according to Randy, depend on whether this new position is made part of an existing department or would stand alone. VSB departments each have their own expense budget, so insertion of a new employee may have minor impact on budget expenses in an existing department. Creating a new department would have more budget visibility; one guide known to the report authors is Virginia Legal Aid Society, which budgets \$2500 per attorney per year for professional dues, travel, and training.

## VIII. Implementation recommendations

On the related questions of where to place and whom to supervise a new employee, the Task Force has two recommendations for consideration:

1. Locate the Practice Management Advisor with the Legal Ethics staff initially to help orient the new person to the operations of the bar, and provide guidance and support with the Ethics Committee or new Practice Management committee or section within the bar;
2. In three years, transition the Practice Management Advisor to become the first employee of a new Virginia Practice Management Service, an independent 501c3 organization with its own board of directors and funding provided by a VSB contributions, ALPS and other vendor sponsorships and advertising, and grants. The service would be similar to VJLAP and could be co-located with VJALP if VJLAP is supportive.

## **IX. Conclusion**

Members of the Practice Management Task Force strongly believe that a Practice Management Assistance Program promoted and available to all Virginia State Bar members and providing one on one consultation, mentoring, CLE presentations, non-CLE presentations, articles in bar publications, and ongoing visibility of best practices in law office management, all without the deterrent of direct cost, would be of significant value to the quality and financial stability of legal practice in Virginia, particularly for solo and small firms that cannot maintain in-house management staff. We hope the Bar can implement our recommendations in the 2022-23 bar fiscal year.

### **Appendices:**

- A. Job Description
- B. Survey of Practice Management Advisor programs in other states and bars
- C. Survey of local bar leaders in Virginia

**JOB DESCRIPTION:**

**PROPOSED PRACTIC MANAGEMENT ADVISOR POSITION WITHIN THE VIRGINIA STATE BAR**

November 4, 2021

---

**JOB TITLE:**

Law Practice Management Advisor

**POSITION SUMMARY:**

Administer a comprehensive Law Practice Management Program that will provide confidential advice and assistance to members in areas including but not limited to practice basics, business planning, personnel, facilities, operations, and information technology management.

**EDUCATION:**

Advanced degree preferred – MLIS, MBA or JD

**EXPERIENCE:**

- Prior experience in law firm technology management or consulting.
- Management and/or supervisory experience.
- Experience in developing and managing budgets.
- Understanding of Trust Account record keeping, lawyer licensing and discipline, rules of professional conduct and ethics.

**ADDITIONAL SPECIALIZED KNOWLEDGE/SKILLS:**

- Degree in business management or related field or prior experience in law firm management or law office management consulting.
- Thorough knowledge of all aspects of law practice management including trust accounting, calendaring and deadline management, client communications, advanced business practices, office management, personnel management, risk management, and the use of evolving technologies in the practice of law.
- Familiarity with current information technology hardware (e.g., computers, networks, telecommunication systems, printers, copiers, etc.) and software (e.g., computer, network, & web-based programs) solutions for efficient law office management.
- Ability to establish and maintain confidential relationships.
- Ability to think logically and solve problems.
- Strong verbal and written communication skills.
- Strong customer service skills.

- Strong presentation skills and acumen in using presentation technology.

#### **ORGANIZATIONAL RELATIONSHIPS:**

- Supervises: N/A
- Reports To: Executive Director, with support and guidance of new Practice Management Assistance committee or section
- FLSA STATUS: Full time/Exempt

#### **JOB DUTIES AND RESPONSIBILITIES**

##### **Primary Functions**

- Implement a comprehensive PMA designed to assist lawyers and legal professionals in improving the efficiency and effectiveness in the delivery of legal services and avoiding ethical and disciplinary difficulties.
- Maintain a “hotline” to provide confidential consultations and to provide timely, informative, advice and assistance on practice management to members.
- Monitor law office management communication tools (e.g., forums, website, etc.)
- Help communicate and market the range of VSB services and resources available to members by (i) presenting this information to lawyers and law offices, (ii) presenting at state and local bar association events, and (iii) using communication tools to “get the word out” (e.g., forums, website, blogs, etc.).
- Develop, publish and present law practice management resources and programs. Provide information to lawyers about the availability of tools and training, including new sources of information about technology, continuing legal education (CLE), practice management, electronic communications, and law-related resources and links
- Develop programs and resources that ensures the VSB is responsive to members’ needs and takes advantage of the best technology and law practice management tools available to improve service to members and the public; and provides practice management and client service solutions to members.
- Help members understand their own need for training; seek innovative ways of bringing new technologies, law practice management tools, services, and risks to members’ awareness to promote a culture of continuous learning and adaptation to change among members.
- Develop and collect materials to aid firms in managing large-scale changes such as retirement, mergers, dissolutions or the sudden death or disability of a solo practitioner.
- Create, monitor, and maintain PMA pages on the VSB website ([www.vsb.org](http://www.vsb.org)).

##### **Secondary Functions**

- Assist Sections, Divisions and Committees as needed.

- Work with Bar Counsel, the Committee on Lawyer Discipline, the Standing Committee on Legal Ethics, the CLE department and Sections in developing and presenting timely practice management and law office management CLE programs including training in the use of technologies with law office applications (e.g., e-filing).
- Perform outreach through other organizations not affiliated with the VSB to promote VSB resources and benefits.
- Write articles for VSB publications and assist in the development of materials pertaining to law practice management issues.
- Actively participate in the national PMA community through memberships and activities in professional PMA organizations, listservs, publications, meetings and conferences in order to stay aware of best practices and new developments
- Review and evaluate materials to identify appropriate reference items for future anticipated needs.

### **WORK ENVIRONMENT**

This job operates in a professional office environment. The role uses standard office equipment such as computers, phones, photocopiers, and telephones, etc.

### **PHYSICAL DEMANDS**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made available to enable individuals with disabilities to perform essential functions.

While performing the duties of this job, the employee is regularly required to sit; use hands to type; and to see, talk and hear. The employee may be required to reach with hands and arms. The employee is frequently required to stand, walk, and occasionally required to stoop, kneel, crouch or crawl. The employee may occasionally lift and/or move up to 15 pounds.

Some travel may be required, using the employee's personal vehicle (subject to authorized reimbursement) or commercial transportation

### **OTHER DUTIES**

This job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time or without notice.

# Virginia State Bar Practice Management Advisor National Survey

# CONTENT

---

PMA ORGANIZATIONS .....	3
INTENDED AUDIENCE FOR PROGRAM .....	5
NUMBER SERVED BY PROGRAM .....	6
SERVICE PLATFORMS OFFERED .....	7
SERVICE TOPICS .....	12
SALARIES .....	26
CONFIDENTIALITY OF CONSULTATION .....	27
QUALIFIED IMMUNITY FOR PROGRAM PERSONNEL .....	29
SOURCE OF FUNDING .....	30
LONG FORM Q & A .....	31

# PMA ORGANIZATIONS

ORGANIZATION	PRACTICE MANAGEMENT PROGRAM NAME	YEAR ESTABLISHED	IS IT A UNIFIED BAR?	NUMBER OF STAFF	NUMBER OF VOLUNTEERS
State Bar of Arizona	Practice 2.0 (Formerly Law Office Management Assistance Program)	1985	Yes	Full-time staff: Roberta (50% with PMAP) + 1 full-time PM lawyer Part-time staff: 1 support staff (20-30% of time with PMAP)	0
State Bar of Wisconsin	Practice411—The State Bar of Wisconsin's Law Office Management Assistance Program	2005	Yes	Full-time staff: 1 Part-time staff: 1	0
American Immigration Lawyers Association	Practice & Professionalism Center	2014	No	Full-time staff: 3 Part-time staff: 1 being hired	Not sure what you mean here but committee members are probably 60 between our 5 committees
State Bar of Michigan	Practice Management Resource Center "PMRC"	2006	Yes	Full-time staff: 1 Part-time staff: 0	0
Oklahoma Bar Association	Oklahoma Bar Association Management Assistance Program	1997	Yes	1 director (Jim), 1 practice management advisor, 1 staff shared with ethics counsel--good synergy	0
State Bar of Georgia	Law Practice Management Program	1995	Yes	Full-time staff: 4 Part-time staff: 0	Accepts Interns
Illinois State Bar Association	Practice HQ	2015	No	Full-time staff: 0 Part-time staff: 1	0
South Carolina Bar	PMAP - Practice Management Assistance Program	2002	Yes	Full-time staff: 2 Part-time staff: 0	0
Virginia Bar Association	VBA Practice Management Advisor	2021	No		
North Carolina Bar Association	Center for Practice Management	2008	No	Full-time staff: 1 Part-time staff: 0	0
DC Bar	Practice Management Advisory Service	1996	Yes	Full-time staff: 2 Part-time staff: 0	0
Oregon State Bar Professional Liability Fund	OSB Professional Liability Fund	1978 - Fund 1985 - Practice Management	Yes	Full-time staff: 3 Lawyers, 1 CLE staff 1 assistant for dept.	0
State Bar of Texas	Law Practice Management	1990s	Yes		

# PMA ORGANIZATIONS

ORGANIZATION	PRACTICE MANAGEMENT PROGRAM NAME	YEAR ESTABLISHED	IS IT A UNIFIED BAR?	NUMBER OF STAFF	NUMBER OF VOLUNTEERS
Washington State Bar	Washington State Bar Practice Management Assistance	Unknown (over 20 years)	Yes	Full-time staff: 1 (+ 1 shared admin) Part-time staff: 0	For specific projects
Michigan State Bar Practice Group	Practice Management Resource Center (PMRC)	2005	Yes	Full-time staff: 1 Part-time staff: 0	0
American Bar Association	Law Practice Management Division	Hard to say. LMP was a late '90's phenomenon. By 2002 there were a number of programs.	No	Full-time staff: 8 Part-time staff: 0	0

# INTENDED AUDIENCE FOR PROGRAM

ORGANIZATION	ENTIRE BAR MEMBERSHIP	SOLO AND SMALL FIRMS	RURAL PRACTITIONERS	OTHER
State Bar of Arizona	Yes			
State Bar of Wisconsin	Yes			
American Immigration Lawyers Association	Yes			
State Bar of Michigan	Yes	Yes		
Oklahoma Bar Association	Yes			PMAP serves the ~20,000 OK lawyers. But realistically, few large firm lawyers are interested in practice management—in-house departments for that. Key is to develop ALA chapter relationships to serve big firms. We mainly hear from small to medium sized firms (without IT staff).
State Bar of Georgia		Yes		Available to all, but focus is on solo and small firms
Illinois State Bar Association	Yes			but more applicable to solo and small firms since that's who make up the bulk of ISBA membership.
South Carolina Bar	Yes	Yes		New lawyers
Virginia Bar Association	Yes			VBA Members as a member benefit
North Carolina Bar Association	Yes			
DC Bar	Yes			Focus is on small bars of 12 or fewer lawyers; DC is big firm city and the market he works with is people transitioning into small firms
Oregon State Bar Professional Liability Fund	Yes			
State Bar of Texas	Yes			
Washington State Bar		Yes	Yes	
Michigan State Bar Practice Group		Yes		Information is good for all, but most of the participants are solos and small firms.
American Bar Association		Yes	Yes	Consultants and firm administrators.

# NUMBER SERVED BY PROGRAM

ORGANIZATION	NUMBER EXPECTED TO BE SERVED ANNUALLY	NUMBER EXPECTED AS PERCENTAGE OF MEMBERSHIP	NUMBER ACTUALLY SERVED ANNUALLY	NUMBER ACTUALLY SERVED AS PERCENTAGE OF MEMBERSHIP
State Bar of Arizona	1500	8%	1480	8%
State Bar of Wisconsin	N/A	N/A	At least 2,500 through CLEs and Consultations	10%
American Immigration Lawyers Association	N/A	N/A	N/A	N/A
State Bar of Michigan	47,000	100%	47,000	100%
Oklahoma Bar Association	N/A	N/A	N/A	N/A
State Bar of Georgia	55,000	N/A	14,000	8%
Illinois State Bar Association	28000	10%	N/A	N/A
South Carolina Bar	N/A	N/A	N/A	N/A
Virginia Bar Association	N/A	N/A	N/A	N/A
North Carolina Bar Association	350	15-20%	350+	15-20%
DC Bar	N/A	N/A	18k-24k	15-20%
Oregon State Bar Professional Liability Fund	See 2019 Report	N/A	N/A	N/A
State Bar of Texas	N/A	N/A	N/A	N/A
Washington State Bar	They track, a bit behind - couple hundred at least	They started tracking ROI recently	N/A	N/A
Michigan State Bar Practice Group	Unknown	Unknown	Unknown	Unknown
American Bar Association	N/A	N/A	N/A	N/A

# SERVICE PLATFORMS OFFERED

ORGANIZATION	SERVICE PLATFORMS OFFERED BY THE PROGRAM
State Bar of Arizona	<p>Telephone information and advice            Email information and advice            Extensive evaluation and consultation, in person or online            Intensive all day or two-day for practice start-up            Annual conference            Touring regional conference            Phone or web CLE presentations            Regular email newsletter or tips            Columns in bar publications and website</p>
State Bar of Wisconsin	<p>Telephone information and advice            Email information and advice            Extensive evaluation and consultation, in person or online            Annual conference            Touring regional conference            Phone or web CLE presentations            Regular email newsletter or tips            Columns in bar publications and website</p>
American Immigration Lawyers Association	<p>Telephone information and advice            Email information and advice            Annual conference            Phone or web CLE presentations            Columns in bar publications and website</p> <p>Other (please specify):            Most consults via videoconference-ethics and practice management issues. We are national org, so PMAs travel to local chapter conferences to present, do in-person consults. Also have bi-weekly drop in office hours, regular intermediate and advanced practice management conferences/tracks, technology innovation summit, short start up series that's recorded and free to all members, weekly blog, monthly articles, and we manage technology, well-being, and ethics offerings and work with committees.</p>
State Bar of Michigan	<p>Telephone information and advice            Email information and advice            Extensive evaluation and consultation, in person or online            Phone or web CLE presentations            Regular email newsletter or tips            Columns in bar publications and website            Monthly podcast and website resources</p>

# SERVICE PLATFORMS OFFERED

ORGANIZATION	SERVICE PLATFORMS OFFERED BY THE PROGRAM
Oklahoma Bar Association	<p>Telephone information and advice            Email information and advice            Extensive evaluation and consultation, in person or online            Intensive all day or two-day for practice start-up            Annual conference            Touring regional conference            Phone or web CLE presentations            Regular email newsletter or tips            Columns in bar publications and website</p> <p>Other (please specify):            1-3 paid in-office consultations per year. Very rare. Telephone and email are the two really big service platforms.            In pandemic, switched to mainly email over telephone. Sometimes email ends up scheduling call. Make sure VSB keeps a regular column/space in bar journal-hugely beneficial.</p>
State Bar of Georgia	<p>Telephone information and advice            Email information and advice            Extensive evaluation and consultation, in person or online            Intensive all day or two-day for practice start-up            Weekly program for stated number of weeks on one or variety of issues            Annual conference            Touring regional conference            Phone or web CLE presentations            Regular email newsletter or tips            Columns in bar publications and website            Sponsorship of trade shows</p>
Illinois State Bar Association	<p>Regular email newsletter or tips            Columns in bar publications and website</p> <p>Other (please specify):            Remote consultations by phone - heavily marketed but then abandoned it (due to lack of interest and cost). Then tried email consultations - heavily marketed but then abandoned it for lack of use and high cost. Presently offer website links to content - collection of white papers, videos, checklists and recommendation reports.</p>

# SERVICE PLATFORMS OFFERED

ORGANIZATION	SERVICE PLATFORMS OFFERED BY THE PROGRAM
South Carolina Bar	<p>Telephone information and advice            Email information and advice            Annual conference            Phone or web CLE presentations            Regular email newsletter or tips            Columns in bar publications and website</p> <p>Other (please specify):            Social media and web pages</p>
Virginia Bar Association	<p>Telephone information and advice            Email information and advice            Phone or web CLE presentations</p> <p>Other (please specify):            Resources posted online (training, etc) plus 30-minute consultations.</p>
North Carolina Bar Association	<p>Telephone information and advice            Email information and advice            Extensive evaluation and consultation, in person or online            Intensive all day or two-day for practice start-up            Phone or web CLE presentations            Regular email newsletter or tips            Columns in bar publications and website</p> <p>Other (please specify):            They do quarterly workshops and participate in the NC Bar's annual conference with a table and sign up for services. However, 90% of their requests come from their website "Contact Us" form on their website. They have a start up boot camp that runs for 1.5 days.</p>
DC Bar	<p>Telephone information and advice            Email information and advice            Extensive evaluation and consultation, in person or online            Intensive all day or two-day for practice start-up            Weekly program for stated number of weeks on one or variety of issues            Annual conference            Phone or web CLE presentations            Regular email newsletter or tips            Columns in bar publications and website            Sponsorship of trade shows</p> <p>Other (please specify):            Practice monitoring for lawyers in disciplinary alternatives</p>

# SERVICE PLATFORMS OFFERED

ORGANIZATION	SERVICE PLATFORMS OFFERED BY THE PROGRAM
Oregon State Bar Professional Liability Fund	<p>Telephone information and advice            Email information and advice            Extensive evaluation and consultation, in person or online            Phone or web CLE presentations            Regular email newsletter or tips            Columns in bar publications and website</p>
State Bar of Texas	<p>Telephone information and advice            Email information and advice            Extensive evaluation and consultation, in person or online            Phone or web CLE presentations            Regular email newsletter or tips            Columns in bar publications and website</p> <p>Other (please specify):  <a href="https://www.texasbarpractice.com/about-us/#lpm">https://www.texasbarpractice.com/about-us/#lpm</a></p>
Washington State Bar	<p>Telephone information and advice            Email information and advice            Weekly program for stated number of weeks on one or variety of issues            Phone or web CLE presentations            Columns in bar publications and website</p> <p>Other (please specify):            30 min consultations, but no limit can call            Has had touring regional in the past            In past and in the future - email newsletter and tips</p>
Michigan State Bar Practice Group	<p>Telephone information and advice            Email information and advice            Extensive evaluation and consultation, in person or online            Intensive all day or two-day for practice start-up            Annual conference            Phone or web CLE presentations            Regular email newsletter or tips            Columns in bar publications and website</p> <p>Other (please specify):            Evaluation - consultations through disciplinary process (referred to them). Intensive - have in past, but short staffed recently and not anymore. They have been very well received. Michigan doesn't have a mandatory CLE requirement - so they do presentations, but not CLE. Quarterly newsletter (in last year). Subscription list for PM updates. Work with ABA as well for their publications (monthly e-zine).</p>

# SERVICE PLATFORMS OFFERED

ORGANIZATION	SERVICE PLATFORMS OFFERED BY THE PROGRAM
American Bar Association	Annual conference Phone or web CLE presentations  Other (please specify): The ABA offers publications, CLEs and the Tech Show in connection with the work of the Law Practice Management Division.

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
State Bar of Arizona	<ul style="list-style-type: none"> <li>calendar</li> <li>conflict of interest systems</li> <li>mail handling</li> <li>time and billing issues and systems</li> <li>trust accounting</li> <li>general accounting</li> <li>financial management</li> <li>client communication</li> <li>tech training for lawyers and staff</li> <li>filing systems and file management</li> <li>client relations</li> <li>closure of practices</li> <li>career planning and transition</li> <li>practice direction and specialization counseling</li> <li>time management</li> <li>marketing</li> <li>resolution of partnership or inter-lawyer disputes or personnel issues</li> <li>assistance to law schools in establishing practice management courses</li> <li>information and advice on buying and selling a practice and practice valuation</li> <li>self-audit materials and/or training</li> <li>Resource bank of practice aids, handbooks, videos</li> <li>webinars, and educational materials</li> <li>setting up on closing a practice</li> <li>supervising employees</li> <li>malpractice/risk prevention and selection of insurance</li> <li>computer software selection</li> </ul> <p>Other (please specify):            Several of the unchecked boxes are provided by other programs in AZ Bar</p>

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
State Bar of Wisconsin	<ul style="list-style-type: none"> <li>calendar</li> <li>conflict of interest systems</li> <li>mail handling</li> <li>time and billing issues and systems</li> <li>trust accounting</li> <li>general accounting</li> <li>financial management</li> <li>client communication</li> <li>computer hardware selection</li> <li>computer hardware and software training and troubleshooting</li> <li>tech training for lawyers and staff</li> <li>filing systems and file management</li> <li>client relations</li> <li>closure of practices</li> <li>career planning and transition</li> <li>practice direction and specialization counseling</li> <li>strategic planning</li> <li>compensation structuring</li> <li>time management</li> <li>marketing</li> <li>resolution of partnership or inter-lawyer disputes or personnel issues</li> <li>assistance for lawyers referred as alternative to disciplinary proceedings</li> <li>assistance to programs serving impaired lawyers</li> <li>assistance to law schools in establishing practice management courses</li> <li>information and advice on buying and selling a practice and practice valuation</li> <li>self-audit materials and/or training</li> <li>Resource bank of practice aids, handbooks, videos</li> <li>webinars, and educational materials</li> <li>setting up on closing a practice</li> <li>supervising employees</li> <li>HR and benefit administration, resources</li> <li>of-counsel arrangements</li> <li>malpractice/risk prevention and selection of insurance</li> <li>computer software selection</li> </ul>

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
<p>American Immigration Lawyers Association</p>	<p>                     calendaring                      conflict of interest systems                      mail handling                      time and billing issues and systems                      trust accounting                      general accounting                      financial management                      client communication                      computer hardware selection                      tech training for lawyers and staff                      filing systems and file management                      client relations                      closure of practices                      career planning and transition                      practice direction and specialization counseling                      strategic planning                      compensation structuring                      time management                      marketing                      resolution of partnership or inter-lawyer disputes or personnel issues                      information and advice on buying and selling a practice and                      practice valuation                      self-audit materials and/or training                      Resource bank of practice aids, handbooks, videos                      webinars, and educational materials                      setting up on closing a practice                      supervising employees                      HR and benefit administration, resources                      of-counsel arrangements                      malpractice/risk prevention and selection of insurance                      computer software selection                 </p> <p>                     Other (please specify):                      well-being resources, programming, application of rules of professional                      conduct, addressing discipline complaints                 </p>

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
State Bar of Michigan	calendaring conflict of interest systems mail handling time and billing issues and systems trust accounting general accounting financial management client communication computer hardware selection tech training for lawyers and staff filing systems and file management client relations closure of practices time management marketing assistance for lawyers referred as alternative to disciplinary proceedings assistance to law schools in establishing practice management courses information and advice on buying and selling a practice and practice valuation Resource bank of practice aids, handbooks, videos webinars, and educational materials, setting up on closing a practice supervising employees HR and benefit administration, resources malpractice/risk prevention and selection of insurance computer software selection

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
Oklahoma Bar Association	<p>                     calendaring                      mail handling                      time and billing issues and systems                      trust accounting                      general accounting                      financial management                      client communication                      computer hardware selection                      computer hardware and software training and troubleshooting                      tech training for lawyers and staff                      filing systems and file management                      client relations                      closure of practices                      career planning and transition                      practice direction and specialization counseling                      strategic planning                      compensation structuring                      time management                      marketing                      resolution of partnership or inter-lawyer disputes or personnel issues                      assistance for lawyers referred as alternative to disciplinary proceedings                      assistance to programs serving impaired lawyers                      assistance to law schools in establishing practice management courses                      information and advice on buying and selling a practice                      and practice valuation                      self-audit materials and/or training                      Resource bank of practice aids, handbooks, videos                      webinars, and educational materials                      setting up on closing a practice                      supervising employees                      of-counsel arrangements                      malpractice/risk prevention and selection of insurance                      computer software selection                 </p> <p>                     Other (please specify):                      Advice and review of materials re: limited scope legal services offered—see OK bar website. Whole section, CLE guides, etc, on doing limited scope services.                 </p>

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
State Bar of Georgia	<p>                     calendaring                      conflict of interest systems                      mail handling                      time and billing issues and systems                      trust accounting                      general accounting                      financial management                      client communication                      computer hardware selection                      computer hardware and software training and troubleshooting                      tech training for lawyers and staff                      filing systems and file management                      client relations                      closure of practices                      career planning and transition                      practice direction and specialization counseling                      strategic planning                      compensation structuring                      time management                      marketing                      resolution of partnership or inter-lawyer disputes or personnel issues                      assistance for lawyers referred as alternative to disciplinary proceedings                      assistance to programs serving impaired lawyers                      assistance to law schools in establishing practice management courses                      information and advice on buying and selling a practice                      and practice valuation                      self-audit materials and/or training                      Resource bank of practice aids, handbooks, videos                      webinars, and educational materials                      setting up on closing a practice supervising employees                      HR and benefit administration, resources                      of-counsel arrangements                      malpractice/risk prevention and selection of insurance                      computer software selection                 </p> <p>                     Other (please specify):                      Also provide managed vendor lists, and Fastcase                 </p>

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
Illinois State Bar Association	conflict of interest systems mail handling time and billing issues and systems trust accounting general accounting financial management client communication computer hardware selection computer hardware and software training and troubleshooting tech training for lawyers and staff filing systems and file management client relations closure of practices time management marketing self-audit materials and/or training setting up on closing a practice computer software selection

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
South Carolina Bar	<ul style="list-style-type: none"> <li>calendar</li> <li>conflict of interest systems</li> <li>mail handling</li> <li>time and billing issues and systems</li> <li>trust accounting</li> <li>general accounting</li> <li>financial management</li> <li>client communication</li> <li>computer hardware selection</li> <li>computer hardware and software training and troubleshooting</li> <li>filing systems and file management</li> <li>client relations</li> <li>closure of practices</li> <li>career planning and transition</li> <li>practice direction and specialization counseling</li> <li>strategic planning</li> <li>compensation structuring</li> <li>time management</li> <li>marketing</li> <li>resolution of partnership or inter-lawyer disputes or personnel issues</li> <li>assistance for lawyers referred as alternative to disciplinary proceedings</li> <li>assistance to law schools in establishing practice management courses</li> <li>information and advice on buying and selling a practice and practice valuation,</li> <li>Resource bank of practice aids, handbooks, videos</li> <li>webinars, and educational materials</li> <li>setting up on closing a practice</li> <li>supervising employees</li> <li>HR and benefit administration, resources</li> <li>of-counsel arrangements</li> <li>malpractice/risk prevention and selection of insurance</li> <li>computer software selection</li> </ul> <p>Other (please specify): Ethics</p>

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
Virginia Bar Association	<ul style="list-style-type: none"> <li>calendar</li> <li>mail handling</li> <li>time and billing issues and systems</li> <li>general accounting</li> <li>financial management</li> <li>client communication</li> <li>computer hardware selection</li> <li>computer hardware and software training and troubleshooting</li> <li>tech training for lawyers and staff</li> <li>filing systems and file management</li> <li>strategic planning</li> <li>time management</li> <li>marketing</li> <li>self-audit materials and/or training</li> <li>Resource bank of practice aids, handbooks, videos</li> <li>webinars, and educational materials</li> <li>computer software selection</li> </ul>
North Carolina Bar Association	<ul style="list-style-type: none"> <li>calendar</li> <li>conflict of interest systems</li> <li>mail handling</li> <li>time and billing issues and systems</li> <li>trust accounting</li> <li>general accounting</li> <li>financial management</li> <li>client communication</li> <li>computer hardware selection</li> <li>computer hardware and software training and troubleshooting</li> <li>tech training for lawyers and staff</li> <li>filing systems and file management</li> <li>client relations</li> <li>closure of practices</li> <li>career planning and transition</li> <li>practice direction and specialization counseling</li> <li>strategic planning</li> <li>time management</li> <li>marketing</li> <li>assistance to law schools in establishing practice management courses</li> <li>Resource bank of practice aids, handbooks, videos</li> <li>webinars, and educational materials</li> <li>setting up on closing a practice</li> <li>supervising employees</li> <li>computer software selection</li> </ul> <p>Other (please specify):            They have a needs assessment for materials and training. Though they do not get into compensation structuring, she's sent out resources on this. She also does first level consulting and refers people out to services they need.</p>

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
DC Bar	<p>                     calendaring                      conflict of interest systems                      mail handling                      time and billing issues and systems                      trust accounting                      general accounting                      financial management                      client communication                      filing systems and file management                      client relations                      closure of practices                      practice direction and specialization counseling                      strategic planning                      compensation structuring                      time management                      marketing                      assistance for lawyers referred as alternative to disciplinary proceedings                      assistance to programs serving impaired lawyers                      assistance to law schools in establishing practice management courses                      information and advice on buying and selling a practice                      and practice valuation                      self-audit materials and/or training                      Resource bank of practice aids, handbooks, videos                      webinars, and educational materials                      setting up on closing a practice                      supervising employees                      of-counsel arrangements                      malpractice/risk prevention and selection of insurance                      computer software selection                 </p> <p>                     Other (please specify):                      Many members are geeks so less attention needed on tech                 </p>

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
Oregon State Bar Professional Liability Fund	<ul style="list-style-type: none"> <li>calendar</li> <li>conflict of interest systems</li> <li>mail handling</li> <li>time and billing issues and systems</li> <li>trust accounting</li> <li>general accounting</li> <li>financial management</li> <li>client communication</li> <li>computer hardware selection</li> <li>tech training for lawyers and staff</li> <li>filing systems and file management</li> <li>client relations</li> <li>closure of practices</li> <li>career planning and transition</li> <li>practice direction and specialization counseling</li> <li>strategic planning</li> <li>compensation structuring</li> <li>time management</li> <li>marketing</li> <li>assistance for lawyers referred as alternative to disciplinary proceedings</li> <li>assistance to programs serving impaired lawyers</li> <li>assistance to law schools in establishing practice management courses</li> <li>self-audit materials and/or training</li> <li>Resource bank of practice aids, handbooks, videos</li> <li>webinars, and educational materials</li> <li>setting up on closing a practice</li> <li>supervising employees</li> <li>malpractice/risk prevention and selection of insurance</li> <li>computer software selection</li> </ul>
State Bar of Texas	<ul style="list-style-type: none"> <li>conflict of interest systems</li> <li>time and billing issues and systems</li> <li>trust accounting</li> <li>computer hardware selection</li> <li>computer hardware and software training and troubleshooting</li> <li>tech training for lawyers and staff</li> <li>filing systems and file management</li> <li>closure of practices</li> <li>career planning and transition</li> <li>strategic planning</li> <li>compensation structuring</li> <li>time management</li> <li>marketing</li> <li>assistance to programs serving impaired lawyers</li> <li>information and advice on buying and selling a practice and practice valuation</li> <li>Resource bank of practice aids, handbooks, videos</li> <li>webinars, and educational materials</li> <li>setting up on closing a practice</li> <li>computer software selection</li> </ul>

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
Washington State Bar	<ul style="list-style-type: none"> <li>calendar</li> <li>conflict of interest systems</li> <li>mail handling</li> <li>time and billing issues and systems</li> <li>trust accounting</li> <li>general accounting</li> <li>financial management</li> <li>client communication</li> <li>computer hardware selection</li> <li>computer hardware and software training and troubleshooting</li> <li>tech training for lawyers and staff</li> <li>filing systems and file management</li> <li>client relations</li> <li>closure of practices</li> <li>career planning and transition</li> <li>strategic planning</li> <li>compensation structuring</li> <li>time management</li> <li>marketing</li> <li>resolution of partnership or inter-lawyer disputes or personnel issues</li> <li>assistance for lawyers referred as alternative to disciplinary proceedings</li> <li>information and advice on buying and selling a practice and practice valuation</li> <li>self-audit materials and/or training</li> <li>Resource bank of practice aids, handbooks, videos</li> <li>webinars, and educational materials</li> <li>setting up on closing a practice</li> <li>supervising employees</li> <li>HR and benefit administration, resources</li> <li>of-counsel arrangements</li> <li>computer software selection</li> </ul> <p>Other (please specify): Personnel issues, not inter-lawyer</p>

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
Michigan State Bar Practice Group	<ul style="list-style-type: none"> <li>calendar</li> <li>conflict of interest systems</li> <li>mail handling</li> <li>time and billing issues and systems</li> <li>trust accounting</li> <li>general accounting</li> <li>financial management</li> <li>client communication</li> <li>computer hardware selection</li> <li>computer hardware and software training and troubleshooting</li> <li>tech training for lawyers and staff</li> <li>filing systems and file management</li> <li>client relations</li> <li>closure of practices</li> <li>career planning and transition</li> <li>practice direction and specialization counseling</li> <li>strategic planning</li> <li>compensation structuring</li> <li>time management</li> <li>marketing</li> <li>information and advice on buying and selling a practice and practice valuation</li> <li>self-audit materials and/or training</li> <li>Resource bank of practice aids, handbooks, videos</li> <li>webinars, and educational materials</li> <li>setting up on closing a practice</li> <li>supervising employees</li> <li>HR and benefit administration, resources</li> <li>of-counsel arrangements</li> <li>malpractice/risk prevention and selection of insurance</li> <li>computer software selection</li> </ul> <p>Other (please specify): Minimal self-audit materials and HR/benefits</p>

# SERVICE TOPICS

ORGANIZATION	SERVICE TOPICS OFFERED BY THE PROGRAM
American Bar Association	<p>                     calendaring                      conflict of interest systems                      mail handling                      time and billing issues and systems                      trust accounting                      general accounting                      financial management                      client communication                      computer hardware selection                      computer hardware and software training and troubleshooting                      tech training for lawyers and staff                      filing systems and file management                      client relations                      closure of practices                      career planning and transition                      practice direction and specialization counseling                      strategic planning                      compensation structuring                      time management                      marketing                      resolution of partnership or inter-lawyer disputes or personnel issues                      assistance for lawyers referred as alternative to disciplinary proceedings                      assistance to programs serving impaired lawyers                      assistance to law schools in establishing practice management courses                      information and advice on buying and selling a practice and practice valuation                      self-audit materials and/or training                      Resource bank of practice aids, handbooks, videos                      webinars, and educational materials                      setting up on closing a practice                      supervising employees                      HR and benefit administration, resources                      of-counsel arrangements                      malpractice/risk prevention and selection of insurance                      computer software selection                 </p> <p>                     Other (please specify):                      All topics apply in the sense that the ABA offers programs covering a multitude of topics.                 </p>

# SALARIES

ORGANIZATION	SALARIES
State Bar of Arizona	\$220k/year
State Bar of Wisconsin	Our Executive Director previously shared this information through an email with Virginia's Executive Director.
American Immigration Lawyers Association	N/A
State Bar of Michigan	N/A
Oklahoma Bar Association	N/A
State Bar of Georgia	Salary ranges based on roles, ranging from \$25k to \$85k
Illinois State Bar Association	overseen by the communications director; Asst. ED
South Carolina Bar	N/A
Virginia Bar Association	N/A
North Carolina Bar Association	The original budget for hiring a PMA was \$80k. Catherine's first salary in 2008 was \$65k. Her final salary before leaving that position in 2017 was \$110k. The operational budget originally for the department was around \$30k. It got reduced each year.
DC Bar	N/A
Oregon State Bar Professional Liability Fund	Practice Management Lawyer Advisor - 16 years, \$103k (higher than most Bars)
State Bar of Texas	\$77,000 gross/year
Michigan State Bar Practice Group	N/A
American Bar Association	N/A

# CONFIDENTIALITY OF CONSULTATION

ORGANIZATION	CONSULTATIONS CONFIDENTIAL?	IF SO, BY ETHICS RULE OR RULE OF COURT?
State Bar of Arizona	Yes	Ethics rules. Theirs tracks model rule 1.6. Other than crimes, etc., anything in consultation stays confidential. Confidentiality provision featured on the webpage. AZ Supreme Court had to approve; Roberta believes AZ Bar approached Court with that rule suggestion.
State Bar of Wisconsin	Yes	Wisconsin Supreme Court Rules 10.05(4)(m)(3) <a href="https://www.wicourts.gov/sc/scrules/DisplayDocument.pdf?content=pdf&amp;seqNo=320586#page=16">https://www.wicourts.gov/sc/scrules/DisplayDocument.pdf?content=pdf&amp;seqNo=320586#page=16</a>
American Immigration Lawyers Association	Yes	Our policy
State Bar of Michigan	Varies based upon consultation requesting entity	Court rule.
Oklahoma Bar Association	Yes	Ethics rule. The Bar supported me in an amendment to amend Ethics Rule 8.3 Reporting Professional Misconduct to exempt me as had been done for the ethics counsel and LHL. While I rarely have to note it after 20+ years (except to new lawyers), for the first five or six years, when I heard lawyers hesitate and struggle how to say something, I would note “the same confidence as information protected by the attorney client privilege” applied to our conversations and the floodgates would open. Supreme Court approved the rule. Obviously, people won’t use the program if they think they’re turning themselves into the Bar.
State Bar of Georgia	Yes	Rule of state bar
Illinois State Bar Association	N/A	N/A
South Carolina Bar	Yes	SCRPC 8.3
Virginia Bar Association	N/A	N/A
North Carolina Bar Association	TBP	
DC Bar	Yes	DC RPC 1.6(j)

# CONFIDENTIALITY OF CONSULTATION

ORGANIZATION	CONSULTATIONS CONFIDENTIAL?	IF SO, BY ETHICS RULE OR RULE OF COURT?
Oregon State Bar Professional Liability Fund	N/A	N/A
Washington State Bar	Yes	Not sure - thinks Rule of Court.
Michigan State Bar Practice Group	Yes	Rule of Court.
American Bar Association	N/A	N/A

# QUALIFIED IMMUNITY FOR PROGRAM PERSONNEL

ORGANIZATION	DO PROGRAM PERSONNEL RECEIVE QUALIFIED IMMUNITY FOR CONSULTATIONS?	IF SO, BY RULE OR COURT?
State Bar of Arizona	Yes	AZ Supreme Court Rule. The rule covers lots of bar programs, not just PMAP. We always remind lawyers our advice is not binding. It can be mitigating that you consulted us in disciplinary proceedings, but not a silver bullet—what was recommended is thoroughly documented.
State Bar of Wisconsin	Yes	Wisconsin Supreme Court Rules 10.05(4(m)(2)) <a href="https://www.wicourts.gov/sc/scrule/DisplayDocument.pdf?content=pdf&amp;seqNo=320586#page=16">https://www.wicourts.gov/sc/scrule/DisplayDocument.pdf?content=pdf&amp;seqNo=320586#page=16</a>
American Immigration Lawyers Association	N/A	N/A
State Bar of Michigan	Unsure	N/A
Oklahoma Bar Association	No	Rely on disclaimers. A lawyer who says messed up relying on someone else's advice isn't a strong plaintiff. The work we do doesn't really lend itself to suit.
State Bar of Georgia	Yes	Rule of state bar
Illinois State Bar Association	N/A	N/A
South Carolina Bar	No	N/A
Virginia Bar Association	N/A	N/A
North Carolina Bar Association	TBP	
DC Bar	Yes	Court Rule 11
Oregon State Bar Professional Liability Fund	Yes	Not sure.
State Bar of Texas	N/A	N/A
Washington State Bar	Yes	Not sure - thinks Rule of Court.
Michigan State Bar Practice Group	N/A	N/A
American Bar Association	N/A	N/A

# SOURCE OF FUNDING

ORGANIZATION	PROGRAM SOURCES OF FUNDING
State Bar of Arizona	Unified bar, so membership annual fees only fund mandatory functions. Discretionary functions like PMAP is funded largely, though not solely, by nonmandatory revenue. E.g., CLE fees, PHV fees, late fees, advertising sponsorship in magazine, etc., all of that is what funds Practice 2.0. Their budget is a line item in the overall AZ Bar budget.
State Bar of Wisconsin	Membership Dues
American Immigration Lawyers Association	AILA budget
State Bar of Michigan	Membership Dues
Oklahoma Bar Association	Just funded by the Bar budget. Our budget is primarily member dues.
State Bar of Georgia	Bar dues; all services are free to members except onsite evaluations, which for firms of 10 or more lawyers are \$187 an hour
Illinois State Bar Association	Membership Dues
South Carolina Bar	General fund
Virginia Bar Association	N/A
North Carolina Bar Association	Membership dues only. Though the NCBA has considered monetizing some of her services.
DC Bar	Membership Dues
Oregon State Bar Professional Liability Fund	Regular PLF Assessment - \$3,200/year each attorney for private practice insurance costs, under that umbrella.
State Bar of Texas	N/A
Washington State Bar	Washington State Bar - from dues
Michigan State Bar Practice Group	Michigan State Bar. Have charged for things in past, but minimally - just trying to break even with programming.
American Bar Association	The ABA General Revenue Fund and sponsorships.

# LONG FORM Q & A

---

## State Bar of Arizona

**Roberta Tepper**  
**Lawyer Assistance Programs Director**  
Roberta.Tepper@staff.azbar.org  
602-340-7332

### Why and How Program Was Established?

Not a lot of history, Roberta wasn't at the Bar when established. She knows it became apparent lawyers starting and building practice needed resources other than each other. First director of the AZ practice management program grew it out of whole cloth.

It has been part of strategic plan to increase lawyer competence; mission is to protect public. Protecting public by making lawyers practice better, smarter, more efficient.

Their mission statement didn't prioritize public protection early on, but always has been about helping lawyers (and thus protect public).

### What Challenges Were Overcome?

Challenge remains is getting lawyers comfortable with contacting unified bar to explain they need help or did something wrong. Fear of discipline, "big bad bar."

1st amendment issues have never been raised with respect to the PMAP. It has been raised regarding other things AZ Bar has done, but not for PMAP.

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

What staff, volunteer and contractor models were considered, adopted or rejected for service provision; pros and cons of each; what differences between unified and voluntary bars. From Roberta's knowledge, outsourcing and contractor never considered. The plan contemplated only internal bar staff from the outset.

### Job Descriptions

Practice Management Advisor (Attorney) - Range: b/t 72,000 and 90,000 depending on experience; midpoint \$86-87k. See separately uploaded job posting/description.

# LONG FORM Q & A

---

## State Bar of Arizona

### Program Annual Budget

Salaries plus fringe: \$220k/year. Money in budget for education, travel, professional development of staff (Roberta plus PM lawyer go to ABA TechShow—most important program to attend. That's ~\$700-900 registration plus ~\$1500 travel, plus membership in ABA Law Practice Management Division at minimum). These are MUST-DO things for a practice management advisor.

### Impact of Covid-19

Work from home, changes in interpersonal dynamic. In terms of services, virtually nothing has changed. No face-to-face meetings except Zoom. Demand temporarily dropped right after pandemic began (March 2020–April 2020), but then rebounded later in the year. Summer spike in calls as people set up home offices, remote team, employee issues, etc.

Ended up having an increase in number of calls 2020 vs. 2019. Lots of webinars, top tips, checklists, etc. in terms of working remotely. CLEs tailored to the need. More of a period of adjustment than real change.

### Interesting Information Learned

Re: VBA's program. Affinity Consulting is incredibly knowledgeable, but it's a pricy proposition. Spoke highly of Baron Henley. They offer limited amount of phone consultations, but price hikes for every little thing. They're very knowledgeable and MO just went with them rather than staff. In AZ, big "y'ain't from around here" attitude, so value add to hire our own people. Big kerfuffle a few years ago when AZ tried to outsource the lawyer assistance program. "Ephemeral benefit for state lawyers to know it's local people helping them as a benefit." "Invested in you because you're us."

You have to be committed to program and give it time to grow and develop, for lawyers to feel comfortable calling unified bar about problem.

One big mistake we made up front is that our materials are not behind a password-protected members-only wall. E.g., people can access our sample fee agreements, letters, etc.

We talk to lawyers and also their staff. Some programs, like ethics hotline, only talk prospectively. We cover past and future.

Sometimes banks will call about trust accounts. We don't answer members of the public, but more than just lawyers. E.g., paralegal, legal assistance, office manager.

Must have a good relationship with other aligned groups. E.g., AZ Legal Administrators, CPAs. Good for recruiting CLE faculty.

### Other

NA

# LONG FORM Q & A

---

## State Bar of Wisconsin

**Christopher Shattuck,**  
**Law Practice Assistance Manager**  
cshattuck@wisbar.org  
608-250-6012

### Why and How Program Was Established?

<https://www.wisbar.org/newspublications/wisconsinlawyer/pages/article.aspx/2006/?Volume=78&Issue=4&ArticleID=891>

### What Challenges Were Overcome?

The biggest challenges are making the membership aware of the program and being comfortable using the program.

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

Having a practice management advisor working in-house for the bar association was preferred over using an outside organization. Inhouse advisor works with many different groups to help further practice management initiatives.

### Job Descriptions

Our Executive Director previously shared this information an email with Virginia's Executive Director.

### Program Annual Budget

\$148,419

### Impact of Covid-19

During the early stages of Covid-19, consultations with the programs doubled for a period of three months. Consultations have returned to pre-COVID levels.

### Interesting Information Learned

Interesting information learned. Lawyers do find the program helpful. The resources developed by the program benefit many attorneys, but sometimes it is hard to measure (like writing an article in a magazine or providing a presentation to a local bar association).

Confidential consultations also help attorneys avoid ethical and/or malpractice issues. The total amount of revenue saved from potential ethical or malpractice cases, easily pays for the program.

### Other

The program would definitely benefit your members.

# LONG FORM Q & A

---

## American Immigration Lawyers Association

**Charity Anastasio**  
**Practice and Ethics Counsel**  
canastasio@aila.org  
202-507-7624

### Why and How Program Was Established?

Don't know all the history. Started by Reid Trautz, Senior Director of the Practice & Professionalism Center

### What Challenges Were Overcome?

NA

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

NA

### Job Descriptions

NA

### Program Annual Budget

NA

### Impact of Covid-19

We don't travel or present in person, moved all consults to videoconferencing, hired consultant and offered trainings, guide, and FAQs on PPP loans and forgiveness. All staff work remotely.

### Interesting Information Learned

I've worked at a unified mandatory state bar, an ununified voluntary state bar, and now a speciality bar. In my experience, lawyermembers don't change that much, though the issues do. It makes a difference in lives and firms if the law office management program is well funded, offers robust support, and stays current on the common issues. Ethics isn't a seperate issue from practice management.

### Other

I hope you do this. Consultants have an agenda and cost more than many members can afford. Vendors have an agenda and often know less about the real workings of a law office than they think. PMAs are there just for the members, without agenda or great cost.

PMAs also connect your bar association to the issues real members are exeriencing on the ground and help the bar association be responsive and helpful to the whole membership base. I believe it's an integral role at all the organizations that have one.

# LONG FORM Q & A

---

## State Bar of Michigan

**JoAnn Hathaway**

**PMA**

jhathaway@michbar.org

517-346-6381

### **Why and How Program Was Established?**

Established need and hiring of advisors to build, develop and launch program after insight from other established programs.

### **What Challenges Were Overcome?**

NA

### **What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?**

On-site staff model used. Volunteer educational volunteers utilized after vetting and development of relationships over the years.

### **Job Descriptions**

Unable to share salary information.

Job descriptions potentially after further inquiry.

### **Program Annual Budget**

Not able to provide, however, budget varies year-to-year depending on program needs and development.

### **Impact of Covid-19**

Remote workplace environment.

### **Interesting Information Learned**

It has always been difficult to measure the impact of the program.

### **Other**

The practice management advisors of North America are a close group who share a wealth of information with one another. It is a wonderful network for new program staff. Also, highly encourage providing budgeting to allow new staff to engage with ABA Law Practice Division. The benefits and contacts will help develop and train your new staff with the highest of standards.

# LONG FORM Q & A

---

## Oklahoma Bar Association

**Jim Calloway**  
**Director**  
jimc@okbar.org  
405-416-7051

### Why and How Program Was Established?

An OK Bar Association committee and task force originally examined things; it determined best thing bars can do for solo/small firm lawyers was to develop a staff person to listen to their concerns. That was presented to the board, approved, funded; Jim interviewed for the position thinking there was an inside candidate so he spent his interview giving advice and recommendations on the nuts and bolts their person should do, and that's what put him over and got him the job. Jim then took the reins and directed program for success. There is now limited oversight for him, and he collects limited statistics. Jim essentially runs the show he built from scratch.

### What Challenges Were Overcome?

NA

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

Misguided expectations by people who believed program would mature into a self-funded program based on consultation fees. Jim had to gently explain that lawyers, particularly solo and small firm lawyers, are extremely tight about any business investment because they see the investment directly decrease their take-home pay, that many lawyers would believe inviting "the bar" out to nose around their offices would be an idea to be avoided (at least until the new program became known and understood) and that even if we were doing the in-office consultations for free and they became widely popular if you factor in the number of available days for one employee in an entire year to do this and compare it with our in-state membership you can see the danger of having a multiyear backlog and it was doubtful that our members would feel it was a good value for their dues dollar there was a new service where you could schedule a consultation 18 months into the future.

Every PMA program will be different; all will be unique. 2 key things determine how things will work: (1) culture of the state, and (2) the PMA's background. Key is PMA needs to be part of PMA community.

### Job Descriptions

NA

# LONG FORM Q & A

---

## Oklahoma Bar Association

### Program Annual Budget

Roughly \$350,000 to 400,000/yr. Not cheap—3 full-time employees.

Must support out-of-state continuing education and networking needs. The Bar funds my travel to the spring and fall Law Practice Section meetings and LP's two meetings held in conjunction with ABA Annual and Midyear. I soon lobbied to add ABA TECHSHOW to the list. That is now my most important annual training event, because the day before TECHSHOW we have a day-long free PMA retreat, with donated meals. So, the only extra cost to the bars for a day of PMA training introductions and networking, is only one extra hotel room night before TECHSHOW. This is now our new PMA basic training and you really can't be a good PMA without regularly attending ABA TECHSHOW. The ABA Annual and Midyear meeting have their merits, but the value for PMA's is diminished. Go to LP meetings enough and will eventually rise up and be active in there, so will get reimbursed at least partially.

Really strong network, so if you don't know them in person, harder to reach out. Need to know these people. Tight network. E.g., Canadian programs don't really participate, so they're not as plugged in.

There's a dedicated PMA slack channel. Essentially, once in the community, PMAs will get trained by the community.

### Impact of Covid-19

Lot of time in March and April talking about online payments. We moved pretty easily into doing county bar talks and other presentations by Zoom. A little hiccup with Courts not allowing Zoom. COVID is going to change things permanently. Emails went up, calls went down—probably more outreach from members during March April May before settling back down.

### Interesting Information Learned

Talk with Courtney Kennedy of SC [not big ABA fan], Jim will provide introduction if needed. Speak at all law schools in state 1-2x/yr. Grads tend to be solo/small firm. Law schools view themselves as islands away from state bar, so this is a valuable connection to meet and build relationships and familiarity.

### Other

There will be resistance. But this is the most important thing you can do for your members. Just to have a place at State Bar they can call when something messes up in their practice, that's such a big service.

Young lawyers will need this service. Most important thing we've learned is we want to focus on what makes your members happy. In the south, lots of phone call. Want to talk to a person. If bar just says here, look at this CLE, not good. "Bar should help lawyers practice law."

Jim is VERY negative on Affinity Consulting, which VBA uses. They're trying to set themselves up on running all state bar PMAPs in a decade from now. Lots of hidden upcharges. I'm sorry—it is different state to state. Different cultures, different things we focus on. I'm sure Affinity is good on Microsoft 365, etc. Bars with PMAP being really popular are the ones where the advisory is in the bar.

# LONG FORM Q & A

---

## State Bar of Georgia

**Natalie Kelly,**  
**Director**  
NatalieK@gabar.org  
404-527-8770

### Why and How Program Was Established?

Grew out of services to solo and small firms, wanted to reach more

### What Challenges Were Overcome?

NA

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

Chose internal staff and bar advisory committee to control costs, content, reach, results; lack of control if use contractor.

### Job Descriptions

NA

### Program Annual Budget

Depends, but \$300k-400k; paid by bar dues.

### Impact of Covid-19

Closed physical resource library, digitized print materials; onsite evaluations are now by Zoom, which they have used since 2017; 90% of bar's 115 employees work from home.

### Interesting Information Learned

Guarantee responses within 24 hours; level of support from bar has been constant; solo and small firm conference was very popular, need to adapt it for the future.

### Other

Feel free to call for info or help at any time.

# LONG FORM Q & A

---

## Illinois State Bar Association

### Timothy Slating

tslating@isba.org

800-252-8908 Ext. 1411

### Why and How Program Was Established?

BOD – came up with notion of getting LPM resources for our members need these benefits to provide member benefits. Task force – Considered in house practice management advisors who create content and offered consulting on an individual basis.

Noted a tendency to be become beholden to PM software vendors. Perception that internal resources not a good model.

Decided to hire Affinity Consulting Group – ISBA was the FIRST client of Affinity. Thereafter, Affinity is used by several other bar associations. Affinity has become a go to for practice management by bar associations.

### What Challenges Were Overcome?

Setting up the Affinity program; much more turnkey now.

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

In Illinois, the state supreme court has an Attorney Registration & Disciplinary Commission that regulates lawyers. See <https://www.iardc.org/>

### Job Descriptions

overseen by the communications director; Asst. ED

### Program Annual Budget

Can't share. Confidentiality clause with Affinity.

### Impact of Covid-19

Slight uptick.

### Interesting Information Learned

When set up Practice HQ, general counsel to ISBA was emphatic that no substantive legal advice be provided. There is no consultations and no legal advice. What you see on the internet in terms of whitepapers and video is what you get. <https://www.isba.org/practicehq>.

### Other

Tim Slating had recently conferred with the VBA about the ISBA's experience with the Affinity group. He noted that he would be very disappointed if he were in the VBA's shoes and the VSB came along and set up a LPM offering after VBA signed contract with Affinity.

# LONG FORM Q & A

---

## South Carolina Bar

**Courtney Troutman**  
**Director Practice Management**  
**Asistance Program**  
pmap@scbar.org  
803-576-3783

### Why and How Program Was Established?

As a member service/benefit. An earlier LOMAP program had existed but did not succeed partly due to charging members for services and partly because it was a joint venture with an insurer. A Bar president wanted to bring it back purely as a member benefit.

### What Challenges Were Overcome?

It's always challenging to get members' attention to let them know what services are available. I've come to not rely on members only reaching out to me. I reach out to members by participating on listservs and Facebook groups answering questions and posting info. Also through involvement in committees and SSF Section, etc.

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

NA

### Job Descriptions

Two positions: Director (JD, Bar member) and an assistant who has a Masters in IT and law office background.

### Program Annual Budget

Outside of salaries, \$25,000.

### Impact of Covid-19

Busier than ever. Working from home since March 2020. Communications with lawyers has gone up since more lawyers have begun using video tools and relying on Internet.

# LONG FORM Q & A

---

## South Carolina Bar

### Interesting Information Learned

Going to lawyer's offices is not productive. Travel etc. takes time away from the office and helping more lawyers. Most lawyers do not have the time to devote to long office consultations. Average attention span for lawyers learning or talking about new tech concepts is one hour. Lawyers prefer talking to an advisor to watching videos or reading something.

Lawyers prefer reaching out by phone or email to in-person visits at the Bar offices. One-one Zoom has now been added and has been very successful. It was a misconception that lawyers want to meet in person. Most don't have the time.

My approach is to handle all inquiries as they occur, if possible, and to give a fast response. Questions from lawyers can be on any topic, from trust accounts to getting rid of old law books to changing case management software. My approach is that nothing is too small if that lawyer needs help. An older solo with a WordPerfect problem needs help just as much as anyone. I try to refer lawyers elsewhere only when it's appropriate. We aren't governed by bureaucracy.

For example, if I can answer an ethics question and save the lawyer another phone call to the ethics counsel, I do. It's important lawyers don't feel the Bar isn't responsive. They hate being transferred or not getting a live person. For several years, I was the primary person taking ethics calls, but everything practice management related relates to the ethics rules. Many times, lawyers just need to talk through an issue with an impartial lawyer who knows the ethics rules or who has experience with other lawyers with similar issues. A common example is when a lawyer is planning to depart a firm.

What makes the job interesting is that there are so many kinds of questions and new ones arise even after 18 years.

PMA also answers questions for family members and law partners when a lawyer is incapacitated or has died, and helps lawyers who are ill. Sometimes, I am the first person to learn a lawyer has died, so I try to facilitate what happens next and make it go smoothly for the family or partner. We are not appointed by the court, but I have worked with the court-appointed lawyer. I consider this one of the most important aspects of my job and one that was not known in advance. When a lawyer dies, the Court is concerned with protecting the interests of the lawyer's clients. The lawyer's staff, partner, or family also need assistance, but this is not covered by Court rules. As a profession, we owe it to our fellow lawyers to look after these people if a lawyer dies or become incapacitated.

If I had to pick the question I've answered the most, it's How long do I keep client files and other questions related to what to do with client files. Whoever is the PMA has to spend a lot of their time reading and educating themselves as part of the job. It's important that time be factored in when looking at how many lawyers a PMA helps. Keeping up with all the changes in tech and ethics, preparing CLE, researching articles, and researching answers for lawyers is a significant portion of the time spent at work (and often outside of work). It really needs to be taken into consideration, PMAs aren't vending machines with answers. Data has to be input constantly. I was told in the beginning: if you keep one person out of ethics trouble this week, you've done your job. And sometimes, one lawyer WILL take up an entire week, if they have significant issues. Luckily, I feel like I've done my job most days!.

### Other

There's a real need for bar members to have a knowledgeable lawyer at the Bar who can answer all kinds of questions, even mundane ones. People contact me all the time and say, you're probably not the person to ask, but I know you'll know the answer.

# LONG FORM Q & A

---

## Virginia Bar Association

**Yvonne Cockram**  
**Executive Director**  
yockram@vba.org  
804-644-5434

### Why and How Program Was Established?

With there being no PMAP program in Virginia, even after Sharon Nelson's term as VSB president, VBA began considering ways to offer the service. In 2020, VBA president Alison McKee put it in the strategic plan, and the Law Practice Management Division began investigating ways to implement the service. The idea was brought up in detail at the July 2020 VBA Summer Meeting. VBA learned about Affinity Consulting, particularly after hearing of Arkansas going with them, then began discussions. The pricing was costeffective for the member benefit provided. VBA Board of Governors approved moving forward. The deal has been in the works since Fall 2020, but contract arrangements took longer than expected. Mostly finalized in December 2020 and announced in February 2021. Rollout began in March 2021 with a full website being built out now.

### What Challenges Were Overcome?

Cost; balancing expense with value of member benefit; part of calculation as a voluntary bar.

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

All outsourced to Affinity.

### Job Descriptions

N/A.

### Program Annual Budget

N/A

### Impact of Covid-19

N/A.

### Interesting Information Learned

VBA would be open to any opportunity to partner with VSB in offering a PMAP. Yvonne floated the idea of VSB subcontracting with the VBA to subsidize a Virginia-hired and -based practice management advisor.

### Other

N/A.

# LONG FORM Q & A

## North Carolina Bar Association

### Catherine Sanders Reach

csandersreach@ncbar.org

919-657-1577

### Why and How Program Was Established?

CPM was founded in 2008, and came out of an effort from our Law Practice Management Section. It was founded to create an internal resource to help NCBA members by providing expert, confidential, and unbiased information on practice management and legal technology without adding to or increasing their bar dues. It is a recruitment and retention of membership effort.

### What Challenges Were Overcome?

The first challenge, one which remains to this day, is effectively marketing the program. "It was in the early years the best member benefit with the least awareness." Deciding to keep the program free as opposed to turning into a source of non-dues revenue was a second challenge.

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

Catherine was not sure she can effectively answer this except to share her experience. When she was hired, she was given a copy of the strategic plan (which included several action items around CPM) and set loose. Everything else she figured out from there. She consulted loosely with the LPM section in an advisory capacity. She did not have a oversight committee. At its height, CPM had a full time assistant director and full time assistant. While NCBA sees the CPM as a way to get and keep members, unified bars use PMAPs to add value for members and help with the perception that the Bar does nothing but license and discipline

### Job Descriptions N/A

### Program Annual Budget

The operational budget was originally 30K and was reduced each year. General revenue was the source of the budget.

### Impact of Covid-19

More people have recognized their current tech platforms are insufficient.  
More attorneys are considering retirement.

### Interesting Information Learned

Catherine has worked in 3 PM depts. She's learned the importance of working with other departments within the NCBA and cosponsors on events and CLEs. It's a form of marketing. They plan to do a business continuity program.

### Other

After we set up a framework for the program, a lot will be driven by the person we hire. A legal administrator could be good because they have big picture awareness of HR. Catherine was a law librarian, so knows how to find resources. A COO of a firm would be good too. Paralegals are great for process, but tend not to delve into it. Lawyers are tempted to veer into giving legal advice. Not allowed in the NCBA program. She suggests giving that person enough freedom to make a program that speaks to their strengths and let them help craft the department.

# LONG FORM Q & A

---

## DC Bar

**Dan Mills**  
**Practice Management Advisor**  
dmills@dcbar.org  
571-213-3401

### **Why and How Program Was Established?**

Response to ABA study in late 80s or early 90s on need to provide help before disciplinary problems emerge.

### **What Challenges Were Overcome?**

NA.

### **What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?**

Don't know.

### **Job Descriptions**

NA.

### **Program Annual Budget**

\$350-375k: salaries, subscriptions, travel to conferences pre-pandemic.

### **Impact of Covid-19**

Kept doing everything; much was on Zoom already; got busier with lawyers needing help with tech at home: steady stream of new clients.

### **Interesting Information Learned**

Marketing important; many lawyers do not understand what PM is. Surprised by how basic had to get; many lawyers proficient in law but not in business, do not have a business plan. PM is a relationship business. Making tech the primary focus is a mistake.

### **Other**

N/A.

# LONG FORM Q & A

---

## Oregon State Bar Professional Liability Fund

**Sheila M. Blackford**  
**Practice Management Attorney**  
sheilab@osbplf.org  
503-684-7421

### Why and How Program Was Established?

See website.

### What Challenges Were Overcome?

See website.

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

Always a unified bar approach, none other considered.

### Job Descriptions

N/A.

### Program Annual Budget

See 2019 Report.

### Impact of Covid-19

Huge impact, distance contacts/education.  
Really ramped up - the lawyers need the help.

### Interesting Information Learned

Tied in with the malpractice.

### Other

Very important and useful for their attorneys.  
She would like a copy of our report.

# LONG FORM Q & A

---

## State Bar of Texas

### Dean Shafer

dean.schaffer@texasbar.org

512-427-1326

### Why and How Program Was Established?

N/A.

### What Challenges Were Overcome?

NA.

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

NA

### Job Descriptions

NA.

### Program Annual Budget

NA

### Impact of Covid-19

NA.

### Interesting Information Learned

NA.

### Other

N/A.

# LONG FORM Q & A

---

## Washington State Bar

**Margeaux Green**  
**Practice Management Advisor**  
margeauxg@wsba.org  
206-443-9722

### Why and How Program Was Established?

Not sure.

### What Challenges Were Overcome?

Not sure.

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

Not sure.

### Job Descriptions

They have a admin within department that's shared with library.

### Program Annual Budget

Not sure - pretty low. Maybe \$1,000 over training for Margeaux and her salary.

### Impact of Covid-19

Just the lending library.

### Interesting Information Learned

On many committees impacting solo/small firm lawyers.  
Recently published COVID impact on attorneys.

### Other

N/A.

# LONG FORM Q & A

---

## Michigan State Bar Practice Group

### JoAnn Hathaway

jhathaway@michbar.org

517-346-6381

### Why and How Program Was Established?

Retired and had discussion with others about need. She was approached by the Bar. Value add-on for its members. Important to decide if a revenue-generating entity at the outset (they weren't at outset, but became with direction from Bar).

### What Challenges Were Overcome?

Dealing with other groups in the Bar to work together and not against one another.

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

At the time, there were not technology-related companies to handle them on a consultation basis. Wasn't around at the time - in house was the only way to go.

### Job Descriptions

They started with two people and one person was moved to the IT department and not replaced. JoAnn is the sole employee - no staff.

### Program Annual Budget

Annual budget - decided each year by the Bar (not public information).

### Impact of Covid-19

Tremendously. No more in-person, working from home, etc. Increase in number of calls.

### Interesting Information Learned

N/A.

### Other

As someone that started the program, she says very important that the person that heads the PMA reports to has a subject matter expertise. It is also difficult to know about staffing - unknown what is needed day by day based on wide-variety of subjects and what is needed that day.

# LONG FORM Q & A

---

## American Bar Association

### Molly Kilmer Flood

molly.flood@americanbar.org  
312-988-5362

### Why and How Program Was Established?

When membership to a bar association became less of a given the ABA realized they needed members (particularly solo and small firms) to understand that the ABA was there for them.

### What Challenges Were Overcome?

We started knowing their lane better. The ABA's Legal Resource and Tech Center is a conduit to bring state and local LPMs together.

Ex. through the Tech Show. We value our relationships with local and state LPMs and do not want to step on their toes so we leave consultations and other such services to them.

### What staff, volunteer and contractor models were considered, adopted or rejected for service provision, pros and cons of each; what differences between unified and voluntary bars?

N/A

### Job Descriptions

N/A.

### Program Annual Budget

Budgeting at the ABA is complicated.

### Impact of Covid-19

The Tech Show went virtual and made money because they were able to cut their prices. She doesn't know the impact on the Exhibit Hall - which can't be replicated virtually.

### Interesting Information Learned

Ms. Flood noted that since VA has Fastcase that is a huge sponsorship source and source of thought leadership. She also encouraged VA to find a LPM with a customer service orientation who is passionate. She mentioned that the ABA's Tech Show is the hub "official/unofficial" hub of LPM and that it brings together Jim Callaway of OK, Laura Callaway of AL, Natalie Kelly of GA, Catherine Sanders Reach of NC, Dan & Rochelle Mill of DC, etc. In MO they have an annual conference for solos and small firms in Lake of the Ozarks that is famously well attended. People bring their families and plan their vacations around it.

### Other

To sum it up, the LPM Division of the ABA puts on the Tech Show, the LPM Magazine and CLEs. They leave the day to day help to local and state LPMs.

**Virginia State Bar  
Local Bar Association  
Survey as to PMAs**

## Warren County Bar Association

---

### **Kimberly B. W. Emerson**

kemerson@silekpc.com

540-305-4245

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes, not sure/don't know.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.

I am not sure it would matter as long as the service was easy to access and product support was easy to obtain, which might be easier with Bar staff.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

No.

## Bristol Bar Association

---

### **John Bradwell**

**Immediate past president**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

Might add value; most firms in this area small.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Bar staff would be more used.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Not sure/don't know.

Is there anything else you think I should know?

No.

## 27th Circuit Bar Association (Wytheville)

---

### **Russell Crewe President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

Would be valuable for most younger members; for older lawyers mostly if closing practice. An increase in dues to pay for it would not be popular.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Bar staff would be more used.

The VSB has no agenda, but a vendor might have an agenda.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

He is a plaintiff's lawyer and is a fan of the VSB, while the VBA is more a defense bar.

Some of the 30 lawyers in his circuit would not care, and those who have gotten crossways with discipline might prefer the VBA.

Is there anything else you think I should know?

No.

## Virginia State Bar, Warren County Bar

---

### **J. Casey Struckmann Of Counsel**

struckmannwhite@hotmail.com

540-636-2918

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

Not sure/don't know.

Am semi-retired and not as much contact with bar as before.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Bar staff would be more used.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

No.

# Criminal Defense Bar Association of the 28th Circuit

---

## **Bruce Russell** **President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

Most firms around Abingdon are small and solo, don't know how to start a business.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Bar staff would be more used.

Lawyers might be wary of a national group. Only issue with VSB would be if affected bar dues.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

VBA does not have much presence in SW VA.

Is there anything else you think I should know?

He is running for Bar Council, thinks SW lawyers should be more involved in VSB.

## **Fredericksburg Bar Association**

---

### **Jeremie Childress**

540-898-8881

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

Not sure/don't know.

Checking with at his meeting this evening.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.

People have different opinions; gave example of attorney referral service that made some people unhappy; wouldn't want to see dues increase for this service since he won't need it

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Not sure/don't know.

Is there anything else you think I should know?

No.

## Fauquier Bar Association

---

### Peter Thomas Hansen

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

Many more lawyers going directly into private practice these days.

They need this type of service.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Bar staff would be more used.

Bar staff more trusted but vendor could work too.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

A Virginia State Bar employee would be used more.

Is there anything else you think I should know?

No.

## Page County Bar Association

---

### David Reed

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, no.

Would prefer individuals who need that sort of service should pay for it themselves and not cause dues increase for everyone to share.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.

Thinks VSB should focus energies upon UPL.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

No.

## Rappahack Bar Association

---

### James Fletcher

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, no.

He's been president for 44 years; only 3 active members; doesn't think they'd be interested or would use it.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.

Depending on qualifications.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

No.

## Arlington Bar Association

---

### Rex Flynn

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, no.

Thinks this is important for small and solos.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

Also president of the NOVA black attorneys assoc.

## Madison-Greene Bar Association

---

### Colt Puryear

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

Good idea; solos could really benefit from this sort of service.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Not sure/don't know.

Is there anything else you think I should know?

No.

## Virginia Bar Association

---

### David Silek

#### Partner

dsilek@sileklaw.com

703-361-9700

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

Not sure/don't know.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Not sure/don't know.

Is there anything else you think I should know?

I am not interested in a baby sitter for those wanting advice on how to run a business.

## Botetourt County Bar Association

---

### **John Alexander** **President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

Yes, bar is very small with lots of solos and small practices.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Not sure/don't know.

Is there anything else you think I should know?

No.

## Dickenson County Bar Association

---

### **Derrick Yates** **President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

Yes, most are in solo and small practice.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

N/A.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't see how two practice management services can coexist.

Is there anything else you think I should know?

No.

# Charlottesville Albemarle Bar Association

---

## **Bryan Slaughter President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

Yes, if done well absolutely.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

N/A.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

N/A.

Is there anything else you think I should know?

No.

# Pulaski County Bar Association

---

## **Everett Shockley President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, no.

Bar is very small, most members have been in practice for some time, nobody is coming in to take their places when they retire.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

N/A.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

N/A.

Is there anything else you think I should know?

Lawyers from Montgomery County are doing much of the work that Pulaski lawyers used to do.

## VA Beach Bar Association

---

**Christy J. Wood**

**President**

757-288-3378

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Vendor firm would be more used.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Not sure/don't know.

Is there anything else you think I should know?

No.

## Halifax VA Bar Association

---

**Michael Freshour**

**President**

434-575-0845

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

Depends on the details of what is offered.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Bar staff would be more used.

Again, details of what is provided and confidentiality would matter.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

Good idea, a lot would depend on cost, confidentiality, and what's offered.

# South Hampton Roads Bar Association

---

## Jamilah D. LeCruise

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?  
Bar staff would be more used.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?  
A Virginia State Bar employee would be used more.

Is there anything else you think I should know?

Very few in area are members of VBA.

# Norfolk & Portsmouth Bar Association

---

## Lamont Demetrius Mattox President

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?  
Bar staff would be more used.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?  
A Virginia State Bar employee would be used more.

Is there anything else you think I should know?

Security would be a concern, assure client info secure.

Local bar tried to do PMA cle, however very hard to get CLE credit for it.

## Louisa County Bar Association

---

**Gaven Winslow Craig**  
**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

Not sure/don't know.

Interesting concept and has possibilities.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.

Doesn't think either matter.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

If involves software, would want to know secure.

## Lunenburg County Bar Association

---

**Robert Edward Clement**  
**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

Outgoing Pres, no new president chosen.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Bar staff would be more used.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

A Virginia State Bar employee would be used more.

Is there anything else you think I should know?

Cost would matter. Good idea. If there is a cost, let it be a choice of the individual.

## Lynchburg Bar Association

---

**Peter Holstead Davies**  
**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

Being free would be important.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Bar staff would be more used.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

A VBA consultant would be used more if paid by the State Bar.

Is there anything else you think I should know?

No fee is of importance. If a cost, should not be mandatory.

## Sussex County Bar Association

---

**Honorable William Wayne Brittle**  
**Past President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, no.

Area is very small, hard to get attorneys to use e-mail.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Vendor firm would be more used.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

What is offered would matter. If offer services, differentiate from what is already available.

## Powhattan Bar Association

---

**Michael Glendon Henkle**  
**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.  
Cost would matter.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Vendor firm would be more used.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

Powhattan is very small, most don't limit practice to one area.

## Northern Neck Bar Association

---

**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.  
Doesn't think either matter.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

Right now looking into the use of Cleo regarding billing, timekeeping.

## Prince Edward County Bar Association

---

**Susan Gayle Andrews**  
**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

Not sure/don't know.

Should not be mandatory.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

Again, should not be mandated. We are kind of "leave us alone" here.

## Prince George County Bar Association

---

**Linda Marie Hawk Tomlin**  
**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

Not sure/don't know.

But if either is VSB sanctioned then ok.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Bar staff would be more used.

Would prefer VSB than outside entity.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

A Virginia State Bar employee would be used more.

Is there anything else you think I should know?

Many are solo or in small firms, cost matters.

## Alexandria Bar Association

---

### Tamika Jones

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise? Bar staff would be more used.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB? Not sure/don't know.

Is there anything else you think I should know?

They don't teach you how to run a firm in law school.

We have lots solos and small firms in my association.

## Bedford VA Bar Association

---

### Linda Gale Willis President

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Not sure/don't know.

Doesn't think either matter.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Not sure/don't know.

Is there anything else you think I should know?

Cost would matter. Bar Association does not like outsiders diving too much in local business.

## Hampton Bar Association, Inc.

---

**Romeo Garcia Lumaban Jr.**  
**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?  
Not sure/don't know.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?  
Not sure/don't know.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?  
Don't think there would be an difference.

Is there anything else you think I should know?  
No.

## Campbell County Bar Association

---

**George William Nolley**  
**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?  
In general, yes.  
All would depend on services, cost.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?  
Not sure/don't know.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?  
Not sure/don't know.

Is there anything else you think I should know?  
The local bar has tried practice management in regard to new attorneys, problem was there was no interest.

## Giles County Bar Association

---

**Bobby Lilly**  
**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

N/A.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

N/A.

Is there anything else you think I should know?

No.

## Grayson-Galax Bar Association

---

**David Boisvert**  
**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, no.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

N/A.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

N/A.

Is there anything else you think I should know?

Just a small number of lawyers, all experienced, in his bar, but he is personally interested in expanding and improving his practice.

# Amherst & Nelson Bar Association

---

**William Thomas Berry**  
**President**

In general, would a no-fee practice management service be used by your local bar members, particularly those in solo and small firms?

In general, yes.

In general, do you think the amount of use would be influenced by whether the service was provided by bar staff hired for their expertise, or a vendor firm that has expertise?

Vendor firm would be more used.

Doesn't think either matter.

Would the amount of use be influenced by whether the service is provided by the Virginia State Bar, or by a Virginia Bar Association consultant being paid by the VSB?

Don't think there would be an difference.

Is there anything else you think I should know?

No.