



CONNECTICUT BAR ASSOCIATION
2020-2021 ANNUAL REPORT
of Sections and Committees



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CONNECTICUT BAR ASSOCIATION OFFICERS

2020-2021



PRESIDENT
Amy Lin Meyerson



PRESIDENT-ELECT
Cecil J. Thomas



VICE PRESIDENT
Daniel J. Horgan



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Erin O'neil-Baker



*ASSISTANT SECRETARY-
TREASURER*
Amanda G. Schreiber



IMMEDIATE PAST PRESIDENT
Nदि N. Moses

CBA BOARD OF GOVERNORS OF THE HOUSE OF DELEGATES

2020-2021

<i>DISTRICT</i>	<i>NAME</i>	<i>CITY</i>	<i>TERM EXPIRES</i>
1	Lorenzo E. Agnoloni	Greenwich	2021
2	Stephen J. Conover	Stamford	2022
3	Kara A.T. Murphy	Norwalk	2021
4	Rute Mendes Caetano	Danbury	2022
5	James O. Gaston	Bridgeport	2021
6	J. Paul Vance, Jr.	Torrington	2022
7	Sherwin M. Yoder	Waterbury	2021
8	Jonathan Weiner	West Hartford	2022
9	Sung-Ho Hwang	New Haven	2021
10	William F. Dezinno	Meriden	2022
11	Patrick J. Cooney	Bristol	2021
12	Emily Gianquinto	Hartford	2022
13	Sylvia K. Rutkowska	Middletown	2021
14	Francis Drapeau	Rockville	2022
15	Howard B. Schiller	Willimantic	2021
16	Roger T. Scukky	New London	2022
17	Matthew J. Cholewa	Wethersfield	2021

CBA HOUSE OF DELEGATES

2020-2021

<i>DISTRICT</i>	<i>NAME</i>	<i>CITY</i>	<i>TERM EXPIRES</i>
1	Erin K. Flynn	Greenwich	2023
2	Diana M. Carlino	Stamford	2023
2	Stephen J. Conover	Stamford	2023
2	Scott M. Harrington	Stamford	2022
3	Lucas Hernandez	Westport	2023
3	Sarah E. Murray	Westport	2021
4	Patricia Cruz Fragoso	Danbury	2022
5	James O. Gaston	Bridgeport	2023
5	Patrick R. Linsey	Bridgeport	2021
5	Johnpatrick C. O'Brien	Bridgeport	2022
5	James T. Shearin	Bridgeport	2022
6	J. Paul Vance, Jr.	Torrington	2023
7	Connor P. McNamara	Waterbury	2021
7	Anthony Minchella	Middlebury	2023
8	Gerald L. Garlick	West Hartford	2021
8	Isis M. Irizarry	Hartford	2021
8	Jonathan Weiner	West Hartford	2021
9	Jason M. Fragoso	West Haven	2022
9	Joshua R. Goodbaum	New Haven	2021
9	Jesse A. Langer	East Haven	2023
9	Vincent M. Marino	Orange	2022
9	Brendan Nelligan	New Haven	2023
9	Alyssa S. Torres	New Haven	2021
9	Leonard Rodriguez	Orange	2021

(Continued on the next page)

CBA HOUSE OF DELEGATES

2020-2021

<i>DISTRICT</i>	<i>NAME</i>	<i>CITY</i>	<i>TERM EXPIRES</i>
10	James O. Craven	Madison	2022
10	William F. Dezinno	Meriden	2021
11	Patrick J. Cooney	Bristol	2023
11	Kristen Mostowy	Bristol	2022
11	Jeffrey A. Zyjeski	New Britain	2022
12	Tamar Bakhbava	Hartford	2021
12	Jamey L. Bell	Hartford	2021
12	Jennifer S. Das	Hartford	2021
12	Melanie P. Dykas	Hartford	2021
12	Emily A. Gianquinto	Hartford	2021
12	Dana M. Hrelac	Hartford	2022
12	Kenneth B. Lerman	Hartford	2023
12	Houston Putnam Lowry	Hartford	2023
12	James F. Sullivan	Hartford	2021
12	Jennifer E. Wheelock	Hartford	2023
13	Kirk W. Lowry	Middletown	2023
14	Christopher T. Bowen	Vernon	2023
15	Pamela S. Bacharach	Willimantic	2022
16	Douglas J. Monaghan	Groton	2022
17	Janis Malec	Rocky Hill	2023
17	Allenston M. Sheridan	Manchester	2022
17	Maria K. Tougas	Manchester	2022

CBA HOUSE OF DELEGATES SECTION DELEGATES

2020-2021

<i>SECTION</i>	<i>NAME</i>	<i>CITY</i>	<i>TERM EXPIRES</i>
Litigation	John Bonee	West Hartford	2021
Business Law	Matthew Gaul	New Haven	2022
Commercial Law & Bankruptcy	Taruna Garg	Stamford	2023
Criminal Justice	Cody Guarnieri	Hartford	2021
ADR	Gary Sheldon	Hartford	2022
Energy, Public Utilities, & Communications Law	Vincent Pace	Berlin	2023

CBA HOUSE OF DELEGATES AFFINITY BAR DELEGATES

2020-2021

<i>AFFINITY BAR</i>	<i>NAME</i>	<i>CITY</i>	<i>TERM EXPIRES</i>
Connecticut Asian Pacific American Bar Association	Raymond Withers-Tong	New Haven	2021
Connecticut Hispanic Bar Association	Geraldo Parrilla	Hartford	2023
Connecticut Italian American Bar Association	Francesco C. Mioli	Bridgeport	2022
George W. Crawford Black Bar Association	Donald Bell	Hartford	2021

ANNUAL REPORT OF THE PRESIDENT

Amy Lin Meyerson

I am honored to have served as the 97th President of the Connecticut Bar Association, the first Asian American to serve in this role, and am proud of all that we have accomplished together during this virtual bar year in promoting justice and strengthening our legal profession. This year certainly has had its extraordinary challenges—the COVID-19 pandemic, great social unrest sparked by the death of George Floyd, threats to our democracy at the US Capitol, and overt hate crimes against Asian Americans and other vulnerable communities to name just a few. The CBA met these challenges through perseverance and innovation. With your safety, health, and overall wellbeing at the forefront of our minds, we adapted, shaped a better legal landscape, and made great strides this year to deliver outstanding member services and programs and to serve the public.

This year's theme was **Connect to Succeed!** with the Connecticut Bar Association as we **Championed** our Communities; **Broadened** Our Networks and **Advanced** Justice together. I thank you for the opportunity to serve you through the association that is the voice of the Connecticut legal profession within the organized bar and with the public, and to ensure that you realized the full benefits of CBA membership. Together we embraced technology, assessed how we had been doing things, collaborated, and were creative in our solutions.

Having adopted our Strategic Plan FY 2021-2023 in September 2020, we are guided by our vision statement: The Connecticut Bar Association is the preeminent leader in the legal profession in Connecticut and beyond. Our members are connected and have achieved collective and individual success in a diverse, equitable, and inclusive profession in service to society.

Summarized below are several achievements and activities from this bar year.

Democracy and the Rule of Law

We decisively took timely action to voice the CBA's unwavering dedication to protect and promote the principles of the rule of law, democracy, and our justice system. The CBA issued statements on January 6, 2021, condemning the violence at the US Capitol and attempts to disrupt democracy, and March 18, 2021, denouncing the acts of violence and discrimination against Asian Americans and calling upon our members to unite in solidarity to support the victims and prevent future incidents.

CBA volunteer attorneys did their part to protect democracy through the CBA's Secretary's Legal Assistance Program. The CBA continues to assist the Connecticut Secretary of the State Denise W. Merrill and her office by providing volunteer attorneys at polling places across Connecticut to protect and ensure our right to vote in state and federal elections. On November 3rd during the General Election, through the CBA's Secretary's Legal Assistance

Program, over 175 attorneys stood at the ready to assist the Connecticut Secretary of the State Denise W. Merrill and her office at polling places across Connecticut to protect and ensure our right to vote. We also joined the American Bar Association in promoting its #PollWorkersEsq initiative, encouraging legal professionals to volunteer at the polls in November 2020. Leading up to the election, the CBA Young Lawyers Section conducted a creative and successful virtual voter registration drive.

The CBA adopted updates recommended by the CBA Professionalism Committee to the CBA Lawyers' Principles of Professionalism with opening affirmations: "As a lawyer, I have dedicated myself to making our system of justice work fairly and efficiently for all. I am an officer of this Court and recognize the obligation I have to advance the rule of law and preserve and foster the integrity of the legal system."

The CBA Civics Education Committee hosted programs celebrating Constitution Day and Law Day. On September 29, 2020, the CBA Constitution Day program entitled "*Bush v. Gore* at Twenty: Lessons for the 2020 Election" examined the disputed 2000 presidential election, the United States Supreme Court's resulting decision in *Bush v. Gore*, the roles of the federal and state courts in considering election disputes, and how they are likely to inform court challenges that may arise during the 2020 presidential election.

Joining together with other bar associations in Connecticut, on May 7, 2021, the CBA hosted the Statewide Law Day celebration themed "Advancing the Rule of Law, Now" to reflect on the role of law in our society and to help encourage a deeper understanding of the legal profession.

On June 28, 2021, the CBA Rule of Law Committee hosted the fourth CBA Rule of Law Conference: The Integrity of the American Election System, with two panels. The first panel featured Connecticut Secretary of the State Denise W. Merrill; Rhode Island Secretary of State Nellie M. Gorbea; and David Becker, executive director and founder of the Center for Election Innovation & Research in Washington, DC with a discussion on the changes in voter registration laws and process. Discussing the partisan disputes over the process of the 2020 presidential election, the second panel featured Connecticut Attorney General William Tong and two university deans, Heather K. Gerken of Yale Law School and Sudha N. Setty of Western New England School of Law.

Legislative Affairs

While the Connecticut State Capitol and Legislative Office Building remain closed and business was conducted via a combination of Zoom, Microsoft Teams, and webinars for most of the bar year, our sections and committees remained active in the legislative process and submitted legislative proposals for the regular legislative session—many of which were considered and approved by the CBA House of Delegates.

Working to strengthen the rule of law, the CBA pursued a very active legislative agenda advocating for several rule changes, including three Practice Book Rule amendments approved by the Connecticut Superior Court's Rules Committee: 1) Rule 8.4 (Misconduct) of the Connecticut Rules of Professional Conduct adding a provision to the Rule making it

professional misconduct for an attorney to engage in discrimination or harassment in the practice of law; 2) Rule 5.5 permitting non-practicing or retired out-of-state licensed attorneys to engage in supervised pro bono services through a legal aid organization, law school, or bar association program; and 3) Rule 1.8(e) allowing a lawyer representing a client pro bono to provide modest gifts to the client to pay for basic living expenses.

The CBA supported House Bill 6531 (Public Act No. 21-34) establishing the right to counsel in eviction proceedings in the Connecticut legislature, which was signed by Governor Lamont on June 10, 2021.

Judicial

The CBA provided testimony to the Connecticut Judicial Compensation Commission in support of fair and appropriate judicial compensation that enables the state to attract and retain qualified, experienced, and diverse lawyers drawn from every segment of the legal profession to a career in judicial service. Our judges are the backbone of an independent, fair, effective, and efficient judicial system. The CBA named a representative to and several CBA members participated on the Connecticut Judicial Branch's Jury Selection Task Force that issued its report on December 31, 2020. We also participated in the Branch's Access to Justice Pro Bono Working Group.

As the work of our COVID-19 Pandemic Task Force came to a close, our ongoing collaborative efforts with the governor's office, the legislature, the Judicial Branch, and other associations allow us to find answers to members' questions, address their concerns, and provide further guidance on how to safely engage in the practice of law and provide timely legal services.

Access to Justice

In November 2020, we launched the CBA Gives campaign highlighting opportunities for members to give time or monetary support to CBA programs or legal and social service programs that align with our mission of advancing the legal profession and the principles of law and justice or meet the needs of some of Connecticut's most vulnerable residents. Some of these giving opportunities are Project Feed Connecticut, The DeMeola Fund (named after Past CBA President Karen DeMeola honoring her as a DE&I champion and supporting the CBA Diversity & Inclusions Committee's efforts), CBA Pro Bono Connect, CBA Lawyers in the Libraries, CBA Virtual Pro Bono Legal Clinics, and CT Free Legal Answers.

The CBA donated \$8,000 to the Connecticut Bar Foundation to benefit their legal service grantees who provide pro bono civil legal services to Connecticut's low-income residents.

Continuing a nearly 25-year tradition of providing pro bono legal services to veterans, CBA members participated in CT's annual Stand Down event despite the ongoing COVID-19 pandemic on September 25.

The CBA launched Project Feed Connecticut, a joint effort by the Connecticut Bar Association, Hartford County Bar Association, CFA Society Hartford, Connecticut Chapter of the American College of Surgeons Professional Association, Connecticut Asian Pacific American Bar Association, Portuguese American Bar Association, George W. Crawford Black Bar

Association, New Haven County Bar Association, Middlesex County Bar Association, Connecticut Society of Certified Public Accountants, the Connecticut Chapter of the American Institute of Architects, Pullman & Comley's ADR Group, the Connecticut Trial Lawyers Association, the South Asian Bar Association of Connecticut, the Connecticut Hispanic Bar Association, and the Connecticut Italian American Bar Association to provide financial support to Food Share and Connecticut Food Bank. We raised over \$40,000 thus far to feed the hungry in Connecticut.

The CBA hosted a statewide COVID-19 Small Business Virtual Legal Clinic along with Robinson+Cole and other area law firms and corporations. The clinic assisted Connecticut entrepreneurs and small businesses that suffered adversely from the impact of the COVID-19 pandemic by providing free, limited-scope legal guidance during 45-minute telephone or video calls with volunteer attorneys.

Professional Development

The CBA continued to provide professional development and networking opportunities that are crucial to exchange ideas and information to equip you with the knowledge and resources to serve your clients while staying connected, resilient, and motivated. Through virtual platforms, our members and other professionals volunteered their knowledge, skill, and experience to improve the profession and provided valuable and relevant content for over 280 continuing legal education programs (CLEs), including the 2020 and 2021 Connecticut Legal Conferences and 2020 and 2021 Celebrate with the Stars; Constance Baker Motley Speaker Series on Racial Inequality; Bankruptcy Series; Federal Tax Institute of New England; Young Lawyers Series; and other CLEs presented during meetings of our 70+ Sections, Committees and Task Forces. The high quality of the CBA CLEs earned the CBA the honor of being named the #1 CLE Provider and #1 CLE Provider—Online as voted by Connecticut Law Tribune readers for the fourth straight year.

Advocacy for the Legal Profession and Member Benefits

The CBA delivered the outstanding services and programs we need to be the exceptional legal professionals our clients and communities rely on, and to equip our members with the knowledge and resources to serve our clients while staying connected, resilient, and motivated. The CBA Membership Committee launched the 2020 Membership Survey and provided analysis based on the responses to understand how we can best address the needs and concerns of our members.

To better serve our members, we enhanced member benefits in these innovative forums:

1. The CBA In-House Counsel Committee provides cost-effective, high-quality, relevant content and resources for general counsel and other in-house attorneys;
2. The CBA Solo and Small Firm Resource Center focuses on starting a practice, growing a practice, and leaving a practice; and
3. The new Experienced Lawyers Committee leverages skill sets, accumulated knowledge, and judgment of experienced lawyers to promote the public interest and the legal profession.

We advanced the CBA Presidential Fellows program that gives Fellows opportunities to become involved in the substantive work of CBA sections and to develop into future leaders and serves to promote CBA sections and committees to other members of the CBA Young Lawyers Section and the bar.

The CBA continued to create a sustainable pipeline of students from high school to college, and, thereafter, to law school and the practice of law through our programming and mentoring activities such as Pathways to Legal Careers, CBA Future of the Legal Profession Scholars, L.A.W. Camp, and Civics First Mock Trial competitions. Additionally, we joined with the Connecticut Judicial Branch to congratulate successful candidates of the CT bar exams administered in February and October 2020 and to welcome new attorneys admitted to practice law in Connecticut in June 2021.

Diversity, Equity, and Inclusion

Diversity, Equity, and Inclusion (DE&I) remained a top priority for the CBA during this time of unprecedented challenges. A new and recurring DE&I column now appears in the CT Lawyer magazine focused on diversity, equity, and inclusion in the Connecticut legal community.

On June 1, 2021, Governor Lamont appointed me, Cecil Thomas, and Sharad Samy to the Connecticut Hate Crimes Advisory Council where we will serve all citizens throughout Connecticut by fostering and coordinating programs to increase community awareness and the reporting of hate crimes so that together we can find effective ways to fight these hate crimes. The council also will make recommendations on how we may further protect and provide relief to the victims of hate crimes and how to remedy the damage caused by these crimes.

Lawyer Well-Being

Our Lawyer Well-Being Committee has been caring for our emotional and mental health by sharing knowledge, experiences, insights, and tips in “Be Well,” a new well-being feature in *The CBA Docket*, articles in the *CT Lawyer*, twelve Wellbeing Challenges, CLE programs, and encouraging us to commit to the Well-Being Pledge.

On February 5th, the CBA Lawyer Well-Being Committee rolled out our first annual Well-Being Pledge. The pledge seeks a commitment from legal employers to promote lawyer well-being and healthy work environments. While the legal community has gradually been tuning in to the value in promoting lawyer well-being, the pandemic and a multitude of other stressors arising since March 2020 have accelerated this recognition by necessity.

During Lawyer Well-Being Week that began on May 3, the CBA Lawyer Well-Being Committee hosted a series of free events for CBA members to celebrate Lawyer Well-Being Week. Before the official start of the week’s events, a preliminary hike at Sleeping Giant State Park was hosted by the CBA Young Lawyers Section (YLS) on May 1.

We were grateful to conclude our bar year with an in-person event bringing together Connecticut legal professionals, CBA past presidents, and their families for food, fellowship, and festivities at the inaugural CBA Summer BBQ at Holiday Hill in Prospect, CT.

Read more about these highlights and other activities in the included reports. Diversity, equity, and inclusion increased in the Connecticut legal community and has allowed us to better serve our clients, provide access to justice, and improve the legal profession as a whole. Today, we are stronger, more connected, and more inclusive than ever.

We are very fortunate to have so many good and special people in our CBA membership, as sponsors, and throughout our legal community who are dedicated and committed to the association's causes and vitality and health of the legal profession and our communities.

Many thanks to all of you for connecting with others involved in the law and legal community, and to our CBA leadership in our Executive Committee; Board of Governors; House of Delegates; and Sections, Committees and Task Forces as well as our members and other volunteers, our partnering entities, and our phenomenal CBA staff. We are excited to reopen the CBA offices and bring back in-person events. The CBA staff and leadership team stand ready to assist you. Please do not hesitate to reach out.

Stay safe and be well.

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ALTERNATIVE DISPUTE RESOLUTION SECTION

Co-Chairs: Bridget C. Gallagher and Lynda B. Munro

This section aims to increase the awareness of alternative dispute resolution (ADR) within the bar and the general public; promote communication among lawyers and others involved in ADR, act as a resource to the courts and other entities, improve the quality of ADR services, and encourage members of the bar to serve as neutrals in various ADR settings.

Specific Goals of the Year

A specific goal of the section this year was to encourage the use of ADR as a timely alternative to litigation in the midst of the COVID-19 pandemic which has temporarily limited access to the judicial process.

Projects

The section continues to actively work to improve the CBA's Legal Fees Dispute Resolution program. Section member Jennifer Shukla has been a very active chairperson for that committee. Bill Stemple will be the new chair of the committee as of July 1, 2021. Brendan Holt will serve as a new member at large. CBA staff has been excellent to work with on that program.

Meetings

- The Executive Committee of the section met on a regular basis. There was one full section meeting on September 2, 2020 via Zoom. Unfortunately no in-person meetings have been possible due to COVID-19. The September meeting included a program regarding drafting arbitration provisions which was eligible for CLE credit.
- The ADR section also hosted a joint program with the Family Law Section on October 13, 2020 via Zoom which discussed the gender differences in negotiation. The program is also eligible for CLE credit and was very well attended.
- The ADR section is presenting a program at the 2021 CBA Legal Conference entitled "Cut the Valuation Knot" which is a two credit program.

Efforts to Improve

- The section also made efforts to involve younger lawyers in the section and on the Executive Committee.

Committee Work

The Legislative Committee has been active in tracking proposed legislation and continuously communicating with the section members on relevant legislative developments.

Future of Section

- A new chair, Jennifer Shulka, has been nominated and approved beginning July 1, 2021.
- A new treasurer, Houston Putnam Lowry, will begin his term July 1, 2021.
- Jamie Saint Paul has been added to the Executive Committee.

ANIMAL LAW SECTION

Co-Chairs: Colette S. Griffin and Jessica Rubin

Formed in 2002, the purposes of the Animal Law Section are to provide a forum for members to exchange ideas, and to study and understand laws, regulations, and case law pertaining to all areas of animal law; to organize periodic CLE seminars on various issues relating to animals and the law in order to educate the members of the Connecticut bar, bench, and the public about animal law and about different ways in which the legal system can work to protect animals; to be a resource for people, organizations, and government agencies that wish to obtain information about the subject; to create and maintain a referral service for the public in order to be able to refer people with animal-related problems or concerns to attorneys who are prepared to handle such cases; and to create and maintain a brief and resources bank for use by attorneys practicing in the field of animal law.

Meetings

Quarterly section meetings have been held via Zoom via the COVID-19 restrictions.

Executive Committee Meetings

Executive meetings have been held throughout the year.

CLE

CT Legal Conference 2021 – The CBA did not have a time slot for the Animal Law Section.

Legislative Efforts

The section has followed pending legislation concerning animals and has forwarded information to the members accordingly. The section actively participated in legislative efforts and supported legislation regarding wildlife trade.

Volunteer Activities

We have continued to provide legal guidance regarding animal laws to a number of not for profit organizations as well as to individuals who have contacted us with legal inquires.

Other Programs and Events

The Animal Law Section had two special speakers, Attorney Michelle Duprey, former Director of Disability Services, will speak about service animals, their use and those who use them and Ms. Jo Anne Basile from CT votes for animals presented on the current legislative session.

The section will plan volunteer activities at local shelters.

We will be hosting an event with UCONN School of Law in the early fall of 2021 on animals in the law.

We are working on creating a helpful summary for the animal rescue community pertaining the contracts that are used.

Future Events

We are intending on holding additional CLE opportunities throughout the upcoming bar year. The Animal Law Section intends on working with the animal community regarding the statutory changes that may be implemented. Also, creating a resource center for animal law issues.

We plan on presenting an update on animals and the law at the 2022 CT Legal Conference.

ANTITRUST AND TRADE REGULATION SECTION

Chair: Robert M. Langer

The Antitrust and Trade Regulation Law Section aims to familiarize CBA members, and more particularly Section members, with all aspects of state and federal antitrust and trade regulation law and practice.

Meetings and CLEs

September 14, 2020

Section Chair Robert M. Langer and Section Member Daniel P. Schofield (now Daniel Belfield) virtually presented “The Impact of *Soto v. Bushmaster* Upon the Scope of CUTPA and Product Liability Law” at the 2020 CBA Connecticut Legal Conference. The program contained an in-depth analysis of the landmark opinion and its implications on many areas of jurisprudence. Attendees were awarded [2.0] CLE credits.

October 7, 2020

The Section held an Executive Committee meeting during which plans for the upcoming year were discussed in the context of pandemic restrictions, including rescheduling events cancelled due to the pandemic during that had been scheduled for the 2019-2020 bar year.

January 7, 2021

The Section co-hosted with the Labor and Employment Section a virtual presentation by Bilal Sayyed, Director of Policy Planning at the Federal Trade Commission “The Federal Trade Commission - A Competition and Consumer Protection Enforcement Agency.” Mr. Sayyed addressed several key FTC initiatives, including the antitrust implications of non-compete agreements, such as agreements among competitors not to poach each other’s employees, as well as the FTC’s commentary on the vertical merger guidelines.

March 10, 2021

The Section hosted a virtual presentation by Connecticut Assistant Attorneys General Jeremy L. Pearlman, Rachel Davis and Nicole Demers, of the Connecticut Attorney General’s Office Antitrust Department. The state’s Antitrust Department is highly regarded nationally and has for many years led important competition initiatives undertaken by state attorneys general. AAG Pearlman and his colleagues discussed high profile litigation matters currently being handled by the Department as well as other areas of focus for the Department.

May 13, 2021

The Section will host a virtual presentation entitled “The Future of the United States Antitrust Enforcement System,” by Professor William E. Kovacic, Antitrust Professor at the

George Washington University Law School and Former Chairman and General Counsel at the Federal Trade Commission. The Professor will speak to a vitally important topic, the future of the antitrust enforcement system in our country. In addition to members of the Section, attendees will include members of the Commercial Finance Section, the Federal Practice Section, and the Young Lawyers Section. Attendees will be awarded 1.0 CLE credit.

June 15, 2021

Section Chair Robert M. Langer and Section Secretary Peter A. Barile III will present “Antitrust Basics: What Every Litigator, Transactional Attorney and General Practitioner Needs to Know” at the CBA Connecticut Legal Conference. The two-hour program will focus on antitrust basics and recent developments aimed toward a general audience. Attendees will be awarded 2.0 CLE credits.

Section Officers

The Section Officers for the 2020-21 year were: Attorney Robert M. Langer of Wiggin and Dana LLP, Chair; Attorney Craig Raabe of IZARD KINDALL & RAABE LLP, Treasurer; and Attorney Peter A. Barile of Lowey Dannenberg PC, Secretary. The Section Officers will continue to serve in their respective capacities during the 2021-2022 year.

APPELLATE ADVOCACY SECTION

Co-Chairs: Jessie Opinion and Tom Donlon

The Appellate Advocacy Section aims to improve appellate practice through meetings and CLE courses; determine the nature, scope, and interest in an appellate certification program; identify the resources and procedures required to maintain such a program; and identify other means to improve the appellate law practice in Connecticut.

The Appellate Advocacy Section has had a productive 2020-2021 bar year, notwithstanding the continued disruption from the COVID-19 pandemic. We held five virtual meetings via Microsoft Teams and Zoom. In addition, the Section will be maintaining its standard practice of participating in the Connecticut Legal Conference, with a CLE program on appellate ethics at the 2021 CLC. Finally, the Section was also involved in initiatives involving appellate e-briefing, revisions to the rules governing petitions for certification, and the Appellate Project, a nonprofit organization focused on increasing diversity in the appellate bar.

Our meetings during the bar year typically involve having an appellate judge from the Appellate Court, Supreme Court, or Second Circuit join us to foster a dialogue between the bench and the bar. This year, we were able to accomplish that at the following four virtual meetings:

- **September 29, 2020:** The section's bar year began with a presentation by Chief Justice Chase Rogers (ret.) of the Connecticut Supreme Court and Judge Christopher Droney (ret.) of the United States Court of Appeals for the Second Circuit, both of whom are now with the law firm of Day Pitney. Justice Rogers and Judge Droney shared their thoughts on the differences between and best practices for federal and state appellate practice, particularly in light of the changes in court operations due to the pandemic.
- **November 18, 2020:** The section was joined by Justice Christine Keller of the Connecticut Supreme Court, who spoke about her transition from the Appellate Court to the Supreme Court during the pandemic as well as her experiences as a jurist on all three levels of state courts.
- **February 9, 2021:** The guests for this section meeting were four attorneys who work in various support roles for the appellate courts, including Paul Hartan, chief administrative officer; Carolyn Ziogas, chief clerk; Jonathan Weiner, permanent law clerk to the Supreme Court; and Jamie Porter, supervising motions staff attorney to the Appellate Court. In a conversation moderated by section co-chair Jessie Opinion,

our guests discussed their respective roles and provided insight to section members regarding the day-to-day operations of the courts.

- **March 30, 2021:** The section was joined by Judge Melanie Cradle of the Appellate Court. In a lively and wide-ranging conversation moderated by section secretary/treasurer Danielle Edwards, Judge Cradle spoke about her transition from the trial court to the Appellate Court during the pandemic and how her background, including her past work as a prosecutor, has informed her work as a jurist.

In addition, the Section held a fifth business only virtual meeting on May 25, 2021, to elect new officers and to discuss ongoing business matters, such as the section's potential work with the Appellate Project, the passage by the Rules Committee of the section's proposed revisions to the appellate rules governing petitions for certification, and the courts' request for section participation in educational offerings to the bar regarding appellate e-briefing.

On June 15, 2021, the Section will present a CLE program at the 2021 CLC titled *The Appealing Road to Ethical Ruin*. During the program, the speakers, led by moderator and section co-chair Tom Donlon, will discuss ethical pitfalls and issues related to modern appellate practice in the context of a series of scenarios—some hypothetical, some real. The speakers for the program include Justice Steven D. Ecker of the Connecticut Supreme Court and Dean Jennifer G. Brown of the Quinnipiac University School of Law.

In addition to a full schedule of programming, the Section has also undertaken several projects over the course of the past bar year. The Section continued its work with the appellate courts to develop a procedure for remote oral arguments and conducted training with appellate judges in the new virtual system. From November to January, at the request of the appellate courts, the Section solicited, gathered, and submitted comments to the Rules Committee regarding proposed e-briefing based revisions to the appellate rules. In February and March, at the request of the appellate courts, the Section solicited, gathered, and submitted comments to the Rules Committee regarding the formatting of petitions for certification. Finally, beginning in March, the Section began working with The Appellate Project, a nonprofit devoted to increasing the diversity of the appellate bar.

The Section hopes to resume in-person meetings during the 2021-2022 bar year. Given the positive response by section members to the virtual meeting format, however, reflected in increased meeting attendance and a broader cross-section of members in attendance from different geographic locations, the Section hopes to continue making meetings virtually accessible to members who are unable to attend in-person. Several new judges have joined the Appellate Court during the past bar year, and the Section hopes it will be able to host them as guests during upcoming meetings. The Section will also consider an informal social event for the appellate bench and bar in spring 2022 when/if live gatherings are permitted. Such an event has been in our long-term plans, but pandemic restrictions made it impossible to schedule over the past two years. The Section has further made attempts to collaborate on a CLE offering with the Young Lawyers Section via the Section's YLS liaisons over the past few years, and should such an opportunity present itself in the future, the Section would be interested in pursuing it.

The officers of the Section serve three-year terms, and the slate of officers elected during the May 25, 2021 meeting will serve for the 2021-2022 bar year. Jessie Opinion will serve the third and final year of her term as Co-Chair, while Danielle Edwards will serve the first of her three years as Co-Chair. Additionally, Jeffrey Gentes will serve the first of his three years as Secretary/Treasurer. The Co-Chairs intend to fill the position of Legislative Liaison previously held by Attorney Gentes.

COMMERCIAL LAW AND BANKRUPTCY SECTION

Chair: Roberta Napolitano

The purpose of the Commercial Law & Bankruptcy Section is “to promote objectives of the State Bar Association of Connecticut within the field of commercial law and bankruptcy.” (Section 2, Bylaws of Commercial Law & Bankruptcy Section of the Connecticut Bar Association) This section achieves this purpose by encouraging the free exchange of ideas and scholarship among its members and by providing a forum to educate and update its members in matters of interest in the area of creditor/debtor relations in commercial transactions. To further these goals, each monthly section meeting is open to the entire section, and attendance is encouraged.

Section Accomplishments

The Section began this COVID-19 affected bar year with its virtual participation in the Connecticut Legal Conference on September 15, 2020, presenting Commercial Law and Bankruptcy: The Year in Review. Nick Vegliante, a principal of Cohn Birnbaum Shea, presented the Annual Commercial Law Update, James Heffernan, of the Law Offices of Neil Crane, presented the Annual Consumer Law Update, and Joanna Kornafel, of Green & Sklarz, presented Recent Developments in Business Bankruptcy.

The pandemic did not prevent the hardworking members of its planning committee, including its Chair, Bob Kaelin, Section Member and former Section Chair, and our Vice-Chair, Kristin Mayhew, from presenting the third annual Connecticut Bankruptcy Court Conference. In lieu of past years’ all day conferences, the committee organized three virtual events. The first session, presented by all three of our bankruptcy judges (Manning, CJ and Nevins and Tancredi, JJ) took place on October 2, 2020, and concentrated on the state of the Connecticut Bankruptcy Court in 2020 and beyond. Joshua Cohen of Day Pitney, Roy E. Filkoff of Altman and Company, Kathleen M. LaManna of Shipman & Goodwin, and William K. Harrington gave updates on hot current topics in business bankruptcy and a review of early Sub Chapter V cases, with practice pointers, in the second session, which took place on October 9, 2020. In the third session, on October 16, 2020, Patrick M. Birney, Joanna M. Kornafel, and Kevin J. McEleney addressed alternatives for winding down a business, including non-bankruptcy remedies available under state law. The combined event provided 6 hours of continuing legal education credit, and attracted 100 attendees. The event could not have succeeded without the contributions of Association staff members, Tom Genung, Phanny Cahill and Shirley Perrin. Vice Chair Kristin Mayhew recently announced that the Association would transfer \$8,419.28 from the revenue produced by the Connecticut Bankruptcy Conference in 2019 and \$5,865.00 from revenue in 2020 to the Robert L. Krechevsky Pro Bono Fund.

On November 6, 2020, Section Members Scott Charmoy, Carl Gulliver, Roberta Napolitano, and Charles Maglieri managed to learn how to use Power Point to present a two hour program on recent Issues in Consumer Bankruptcy Law. Topics included the impact of the Court's finding in *U.S. Bank v. Mamudi*, and the attendant suggestion of filing bankruptcy before entry of a judgment of foreclosure by sale, luxury goods, good faith and the Chapter 13 Plan, issues involving the assumption of personal property leases in Chapter 13, post petition means test issues, and the effect of a direct pay default on the entry of a discharge in a case under Chapter 13. Attendees received two continuing legal education credits and the presenters relied greatly on the help and extreme patience of Association staff members, Tom Genung, Phanny Cahill and Shirley Perrin.

The Section held a virtual November Executive Committee meeting on November 10, 2020. The Committee voted to request that the Connecticut Bar Association support generic legislation that removes language from the United States Bankruptcy Code permitting companies to file for bankruptcy where they are incorporated or where smaller affiliates operate in favor of filing where the debtor's principal place of business or principal assets are located. Joanna Kornafel successfully advocated for the Section's position at a meeting of the Legislative Policy and Review Committee ("LPRC") on December 4, 2020. The generic nature of the approval means the Section need not renew its request for support of that position for three years.

As in years past, the Section held a virtual joint holiday party with the Connecticut Chapter of the Turnaround Management Association. The event was surprisingly enjoyable even though it took place through Zoom.

On January 27, 2021, the Section's Executive Committee met and voted to request that the Connecticut Bar Association support legislation clarifying that borrowers with only post-COVID defaults on SBA loans remain eligible for Paycheck Protection Program loans. Once again, Joanna Kornafel successfully advocated for the Section's position before the LPRC on February 5, 2021. Bill Chapman of the Association managed to organize a meeting on the topic with the staff of our United States Senators, Kristin Mayhew, Vice Chair of the Section, and Jeffrey Sklarz, of Green & Sklarz on February 26, 2021.

The January Executive Committee Meeting was followed by a presentation on the Employment Law Implications of COVID-19, given by Bernard Jacques of McElroy, Deutsch, Mulvaney & Carpenter and Christopher L. Brigham & Valerie M. Ferdon of Updike, Kelly & Spellacy. Attendees earned an hour of CLE credit.

The Section paid tribute to Barbara Katz, Elizabeth Austin, Charles Maglieri, and Rick Polivy, members of the section who retired, or semi-retired, on February 24, 2021. Attendance at a meeting to honor these cherished members of our community was robust.

The meeting was preceded by an Executive Committee Meeting at which the Committee voted to a) approve the creation of a Pro Bono Panel Administering Committee which would monitor a list of candidates for pro bono appointments before the United States Bankruptcy Court, and b) to request the Association's approval of the Section's entry into a

Memorandum of Understanding with Statewide Legal Services of Connecticut, Inc. Under the terms of the MoU, the Pro Bono Panel Administering Committee would provide a list of suitable candidates for representation in cases under Chapter 7 of the Bankruptcy Code. Statewide Legal Services, in turn, would review applications for pro bono representation, refer applicants to the candidates provided by the PBPAC, and provide malpractice insurance to cover the proposed representation. The CBA and the Section would provide links to the applications reviewed by Statewide Legal Services. The Board of Governors approved the Section's request to enter into the MoU on April 19, 2021.

On May 5, 2021, we met to honor this year's CLABBY award winners, and were treated to a sneak preview of our section's presentation at the Connecticut Legal Conference by John Cesaroni, Andrew De Peau and Paige Vaillancourt. The Section bestowed the Career Achievement Award on Richard Coan, the Service to the Profession Award on Suzanne B. Sutton, and the Rising Star award on Taruna Garg.

On May 25, 2021, our Executive Committee met to approve the creation of an Outreach Committee to coordinate providing programs to the general public, including area elementary, middle and high schools as well as vocation institutions and community colleges. The creation of the committee arose from a discussion with Judge Julie A. Manning at a Bench Bar luncheon. Judge Manning has been enthusiastically involved in outreach programs.

On June 4, 2021, the United States Trustee for Regions 1 and 2, William K. Harrington, the Assistant United States Trustee for the District of Connecticut, Kim McCabe, and Erin Hogan, Bankruptcy Analyst, presented a timely and informative program regarding the new procedures for completing uniform periodic reports in non-small business cases. Attendees received 1.25 CLE credits.

The untiring efforts of the Section's Standing Pro Bono Committee to develop a proposed model rule resulted in a more comprehensive pro bono program for indigent bankruptcy debtors in both Chapter 7 cases and Adversary Proceedings, which the United States District Court for the District of Connecticut approved. The Standing Pro Bono Committee is working on the form of the application for assistance, and where it will reside. The Court and the Committee anticipate an effective date of July 1, 2021 for the rule to take effect.

The legislative committee, led by Chris Bowen and Joanna Kornafel, has been monitoring bills and other proposed legislation impacting the Section's members' practices, and reported on the General Assembly's activity in the current legislative sessions, and at Executive Committee meetings. The Local Rules Revision Committee worked with the Bankruptcy Court bench to revise and supplement the Court's current local rules. The District Court approved the revisions and the comment period expired on April 30, 2021. We received a lovely thank you note from one of the recipients of the Association's LSAT preparation scholarships.

CLE

The Section held three events which provided CLE credits, which are described in more detail above:

- November 6, 2020 - Recent Issues in Consumer Bankruptcy Law for two continuing legal education credits.
- January 27, 2021 - Employment Law Implications of COVID-19 for one hour of CLE credit.
- June 4, 2021 - Completing Uniform Periodic Reports in non-small business cases for 1.25 CLE credits.

Legislative Efforts

Again described more fully above, the Section participated in the following legislative efforts:

- Joanna Kornafel successfully advocated for the Section's position in support of permitting companies to file for bankruptcy where they are incorporated or where smaller affiliates operate in favor of filing where the debtor's principal place of business or principal assets are located at a meeting of the Legislative Policy and Review Committee ("LPRC") on December 4, 2020. The generic nature of the approval means the Section need not renew its request for support of that position for three years.
- On January 27, 2021, the Section's Executive Committee met and voted to request that the Connecticut Bar Association support legislation clarifying that borrowers with only post-COVID defaults on SBA loans remain eligible for Paycheck Protection Program loans. Once again, Joanna Kornafel successfully advocated for the Section's position before the LPRC on February 5, 2021. Bill Chapman of the Association managed to organize a meeting on the topic with the staff of our United States Senators, Kristin Mayhew, Vice Chair of the Section, and Jeffrey Sklarz, of Green & Sklarz on February 26, 2021.

Volunteer Activities

The Section as an entity did not engage in any volunteer activities this year. With its creation of a Pro Bono Panel Administering Committee and Public Outreach Committee, our sections report next year should be very different, and I hope to report on those anticipated volunteer activities next year.

Diversity and Inclusion Efforts

Thwarted by the COVID-19 epidemic this year, the Section hopes our diversity and inclusion efforts bears more fruit next year. I note that two of our three officers are women, two of the three CLABBY award winners are women, and each panel addressing the section this year had a female member.

Other Programs and Events

- While not under the aegis of the Section, we look forward to attending next fall's Connecticut Bankruptcy Conference.
- The Section's finances are in excellent condition.

DISABILITY LAW SECTION

Chair: Russell D. Zimmerlin

The Disability Law Section (DLS) examines the law as it pertains to the physically and mentally impaired, promotes change where indicated (through the CBA and section action), and assures the safeguarding of the rights of the disabled. It is the further purpose of this section to support the mission of the association by promoting best practices in legal research and advocacy as they apply to the preceding purposes. The Section shall achieve these purposes by providing relevant Continuing Legal Education to its members, providing relevant updates to its members of important developments concerning the practice area, fostering discussion of current issues affecting the practice area, and engaging in legislative advocacy on issues relating to the practice area, in accordance with procedures established by the Connecticut Bar Association.

Officers

Russell D. Zimmerlin, Chair
Paul E. Daddario, Vice Chair
Ashley E. Palma, Secretary
Benjamin Shapiro, Treasurer

DLS will concentrate on scheduling bi-monthly section meetings at the CBA or other locations. DLS is planning on live events after the COVID-19 restrictions are lifted. This year DLS will focus on a robust July 2021-June 2022 schedule.

- Update on Social Security hearings amidst COVID-19 and a preclusion of in person hearings during the pandemic. Current hearings are via telephone or Microsoft Teams.
- Planning on having five meetings in the next CBA year.
- Possible joint meeting with other sections of the CT Bar.

Continuing Legal Education

DLS is planning a CLE at a 2022 meeting.

Legislative Efforts

This section supported HB-5606

AN ACT CONCERNING THE ELIGIBILITY FOR A DISABILITY ALLOWANCE UNDER THE TEACHERS' RETIREMENT SYSTEM. Be it enacted by the Senate and House of Representatives in General Assembly convened: That section 10-183aa of the general statutes be amended to permit a former teacher to apply for and receive a disability

allowance at any time, provided the disability began when such former teacher was an active member.

Statement of Purpose: To permit certain former teachers to apply for and receive a disability allowance at any time.

ELDER LAW SECTION

Chair: James L. Young, Jr.

The purpose of the Elder Law Section is to discuss and consider issues in elder law, promote the continuing education of CBA members and the general community, monitor and develop positions with respect to proposed legislation and regulatory action involving the elderly, and to foster relationships between attorneys and private, public, and governmental organizations dealing with the elderly.

James L. Young, Jr., Chairperson
Carmine Perri, Vice Chairperson
Kathleen Hayes, Treasurer
Scott Rosenberg, Secretary

This year the Elder Law Section of the CBA continued its policy of open meetings for all section members.

All of our meetings were held on Zoom, and attendance at the meetings frequently exceeded 100 persons, which is far above the attendance at our traditional dinner meetings at the Graduate Club in New Haven.

All members are continuously encouraged to join committees and have a more integral role in the Section.

Our Section continues to remain fiscally sound.

Legislative Committee

Co-Chaired by Carmine Perri and Kathleen Hayes

Our legislative efforts continued this year under leadership of Carmine Perri and Kathleen Hayes, with the substantial assistance of Nicole O'Connor especially in the early going of the session, among other members. The legislative session began as it usually does with testimony from various members. We continued our efforts with many of the same initiatives we have worked on in the past, including increasing the Community Spouse Protected Amount, increasing the Personal Needs Allowance, and retroactive eligibility for the Connecticut Homecare Program for Elders, and Medical Aid in Dying, among other initiatives.

SNF/ALF Committee

Co Chairs Sandra Sherlock White and Lara Stauning

The section created a new Committee, the SNF/ALF Committee, which is focused on the rights of those residing in these facilities and expanding through educational programs an awareness of the rights and also opportunities for advocacy for these persons. Among other things during the year, the Committee had a big part in the Section taking a position regarding the use of cameras and other electronic devices by residents in facilities, which helped lead to legislation.

Continuing Legal Education/Program Committee

Chaired by Tanya Spurlin

The 2020/2021 continuing education efforts continued under the strong leadership of Tanya Spurlin, with the support of many committee members.

Programs for the 2020/2021 years included:

1. September 2020 Probate Mediation – Presented by Paul Knierim and Bonnie Bennet
2. October 2020: Practical Medicaid Planning: Using Gifts and Medicaid – Compliant Annuities - Presented by Wade Jensen
3. November 2020: Advocating for Clients Living in Facilities – During the Covid Crisis and Beyond – Presented by Lara Stauning, Mairead Painter and Eric Carlson
4. December 2020: The Year in Review: Recent Developments in Contested Elder Law – Presented by Carmine Perri and Scott Rosenberg
5. January 2021: Drafting and Working with Wholly Discretionary Third Party Trusts – A Round Table Discussion. Presented by Joe Cipparone, Deb Tedford and Jim Funnell.
6. February 2021: Increasing the Asset and Income Limits for Community Spouses of a Medicaid Applicant: Presented by Steve Keough, Ruth Fortune and George A. Baker.
7. March 2021; Transfer of the Principal Residence to an Intentionally Defective Grantor Trust for Medicaid Purposes. Presented by Mark Dost and Suzy Walsh
8. April 2021: Preservation of the Estate Plan in the Face of Incapacity, Disruption and Avarice. Presented by Rebecca Iannantuoni and Charlie Pieterse.
9. May 2021. Attorney’s and Fiduciary’s Fees Incurred in Probating an Estate and Other Related Matters. Presented by Jennifer Reale and Andrew Knott.

Annual Legal Conference. The Section is also bringing forward a program for the Bar's 2021 Annual Conference "Advocating for Residents in Nursing Homes and Other Facilities" which will build upon and go beyond the Section program in November, 2020, to be presented by Julia Brown and Mairead Painter, and moderated by Lara Stauning.

FEDERAL PRACTICE SECTION

Co-Chairs: Adam S. Mocchiolo and James J. Healy

The Federal Practice Section (the “Section”) is involved with all aspects of practice in the federal courts in Connecticut. Working primarily with the federal district and magistrate judges, who are ex officio members of the Executive Committee, with the invaluable assistance of Clerk of Court Robin Tabora and Chief Deputy Clerk Dinah Milton Kinney, the Section seeks to create a forum for consultation and dialogue between members of the federal bar and the bench on issues of mutual interest, including rules and practice in the federal courts, relevant legislation, content for general meetings, presentations, and topics for the Section’s bench-bar conference. The Section takes an active role in shaping and commenting on legal and procedural developments affecting federal practice in the District of Connecticut.

Like many sections, the Federal Practice Section faced an unusual and challenging year. The Section was forced to reschedule its biannual Bench Bar Conference, which regularly includes panel discussions on timely legal questions, and provides an opportunity for the Court and the Section members to interact. We hope that the coming bar year will allow us to return to some of these in-person meetings and events.

On October 21, 2020, the Federal Practice Section’s Executive Committee met virtually to discuss planning and expectations for the unprecedented bar year ahead. Based on the feedback from the Executive Committee, and in concert with a report from Chief Judge Underhill on behalf of the Court, the Section elected to prioritize a more limited array of quality remote programs for the year.

On March 11, 2021, the Section convened a dual remote program with Connecticut’s most recently-appointed federal judges. The evening commenced with a State of the Circuit address from the Honorable William J. Nardini of the U.S. Court of Appeals for the Second Circuit. Judge Nardini reviewed the newest judges on the Circuit, described the Court’s approach to hearing arguments during the pandemic, and offered further updates on *en banc* proceedings and other notable events at the Circuit. Thereafter, the Honorable Kari Dooley of the U.S. District Court for the District of Connecticut sat for a remote interview with Attorney David Rosen. Following a regular tradition, Attorney Rosen interviewed the newest District Judge on a range of topics. The program was very well received.

The Section’s year will end with a remote program as part of the Connecticut Legal Conference on June 15, 2021. The “Candor to the Court” program will be a panel discussion featuring the various perspectives of the bar, the bench, and academia on the

interplay between the Connecticut Rules of Professional Conduct and common aspects of federal practice, such as discovery disputes, settlement negotiations, and motion practice. The speakers will be the Honorable Robert M. Spector of the U.S. District Court for the District of Connecticut, Dean Jennifer G. Brown of the Quinnipiac University School of Law, and Attorney David P. Atkins.

Current Officers

Adam S. Mociolo, Section Co-Chair, Pullman & Comley, LLC, Bridgeport

James J. Healy, Section Co-Chair, Cowdery & Murphy, LLC, Hartford

Allison Near, Secretary, Federal Defender's Office, New Haven

Craig Raabe, Treasurer, IZARD Kindall & Raabe LLP, West Hartford

Sherwin M. Yoder, Legislative Liaison, Carmody Torrance Sandak & Hennessey LLP, New Haven

FRANCHISE, DISTRIBUTION, AND DEALER LAW SECTION

Chair: Michael A. King

The Franchise, Distribution & Dealer Law Section seeks to promote the educational and professional objectives of the CBA within the practice area of franchise, distribution & dealer law, which include discussing and providing updates regarding current issues and events affecting this practice area and industry, educating the section membership about relevant legal issues affecting the practice area and industry, and fostering positive relationships among those practicing attorneys and other members of the section.

The section officers for the 2020-21 year were:
Michael A. King of Shipman & Goodwin LLP, Chair
Jaime Paoletti of Garcia & Milas, P.C., Vice-Chair
Robert Huelin of Wireless Zone, Treasurer
James T. Dowling-Healey, Legislative Liaison

Meetings and CLEs

November 12, 2020 - The FDD in the Covid-19 Era

The section started the year with a virtual section meeting in which Section Treasurer Rob Huelin, the Vice President of Legal and Compliance at Wireless Zone, and former Section Chair Allan Hillman of Garcia & Milas, P.C. discussed the Franchise Disclosure Document (“FDD”), the principal document that provides prospective franchisees with information about a franchisor, the franchise system, and franchise agreements so that franchisees can make informed business decisions. The presentation included an informative overview of the essential elements of the FDD, insights about the most recent developments from the North American Administrators Associations (“NASAA”), and practical advice for lawyers who represent both franchisees and franchisors.

January 14, 2021 - Law Firm Marketing and Client Development in Pandemic Times

Bethany Appleby, the founder (in a pandemic) of Appleby & Corcoran, LLC and former Chief Legal Officer of Subway Restaurants, led a discussion of tips, tricks, and observations about how law firms have reacted and adapted to the sudden and significant changes brought about by the global pandemic in terms of firms’ marketing and client development practices. The attendees reflected on how marketing has become harder in some ways, easier in others, and the value and permanency of certain changes.

March 8, 2021 - Accounting for Lawyers

The section sponsored a CLE program on accounting for lawyers by Robyn E. Gallagher, CPA, a litigator at Wiggin and Dana and formerly a senior accountant at Kosovsky, Pratesi & Company to help lawyers get up to speed on basic accounting concepts that come up in legal practice. This session covered accounting basics, such as how to read balance sheets, income statements, statements of cash flows, and notes to the financial statements; tips for recognizing and reading general ledgers and trial balances; a comparison of tax accounting versus book accounting; special issues relating to franchise revenues; using financial experts in litigation; and how to recognize when something has been modified after the fact (i.e., errors that shouldn't be there, balance sheets that don't balance, etc.). Our section members were also joined by members of the Litigation Section and the Young Lawyers Section.

May 11, 2021

In furtherance of its commitment to making diversity, equity, and inclusion (“DEI”) a priority, the section ended the section year with a presentation and discussion led by Joelle Murchison, the Executive Director of the Lawyers Collaborative for Diversity and the Founder and Principal of ExecMommyGroup LLC. The event included an overview of the diversity, equity and inclusion landscape today, its implications for the section, and a discussion around steps members can take to become more engaged in DEI to better serve their clients.

Diversity, Equity, and Inclusion Efforts

Shortly after the death of George Floyd, I reached out to section members to encourage them to ask themselves what more they can do to better serve our underrepresented communities and promote the public interest by advancing equal justice and protecting liberty, as the CBA has called on all of its members to do. I reaffirmed my commitment to take steps to make increased diversity in our section membership a reality, and I included links to the CBA’s “3 Ways to Help” webpage, encouraging our members to seek out opportunities to volunteer and make a difference in ways that are right for each of them.

Our final meeting of the section year was an important first step in putting our goal of prioritizing diversity and inclusion into action and not let these issues and related underlying racial inequities become issues that we just acknowledge as important without taking steps to grapple with them and make improvements in our organization and in ourselves. We plan to continue working with Joelle Murchison to make improvements to our section and plan future events that help raise awareness.

HUMAN RIGHTS AND RESPONSIBILITIES SECTION

Chair: Barbara J. Collins

The purpose of the Section is to promote the educational and professional objectives of the Connecticut Bar Association within the general field of civil and human rights and responsibilities, as well as the lawyer's role in the pursuit of such rights through the rule of law. The main forum for our efforts is the General Assembly.

Meetings

Meetings are always open to all members. In this age of Covid the Section met only via Zoom but regularly communicate with the members via email.

CLE

In 2020-21 due to covid and the lack of activity by the General Assembly, the Section concentrated on the watching covid actions by government to ensure equality in implementation so did not offer or co-sponsor any CLE.

Legislative Efforts

Due to covid, the Section had a very quiet year although we did successfully seek CBA approval on several pieces of legislation including Aid In Dying, Human Trafficking and a bill clarifying anti-discrimination law and the Commission on Human Rights and Opportunities enforcement procedures. The Section also sought approval to support the bill prohibiting genital mutilation, to support the prohibition while supporting exceptions to protect medically necessary treatment by qualified licensed medical providers and gender transition surgery and treatment. We also continue to monitor budget battles regarding state agencies in particularly the Commission on Human Rights and Responsibility (CHRO).

INSURANCE LAW SECTION

Chair: Theresa A. Guertin

The Insurance Law Section (the “Section” or “ILS”) includes approximately 200 members who represent the interests of insurance policyholders, insurance companies, defense counsel, and industry representatives. The purpose of the ILS is to promote the educational and professional objectives of the Connecticut Bar Association within the general field of insurance law, regulation, and practice.

Despite the difficulties posed by the COVID-19 pandemic, which eliminated the possibility of in-person meetings and events during the Section year, the ILS hosted robust programming and met on a regular basis. The Chair and other Section members kept in touch with one another about ILS events and other industry happenings via the CBA’s listserv.

2020-2021 Meetings and Events

The meetings and events held by the ILS this bar year included the following:

1. September 29, 2020 – Insurance Law Section Meeting & CLE Presentation: COVID Insurance Law Update, presented by section member Brian Clifford.
2. October 21, 2020 – Insurance Law Section Meeting & CLE Presentation: Your Online Mediation is Not Confidential, with guest speaker Jeff Kichaven.
3. January 12, 2021 – Insurance Law Section Meeting & CLE Presentation: ERISA, Anti-Subrogation, and Collateral Sources, presented by section Secretary John Pitblado.

The ILS had hoped to host a fourth event centered on a diversity and inclusion topic, but this was postponed due to various scheduling difficulties associated with the pandemic.

Lastly, the ILS proposed and presented a topic at the 2020 Virtual Connecticut Legal Conference titled “Coverage for An American Epidemic: Insurance Coverage Issues Stemming from Opioid Litigation.”

Plans for the Coming Bar Year

With the pandemic restrictions loosening, the ILS is excited to return to a mix of in-person and virtual events. The EC has been in discussion about having a social event to kick-off the Section year and have also considered how to increase participation from traditionally under-represented areas of the state (Stamford, the eastern shoreline) by hosting events in those vicinities.

The ILS will also host a panel discussion in the fall about the experiences of under-represented individuals (mainly women and people of color) in the insurance industry. The Section's Diversity liaison and Membership liaison are working to identify panelists for this event.

The ILS will also continue to partner with UCONN Law and the American College of Coverage Counsel if and when they resume in-person symposium type events. These events were cancelled in 2020-2021 due to the pandemic, but the ILS has historically been engaged with these groups and intends to stay involved through sponsorship and suggestion of speakers for participation.

Insurance Law Section – Executive Committee Roster for 2021-2022

Chair

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Treasurer

Josiah Tyler Butts
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INTELLECTUAL PROPERTY SECTION

Co-Chairs: John Cordani, Jr. and Mallory Hein

The purpose of this Section is to promote patent, trademark, copyright, trade secret, unfair competition, and other technology-related areas of the law.

The Section has held the following events/programs during this term:

- On January 19, 2021 the Section hosted an Intellectual Property Year in Review webinar program entitled “2020 SCOTUS Decisions and Other Landmark Cases.” The event offered 2.0 hours of CT and NY CLE.
- On April 6, 2021 the Section hosted a webinar program entitled “Patent Claim Drafting: Practical Prosecution and Portfolio Strategy Workshop.” The event offered 1.5 hours of CT and NY CLE.

The Section has begun planning two (2) CLE events to be held during the next term, one in early fall and one in mid-December.

In addition to the meetings held above, the Section held four (4) Executive Committee meetings during this term.

INTERNATIONAL LAW SECTION

Chair: Houston Putnam Lowry

The purpose of the Section of International Law is to promote the educational and professional objectives of the Association within the general field of international law, and to advance the lawyer's role through the rule of law, including Private International Law (including International Commercial Law, International Trade Law, International Commercial Arbitration, and International Family Law), and Public International Law (including International Human Rights Law).

Officers

Chair: Houston Putnam Lowry

Vice Chair: Thomas J. Welsh

Secretary/Treasurer: Paul B. Edelberg

Executive Committee

Houston Putnam Lowry

Thomas J. Welsh

Lorenzo Agnoloni

Daniel R. Cooper

Paul B. Edelberg

Committees

The following committees were appointed:

1. Legislative Committee Chair-Houston Putnam Lowry
2. International Human Rights Committee Chair-Lorenzo Agnoloni
3. Annual Meeting Program Chair-Daniel R. Cooper

Programs

- April 21, 2021 - A Brief Introduction to Islamic Finance Law by Daniel Cooper, Cooper & Kurz
- January 19, 2021 - Sportswashing: International Sports and Human Rights by Honorable Delissa A. Ridgway, Senior Judge, US Court of International Trade and Professor Simon Chadwick, Professor of Eurasian Sport Industry, Em Lyon Business School, Paris and Shanghai

- November 12, 2020 - The Business Lawyer's International Toolbox: Force Majeure Excuses for Contract Non-Performance – In an Age of Pandemic-Thomas J. Welsh, General Counsel, Nippon Steel Trading Americas, Inc. and Counsel, Updike, Kelly & Spellacy, P.C.
- October 7, 2020-Doing Business in the Asia-Pacific Region by James J. Doody III of Parallax Group
- September 22, 2020-Revamping Foreign Investment in the U.S. from a National Security Perspective by: Paul B. Edelberg, Fox Rothschild LLP

Legislative Positions Adopted

The section took the following legislative positions:

1. Support 2006 revisions to the UNCITRAL Model Law on International Commercial Arbitration (currently enacted in Connecticut General Statutes §50a-100, et seq)
2. Support ratification of Hague Convention on the Recognition and Enforcement of Foreign Judgments in Civil or Commercial Matters (July 2, 2019).
3. Support ratification of the Hague Convention on Choice of Court Agreements (June 30, 2005).
4. Support enacting a CT statute analogous to the Alien Tort Claims Act 28 USC §1350
5. Support a choice of law statute
6. UNCITRAL Model Law on International Commercial Mediation and International Settlement Agreements Resulting from Mediation, 2018

LITIGATION SECTION

Chair: Andrew Nevas

Article I, Section 2 of the bylaws of the Litigation Section of the Connecticut Bar Association, amended by the Board of Governors on September 16, 1996, provides that “the purpose of this section shall be to promote the objectives of the Connecticut Bar Association within the field of civil justice and litigation.” The Litigation Section views that directive as requiring regular Executive Committee/Section meetings between September and June designed to promote legal education, monitor and present positions with respect to legislative matters that have the potential to affect the administration or process of an effective and efficient civil justice system, enhance relationships between the bar and the Judiciary, and promote civility and professionalism in the practice of litigation.

Meetings

Six Litigation Section meetings were held, on October 29 (“Credibility in the Time of COVID-19”), December 10 (“Business Litigation 2020: The Year in Review”), February 11 (“The Pandemic Orders”), March 1 (“Bills Pending Before the Legislature”), March 8 (“Raised Bill 6548 re Jury Selection Task Force”), and April 21 (“A Conversation on Virtual Trials”). The final meeting of the year, June 10, will be a purely social gathering as we celebrate the end of the bar year and the easing of COVID restrictions. Our Biennial retreat at the Chatham Bars Inn was postponed due to COVID from May 2021 to May 2022.

CLE

We presented a CLE program for the Connecticut Legal Conference in September 2020 entitled “Working With 21st Century Clients.” The program focused on the fact that clients today have much different expectations than clients did a generation or two ago. Attendees learned from industry leaders in law and technology how to meet and exceed those expectations. Attendees also learned how to anticipate, meet and exceed the evolving expectations that clients have of lawyers in the 21st century - from alternate fee arrangements, to 24/7 availability to cutting edge technology, and everything in between. We will also be presenting a CLE program for the Connecticut Legal Conference in June 2021 entitled “21st Century Litigator: How to Take Depositions, Use Them at Trial, & Get Evidence Admitted in the Age of Remote Depositions & Trials.” Attendees will learn how to properly take a deposition, as well as how to use the deposition at trial, as well as common evidentiary issues faced at trial, including impeaching witnesses, refreshing witness recollection, and admitting exhibits, and about new issues raised by the proliferation of zoom depositions and trials, such as how to cross examine and judge the credibility of a masked witness. Any litigator, whether fresh out of law school or seasoned, will benefit from this session, which will include new issues which have arisen in this era of remote witness examination.

Legislative Efforts

The Section's Executive Committee held a telephonic meeting on August 27 to discuss, inter alia, the proposed amendment to Rule 8.4 of the Rules of Professional Conduct to forbid harassment and discrimination in the practice of law. The Committee voted to adopt a position supporting that amendment. At our March 1 and March 8 meetings, the Section considered various bills pending before the Legislature, including those arising out of the recommendations of the Jury Selection Task Force. The Executive Committee also held a telephonic meeting in March 8 to discuss the findings of the Jury Selection Task Force.

Development and Implementation of Diversity and Inclusion Plans

The Section worked throughout the year to implement the new provisions in our bylaws which were adopted in 2019 adding sections reiterating the CBA's commitment to diversity, and committing to appoint members of the Young Lawyers Section to the Executive Committee. In addition to amending our bylaws to ensure that members of the YLS are on our Executive Committee, we have redoubled our efforts have YLS members attend and participate in our meetings, and will create a YLS subcommittee for our section. As noted above, we also supported the adoption of the amendment to Rule 8.4 to forbid harassment and discrimination in the practice of law.

MEDIA AND THE LAW SECTION

Chair: Greg Kanaan

The Media and the Law Section aims to provide a forum for CBA members to discuss and take action on legal issues related to the media, journalism, social media, and entertainment industries. The section will explore a wide variety of topics, including First Amendment and FOIA issues, privacy protection for individuals, the rights and protection of journalists, and the intersection of digital and social media in our culture.

Programs and Events

In the 2020-2021 bar year, the Media and the Law Section held several CLEs. In June 2020, we held a well-attended CLE entitled FOIA in the Pandemic Age about FOI changes as a result of COVID-19 pandemic. In July 2020, we held a CLE entitled Media Training for Lawyers which taught attorneys how to interact with reporters and other media. In December 2020 we held a CLE entitled Connecticut's Police Reform Bill and Access to Police Records which dealt with FOI implications of the state's new police reform accountability bill. We scheduled a redux of the Media Training for Lawyers CLE in May 2021 but were forced to postpone it due to lack of registrations. We intend to hold the training over the summer, if possible. We've also had smaller discussion topics in our meetings lately, including discussions on supporting bills to open up court hearings to the public and on the CT State Legislature's move to an entirely virtual session.

There have been other events or talks based on proposals from the members, though all are early planning stages. With no confirmation that in-person events will resume this summer or fall, the section intends to plan upwards of five virtual events between now and next summer.

Section Communications and Meetings

As Chair of the Section, I communicate with my section predominantly via Sidebar, but I've also communicated over email, over the phone, and during our virtual meetings. I also communicate with the section via two newly created social media handles: CTBarMediaLaw on Twitter and Facebook and post articles, news items, and events relevant to the section's topics.

This year we have held three Executive Committee meetings in November, January, and March). We have also held five Section meetings in September, November, February, March and May. All meetings were held via Zoom video conference.

Executive Committee and Section meeting minutes have all been submitted to the CBA.

Other Items

The Section has not issued any publications or engaged in any legislative efforts this year. As with last year, this was very much a rebuilding year for the section and getting things moving. My goal this past year was to continue on the rebuilding effort by hosting regular meetings, planning and hosting multiple CLEs, and opening meetings for discussion topics related to the section's interest.

Attendance at meetings has been small but with a committed group of regulars. The Section has made diversity a cornerstone of its new direction, placing women in positions of authority on the Executive Committee and increasing the female membership of the section. One of our goals in the 2021-2022 year is to work with the CBA to increase the diversity of the section by including more female attorneys and attorneys of minority background. It is also a goal to bring in younger attorneys who can see the section through the next round of growth.

This was my last year as Section Chair so it was important to be able to provide value in the form of CLEs and interesting meeting discussion topics. I think we're getting there and I'm proud that I'll be handing off the section soon to a new Chair who can then take what I've done and expand it. The Vice Chair and Secretary are both staying on for another year and we have an excellent Chair lined up for the 2021-2022 bar year.

PARALEGALS SECTION

Chair: Regina Graziani and Vanessa Laro

The purpose of the Paralegals Section is to disseminate information to attorneys regarding the paralegal profession, to publicize issues of importance regarding this profession, to encourage attorneys to practice with qualified paralegals in order to lower costs, and to improve the quality of service to clients.

The Paralegals Section's priority for this bar year was to continue and build upon our action plan from last year – continued provision of high-quality, cost-effective CLE programs for our members, continued development of a voluntary regulation plan for qualified paralegals in this state, as well as a plan for limited licensing of legal professional in response to the access to justice gap, outreach to ABA-approved paralegal education programs, recruitment and development of a diverse group of leaders to represent the section, improved access to our educational programs, business meetings and networking opportunities to paralegals throughout the state, and promoting pro bono initiatives.

While this year brought many challenges operating in a fully virtual space due to COVID. we still achieved success on all fronts:

- We have continued to work with the Education Director at the CBA to accommodate educational programs designed for paralegals within the new MCLE rules for attorneys.
- We designed two educational programs for paralegals and attorneys presented via Zoom—one was a program presented by a member of the Elder Law Section on estate planning, and our other event was a presentation on legal technology, depositions and video conferencing from a company that has worked in the legal community for many years.
- We sponsored a full-Bar virtual CLE with the Solo and Small Practice Section featuring a presentation by Michael Whitehouse and Attorney Regina Graziani on the importance of networking and building connections.
- We also joined other Sections this legislative session in presenting our Section's position in opposition to proposed legislation relating to remote notarization.
- We have continued work on access to justice initiatives including researching and promoting paralegal regulation and licensing initiatives. This year these efforts

included work a couple of our members have been doing as part of the State of the Legal Profession Task Force.

- Two of our members were also nominated for and later appointed to positions within the National Federation of Paralegal Associations, Inc. This has led to our members being asked to join additional committees and speak at national events. Having this involvement in this national organization further promotes the work of and opportunities for our paralegal members.
- We have continued our outreach efforts to Connecticut's ABA approved paralegal degree and certificate programs.
- With restrictions that were instituted due to COVID we offered zoom conferencing for all of our meetings, including those involving speakers.
- Two of our Executive Committee members are serving as members on the Pro Bono Committee, allowing us to offer our voice as to how paralegals can be utilized for pro bono activities. One of these members has continued her work from last Bar year leading a Committee initiative in planning two two-day pro bono events held in the Spring and again during Pro Bono Week in the Fall and training the paralegal and law student volunteers doing client intakes. We are also working on additional pro bono efforts involving utilization of paralegal members. This is a cause the Section plans to continue to promote into the next bar year and will encourage additional member participation.
- We've continued to work to be inclusive of the full diversity of our section and to create opportunities for different members to contribute through activities ranging from suggesting and introducing our speakers, to reaching out to educational programs in the state, working on regulation and licensing proposals, and working on ad-hoc committees.

VETERANS AND MILITARY AFFAIRS SECTION

Chair: Cinthia Johnson

The Veterans and Military Affairs Section (VMAS) is to be available to (1) coordinate CBA legal assistance to military personnel residing in the state of Connecticut, CBA legal assistance to Connecticut residents serving as military personnel stationed outside the state, and CBA legal assistance to the military legal assistance staffs which serve them; and (2) assist in resolving legal problems facing any of (a) Connecticut's veterans, and (b) active-duty, reserve, national guard, and state statute-established militia, military personnel. It is the further purpose of this section to support the mission of the association by promoting best practices in legal research and advocacy as they apply to the preceding listed purposes.

The VMAS held bi-monthly via Zoom for this Bar year. This year we prioritized speakers and CLE opportunities. Speakers that presented out our meetings were:

- Dr. Brim – Psychologist with Center for Deployment Psychology
- Sen. James Maroney – reviewed Veteran Committee Legislative Priorities
- Atty. Sarah Spodick – Director of Quinnipiac Tax Clinic
- Atty. Eugene Fidell – Discussed priorities of the incoming administration
- Atty Jason Thomas – Discussed Veteran Treatment Courts in MA

Court of Appeals for the Armed Forces

The CBA and VMAS hosted a virtual swearing in ceremony for the Court of Appeals for the Armed Forces on March 16th. Eight Connecticut Attorneys were admitted.

CLE

The VMAS hosted Intermediate VA Benefit training on December 3, 2020. The training was done virtually and Connecticut Veterans Legal Center provided the instruction.

Legislative Efforts

The Section monitored all legislation affecting veterans and took a position in favor of SB 918, a bill to increase access to CT veteran benefits.

Sub-Committees

The Executive Committee met two times to plan future Section activities

Volunteer Activities

The VMAS continued its support the veteran community but working for find volunteer attorneys to help on requests for legal services that come to the Section. The section

continued to spread the word through contact and participation in activities such as the Veterans Stand-down.

Synergy

November 10th 2020 was a joint meeting between the Veterans and Military Affairs Section and the Disability Section. Both sections learned about Post-Traumatic Stress from Dr. Brim, a psychologist with the Center for Deployment Psychology

WORKERS' COMPENSATION SECTION

Chair: Colette Griffin

This section aims to organize the members of the CBA who are workers' compensation practitioners and to educate all members of the bar from all sides at all levels of expertise as to workers' compensation law. Furthermore, the section attempts to provide services to organizations other than the CBA when those organizations are involved in the Connecticut Workers' Compensation system. The section works with all levels of government in an effort to improve the system. The Executive Committee will take positions on pending legislation where appropriate. It will work through committees on various issues that arise in the practice such as amicus briefs, creating new and exciting continuing legal education, and producing our publication Compensation Quarterly. The committee works with the commission giving feedback on issues affecting day-to-day practice of the parties that appear before the commission as they arise. The section consists of members who represent injured workers, employers and insurers as well as the State of Connecticut and the Second Injury Fund.

Events

Throughout the CBA year, Chair, Colette Griffin, attended CBA meetings on the CBA COVID-19 response reporting results to the section.

September 2020

CT Legal Conference. (First ever virtual CT Legal Conference)

Annual Section Meeting – Current Issues in the WC System

We began with an update regarding the Workers' Compensation Commission by Chairman Stephen Morelli. Jack Clarkson presented his annual CRB and appellate case review with commentary, and Lucas Strunk provided a legislative update. Dr. William Shaw of REACT also provided background and information regarding REACT.

3rd Annual Joint Seminar with YLS

Young lawyer Alessandra Carullo teamed up with WC Executive Committee to present How to Use the Official Connecticut Fee Schedule For Hospitals and Ambulatory Surgical Centers – A Primer for Attorneys" with special guest speaker, Emily Casey of Tobin Carberry O'Malley Riley Selinger, P.C.

September 17, 2020

Belkin-Verilli Charity Golf Tournament and Section Meeting Dinner at Shuttle Meadow Country Club in Kensington. Over 100 hundred golfers participated in this event. Registration fees covered expenses, but hole sponsorship, contests, and raffles raised over \$9,600.00 for Food Share and Food Bank. Several current and former Commissioners attended the section meeting dinner. Despite COVID, the event was tremendous.

September 23, 2020

Workers' Compensation Executive Committee Meeting via Zoom. All committee reports were made.

October 2020

Our October medical/legal conference was put on hold due to COVID 19 restrictions.

November 13, 2020

WC Section presented a webinar: Unmasking changes. New issues in workers' compensation created by COVID 19 Executive Orders. Discussed Governor Lamont's Executive Orders created novel legal issues for workers' compensation practitioners. The seminar was designed to assist with the issues.

November 18, 2020

Executive Committee Meeting, via Zoom given the COVID 19 restrictions. In addition to our usual committee reports, the committee discussed Pomeranz/O'Brien awards, by-laws with inclusion provisions and upcoming webinars.

January 21, 2021

Workers' Compensation Executive Committee Meeting via Zoom. In addition to our usual committee reports and discussion there was a discussion regarding upcoming legislation.

February 11, 2021

WC Section presented a webinar: Unpacking Apportionment: Mages Tricks to Pull out of a Hatt. Charlene Russo moderated with Cori-Lynn Webber and Jack Clarkson as speakers.

April 21, 2021 (Held Remotely)

Workers' Compensation Executive Committee Meeting.

May 2021 Retreat

(ONCE AGAIN POSTPONED DUE TO COVID 19)

Future Planned Events:

June 12-14, 2021

Connecticut Legal Conference

Annual Section Meeting

The agenda includes a State of the Commission address by Chairman Stephen Morelli, Jason Dodge's annual CRB and appellate case review with commentary, and Lucas Strunk's legislative update. Dr. Steve Banach, infectious disease doctor, will present on COVID-19.

September 9, 2021

Belkin-Verilli Charity Golf Tournament and Section Meeting Dinner at Shuttle Meadow Country Club in Kensington.

Date to Be Determined (October/November)

Fall full day medical/legal seminar dependent upon COVID 19 restrictions.

Subcommittee Activity:

Charitable Committee

The section donated over \$9,600 to Food Share and Food Bank from proceeds of the golf tournament. This committee also oversees the funding and awarding of scholarships from the Mathew Shafner Injured Worker Scholarship Fund. The committee expanded the definition of students who would qualify for this scholarship and renewed efforts to publicly advertise this opportunity.

CLE Committee

This committee is chaired by Donna Civitello, the vice-chair of the section. Under her direction, our CLE programs were hugely successful again this year. (See "Events" above.) Our section will organize five CLE programs: (1) our annual section meeting at the CT Legal Conference; (2) a joint program with the YLS immediately before or after the annual meeting; (3) a full-day Fall program, usually with a medical-legal focus; (4) a 3-day Workers' Comp Retreat; and (5) a half-day Spring seminar, usually with a practice focus.

Compensation Quarterly

Since December 1990, CQ has been the crown jewel of the WC Section. Frank Costello is its editor-in-chief. It is frequently at the center of conversation among lawyers at the district offices before and between hearings. Every issue contains legislative updates, case summaries, tech tips, interviews, point-counterpoint, a chair's column, as well as topical articles

Legislative Liaison

Lucas Strunk continued as our legislative liaison. He monitors and reports on developments at the Capitol. This year he was kept busy with undue delay legislation and an undue delay task force. More recently, a number of WC bills continue to progress through the legislative process, SB351 that contains proposals from both the WC section and the WC commission.

Legislative Initiative

Immediate past chair, Bud Drapeau, created a committee of pre-eminent WC attorneys to address necessary changes in the Act. The section has once again moved forward with a legislative agenda that proposes the repeal of three obsolete statutes. As of this submission,

the minor technical changes bill is working its way through the legislature. There is hope of passage this legislative session.

Medical/Legal Cooperative

Colette Griffin, Mike Kerin and Lawrence Morizio co-chair this committee, which meets with doctor groups to educate them as to medical-legal issues in WC and to gain feedback from the doctors as issues that they have with the WC bar, the commission, or the system. As a result of COVID restrictions in person meetings have been curtailed.

Membership Committee

The committee continues to find ways to build our membership. This year it asked the CBA to identify attorneys who had attended our events in the past three years, but who were not section members. The committee also reaches out to test drivers to encourage an ongoing commitment to the section

Examining Committee/Standing Committee

The committee hopes to have six candidates who qualify to sit for the exam, so the examining committee may administer an exam this year. Attorney Greg Lisowski has been added to the Standing Committee and Attorney Andrew Morrissey to the Examining Committee.

Pomeranz-O'Brien Award Committee

This committee is chaired by Bud Drapeau who is ready to accept nominations for this achievement award. The committee is working on adopting some language in an effort to add clarity and transparency to the role of the nominating committee and the process generally.

Verrilli-Belkin Tournament Committee

Rick Aiken again organized this incredibly successful event, which saw over 80 golfers participate at Shuttle Meadow Country Club in Kensington. Registration fees covered expenses, but hole sponsorship, contests, and raffles raised about \$9,600 for Food Share and Food Bank. Several current and former commissioners attended the section meeting dinner afterward, which addressed current financial issues impacting the commission. This 2021 tournament will also be held at Shuttle Meadow in September.

Website/Technology Committee

Scott Carta, Maribeth McGloin, and Tushar Shah completed a monumental project of collecting all issues of Compensation Quarterly, from December 1990 to the present, and working with the CBA to put them all on to the section web page in a searchable OCR format which eventually only current section members can access. The next project is producing short video discussions of recent state Supreme Court decisions.

Workers' Compensation Retreat

Jeremy Brown organizes an annual retreat alternating between remote locations in the even years and more local (driving distance) locations in the odd years. 2019's retreat was a huge success with 72 practitioners traveling to Chatham Bars Inn on Cape Cod for a three-day event in May which included CLE and comradery. The 2020 event at Walt Disney World at

the Dolphin Resort in Orlando, Florida was curtailed by COVID 19. We are planning our next retreat to be held March 2022 in Stowe, Vermont.

Bylaw Committee

Bob Bystrowski headed up the bylaw committee bringing the Workers' Compensation Section bylaws into compliance with the diversity and inclusion policies of the CBA.

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CIVICS EDUCATION COMMITTEE

Chair: Jonathan Weiner

The Civics Education Committee is charged with the advancement of citizen knowledge and understanding of government, with an emphasis on educating young students and teachers.

The Civics Education Committee, energized by an infusion of active and engaged new members, organized two major programs this year, both of which were held virtually because of the COVID-19 pandemic. Our first program was a Lunch and Learn CLE program that marked the first annual bar-wide celebration of Constitution Day, which is a federal observance that takes place each year on September 17 to commemorate the Founding Fathers' signing of the United States Constitution on that day in 1787. This event, "*Bush v. Gore* at Twenty: Lessons for the 2020 Election," was held on Tuesday, September 29, 2020. Our featured speakers were Professor Douglas Spencer from the University of Connecticut Law School, and Secretary of State Denise Merrill. They discussed the lessons to be drawn from the United States Supreme Court's decision in *Bush v. Gore* as they might apply to specific disputes that were expected to arise from the 2020 Presidential election.

Our second program was the Annual Law Day celebration, which was held on Friday, May 7, 2021. Given continuing Covid restrictions, this was again a statewide program, which was co-sponsored by the Connecticut Bar Association, the Danbury Bar Association, the Hartford County Bar Association, the Litchfield County Bar Association, the New Haven County Bar Association, and the Windham County Bar Association. The program began with welcoming remarks from CBA President Amy Lin Meyerson, followed by inspiring readings of landmark writings on the rule of law by five middle school students, Amalia Morizio (daughter of Civics Education Committee member Lawrence Morizio) and Anna Hansard from North Haven Middle School, and Julianna Farquharson, Claire Flynn and Grace Piccioli from Sedgwick Middle School in West Hartford. Continuing our relationship with the Connecticut Appellate Court, which has hosted Law Day ceremony for many years, Appellate Court Judge Michael Sheldon was our keynote speaker, and he addressed the 2021 topic, "Advancing the Rule of Law, Now!" Drawing on his work on exchange programs with the judicial systems of other nations, Judge Sheldon's remarks contrasted the American legal institutions, such as the jury and judicial review, with those of other nations. After Judge Sheldon's remarks and a lively question/answer session, the Litchfield County and Hartford County Bar Associations recognized several outstanding attorneys and judges as Liberty Bell honorees for their personal contributions to advancing the rule of law and access to justice, including CBA Past President Karen DeMeola, Margarita Charleton, and Judge Jack Pickard.

Beyond the major programs, the Civics Education Committee also actively supported proposed legislation that would have organized a statewide task force on civics education,

with committee chair Jonathan Weiner testifying before the Joint Education Committee. Members of the Civics Education Committee actively continued their other efforts to promote education about law and government in schools around Connecticut, by serving as coaches, organizers, and judges for the Civics First mock trial and debate programs, and visiting schools virtually, some via participation in the Young Lawyers Section's Lawyers in the Classroom program. The committee recognizes Lawrence Morizio and Leland Moore for their leadership in classroom visitation.

Finally, the Civics Education committee gratefully acknowledges the many years of contributions of Judge Susan Handy, who is retiring from the committee this year. Judge Handy, who was honored several years ago as a Henry B. Naruk Judiciary Award winner in part for her work in advancing civics education, has been instrumental in preparing school students for their roles in our Law Day celebrations. We will miss Judge Handy's efforts, insights, and friendship, and wish her a wonderful retirement.

CYBERSECURITY AND TECHNOLOGY COMMITTEE

Co-Chairs: Dena M. Castricone and James P. Sexton

The mission of the Cybersecurity and Technology Committee is to educate CBA members on: (1) the ever-growing risks that lawyers and law firms face from cybercrime, phishing, data breaches, fraudulent wire transfers and other common types of cyber-wrongdoing and cyber-incidents; (2) applicable data privacy laws; and (3) the use of technologies and virtual platforms to increase access to justice, improve business operations and mitigate cybersecurity and data privacy risks. The committee analyzes how such issues can impact solo practitioners as well as lawyers practicing at small, medium, and large law firms, including the ethical canons governing lawyers as they relate to cybersecurity, privacy, and technology and how lawyers can meet existing and emerging legal obligations and client expectations in this area.

Committee Meetings

Since the current co-chairs took over at the beginning of the calendar year, the committee held one general membership meeting and has planned to meet every other month on the third Thursday going forward (July 15, September 16, November 18, 2021). With respect to the meeting earlier this year:

May 20, 2021

The committee met for the first time in several months due to change in committee leadership. The meeting focused on:

- Pending privacy and cybersecurity legislation.
 - How the committee can assist members with understanding and complying with any new laws, including by partnering with the Judicial Branch to develop a standard cybersecurity framework that is both based on a recognized standard and specifically tailored to legal practices. This concept is related to HB 6607, which passed the House and is likely to become law.
 - General discussion regarding other possible CLE programs in the fall to educate on new laws regarding relevant to cybersecurity developments.
- The upcoming CLC cybersecurity and technology session, which is being co-sponsored by this committee and the Young Lawyer's section. See details below.
- Ideas for CLE programs related to developing legal technologies, as well as partnering with federal and/or state agencies to facilitate additional educational opportunities in cybersecurity.
- Meeting schedule for the remainder of the year

CLE Programs

The section helped organize two CLE programs. Since many of the committee members also participated on the COVID-19 Technology Task Force, which offered many programs through the pandemic, committee activity was not as frequent.

Webinar: Incorporating Privacy Compliance into Your Practice (May 29, 2020)

This program provided an overview of the legal landscape in privacy such as the NY Shield Act, GDPR, and CCPA, examined Connecticut's privacy laws, outlined best practices for compliance, and reviewed ethical considerations related to privacy.

Speakers:

Dena M. Castricone, DMC Law LLC, North Haven
Kristine Saul, Senior Privacy Counsel, PayPal, Inc.
Joseph V. DeMarco, DeVore & DeMarco LLP, New York, NY

CLC Session: Data Privacy Laws and How They Impact Your Clients (June 17, 2021)

This session will explore data privacy laws not just in Connecticut, but across the globe and touch on how the changing landscape impacts not just your business but also clients' businesses.

Speakers:

Dena M. Castricone, DMC Law, LLC
Joshua J. Devine, UnitedHealthcare
Tara L. Trifon, Locke Lord LLP

Other Initiatives

Vendor Due Diligence Guidance

As noted above, the committee prepared and published a list of considerations for lawyers and law firms to use as guidance when selecting a vendor, including cyber and technology related vendors. Although all firms should create a vendor due diligence questionnaire tailored to meet their specific needs, this guidance provided a sample of some basic, broadly applicable vendor due diligence questions. We released this guidance document just before the pandemic and fear that it got lost in the chaos. We will be revising and recirculating this guidance as it continues to be important for all members.

COVID-19 Taskforce

Representatives from the Cybersecurity and Technology Committee served on the CBA's COVID-19 Taskforce. Among other things, those representatives and other Cybersecurity and Technology Committee members provided guidance and a CLE webinar on cyber security risks, they provided guidance on technology and risks associated with working from home, they provided, and continue to provide guidance on virtual platforms for depositions, court hearings, etc. and they provided a number of resources to practitioners as well as contributions to the CBA's COVID-19 resource page.

LAWYER WELL-BEING COMMITTEE

Co-Chairs: Traci Cipriano and Tanyee Cheung

The Lawyer Well-Being Committee is charged with improving the well-being of lawyers in the state of Connecticut.

The Lawyer Well-Being Committee actively promoted lawyer well-being throughout the year, spearheading the development and implementation of the CBA Well-Being Pledge, providing regular features in *The Docket*, offering presentations and CLE workshops, leading CBA Well-Being Week, and writing articles for *CT Lawyer Magazine*. Meetings and events were all held virtually via Zoom due to the COVID-19 pandemic.

CBA Well-Being Pledge

The major on-going project of the committee this year was initiating the CBA Well-Being Pledge, spearheaded by co-chair Traci Cipriano, with the help of committee members Dan Horgan and Sara Bonaiuto. The committee drafted its own Pledge Commitment, including pledge criteria. Each April, law firms are invited to committee to as many, or as few, items as they believe they can reasonably accomplish in the coming year. The Pledge also includes space for writing out 2-3 objectives for the coming year to enhance well-being goals committed to in the Pledge. The following April, firms are invited to re-commit to the Pledge, with the idea being the number of goals pledged will increase over time.

In addition, law firm well-being leaders will be asked to fill out a Pledge Progress Form to rate how well their firm progressed on each Pledge goal over the course of the prior year, using a rating scale. Similarly, associates and staff will also have the opportunity anonymously complete separate but identical Pledge Progress Forms, as a measure of accountability. Data from the Pledge Commitment and Pledge Progress forms will remain confidential. The CBA will consider releasing aggregate data without any identifying information when and if participation in the CBA Well-Being Pledge grows to include several firms.

Well-Being Week Campaign

For the 2020-2021 bar year, the Wellbeing Committee hosted a week of wellbeing events during legal wellbeing week, organized by co-chair Tanyee Cheung and committee member Sara Bonaiuto. The events included a group hike, virtual yoga class, Mindfulness Based Stress Reduction training and several presentations, including an over-view of the multidimensional aspects of well-being, ethical considerations related to well-being, nutrition, and mindset. We provided useful tips and suggestions for action. We urged

practices and firms to take the Connecticut Wellbeing Pledge to show our collective efforts at creating a healthier work environment.

The Docket

The Committee provided content for a well-being feature in The Docket e-newsletter at least twice per month. Committee members (David McGrath, Cody Guanieri, Karen DeMeola) wrote brief articles sharing their own well-being story or were interviewed (Judge Trial Referee John Danaher, Regina Wexler) by co-chair Traci Cipriano for a feature in the e-newsletter, again sharing their well-being story or journey, including learning to appreciate the vital importance of sleep, and coming to appreciate walks outdoors in nature. In addition, brief articles were written by co-chair Traci Cipriano throughout the year on managing stress and uncertainty, including, dealing with the aftermath of Tropical Storm Isaias, managing back to school worry, identifying burnout, the importance of hope and resilience, as well as features on suicide prevention, alcohol awareness, a holiday season well-being challenge, and informational updates related to committee activities at CLC 2020, CLC 2021, and Lawyer Well-Being Week.

Collaborations

Young Lawyers Section: The LWBC invited participation of a YLS Liaison to the Committee, Sara Bonaiuto, and throughout the year collaborated with YLS. Both LWBC co-chairs presented at YLS meetings in early 2021, and YLS co-sponsored the LWBC's Lawyer Well-Being Week in early May 2021.

COVID-19 Pandemic Task Force: The LWBC provided a liaison to the Task Force (Traci Cipriano) designed to support CBA members during the early stages of the pandemic. Dr. Cipriano participated in the weekly town hall meetings by providing relaxation interventions, and education on stress and uncertainty and how to manage it.

CE Workshops and Presentations

- CBA President's Wellness Retreat, August 2020 — The originally planned spa retreat became a virtual event as a result of the pandemic. Jen Dankoski led participants in meditation and yoga exercises, Stuart Edelstein presented well-being tips, Tanyee Cheung presented on the benefits of meditation, Traci Cipriano provided a closing remarks addressing the events of 2020 and the importance of self-care.
- CLC September 2020 – Tanyee Cheung, JD, The Business Case for Lawyer Well-Being, and Traci Cipriano, JD, PhD, Mental and Physical Endurance in 2020: Dealing with Uncertainty
- YLS Meeting January 2021– Traci Cipriano, JD, PhD, presented on managing stress and uncertainty
- YLS Meeting March 2021– Tanyee Cheung, JD, and Sara Bonaiuto, JD, presented on time management and productivity

- Lawyer Well-Being Week Presentation 5/3/2021 – Traci Cipriano, JD, PhD, presented on the multidimensional aspects of individual and organizational well-being and their impacts on physical and psychological health and healthy work environments. She also highlighted the CBA Well-Being Pledge.
- Lawyer Well-Being Week Presentation 5/3/2021 – Cindy Cieslak, JD, presented on self-care as a professional responsibility
- Lawyer Well-Being Week Presentation 5/4/2021 –Siena Loprinzi, yoga instructor, provided a yoga workshop
- Lawyer Well-Being Week Presentation 5/5/2021 –Sara Soyeju, presented on nutrition
- Lawyer Well-Being Week Presentation 5/6/2021—Anne Dutton, LCSW, provided a Mindfulness-Based Stress Reduction workshop, with both educational and experiential components
- Lawyer Well-Being Week Presentation 5/7/2021 – Tanyee Cheung, JD, and Sara Bonaiuto, JD, presented on the importance of mindset in leading a healthier lifestyle and being more productive
- CLC June 2021 (pending) - Well-Being is Here to Stay: Large and Small Firm Models for Changing Culture to Promote Mental and Physical Health, and Productivity.
Moderator: Traci Cipriano, JD, PhD, Co-Chair, CBA Lawyer Well-Being Committee; Owner, Traci Cipriano, JD, PhD, LLC.
Presenters: Robin Belleau, JD, LCPC, Director of Well-Being, Kirkland & Ellis; Krista Larson, MAPP, Director of Employee Well-Being, Morgan Lewis; Tanyee Cheung, JD, Co-Chair, CBA Lawyer Well-Being Committee; Partner, Finn Dixon & Herling.

CT Lawyer Magazine

- November/December 2020: The Importance of Self-Care and Workplace Culture in 2020, Traci Cipriano
- July/August 2021 (in press): Lawyer Well-Being Pledge and Awards: Motivating Legal Employers to Embrace and Promote Positive Change, Traci Cipriano

Meetings (via Zoom):

Meetings were held via Zoom due to the COVID -19 pandemic. At our first meeting, on September 9, 2020, one member raised the issue of meeting times and members agreed to change the meeting time to a mid-day/lunch-time meeting from an evening meeting, to help promote LWBC members’ work-life balance.

September 9, 2020

October 7, 2020

November 18, 2020
February 10, 2021
March 4, 2021
April 8, 2021
June 2021 (date TBD)

MEMBERSHIP COMMITTEE

Co-Chairs: Sarah Gruber and Scott Schwefel

The Membership Committee shall have between five and seven members who shall be appointed by the President to staggered three-year terms, and shall include a member of the House of Delegates and a member of the Young Lawyers Section. The Executive Director shall be an ex-officio member. The Committee's duties shall include the promotion and reaffirmation of membership in the Association by, among other approaches, affirmatively reaching out to the diverse lawyer population of Members and potential members. Consistent with the purpose of the Association, the Committee should advocate the highest level of professionalism, emphasize the common interests of the members of the profession, and foster inclusion within the Association of a broadly diverse membership.

The Membership Committee had another productive bar year despite the pandemic and continued shutdown for most of the year. In addition to its perennial undertakings, the Committee, distributed its member-wide survey and developed an analysis of the responses. The analysis and recommendations are described, *infra*, in this report.

The 2020-2021 Membership Committee consisted of the following members: Co-Chair Sarah Gruber, Co-Chair C. Scott Schwefel, Jonathan Weiner, Jonathan Shapiro, Leland Moore, Garlinck Dumont, and Sara Dickson. Executive Director Keith Soressi, CBA President Amy Lin Meyerson, President-Elect Cecil J. Thomas, Vice President Daniel J. Horgan, and Past-President Ndidi Moses served as members ex-officio of the Committee. Staff advisors included Carol DeJohn and Corrine King. The Membership Committee remotely met four times throughout the bar year to review proposals and develop projects to serve the current members and ensure the association provided as much value as possible so as to both retain current members and obtain new members.

The Membership Committee reviewed and evaluated existing benefit programs for association members, and made recommendations to the CBA staff on changes and additions to current benefits. The Committee reviewed more than seven proposals from potential member benefit providers and voted to approve several new member benefits. Among the new member benefits added were Assured Enterprises, Inc., Axel, Barker Specialty Company, LEAP Group Holdings, Inc., Tracers, U.S. Attorneys.com, and We Care Computers, LLC. Additionally, the Committee voted to renew several existing benefit providers, including ABA Books, ABA Retirement Programs, ABC Language Services, Bank of America Merchant Services, Citizens Bank, CosmoLex, Hotel Engine, Idea Company, Janco Business Systems, MyCase, Paychex, and Ruby Receptionist. Additionally, the Committee discussed providing discounted health insurance as a future member benefit. The Committee encourages

members to visit <https://www.ctbar.org/members/membership-benefits> to take advantage of the wide array of discounted services and products offered.

While the continued pandemic and shutdown prevented indoor events, the Committee organized several association-wide events including shredding trucks in December and May with Westport and West Hartford locations. The Committee also organized numerous virtual events including “Name That Tune Bingo.” The Committee looks forward to resuming in-person and indoor gatherings next bar year. The chairs expect next years’ membership appreciation events to include receptions, complimentary headshots, and luncheons.

The Membership Committee continued to evaluate a proposal for an association-wide dues restructuring, which was an initiative carried over from several previous bar years. The Committee determined that evaluation of a dues restructuring would be challenging given the changing financial circumstances occasioned by the pandemic, and decided not to propose a restructure to the House of Delegates this year. For similar reasons, the Committee decided to postpone deliberation on proposals to provide unlimited continuing legal education programs for an additional fee. The results obtained from the membership survey, discussed in more detail below, suggest that these initiatives—in particular CLE pricing options—should be revisited.

The Committee’s primary initiative, this year, was to create a membership survey and develop an analysis of the responses with recommendations. The purpose of the survey was to determine what CBA members want from their association membership, and how well members perceive the Association’s delivery on the benefits and programs they value. The Committee finalized survey questions, primarily designed to assist CBA staff in determining members’ wants and needs and submitted the survey to its members in October of 2020. The report of findings is as follows:

Membership Survey Report of Findings

Background

The Connecticut Bar Association (“CBA”) conducted a Membership Survey in October of 2020. The survey was distributed to the listserv of all current CBA members consisting of approximately 6,486 members. Of those members, 653 members (roughly 10%) responded. The majority of respondents have been in practice greater than 16 years (57.57%), practicing in their professional roles for greater than 20 years (59.64%), and/or were from solo/small firms (57.53%). This survey was conducted in house; as such, the Membership Committee does not consider the findings to be statistically significant, nor does it intend that this report be seen as a complete summary of such findings. Instead, a summary of findings is listed below, and the survey results are attached in their entirety to this report.

Key Findings and Takeaways

Overall, current members appear to be satisfied with the CBA. Almost two-thirds of respondents did not indicate ways by which CBA membership could be improved. Several categories of findings are listed below:

Dues

- 90% of respondents believe that the value they receive from their CBA membership is sufficient to justify the cost of the membership.
- Cost was mentioned as a reason why members may be hesitant to renew. Many comments suggested that members did not understand why section and CLE costs were additive to a CBA membership. Close to 50% of respondents also belong to county bars and/or the American Bar Association (“ABA”), compounding the cost of bar membership generally.
- Though members derived value from their CBA membership, they consistently mentioned that costs for CLEs—a primary driver of membership with 51.88% of respondents receiving between 50-100% of their CLE from CBA offerings—were too high, and free/low-cost CLE offerings were too few. Most members either support a one-time yearly fee for unlimited online CLE products on the Education Portal (57.20%) or one comprehensive membership fee that includes unlimited access to online CLE products on the Education Portal (66.67%).

Reasons to Join/Stay a Member

- Most respondents joined the CBA for CLE (77%), to support the profession (68%), and for networking opportunities (53.6%).
- Mentorship and networking opportunities were cited as a reason to remain a member, but survey responses indicated that mentor programs need to be enhanced or better publicized, and networking opportunities are often limited to section events that operate on a section-by section basis, and not available to membership as a whole.
- Solo practitioners and attorneys from small firms seek more support from the CBA, in administering their practices, with law office technology, and with the nuts and bolts of advertising to attract and retain new clients.

Member Benefits

- Access to Casemaker was especially important—and justified continued membership—for many members, particularly solo/small firm members.
- Many members cite “time management” as a challenge in their day-to-day practices. Time management seminars might be welcome to a large portion of the membership.
- Many members cite “work/life balance” as a challenge. The CBA should consider other member benefits or CLEs that can assist members in that regard.

- A handful of members (solos/small firm) requested that the CBA offer group health insurance, although state law currently does not permit the CBA to offer such insurance.

Recommendations

The CBA needs to better advertise its member benefits. Staff indicated that the CBA does offer benefits that speak to some of the key takeaways—e.g., law office technology support for small firms, mentorship programs—but there appear to be challenges in educating members of existing benefits. Many members cited frustrations with navigating the CBA website.

CBA leadership and section leaders should communicate about the best way to implement suggestions from this survey. A vast proportion of respondents seek legal support and CLE offerings from sections, but offerings section-by-section vary in quality and frequency. Section leaders should take these (and other) survey results into consideration when developing offerings, and in turn should communicate to CBA leadership what obstacles they are facing in providing appropriate support and programming, and how CBA leadership can assist them in achieving member satisfaction. CBA leadership should institutionalize routine check-ins with sections to ensure that offerings are meeting members' needs as articulated in these (and other) surveys.

More CLE offerings. Sections should be incentivized to increase their CLE offerings, and those offerings should be routinely offered to more than just the members of individual sections. CLE and networking opportunities are the primary reasons for CBA memberships—as a primary driver, this should be a focus of all sections and CBA leadership.

CLE costs and/or CLE cost structuring needs improvement. CLEs were consistently rated as too expensive, particularly where members were unaware what their base dues paid for. When more in-person CLEs begin to reoccur, sections should be given more leeway to determine CLE costs.

* * *

The co-chairs would like to take this opportunity to thank the Membership Committee members for their ongoing contributions. Additionally, the Committee is grateful to Keith Soressi, Carol DeJohn, and Corrine King for their tireless work with the Committee.

PROFESSIONALISM COMMITTEE

Co-Chairs: Hon. Omar A. Williams and James T. Shearin

The mission of the Connecticut Bar Association Professionalism Committee is to enhance the level of professionalism among lawyers and judges and to promote their commitment to the Lawyers' Principles of Professionalism (adopted by the Connecticut Bar Association House of Delegates on June 6, 1994) (Principles). The Committee rewrote the Principles in 2020 which were then approved by the CBA House of Delegates. Our mission now will 1) encourage, recommend, and provide assistance to CBA Committees and Sections in the development and coordination of professionalism initiatives according to the Principles; 2) encourage and provide assistance to local bar associations, law schools, and the judiciary in their efforts to improve professionalism as articulated by the Principles; and 3) educate members of the legal profession and the public about Principles.

The Professionalism Committee also organizes the annual Professionalism Symposium; to manage the statewide mentoring program; identify and select the recipient of the Edward F. Hennessey Professionalism Award; stimulate interest in professionalism, ethics, and civility among other sections and committees; and produce its own continuing legal education programs stressing those principles.

The Committee recommended Patricia Kaplan to receive the Edward F. Hennessey Professionalism Award for her service to the bar, including her unwavering commitment to making justice available to all regardless of economic means. During her career she encouraged and mentored lawyers in learning how to imbue day-to-day practice with professionalism and a distinctively practical, ethical and compassionate approach. She was the poster child for a brand of civility that is warm, energetic and infectious.

There continues to be a mentoring program centered in Hartford and New Haven in conjunction with those local bar associations. Newly admitted lawyers seeking a mentor are paired with a more senior members of the bar and they interact for a fully year. David Case in Hartford and Dean Brad Sexton in New Haven co-chair this program.

The second annual Professionalism Boot Camp took place in December 2019 at the CBA's office. This program was designed so that newly admitted lawyers could master the skills needed to practice more effectively and ethically. The programs included topics such as "Avoiding a Grievance" "Creating a Small 21st-Century Law Office," "Networking and Rainmaking," "Screening New Clients, Billing and Fee Agreements," "Surviving Technology," and the "Ethical Do's and Don'ts of Social Media." There was no program in 2020 because of the pandemic. It is being scheduled this year for December 2021.

The Professionalism Symposium is the capstone event of the Professionalism Committee. In its 17th year in 2019, the program was a collaborative effort with the Greater Bridgeport Bar Association. The half-day program, held at the Superior Courthouse in Bridgeport, included both plenary and breakout sessions which focused on specific practice areas while stressing the importance of professionalism, civility and ethics. This program always enjoys the full support of the bench and bar with the judicial branch permitting the use of its courthouse and suspending the normal dockets so that lawyers and judges can participate. We did not host a program in 2020 because of the pandemic, but intend to host a program this year.

The committee meets four times per year by phone and person in New Britain.

STANDING COMMITTEE ON PROFESSIONAL ETHICS

Chair: Kim Rinehart

The Standing Committee on Professional Ethics provides members of the Bar with opinions on matters of professional ethics, interpreting and applying the Connecticut Rules of Professional Conduct.

Written requests for opinions are referred to a drafting committee of one or two Committee members for preparation of a draft opinion, which is then debated and considered for adoption, revision or rejection at the Committee's monthly meeting. Some opinions are referred to subcommittees for further research, reconsideration, and revision. All of the Committee members are, therefore, given an opportunity to participate in the activities of the Committee. The Committee issues Formal and Informal Opinions. Formal Opinions are published in the Connecticut Bar Journal and Formal and Informal Opinions are shared with the ABA/BNA Lawyers Manual on Professional Conduct. Recent Opinions are also available on the Committee's website. All of the Committee's Formal and Informal Opinions are available through Casemaker, which CBA members may access by logging in on the CBA website.

Though this year has required much change given the impact of the Covid-19 pandemic, it has nevertheless been a productive year for the Committee. The Committee generally meets monthly, unless there is not enough business to warrant a meeting. This year, the Committee transitioned to meeting via zoom and found this to work very well. In fact, the Committee recently voted to continue conducting some meetings via zoom even after in-person meetings resume. This makes meeting participation easier for some members, particularly those who would need to travel farther to attend in-person events.

Among the Committee's accomplishments this year were: adopting three new informal opinions, recommending multiple changes to the Rules of Professional Conduct, and providing ongoing education to the Bar. Additional details about the Committee's activities are provided below.

Ethics Opinions

The Committee has adopted three new Informal Opinions thus far during the 2020-2021 year:

1. Informal Opinion 20-03: Payment of Indigent Client's Litigation-Related Expenses

2. Informal Opinion 21-01: Maintaining Client Files and Original Wills When a Partner Departs
3. Informal Opinion 21-02: Use of a Vendor in Connection with Filing a Patent Application

Other opinions are in the process of being drafted or revised and may still be voted on over the next couple of months. All of the Opinions the Committee has adopted in recent years (since 2011) are posted on the CBA's website. These opinions are located through a link on the website page dedicated to the Standing Committee on Professional Ethics.

Rules Committee Participation

Marcy Stovall has served as the Committee's liaison to the Rules Committee this year. She has done an excellent job keeping the Committee abreast of proposed Rules changes and coordinating Committee feedback/recommendations where appropriate. The Committee's key accomplishments in this area this year were:

- Sponsoring, along with the Pro Bono Committee, a proposed amendment to Rule 5.5 to add subsection (d), which would permit pro bono practice in Connecticut by retired attorneys and attorneys licensed and in good standing in other jurisdictions.
- Sponsoring, along with the Pro Bono Committee, a proposed amendment to Rule 1.8(e) to permit limited humanitarian financial assistance to indigent clients.
- Serving as part of a CBA working group that drafted a proposed amendment to add subsection (7) to Rule 8.4, addressing discrimination and harassment. The proposed amendment is based on the ABA model rule 8.4(g), but includes significant changes to address any First Amendment issues posed by the ABA's rule. The working group's proposed amendment was approved and supported by a coalition of CBA committees.

All three of these proposed amendments have been approved by the Rules Committee and will be voted on at the Judges' conference on June 10, 2021.

Educational Programming

The following educational programs were provided during the 2020-21 year or are currently being scheduled:

- September 14, 2020 Ethics: An Annual Review (1 hour).
Presented by Kim Rinehart, Deborah Sullivan, Brendon Levesque, Steve Conover
- October 1, 2020: Drafting Effective Engagement Letters
Presented by Marcy Stovall
- November 5, 2020: Recognizing and Avoiding Conflicts
Presented by Marcy Stovall
- December 1, 2020: Trust Account Program
Presented by Stephen Conover and Debbie Schaffer

- December 2, 2020: Ethics – What You Need to Know
Presented by Brendon Levesque
- December 9, 2020: Ethics – What You Need to Know
Presented by John Logan and Brendon Levesque
- TBD Ethical Issues for the Litigator
Presented by James Sullivan
- TBD Conflicts of Interest
Presented by James Sullivan

In addition to providing formal training sessions and issuing opinions, the Committee also educates members of the bar by answering practitioners' phone calls and emails regarding ethical topics/concerns.

* * *

I commend the hard-working members of the Standing Committee on Professional Ethics for their time, dedication, and professionalism. The consistently high level of quality work product produced by these members – including the very spirited discussion and extensive revision that precedes the adoption of nearly every opinion – is not only a tribute to their legal acumen, but also to the serious nature of the task. I am also extremely grateful for the respectfulness shown by each member to every other. Our debates, while energetic, are always thoughtful.

I hope the members of the Bar find the work of the Committee helpful in their practice. Members of the Bar interested in serving on the Standing Committee on Professional Ethics should make such preference known to the CBA staff.

In addition, the Committee encourages Connecticut lawyers who have questions about their professional responsibilities in specific situations to request an opinion from the Committee.

STANDING COMMITTEE ON STANDARDS OF TITLE

Chair: Ellen L. Sostman

The Standing Committee on Standards of Title has the responsibility of (1) considering, formulating and proposing new Standards of Title; (2) reviewing and updating present Standards of Title; and (3) soliciting suggestions from members of Connecticut's conveyancing bar with respect to title matters where the formulation of new standards would be helpful.

The Committee met virtually in October, November, February, March, April and May, and plans to meet in June before adjourning for the summer. It accomplished the following actions:

- In response to the adoption of a new section of the Validating Act, Conn.Gen.Stat. Sec. 47-36bb, Chapter 7, Standards 7.1,7.2, 7.3 and 7.5 were revised and a new Standard 7.6 was formulated, proposed and approved by the Board of Governors effective February 22, 2021, to address the validity of a conveyance of title to a trust in its own name.
- The Committee revised Standard 9.3 in March 2021 to correct an erroneous case citation in Comment 5. Credit goes to Attorney Gerald Garlick for catching the error and contacting a member of the Committee. We extend our thanks and encourage practicing members of the real estate bar who discover errors or inconsistencies in the Standards or the need for a new standard or standards to address a letter or email to any member of the Committee with suggestions. The members of the Committee are listed at the end of this report and on the CBA's website under the Real Property Section.
- Standard 18.9 was revised in April to add new information regarding payoffs to be made to HUD for advances made by HUD under its duplicate mortgage securing a HECM (Reverse) mortgage.

A significant amount of the Committee's time since October 2020 has been directed towards drafting a proposed new Standard 23.2 addressing the Connecticut Estate Tax lien. It is expected to be the first of two such standards on this subject. It is our intention to complete a satisfactory draft of Standard 23.2 in June so that this proposed Standard can be made available for comment to other interested CBA sections and published in the Connecticut Lawyer over the summer. Because it is a new standard, it will need the approval of the Board of Governors in order to be adopted.

STANDING COMMITTEE ON WORKERS' COMPENSATION CERTIFICATION

Chair: Brian L. Smith

The Connecticut Bar Association Standing Committee on Certification (SCWCC) certifies and re-certifies lawyers as specialists in the field of workers' compensation. In addition, the SCWCC promulgates Rules and Procedures to implement the Standards.

The SCWCC was chaired this year by the undersigned and the following Board Certified Workers' Compensation Specialists served on the SCWCC: Diane Duhamel (Chair Examining Committee), Mike Kerin, David J. Morrissey, Jeffrey Oliveira, Charlene Russo, Dominick Statile, and Gregory Lisowski. The SCWCC was greatly assisted by Phanny Cahill of the Connecticut Bar Association.

This year was a busy and challenging year for The Standing Committee and Examining Committee. Recertification of 4 candidates from 2020 was delayed by COVID and recertification of 2021 candidates involves the largest class of candidates. We continue to add approved courses to the list of those that qualify for inclusion in the certification and re-certification process. We reviewed and approved CLE credits from countless seminars, presentations, articles, etc. and updated our list of approved seminars. Our program is up for recertification by the Superior Court Rules Committee. Ms. Cahill was instrumental in the submission of our application for renewal of our specialization program.