

AGENDA
Florida Bar Citizens Advisory Committee Meeting
Thursday, July 27, 2023, 9 a.m. – 12 noon
Working Lunch/Communications Committee 12-2:30 p.m.
Sarasota Ritz Carlton
<https://us02web.zoom.us/j/88968828991>

1. Call to order and [introductions](#) – Hilary Creary, Chair
2. Approve Summary Minutes from the June 2023 meeting – Attachment 2
3. Update from President Scott Westheimer
4. Presentation on [Florida Bar Discipline Process](#) and [Professionalism](#) Rules – Patti Savitz, Deputy Director Lawyer Regulation
5. Access to Justice Discussion ([Link to Special Committee Report](#))
6. Presentation on Unlicensed Practice of Law in Florida – Jeffrey Picker, Director, Unlicensed Practice of Law
7. CAC Member Topics – an opportunity to raise issues for the BOG to consider
8. Adjourn for working lunch with [Communications Committee](#)

ATTEND COMMUNICATIONS COMMITTEE FROM 12 – 2:30 P.M. IN THE SAME ROOM

TENTATIVE NEXT MEETING: THE WEEK OF SEPTEMBER 4 VIA ZOOM



The Florida Bar

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CITIZENS ADVISORY COMMITTEE MEETING

Thursday, June 22, 2023
Annual Florida Bar Convention
Boca Raton

1. **Call to Order:** The meeting was called to order by Chair Tad Yates around 2:10 p.m.
2. **Attendance:**
 - a. Committee members: Chair Tad Yates, Jarrod Dawson, Lawrence Gordon, Tashara Cooper, Orlando Rolón, Candy Olson, Michelle Pelaez, Kimberly Jackson, Tad Yates, Ron Cunningham, Susan Rolston, Kevin Gay, Robert Johnson, and Hillary Creary (incoming chair)
 - b. Guests (in order of appearance): Linda Goldstein, public member BOG; President-Elect Scott Westheimer, President-Elect Designate Roland Sanchez Medina, Jr., President Gary Lesser
 - c. Bar staff: Jennifer Krell Davis, Sue Ray
3. **Welcome and Introductions**

Chair Yates welcomed committee members and guests and read the CAC mission. Members introduced themselves. President-Elect Westheimer and President-Elect Designate Sanchez Medina Jr. recognized CAC members and thanked them for their work.
4. **Minutes**

Jan. 26, 2023, meeting minutes approved.
5. **New Member Orientation**
 - a. **CAC Overview**

Chair Yates provided an overview of the CAC, its objectives, scope of responsibility and relationship to the Board of Governors and the Communications Committee.
 - b. **Keeping up With The Florida Bar**

Jennifer Krell Davis gave members a list of resources available to stay on top of what's happening at The Florida Bar, including links (DNS, Bar News & Journal, Bar Social Media) and provided a Glossary of Florida Bar terms and Acronyms.
 - c. **Opportunities for Service**

Incoming Chair Hilary Creary introduced public BOG member Linda Goldstein and discussed additional opportunities for service for

members of the public, including sitting on grievance committees. Yates and Creary both stressed the importance of having an outside point of view on grievance committees, and asked CAC members for referrals for public member positions.

- d. BOG Public Member Linda Goldstein, a former CAC member, gave members an overview of what to expect in terms of materials, projects, and toolkits.

6. Special Projects Updates

Jennifer Krell Davis went over meeting arrangements and expense reimbursement procedures, and gave members an update on the Life's Legal Moments and Benchmarks initiatives.

7. New Topics: Committee members talked about possible topics of concern

a. Mental Health of Attorneys

Committee talked about the mental health of attorneys and the impact on increased discipline and lower job satisfaction rates, a presentation by FLA Inc was discussed. Also discussed access to the legal system, staff offered to share the Special Committee on Great Access to Legal Services report. Another suggestion was to create a one-pager for clerks offices so they can better refer members of the public to the correct services from the Bar.

8. Next Meeting: July 27, 2023, 9 a.m. – 12 noon; Working Lunch with the Communications Committee 12:30 – 2:30 p.m., Sarasota

9. Meeting adjourned at 3:30 p.m.