

2026 September Board of Commissioners Meeting - 9:00-11:00 a.m.

Schedule	Friday, September 18, 2026 9:00 AM — 11:00 AM EDT
Venue	Detroit Marriott Troy - Dennison Room
Organizer	Amy Owens

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1. Call to Order

STATE BAR OF MICHIGAN
2025-2026 BOARD OF COMMISSIONERS
Friday, September 18, 2026
Detroit Marriott Troy – Dennison Room
Wi-Fi Password: Statebar26
AGENDA
9:00am

State Bar of Michigan Statement of Purpose

“The State Bar of Michigan shall aid in promoting improvements in the administration of justice and advancements in jurisprudence, in improving relations between the legal profession and the public, and in promoting the interests of the legal profession in this state.”

Rule 1 of the Supreme Court Rules Concerning the State Bar of Michigan

1. **Call to Order**Lisa J. Hamameh, President

2. **Consent Agenda**

- 2.1. MinutesLisa J. Hamameh, President
2.1.1. July 24, 2026, Board Meeting*
2.1.2. July 8, 2026, Executive Committee Meeting*
- 2.2. President’s Activities*Lisa J. Hamameh, President
- 2.3. Executive Director’s Activities*Peter Cunningham, Executive Director
- 2.4. Finance and Audit Committee David C. Anderson, Treasurer
2.4.1. FY2026 Financial Reports through July 2026*
2.4.2. 2025 SBM Retirement Plan*
2.4.3. SBM Entities Trust Annual Reports*

3. **Upcoming Events – [SBM Event Calendar](#)**
3.1. Commission on Fairness and Public Trust Pathways to the Judiciary Event*

LEADERSHIP REPORTS

4. **President’s and Executive Director’s Report**.....Lisa J. Hamameh, President
Peter Cunningham, Executive Director
- 4.1. Michigan Supreme Court Commissions Updates
- 4.2. BOC Retreat Update
- 4.3. Staff Updates
5. **Representative Assembly Report**Nicole A. Evans, Chairperson
6. **Young Lawyers Section Report** Jacob Eccleston, Chairperson

COMMISSIONER COMMITTEES

7. **Public Policy**..... Erika L. Bryant, President-Elect
8. **Finance and Audit** David C. Anderson, Treasurer
 - 8.1. Finance Report
 - 8.2. Contract Renewal: K2dnn*
 - 8.3. Budget Amendments*
9. **Strategic Planning and Engagement** Thomas H. Howlett, Vice President
 - 9.1. Event Reports
 - 9.1.1. 50-Year Golden Celebration*
 - 9.1.2. Great Lakes Legal Conference*
 - 9.2. Partner Program: Answering Legal*
 - 9.3. Awards Criteria*
 - 9.4. SPAR Recommendations*
10. **Professional Standards** Suzanne C. Larsen, Secretary

COMMISSIONER RECOGNITION

11. **Recognition of Outgoing Board Members**..... Lisa J. Hamameh, President
 - 11.1. Hon. David A. Perkins – Written and presented by Commissioner Darnell T. Barton
 - 11.2. Gerrow (Gerry) Mason – Written and presented by Commissioner Nicholas M. Ohanesian
 - 11.3. Nicole Evans – Written and presented by Commissioner Alena Clark
 - 11.4. Hon. B. Chris Christenson – Written and presented by Vice President David C. Anderson
 - 11.5. Silvia A. Mansoor – Written and presented by Commissioner Jacob G. Eccleston
12. **Recognition of President Lisa J. Hamameh** Erika L. Bryant, President-Elect

13. For the Good of the Public and the Profession

- 13.1. Comments or Questions from Commissioners
- 13.2. Public Comment

Any member of the public who wishes to address the commissioners during public comment must sign up before 9:00 a.m. on the date of the meeting using the “Public Comment Sign Up” sheet.

14. Adjournment

*Materials included with the agenda.

2. Consent Agenda

For Approval

2.1. Minutes

Presented by Lisa J. Hamameh

2.1.1. July 24, 2026, Board Meeting*

STATE BAR OF MICHIGAN BOARD OF COMMISSIONERS MEETING MINUTES

President Hamameh called the meeting to order at 9:32 a.m. on Friday, July 24, 2026, in the Boardroom at the Michael Franck building in Lansing, Michigan.

Commissioners present:

David C. Anderson, Treasurer
Darnell Barton
Erika L. Bryant, President-Elect
Aaron V. Burrell
Alena Clark
Hon. Ponce Clay
Patrick J. Crowley
Tanisha Davis
Sherree L. Detzler
Robert A. Easterly
Jacob G. Eccleston
Nicole A. Evans
Lisa J. Hamameh, President
Claudnyse D. Holloman
Thomas H. Howlett, Vice-President
Elizabeth A. Kitchen-Troop

Suzanne C. Larsen, Secretary
Joshua A. Lerner
James L. Liggins, Jr.
James W. Low
Ashley E. Lowe
Elizabeth L. Luckenbach
Silva A. Mansoor
Gerard V. Mantese
Moheeb H. Murray
Thomas P. Murray, III
Gerrow D. "Gerry" Mason
Nicholas M. Ohanesian
Hon. David A. Perkins
Douglas B. Shapiro
Hon. Kristen D. Simmons
Lisa W. Timmons

Commissioners absent:

Hon. Karl A. Barr

Hon. B. Chris Christenson

Consent Agenda

The Board received the minutes from the June 12, 2026, Board meeting.
The Board received the minutes from the May 20, 2026, Executive Committee meeting.
The Board received the recent activities of the President.
The Board received the recent activities of the Executive Director.
The Board received the FY 2026 financial reports through May 2026.
The Board received the Client Protection Fund Claims.
The Board received the Unauthorized Practice of Law Claims.
The Board received the Institute for Continuing Legal Education (ICLE) recommendation.
The Board received the Model Jury Instructions.

President Hamameh asked if any items needed to be removed from the consent agenda. There were none.

A motion was offered and approved to accept the consent agenda.

Board Secretary Election

President Hamameh informed the Board of the four candidates who submitted their names for consideration for the position of Secretary for the 2026-2027 Board of Commissioners: Commissioners Burrell, Lerner, Low and Mantese. President Hamameh asked if there were any nominations from the floor; hearing none, a motion was offered and approved to close the nominations.

Commissioners Burrell, Lerner, Low and Mantese addressed the board, per policy. Following the five-minute presentation by each candidate, President Hamameh opened the floor for questions for the candidates.

Upon completion of the question-and-answer, President Hamameh appointed Commissioners Clark, Clay and Detzler to serve as tellers. A motion was offered and approved to vote by secret written ballot with the voting to be announced and recorded as the winner only, without the vote total and the vote total will be known only to President Hamameh, the tellers and to only disclose the number of votes received to the candidates upon the candidate's request. Ballots were then distributed.

President Hamameh announced that President-Elect Bryant would succeed her as President of the state Bar of Michigan for the 2026-2027 bar year.

President Hamameh announced that Vice President Howlett would succeed President-Elect Bryant as the President-Elect of the State Bar of Michigan for the 2026-2027 bar year.

A motion was offered and approved to nominate Treasurer Anderson as Vice President of the State Bar of Michigan for the 2026-2027 bar year.

A motion was offered and approved to nominate Secretary Larsen as Treasurer of the State Bar of Michigan for the 2026-2027 bar year.

President Hamameh announced that Commissioner Burrell was elected as Secretary of the State Bar of Michigan for the 2026-2027 bar year.

A motion was offered and approved to destroy the ballots of the election.

Upcoming Events

President Hamameh shared the link to the SBM Events Calendar and highlighted the Young Lawyers event occurring on July 25.

President and Executive Director's Report: Lisa Hamameh, President and Peter Cunningham, Executive Director

President's Report

President Hamameh highlighted recent activities since the last Board meeting and recognized Nicole Evans for graduating from the 55th ICM Fellows program with a ceremony at the U.S. Supreme Court.

Executive Director's Report

Michigan Supreme Court Commissions Updates

Justice For All Commission

Mr. Cunningham provided an update on the proposed Legal Practitioner Pilot Program. The State Court Administrative Office has agreed to provide the State Bar \$83,000 to build the character and fitness portal for applicants, and an additional \$600 per applicant to complete the character and fitness investigations for applicants to the pilot program. The contract is being finalized and once it is final, it will probably require a budget amendment. SBM staff have already begun building the portal in anticipation of the Court approving the pilot program early next year.

BOC Retreat Update

Mr. Cunningham noted that the BOC retreat is scheduled for November 19-20 at the Grand Traverse Resort in Acme, Michigan. The retreat will begin with a half day on Thursday afternoon and a full day on Friday until 5pm with a BOC meeting included. Additional details will follow with meetings invites to be updated accordingly once the agenda has been confirmed.

Staff Updates

Mr. Cunningham provided several staff updates starting with Lucille Willis who retired last month after 27 years with the Bar. Lucille was one of the founding editors of the eJournal.

Mr. Cunningham also announced that Jeanette Socia, Director of Human Resources, is retiring and today is her last day. Jeanette's replacement is Denise Boucke who started with the State Bar on May 26 and has been able to work alongside Jeanette for the past six weeks.

Lastly, Mr. Cunningham announced that a memorial service for Nancy Brown is scheduled for Thursday, August 20, from 2:00-3:00pm in the SBM building. A plaque recognizing Nancy's contributions to the Bar will be placed in the library and a nameplate for Nancy will be added to the flower garden in front of the building where employees who have passed away while working at the bar are recognized.

NSF AI Readiness Grant Collaboration

Mr. Cunningham also reported on a possible collaboration with Michigan State University College of Law on artificial intelligence (AI) readiness for the legal profession. Michigan State University, the University of Michigan, and Michigan Tech submitted a grant proposal for the National Science Foundation to create a statewide AI Readiness Hub. If awarded, this grant would establish a state-wide hub for Michigan to support AI readiness, education, adoption and deployment across Michigan. The proposal is to create an AI readiness hub for the state of Michigan to help the legal profession become AI Ready. After SBM leadership met with Jennifer Carter-Johnson from the MSU College of Law, the State Bar submitted a nonbinding letter of support expressing its interest in participating in the initiative. Professor Carter-Johnson indicated that even if the grant is not awarded, there may be opportunities for the State Bar to collaborate with the MSU College of Law on ethical and professional guidance regarding attorney use of AI and AI readiness training for lawyers and law students.

Certificate of Good Standing

Mr. Cunningham announced the new fully automated certificate of good standing electronic ordering system has been launched. The system will allow attorneys to obtain a PDF of their certificate instantly, which will require no staff time to produce.

Payments/Credit Card Update

Mr. Cunningham shared the State Bar has launched its new American Express credit card through Mercantile Bank. This was tied to our preferred partner program and means we will also start accepting American Express for license renewal/payment processing which is something members have been requesting.

SBM Presentation – Public Policy

Nathan Triplett, Director of Governmental Relations, presented to the Board about the SBM public policy program and focused on the Bar's successful advocacy for recently enacted juvenile justice legislation.

Discussion: Challenges & Opportunities for the Profession and Justice System: CLEAR Report

Mr. Cunningham presented a brief overview of the Committee on Legal Education and Admissions Reform (CLEAR) Report that Chief Justice Cavanaugh contributed to, writing an article in the June Bar Journal and spoke about in a session on Mackinaw Island at the Great Lakes Legal Conference. At its core, the report asks one simple question, "how do we better prepare lawyers to serve the public?". Chief Justice plans to bring the conversation more to Michigan while she continues to serve on the committee. An updated report is expected to come out in December.

Representative Assembly (RA) Report: Nicole A. Evans, Chairperson

Chair Evans reported that the Representative Assembly is continuing to fill their vacancies and are also preparing for the next meeting in September where there is currently one proposal submitted for consideration.

Young Lawyers Section (YLS) Report: Jacob Eccleston, Chairperson

Commissioner Eccleston reported on several upcoming events including the ZooLAWgical event on July 25 at the Detroit Zoo. Mr. Eccleston also reminded the Commissioners of the National Trial Advocacy Competition scheduled for November 6-8 where they are in need of 80+ volunteers including sitting judges.

COMMISSIONER COMMITTEES

Public Policy: Erika L. Bryant, President-Elect

President-Elect Bryant provided the report for the Public Policy committee.

Court Rules

1. **ADM File No. 2026-10: Addition of MCR 2.114 and Amendment of MCR 7.209**

The addition of MCR 2.114 provides a process for special motions under the Uniform Public Expression Protection Act (MCL 691.1853 et seq.), and the amendment of MCR 7.209 clarifies the availability and applicability of the stay during an appeal as contemplated by this new Act.

A motion was offered and approved to support ADM File No. 2026-10.

2. **ADM File No. 2024-15: Proposed Addition of MCR 6.426 and Proposed Amendments of MCR 7.216 and 7.315**

The proposed addition of MCR 6.426 and proposed amendments of MCR 7.216 and 7.315 would ensure that self-represented criminal defendants are advised of the right to counsel in remand proceedings from the appellate courts and would facilitate appointment of such counsel.

A motion was offered and approved to support ADM File No. 2024-15.

3. **ADM File No. 2024-34: Proposed Amendment of MCR 7.316**

The proposed amendment of MCR 7.316 would allow the Court to accept late applications for leave to appeal or cross-appeal in limited circumstances.

A motion was offered and approved to support ADM File No. 2024-34 with an amendment allowing 14 days to file a late application for leave to appeal.

4. **ADM File No. 2025-30: Proposed Adoption of Administrative Order No. 2026-X**

The proposed administrative order would approve a pilot project to study the effectiveness of an informal domestic relations docket.

A motion was offered and approved to oppose ADM File No. 2025-30 noting that Vice President Tom Howlett and Judge David Perkins opposed the motion.

Legislation

1. **HB 6028** (McFall) Courts: veteran's court; veterans treatment court; modify. Amends secs. 1200, 1201, 1203, 1205, 1206 & 1209 of 1961 PA 236 (MCL 600.1200 et seq.).

A motion was offered and approved that the legislation is *Keller*-permissible.

A motion was offered and approved to support HB 6028.

2. **HB 6081** (Kuhn) Criminal procedure: preliminary examination; certain rules and procedures for conducting a preliminary examination; revise. Amends sec. 11b, ch. VI of 1927 PA 175 (MCL 766.11b) & adds sec. 11c to ch. VI.

A motion was offered and approved that the legislation is *Keller*-permissible.

A motion was offered and approved to oppose HB 6081 noting one abstention from Commissioner Claudy Holloman.

3. **HB 6092** (Hope) Criminal procedure: DNA; postconviction DNA testing; modify. Amends sec. 16, ch. X of 1927 PA 175 (MCL 770.16).

A motion was offered and approved that the legislation is *Keller*-permissible.

A motion was offered and approved to support HB 6092.

4. **HB 6110** (MacDonell) Civil procedure: civil actions; violation of constitutionally or legally provided civil rights; provide a cause of action for. Creates new act.

A motion was offered and approved that the legislation is *Keller*-permissible.

A motion was offered and approved to support HB 6110 noting one abstention from Commissioner James Liggins.

5. **Trial Court Funding**

SB 1089 (Chang) Courts: funding; trial court funding; provide for. Amends secs. 880d, 8727 & 8827 of 1961 PA 236 (MCL 600.880d et seq.); adds secs. 1495, 1496 & 1497 & repeals secs. 8729 & 8829 of 1961 PA 236 (MCL 600.8729 & 600.8829).

SB 1090 (Damoose) Courts: funding; trial court funding; provide for. Amends sec. 13, ch. II, secs. 1k & 5, ch. IX & secs. 1, 3, 3c & 3e, ch. XI of 1927 PA 175 (MCL 762.13 et seq.).

SB 1091 (Cavanagh) Courts: funding; trial court funding; provide for. Amends sec. 907 of 1949 PA 300 (MCL 257.907) & repeals sec. 908 of 1949 PA 300 (MCL 257.908).

A motion was offered and approved that the legislation is *Keller*-permissible.

A motion was offered and approved to support SB 1089, SB 1090 and SB 1091 with an additional amendment adding a fourth factor to the proposed indigency determination: an individual determined to be indigent under the MIDC standard for the purpose of appointing counsel in a criminal matter should be presumed indigent for the purpose of assessments issued at sentencing.

Alternative Dispute Resolution Section Proposals

1. **Request to Change the Mediator Standards of Conduct regarding disclosure and to amend the Court Rules regarding disqualification.**

Request to change captions on divorce forms.

Request to amend Form MC 274 – Order for Mediation.

Request to revise Mediation Training Standards.

Proposal to Revise Domestic Violence Screening Protocol and Standards of Conduct for Mediators related to consideration of mental health.

The Board determined that the State Bar's position on these proposals, if any, was a question for the Representative Assembly.

Strategic Planning and Engagement Committee (SPEC): Thomas H. Howlett, Vice President
Vice President Howlett had no items to report.

Finance and Audit: David C. Anderson, Treasurer

Treasurer Anderson thanked all staff and Commissioners for attending the June 25, 2026, budget meeting.

FY 2027 Budget

Mr. Cunningham presented the FY 2027 budget.

A motion was offered and approved to accept the FY 2027 budget.

Professional Standards: Suzanne C. Larsen, Secretary

Secretary Larsen had no items to report.

FOR THE GOOD OF THE PUBLIC AND THE PROFESSION

Comments or questions from Commissioners

Commissioner Mason reminded the Board that it was the final day to register for the American Indian Law Section annual meeting at the Soaring Eagle Casino on August 13-14.

Vice President Howlett provided kudos to the MiLawyer podcast and encouraged all to listen as Commissioner Ashley Lowe was featured in the most recent episode.

President-Elect Bryant asked all Commissioners to please consider sending a quick note to Representative Assembly member Kimberly Ann Ward as she campaigns in Nashville for NBA President-Elect.

Comments or questions from the public

None.

Adjournment

The meeting was adjourned at 12:53 p.m.

2.1.2. July 8, 2026, Executive Committee Meeting*

State Bar of Michigan
Executive Committee Virtual Meeting
Wednesday, July 8, 2026
4:00 p.m.

President Hamameh called the meeting to order at 4:00 p.m.

Members Present: President Lisa J. Hamameh, President-Elect Erika Bryant; Vice-President Thomas H. Howlett; Treasurer David C. Anderson; Secretary Suzanne C. Larsen; Representative Assembly Chair Nicole Evans; Representative Assembly Chair-Elect Alena Clark; Commissioner Sherrie L. Detzler; Commissioner Robert A. Easterly

State Bar Staff Present: Peter Cunningham, Executive Director; Amy Owens, Senior Executive Assistant; Felicia Thomas, Assistant Executive Director; Kari Thrush, Assistant Executive Director; General Counsel Drew Baker

Minutes:

A motion was offered and supported to approve the May 20, 2026, meeting minutes. The motion was approved.

President and Executive Director's Report

President Hamameh reported that she would provide an update on recent activities at the July BOC meeting.

Executive Director Cunningham reported that updates to the classic online member directory would launch on July 9. Updates will be minimal and will include minor language and font changes. Legacy photos will also be removed but affected users will receive instruction on how to upload new photos. He also reported that a new feature of the online store would soon allow members to obtain certificates of good standing online. The automated process is expected to reduce staff time associated with manually processing more than 2,000 certificate requests annually.

Mr. Cunningham provided an update on the BOC Retreat at the Grand Traverse Resort scheduled for Thursday, November 19 and Friday, November 20. The retreat will include a shortened Board meeting, with more substantial Board discussions deferred to the January meeting.

Mr. Cunningham reported on plans for a new Bar Leadership Event focused on education, networking, and collaboration. The event will be a one-day event held in the summer of 2027, with the date, location, and registration fee still being determined.

Mr. Cunningham also reported on a possible collaboration with Michigan State University College of Law on artificial intelligence (AI) readiness for the legal profession. Michigan State University, the University of Michigan, and Michigan Tech submitted a grant proposal for the National Science Foundation to create a statewide AI Readiness Hub. If awarded, this grant would establish a state-wide hub for Michigan to support AI readiness,

education, adoption and deployment across Michigan. The proposal is to create an AI readiness hub for the state of Michigan to help the legal profession become AI Ready. After SBM leadership met with Jennifer Carter-Johnson from the MSU College of Law, the State Bar submitted a nonbinding letter of support expressing its interest in participating in the initiative. Professor Carter-Johnson indicated that even if the grant is not awarded, there may be opportunities for the State Bar to collaborate with the MSU College of Law on ethical and professional guidance regarding attorney use of AI and AI readiness training for lawyers and law students.

Representative Assembly (RA) Report

Chair-Elect Clark noted the next meeting is planned in September after the luncheon and Commissioners are encouraged to attend. There is one proposal submitted with a submission deadline of August 7. The RA continues to fill vacancies as Robin Dillard transitions to the BOC and Scott Stanford stepped in as chair of the Special Issues Committee.

July 24, 2026, Board Agenda

The Committee discussed the July 24, 2026, Board meeting agenda. A motion was offered and supported to approve with the amendments that were discussed.

Institute for Continuing Legal Education (ICLE)

A motion was offered and supported to approve Takura Nyamfukudza as the ICLE nominee.

Adjournment

The meeting was adjourned at 4:44 p.m.

2.2. President's Activities*

Presented by Lisa J. Hamameh

President Lisa J. Hamameh
President's Activities
July 25 through September 18, 2026

Date	Event	Location
August 12	SBM Executive Committee Meeting	Zoom
August 19-22	Up Tour: Escanaba, Iron Mountain, Houghton, Marquette	UP
August 22	Prosecuting Attorney's Annual Meeting Reception	Mackinac Island
September 2	SBM Executive Committee Meeting	Zoom
September 17	MSBF Annual Meeting	Troy
September 18	Board of Commissioners Meeting/Inaugural & Awards Luncheon	Troy

2.3. Executive Director's Activities*

Presented by Peter Cunningham

**Executive Director Peter Cunningham Activities
July 24 through September 18, 2026**

Date	Event
July 28-August 1	NABE/NCBP – ABA Annual Conferences
August 3	Commission on Well-Being in the Law Executive Team Meeting
August 5	Meeting with SCAO on Legal Practitioner Licensing Pilot
August 6	SBM Board Retreat Planning Meeting
August 6	Justice For All Executive Team Meeting
August 7	Meeting with Jeff Kirkey, ICLE Director
August 18	Strategic Planning and Engagement Committee Meeting
August 19	Meeting with President-elect Bryant and Vice President Howlett on Awards Committee Criteria Recommendations
August 19	Panelist prep meeting for NCBP-NABE Webinar
August 20	JFA Executive Team Meeting
August 28	2026-2027 SBM Committee Appointment Meeting
August 31	Meeting with President-elect Bryant on Commissioner Committee appointments
September 2	Commission on Well-Being in the Law Meeting
September 2	Executive Committee Meeting
September 3	Meeting with Jeff Kirkey, ICLE Director
September 3	JFA Executive Team Meeting
September 11	Commission on Fairness and Public Trust – Executive Team Meeting
September 14	Capitol Club Business Meeting
September 14	Justice for All Commission Meeting
September 14	Commission on Well-Being in the Law: Executive Team and Workgroup Chairs Meeting
September 15	SBM Finance and Audit Committee
September 17	Call with Chief Justice Cavanagh

September 17	JFA Executive Team Meeting
September 17	MSBF 2026 Fellows Reception
September 18	Board of Commissioners Meeting/Inaugural Luncheon/RA Meeting

2.4. Finance and Audit Committee

Presented by David C. Anderson

2.4.1. FY2026 Financial Reports through July 2026*

State Bar of Michigan Financial Results Summary

For the Ten Months Ended July 31, 2026
Fiscal Year 2026

Administrative Fund - Summary of Results as of July 31, 2026

Operating Revenues	\$10,792,377
Operating Expenses	<u>(10,226,753)</u>
Operating Income (Loss)	565,624
Non-Operating Income (Loss)	<u>1,059,434</u>
Change in Net Position	\$1,625,057
Net Position, October 1, 2025	<u>\$18,394,134</u>
Net Position, July 31, 2026	<u>\$20,019,192</u>

As of July 31, 2026, Net Position *excluding* net assets restricted for retiree healthcare was \$15,083,964, an increase of \$1,252,005 since the beginning of the year and favorable to budget by \$1,266,323.

YTD Operating Revenue variance – \$299,735, favorable to budget (2.9%):

- License Fees and Related revenue was favorable to budget by \$26,630 (0.3%), primarily due to higher late fees, partially offset by lower reinstatement fees and lower delinquent dues.
- Other Operating Revenue was favorable to budget by \$273,105 (15.7%) primarily due to higher Bar Journal, Character & Fitness, Administration, E-Journal, Lawyer Referral Services, Lawyer Services, Print and Design, IAP, Digital, and Lawyers & Judges Assistance Program revenues, partially offset by lower Inauguration and Awards Lunch revenue.

YTD Operating Expense variance – \$935,468, favorable to budget (8.4%):

Labor Operating Expenses were favorable to budget by \$432,712 (5.7%).

- Salaries expenses were lower than budget by \$314,060 (5.6%) due to vacancies.
- Employee Benefits & Payroll Taxes were lower than budget by \$118,652 (6.2%) due to vacancies and timing of some expenses.

Non-Labor Operating Expenses were favorable to budget by \$502,756 (14.0%).

- Division 1 - \$93,861 (20.3%) favorable, primarily due to lower IAP, Outreach, UPL, Justice Initiatives, and Character & Fitness expenses, partially offset by higher Client Protection Fund expenses.
- Division 2 - \$330,954 (17.6%) favorable, primarily due to lower IT, Digital, Bar Journal, Facilities, 50 Year Event, Inauguration and Awards Lunch, Research, Lawyers & Judges Assistance Program, Practice Management Resource Center, Lawyer Services, Print and Design, General Communications, and Great Lakes Legal Conference expenses, partially offset by higher E-Journal expenses.
- Division 3 - \$77,942 (6.2%) favorable, primarily due to lower Finance, Human Resources, General Counsel, Board of Commissioners, Administration, Executive Office, and Representative Assembly expenses.

YTD Non-Operating Revenue Budget Variance – \$31,121, favorable to budget (5.4%):

- Investment income was favorable to budget by \$31,121 (5.4%) due to higher interest rates and investment balances.
- Retiree Health Care Trust had a net investment income of \$447,893 (this amount is not budgeted).

Cash and Investment Balance

As of July 31, 2026, cash and investment balances net of due to Sections, ADS, Client Protection Fund, and Retiree Health Care Trust were \$14,104,416, an increase of \$435,386 from the beginning of the year primarily due to collection of license fees.

SBM Entities Retiree Health Care Trust

As of July 31, 2026, the SBM retiree health care trust investments were \$5,382,893, an increase of \$373,052 since the beginning of the year. The change was due to investment income of \$459,983, disbursements of \$74,841 and investment advisor and custodian fees of \$12,090.

Capital Budget

Year-to-date capital expenditures totaled \$368,626, or 66% of the FY 2026 amended capital expenditures budget of \$555,330.

Client Protection Fund

The Net Position of the Client Protection Fund as of July 31, 2026, totaled \$3,062,816, a decrease of \$234,515 from the beginning of the year. Claims expenses totaled \$701,326.

SBM Membership

As of July 31, 2026, the active, inactive, and emeritus membership in good standing totaled 47,549, an increase of 327 attorneys since the beginning of the year. The number of active fee-

paying attorneys decreased by 142. Since the beginning of this fiscal year, 913 new attorneys joined SBM, compared to 895 during the same period of FY 2025.

**STATE BAR OF MICHIGAN
ADMINISTRATIVE FUND**

Unaudited and For Internal Use Only

**FINANCIAL REPORTS
July 31, 2026**

FY 2026

Note: License fee revenue is recognized
and budgeted as earned each month
throughout the year.

State Bar of Michigan
Statement of Net Position
July 31, 2026

Financial Row	Current Period (As of Jul 2026)	Prior Month (As of Jun 2026)	Variance	Variance %	Beginning of FY (As of FY 2025)
ASSETS AND DEFERRED OUTFLOWS OF RESOURCES					
Assets					
Cash	\$ 763,161	\$ 796,360	\$ (33,199)	(4.2%)	\$ 1,536,471
Investments	\$ 16,561,403	\$ 17,529,199	\$ (967,795)	(5.5%)	\$ 15,095,629
Due from (to) CPF	\$ (1,414)	\$ 1,487	\$ (2,900)	(195.1%)	\$ 14,118
Due from (to) Sections	\$ (3,219,470)	\$ (3,367,734)	\$ 148,265	(4.4%)	\$ (2,933,667)
Due from (to) ADS	\$ 735	\$ 919	\$ (184)	(20.0%)	\$ (43,520)
Net Administrative Fund Cash and Investment Balance	\$ 14,104,416	\$ 14,960,230	\$ (855,814)	(5.7%)	\$ 13,669,030
Accounts Receivable	\$ 311,108	\$ 276,484	\$ 34,624	12.5%	\$ 221,664
Prepaid Expenses	\$ 361,895	\$ 331,220	\$ 30,675	9.3%	\$ 370,218
Capital Assets, Net	\$ 3,067,791	\$ 3,014,963	\$ 52,828	1.8%	\$ 3,110,581
SBM Retiree Health Care Trust	\$ 5,382,893	\$ 5,405,329	\$ (22,436)	(0.4%)	\$ 5,009,841
Total Assets	\$ 23,228,103	\$ 23,988,226	\$ (760,123)	(3.17%)	\$ 22,381,333
Deferred Outflows of Resources					
Deferred Outflows of Resources Related to Pensions	\$ 14,807	\$ 14,807	\$ -	0.0%	\$ 14,807
Deferred Outflows of Resources Related to OPEB	\$ 878,755	\$ 878,755	\$ -	0.0%	\$ 878,755
Total Deferred Outflows of Resources	\$ 893,563	\$ 893,563	\$ -	0.00%	\$ 893,563
TOTAL ASSETS AND DEFERRED OUTFLOWS OF RESOURCES	\$ 24,121,666	\$ 24,881,789	\$ (760,123)	(3.05%)	\$ 23,274,895
LIABILITIES, DERERRED INFLOWS OF RESOURCES AND NET POSITION					
Liabilities					
Accounts Payable	\$ 3,466	\$ 4,514	\$ (1,048)	(23.21%)	\$ 520,342
Accrued Expenses	\$ 743,135	\$ 742,624	\$ 511	0.07%	\$ 848,383
Deferred Revenue	\$ 1,825,953	\$ 2,649,424	\$ (823,471)	(31.08%)	\$ 1,959,429
GASB 96 Subscription Liability	\$ 100,350	\$ 108,063	\$ (7,712)	(7.14%)	\$ 123,037
Net Pension Liability	\$ 82,698	\$ 82,698	\$ -	0.00%	\$ 82,698
Net OPEB Liability	\$ 126,297	\$ 126,297	\$ -	0.00%	\$ 126,297
Total Liabilities	\$ 2,881,899	\$ 3,713,619	\$ (831,720)	(22.40%)	\$ 3,660,186
Deferred Inflows of Resources					
Deferred Inflows of Resources Related to Pensions	\$ 20,452	\$ 20,452	\$ -	0.00%	\$ 20,452
Deferred Inflows of Resources Related to OPEB	\$ 1,200,123	\$ 1,200,123	\$ -	0.00%	\$ 1,200,123
Total Deferred Inflows of Resources	\$ 1,220,575	\$ 1,220,575	\$ -	0.00%	\$ 1,220,575
Total Liabilities and Deferred Inflows	\$ 4,102,474	\$ 4,934,194	\$ (831,720)	(16.86%)	\$ 4,880,761
Net Assets					
Invested in Capital Assets, Net of Related Debt	\$ 2,967,441	\$ 2,906,900	\$ 60,541	2.08%	\$ 2,987,544
Restricted for Retiree Health Care Trust	\$ 4,935,228	\$ 4,957,664	\$ (22,436)	(0.45%)	\$ 4,562,176
Unrestricted	\$ 12,116,523	\$ 12,083,030	\$ 33,493	0.28%	\$ 10,844,415
Total Net Position	\$ 20,019,192	\$ 19,947,594	\$ 71,597	0.36%	\$ 18,394,134
TOTAL LIABILITIES, DERERRED INFLOWS OF RESOURCES AND NET POSITION	\$ 24,121,666	\$ 24,881,789	\$ (760,123)	(3.05%)	\$ 23,274,895
Net Position Excluding Impacts of Retiree Health Care Trust	\$ 15,083,964	\$ 14,989,930	\$ 94,034	0.63%	\$ 13,831,958

State Bar of Michigan
Summary Report
July 31, 2026

Financial Row	Actual YTD (Oct 2025 - Jul 2026)	Budget YTD (Oct 2025 - Jul 2026)	Variance	Percentage	Prior YTD Actual (Oct 2024 - Jul 2025)
Operating Revenue					
License Fees, Dues and Related	\$ 8,780,575	\$ 8,753,945	\$ 26,630	0.3%	\$ 8,852,810
All Other Op Revenue	\$ 2,011,802	\$ 1,738,697	\$ 273,105	15.7%	\$ 1,913,262
Total Operating Revenue	\$ 10,792,377	\$ 10,492,642	\$ 299,735	2.9%	\$ 10,766,072
Operating Expenses					
Labor Operating Expenses					
Salaries	\$ 5,332,670	\$ 5,646,730	\$ (314,060)	(5.6%)	\$ 5,338,008
Benefits and Payroll Taxes	\$ 1,794,953	\$ 1,913,605	\$ (118,652)	(6.2%)	\$ 1,812,917
Total Labor Operating Expenses	\$ 7,127,623	\$ 7,560,335	\$ (432,712)	(5.7%)	\$ 7,150,925
Non Labor Operating Expenses					
Division 1 Non Labor Operating Expenses	\$ 367,383	\$ 461,244	\$ (93,861)	(20.3%)	\$ 336,699
Division 2 Non Labor Operating Expenses	\$ 1,551,166	\$ 1,882,120	\$ (330,954)	(17.6%)	\$ 1,504,236
Division 3 Non Labor Operating Expenses	\$ 1,180,580	\$ 1,258,522	\$ (77,942)	(6.2%)	\$ 1,097,947
Total Non Labor Operating Expenses	\$ 3,099,130	\$ 3,601,886	\$ (502,756)	(14.0%)	\$ 2,938,883
Total Operating Expenses	\$ 10,226,753	\$ 11,162,221	\$ (935,468)	(8.4%)	\$ 10,089,808
Operating Income (Loss)	\$ 565,624	\$ (669,579)	\$ 1,235,203	(184.5%)	\$ 676,263
Non Operating Revenue (Expenses)					
Investment Income	\$ 611,541	\$ 580,420	\$ 31,121	5.4%	\$ 639,056
Investment Income - Ret HC Trust	\$ 447,893	\$ -	\$ 447,893	0.0%	\$ 268,302
Loss on Disposal on Capital Asset	\$ -	\$ -	\$ -	0.0%	\$ (4,466)
Total Non Operating Revenue (Expenses)	\$ 1,059,434	\$ 580,420	\$ 479,014	82.5%	\$ 902,892
Increase (Decrease) in Net Position	\$ 1,625,057	\$ (89,159)	\$ 1,714,216	(1,922.7%)	\$ 1,579,155
Net Position Beginning of Year	\$ 18,394,134	\$ 18,394,134	\$ 0	0.0%	\$ 16,076,928
Net Position End of Period	\$ 20,019,192	\$ 18,304,975	\$ 1,714,217	9.4%	\$ 17,656,083
Change in Net Position Excluding Ret HC Trust Investment Income (Loss)	\$ 1,177,164	\$ (89,159)	\$ 1,266,323	(1,420.3%)	\$ 1,310,853

**State Bar of Michigan
Income Statement
July 31, 2026**

Financial Row	Actual (Oct 2025 - Jul 2026)	Budget YTD (Oct 2025 - Jul 2026)	Budget Variance	Budget Variance %	Last YTD Actuals (Oct 2024 - Jul 2025)	Actuals Variance	Actuals Variance %
Operating Revenues							
License Fees and Related	\$ 8,780,575	\$ 8,753,945	\$ 26,630	0.3%	\$ 8,852,810	\$ (72,235)	(0.8%)
Other Operating Revenues							
Division 1							
Character & Fitness	\$ 386,545	\$ 331,634	\$ 54,911	16.6%	\$ 350,405	\$ 36,140	10.3%
Diversity	\$ 1,395	\$ 600	\$ 795	132.5%	\$ 1,590	\$ (195)	(12.3%)
Ethics	\$ 3,300	\$ 2,920	\$ 380	13.0%	\$ 3,525	\$ (225)	(6.4%)
IAP	\$ 209,820	\$ 199,500	\$ 10,320	5.2%	\$ 212,460	\$ (2,640)	(1.2%)
Lawyer Referral Services	\$ 150,129	\$ 129,330	\$ 20,799	16.1%	\$ 134,832	\$ 15,197	11.3%
UPL	\$ -	\$ -	\$ -	0.0%	\$ 203	\$ (203)	(100.0%)
Total - Division 1	\$ 751,189	\$ 663,984	\$ 87,205	13.1%	\$ 703,115	\$ 48,074	6.8%
Division 2							
50 Year Event	\$ 4,880	\$ 6,000	\$ (1,120)	(18.7%)	\$ 6,915	\$ (2,035)	(29.4%)
Bar Journal	\$ 226,693	\$ 147,808	\$ 78,885	53.4%	\$ 183,781	\$ 42,913	23.3%
Digital	\$ 60,925	\$ 51,670	\$ 9,255	17.9%	\$ 38,175	\$ 22,750	59.6%
E Journal	\$ 58,497	\$ 29,000	\$ 29,497	101.7%	\$ 36,674	\$ 21,823	59.5%
Great Lakes Legal Conference	\$ 39,326	\$ 40,000	\$ (674)	(1.7%)	\$ 42,380	\$ (3,054)	(7.2%)
Inauguration and Awards Lunch	\$ 2,775	\$ 11,000	\$ (8,225)	(74.8%)	\$ 4,250	\$ (1,475)	(34.7%)
Lawyer Services	\$ 124,319	\$ 106,770	\$ 17,549	16.4%	\$ 182,233	\$ (57,914)	(31.8%)
Lawyers & Judges Assistance Program	\$ 64,110	\$ 61,250	\$ 2,860	4.7%	\$ 65,014	\$ (904)	(1.4%)
Practice Management Resource Center	\$ 990	\$ 1,250	\$ (260)	(20.8%)	\$ 586	\$ 404	68.9%
Print and Design	\$ 19,636	\$ 6,150	\$ 13,486	219.3%	\$ 25,744	\$ (6,108)	(23.7%)
Total - Division 2	\$ 602,152	\$ 460,898	\$ 141,254	30.6%	\$ 585,751	\$ 16,401	2.8%
Division 3							
Administration	\$ 658,461	\$ 613,815	\$ 44,646	7.3%	\$ 624,395	\$ 34,066	5.5%
Total - Division 3	\$ 658,461	\$ 613,815	\$ 44,646	7.3%	\$ 624,395	\$ 34,066	5.5%
Total Other Operating Revenues	\$ 2,011,802	\$ 1,738,697	\$ 273,105	15.7%	\$ 1,913,262	\$ 98,540	5.2%
Total Operating Revenues	\$ 10,792,377	\$ 10,492,642	\$ 299,735	2.9%	\$ 10,766,072	\$ 26,305	0.2%
Operating Expenses							
Division 1							
Character & Fitness	\$ 37,239	\$ 40,601	\$ (3,362)	(8.3%)	\$ 25,417	\$ 11,822	46.5%
Client Protection Fund	\$ 27,505	\$ 18,010	\$ 9,495	52.7%	\$ 51,147	\$ (23,642)	(46.2%)
Diversity	\$ 33,656	\$ 32,620	\$ 1,036	3.2%	\$ 30,187	\$ 3,469	11.5%
Ethics	\$ 2,393	\$ 3,760	\$ (1,367)	(36.4%)	\$ 6,170	\$ (3,778)	(61.2%)
IAP	\$ 8,765	\$ 62,285	\$ (53,521)	(85.9%)	\$ 9,306	\$ (541)	(5.8%)
Justice Initiatives	\$ 129,741	\$ 133,835	\$ (4,094)	(3.1%)	\$ 130,953	\$ (1,212)	(0.9%)
Lawyer Referral Services	\$ 5,902	\$ 7,140	\$ (1,238)	(17.3%)	\$ 7,283	\$ (1,382)	(19.0%)
Outreach	\$ 119,635	\$ 150,248	\$ (30,613)	(20.4%)	\$ 70,834	\$ 48,801	68.9%
UPL	\$ 2,548	\$ 12,745	\$ (10,197)	(80.0%)	\$ 5,402	\$ (2,854)	(52.8%)
Total - Division 1	\$ 367,383	\$ 461,244	\$ (93,861)	(20.3%)	\$ 336,699	\$ 30,684	9.1%
Division 2							
50 Year Event	\$ 36,743	\$ 48,700	\$ (11,957)	(24.6%)	\$ 40,106	\$ (3,363)	(8.4%)
Bar Journal	\$ 280,366	\$ 324,183	\$ (43,818)	(13.5%)	\$ 297,137	\$ (16,772)	(5.6%)
Digital	\$ 132,077	\$ 197,630	\$ (65,553)	(33.2%)	\$ 93,120	\$ 38,957	41.8%
E Journal	\$ 17,006	\$ 13,965	\$ 3,041	21.8%	\$ 14,378	\$ 2,627	18.3%

Financial Row	Actual (Oct 2025 - Jul 2026)	Budget YTD (Oct 2025 - Jul 2026)	Budget Variance	Budget Variance %	Last YTD Actuals (Oct 2024 - Jul 2025)	Actuals Variance	Actuals Variance %
Facilities	\$ 323,790	\$ 366,620	\$ (42,830)	(11.7%)	\$ 336,157	\$ (12,367)	(3.7%)
General Communications	\$ 17,511	\$ 22,320	\$ (4,809)	(21.5%)	\$ 15,806	\$ 1,705	10.8%
Great Lakes Legal Conference	\$ 9,792	\$ 13,700	\$ (3,908)	(28.5%)	\$ 6,572	\$ 3,221	49.0%
IT	\$ 625,802	\$ 737,852	\$ (112,050)	(15.2%)	\$ 576,631	\$ 49,171	8.5%
Inauguration and Awards Lunch	\$ 22,189	\$ 32,550	\$ (10,361)	(31.8%)	\$ 22,716	\$ (526)	(2.3%)
Lawyer Services	\$ 24,027	\$ 29,640	\$ (5,613)	(18.9%)	\$ 16,854	\$ 7,174	42.6%
Lawyers & Judges Assistance Program	\$ 22,491	\$ 32,420	\$ (9,929)	(30.6%)	\$ 44,958	\$ (22,467)	(50.0%)
Practice Management Resource Center	\$ 11,060	\$ 18,620	\$ (7,560)	(40.6%)	\$ 1,249	\$ 9,811	785.6%
Print and Design	\$ 21,392	\$ 26,830	\$ (5,438)	(20.3%)	\$ 37,486	\$ (16,094)	(42.9%)
Research	\$ 6,920	\$ 17,090	\$ (10,170)	(59.5%)	\$ 1,066	\$ 5,854	549.0%
Total - Division 2	\$ 1,551,166	\$ 1,882,120	\$ (330,954)	(17.6%)	\$ 1,504,236	\$ 46,930	3.1%
Division 3							
Administration	\$ 71,714	\$ 77,399	\$ (5,685)	(7.3%)	\$ 66,961	\$ 4,753	7.1%
Board of Commissioners	\$ 69,623	\$ 78,070	\$ (8,447)	(10.8%)	\$ 55,754	\$ 13,869	24.9%
Executive Office	\$ 40,567	\$ 45,450	\$ (4,883)	(10.7%)	\$ 34,812	\$ 5,756	16.5%
General Counsel	\$ 26,233	\$ 36,680	\$ (10,447)	(28.5%)	\$ 3,774	\$ 22,458	595.0%
Governmental Relations	\$ 61,447	\$ 62,140	\$ (693)	(1.1%)	\$ 62,599	\$ (1,151)	(1.8%)
Representative Assembly	\$ 21,949	\$ 26,500	\$ (4,551)	(17.2%)	\$ 21,946	\$ 4	0.0%
Human Resources							
Payroll Taxes	\$ 390,137	\$ 432,984	\$ (42,847)	(9.9%)	\$ 393,387	\$ (3,250)	(0.8%)
Benefits	\$ 1,404,816	\$ 1,480,621	\$ (75,805)	(5.1%)	\$ 1,419,530	\$ (14,714)	(1.0%)
Human Resources - Other	\$ 57,735	\$ 79,160	\$ (21,425)	(27.1%)	\$ 66,157	\$ (8,422)	(12.7%)
Total Human Resources	\$ 1,852,688	\$ 1,992,765	\$ (140,077)	(7.0%)	\$ 1,879,074	\$ (26,387)	(1.4%)
Finance							
Finance	\$ 458,147	\$ 481,413	\$ (23,266)	(4.8%)	\$ 426,447	\$ 31,700	7.4%
Depreciation	\$ 373,165	\$ 371,710	\$ 1,455	0.4%	\$ 359,498	\$ 13,667	3.8%
Total Finance	\$ 831,312	\$ 853,123	\$ (21,811)	(2.6%)	\$ 785,945	\$ 45,367	5.8%
Total - Division 3	\$ 2,975,533	\$ 3,172,127	\$ (196,594)	(6.2%)	\$ 2,910,865	\$ 64,669	2.2%
Salaries	\$ 5,332,670	\$ 5,646,730	\$ (314,060)	(5.6%)	\$ 5,338,008	\$ (5,338)	(0.1%)
Total Operating Expenses	\$ 10,226,753	\$ 11,162,221	\$ (935,468)	(8.4%)	\$ 10,089,808	\$ 136,944	1.4%
Net Operating Income (Loss)	\$ 565,624	\$ (669,579)	\$ 1,235,203	(184.5%)	\$ 676,263	\$ (110,639)	(16.4%)
Non Operating Revenue (Expense)							
Investment Income	\$ 611,541	\$ 580,420	\$ 31,121	5.4%	\$ 639,056	\$ (27,515)	(4.3%)
Non-Operating Expenses	\$ -	\$ -	\$ -	0.0%	\$ (4,466)	\$ 4,466	(100.0%)
Investment Income - Retiree HC Trust (Net)	\$ 447,893	\$ -	\$ 447,893	0.0%	\$ 268,302	\$ 179,591	66.9%
Total Non Operating Revenue (Expense)	\$ 1,059,434	\$ 580,420	\$ 479,014	82.5%	\$ 902,892	\$ 156,541	17.3%
Increase (Decrease) in Net Assets	\$ 1,625,057	\$ (89,159)	\$ 1,714,216	(1,922.7%)	\$ 1,579,155	\$ 45,902	2.9%

**State Bar of Michigan
Administrative Fund
FY 2026 Capital Expenditures
July 31, 2026**

CAPITAL EXPENDITURES	FY 2026 YTD Actual	FY 2026 Amended Budget	Comments
FACILITIES, FURNITURE & OFFICE EQUIPMENT			
Breaker units and electrical panel upgrade in the building	\$ 79,630	\$ 79,630	As amended in April 2026
Heating & Cooling Thermostats	29,200	52,040	As amended in April 2026
Heating & Cooling Fan Boxes	68,396	118,980	As amended in April 2026
TOTAL FACILITIES, FURNITURE & OFFICE EQUIPMENT	\$ 177,226	\$ 250,650	
INFORMATION TECHNOLOGY			
Website, Application and Software Development:			
Website Rebuild (FY 2026 Phase 2)	\$ -	\$ 75,000	As amended in April 2026
Receivership /Interim Administrator Program Data Portal	6,973	31,600	
Applicant Wizard	3,701	-	
Bar Cards	6,380	-	
Michigan Bar Journal Upgrade	4,853	-	
Sync Portal for Windows	16,982	-	Servers migration
E-commerce Store	34,541	10,000	
E-commerce Events	35,023	32,460	
E-commerce License Fee Updates	17,596	40,600	
e-Services Application to Court e-Filing (mi-File)	1,085	20,000	
Firm Administration and Billing	-	11,000	
Legal Practitioner	51,817	-	
Server Migration	1,706		
Website Functionality Enhancements	-	12,680	
Character & Fitness Module	-	34,800	
Volunteer Application Updates	2,585	19,140	
Consumer Portal (LRS)	8,159	17,400	
TOTAL INFORMATION TECHNOLOGY	\$ 191,400	\$ 304,680	
TOTAL CAPITAL EXPENDITURES	\$ 368,626	\$ 555,330	

**STATE BAR OF MICHIGAN
CLIENT PROTECTION FUND**

Unaudited and For Internal Use Only

**FINANCIAL REPORTS
July 31, 2026**

FY 2026

Note: License fee revenue is recognized
and budgeted as earned each month
throughout the year.

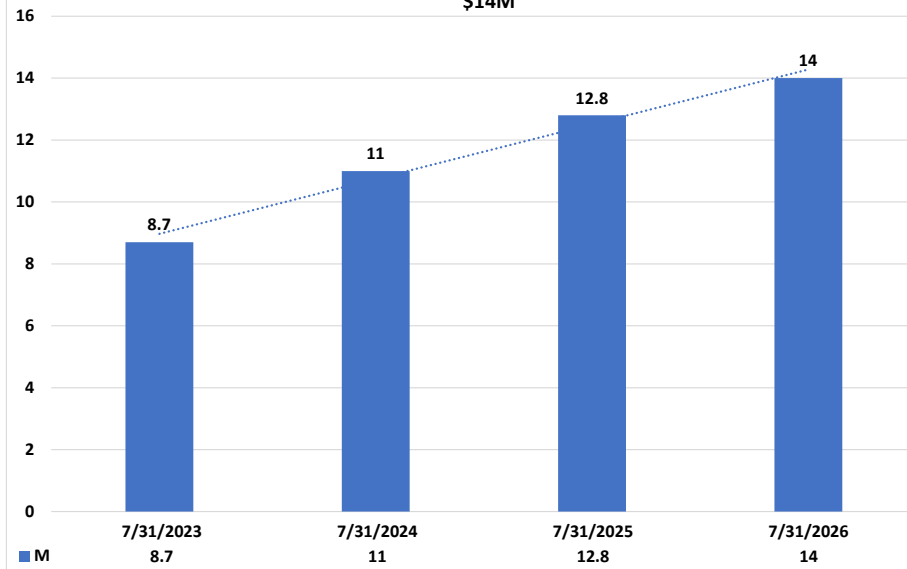
**Client Protection Fund
Income Statement
July 31, 2026**

Financial Row	CY (Oct 2025 - Jul 2026)		PY (Oct 2024 - Jul 2025)		Variance
Income					
License Fees	\$	521,457	\$	516,480	\$ 4,978
Other Operating Revenues					
42965 - Claims Recovery	\$	49,018	\$	19,181	\$ 29,837
42966 - Claims Recovery Collection Fees	\$	(9,073)	\$	(1,169)	\$ (7,905)
42970 - Contributions Received	\$	20,223	\$	29,082	\$ (8,859)
40055 - Pro Hac Vice Fees	\$	14,070	\$	12,465	\$ 1,605
Total - Other Operating Revenues	\$	74,238	\$	59,560	\$ 14,679
Total Income	\$	595,695	\$	576,039	\$ 19,656
Expenses					
65285 - Bank Service Fees	\$	449	\$	350	\$ 99
69060 - SBM Administrative/Service Fees	\$	225,830	\$	219,000	\$ 6,830
71005 - Claims Payments	\$	701,326	\$	368,275	\$ 333,051
Total Expenses	\$	927,604	\$	587,625	\$ 339,980
Investment Income					
49010 - Interest & Dividends	\$	17,067	\$	10,768	\$ 6,298
49015 - Gain or Loss on Investment JPM Brokerage	\$	80,328	\$	103,320	\$ (22,993)
Total Investment Income	\$	97,395	\$	114,089	\$ (16,694)
Increase or Decrease in Net Posisiton	\$	(234,515)	\$	102,503	\$ (337,018)
Net Position, Beginning of Year	\$	3,297,330	\$	3,125,627	\$ 171,703
Net Position, End of Period	\$	3,062,816	\$	3,228,130	\$ (165,315)

Client Protection Fund
Comparative Statement of Net Assets
July 31, 2026

Financial Row	As of Jul 2026		As of Jun 2026		Variance	Variance %	As of FY 2025
Assets							
Cash-Checking	\$	75,445	\$	7,439	\$ 68,006	914.2%	\$ 5,537
Savings	\$	3,865	\$	26,755	\$ (22,890)	(85.6%)	\$ 90,972
Investments	\$	3,132,686	\$	3,186,085	\$ (53,398)	(1.7%)	\$ 3,305,563
Account Receivable	\$	21,702	\$	21,838	\$ (136)	(0.6%)	\$ 24,757
Due (To) From SBM	\$	1,414	\$	(1,487)	\$ 2,900	(195.1%)	\$ (14,118)
Total Assets	\$	3,235,113	\$	3,240,630	\$ (5,517)	(0.2%)	\$ 3,412,711
Liabilities and Fund Balance							
Liabilities							
Claims Payable	\$	63,281	\$	3,275	\$ 60,006	1,832.3%	\$ -
Deferred Revenue	\$	109,016	\$	160,707	\$ (51,691)	(32.2%)	\$ 115,381
Total Liabilities	\$	172,297	\$	163,982	\$ 8,315	5.1%	\$ 115,381
Fund Balance Beginning of Year	\$	3,297,330	\$	3,297,330	\$ -	0.0%	\$ 3,125,627
Net Income (Expense) Year to Date	\$	(234,515)	\$	(220,682)	\$ (13,832)	6.3%	\$ 171,703
Total Fund Balance	\$	3,062,816	\$	3,076,648	\$ (13,832)	(0.4%)	\$ 3,297,330
Total Liabilities and Fund Balance	\$	3,235,113	\$	3,240,630	\$ (5,517)	(0.2%)	\$ 3,412,711

State Bar of Michigan Cash & Investments
Excluding Sections, ADS, Client Protection Fund and Retiree Health Care Trust
For the Ten Months Ending July 31, 2026
\$14M



As of July 31, 2026, the cash and investment balance in the State Bar Admin Fund net of due to Sections, ADS, Client Protection Fund, and Retiree Health Care Trust was \$14,104,416 an increase of \$435,386 from the beginning of the year primarily due to collection of license fees and other revenues.

Summary of Cash and Investment Balances by Financial Institution

7/31/2026

Bank Rating	Assets	Financial Institution	Amount	Interest Rate	Fund Summary	
4	\$3.8 trillion	SBM Chase Checking	\$ 148,732	3.40%	Client Protection Fund	\$ 3,211,997
		SBM Chase Credit Card	\$ 5,922			
		SBM Chase E Checking	\$ 1,775		State Bar Admin Fund	\$ 17,324,564
		SBM Chase Payroll	\$ (386)		(including Sections)	
		ADS Chase Checking	\$ 91,357		Attorney Discipline System	\$ 4,439,014
		ADS Chase Petty Cash	\$ 3,804			
		CPF Chase Checking	\$ 75,445			
		** Chase Total	\$ 326,650			
		SBM Horizon Bank Money Market	\$ 9		SBM - Retiree Health Care Trust	\$ 5,405,329
		SBM Horizon ICS	\$ 560,452		ADB - Retiree Health Care Trust	\$ 1,870,695
5	\$6.4 billion	Horizon Bank Total w/CD	\$ 560,461		AGC - Retiree Health Care Trust	\$ 5,606,137
					Total	\$ 37,857,737
5	\$214 billion	SBM Fifth Third Commercial Now	\$ 2,738		State Bar Admin Fund Summary	
		Fifth Third Total	\$ 2,738			
4	\$8.4 billion	MSUFCU Savings & MM	\$ 5	0.05%	Cash and Investments	\$ 17,324,564
		MSUFCU Checking	\$ 12,554		Less:	
		MSUFCU Total	\$ 12,559		Due (to)/from Sections	\$ (3,219,470)
		MSUFCU Total w/CDs	\$ 763,683		Due (to)/from ADS	\$ 735
					Due (to)/from CPF	\$ (1,414)
5	\$0.4 billion	CASE Cr Un	\$ 5		Due to Sections and CPF	\$ (3,220,148)
		CASE Cr Un Total w/CD	\$ 59,267			
					Net Administrative Fund	\$ 14,104,416
5	\$0.5 billion	Grand River Bank	\$ -		SBM Average Weighted Yield:	3.68%
		Grand River Bank Total w/CD	\$ 766,316		ADS Average Weighted Yield:	3.66%
5	\$4.3 billion	MI Schools & Govt Cr Un	\$ 5		CPF Average Weighted Yield:	3.78%
		MI Schools & Govt Cr Un w/CD	\$ 974,622			
4	\$6.7 billion	FNBA	\$ 1,501,115		Notes:	
		FNBA Total w/CDs	\$ 1,501,115		- All amounts are based on reconciled book balance and interest rates as of	
3	\$88 billion	SBM Flagstar Savings	\$ 28,536	2.30%	- Actual unreconciled Chase balance per statements was \$357,562.02(**).	
		Flagstar Total w/CD	\$ 228,536		- Funds held in bank accounts are FDIC insured up to \$250,000 per bank.	
					- ICS and CDARS are invested in multiple banks up to the FDIC limit for each bank and are FDIC insured.	
		SBM Flagstar ICS Checking	\$ 2,814		- Bank star rating from Bauer Financial.	
		ADS Flagstar ICS Checking Account	\$ 3,826		- Average weighted yields exclude retiree health care trusts.	
		CPF Flagstar ICS Checking	\$ 3,865	2.20%	- Funds held in SBM Entities Trust with Schwab are invested in bond mutual funds (33%), equity mutual funds (64%), and cash (3%).	
		Flagstar Bank FDIC Insured with CDARS	\$ 7,199,037			

Asset size & ratings from Bauer Financial were updated on 6/30/26 (based on 3/31/26 data)

SBM US Treasuries & Gov Money Market		Amount	Interest Rates	Maturity
	912797SA6 \$	223,645.21	3.50%	10/1/2026
	912797US4 \$	499,949.93	3.53%	8/4/2026
	912797UT2 \$	249,799.63	3.51%	08/11/26
	912797UV7 \$	249,450.00	3.51%	08/25/26
	912797VC8 \$	448,050.22	3.54%	9/15/2026
	9128282R0 \$	197,106.23	4.11%	08/15/27
	91282CHU8 \$	595,997.06	3.82%	8/15/2026
	91282CHY0 \$	246,235.43	3.59%	9/15/2026
	91282CKA8 \$	468,255.02	3.51%	2/15/2027
	91282CLH2 \$	588,907.97	3.62%	8/31/2026
	91282CLP4 \$	424,743.01	3.89%	9/30/2026
	91282CLS8 \$	570,218.20	4.10%	10/31/2026
	91282CMV0 \$	299,695.31	3.88%	3/31/2027
	91282CMY4 \$	295,281.51	3.58%	4/30/2027
	91282CNE7 \$	249,509.38	3.89%	5/31/2027
	91282CNL1 \$	313,917.19	3.75%	6/30/2027
	91282CNV9 \$	248,535.16	3.63%	8/31/2027
	91282CPL9 \$	494,550.78	3.48%	11/30/2027
	US Gov MM Fund - SXX \$	297,506	3.24%	
SBM US Treasuries & Gov Money Market Total		\$ 6,961,353		
CPF US Treasuries & Gov Money Market		Amount	Interest Rates	Maturity
	912797RG4 \$	289,913	3.78%	08/06/26
	912797UD7 \$	161,093	3.52%	03/18/27
	91282CMV0 \$	208,788	3.88%	03/31/27
	912797UX3 \$	242,524	3.69%	05/13/27
	91282CNE7 \$	798,430	3.95%	05/31/27
	91282CNL1 \$	249,141	3.95%	06/30/27
	91282CQS3 \$	149,297	4.08%	05/31/28
	91282CHQ7 \$	324,061	4.18%	07/31/28
	US Gov MM Fund - GXX \$	182,968	3.09%	
CPF US Treasuries & Gov Money Market Total		\$ 2,606,214		

ADS US Treasuries & Gov Money Market	Amount	Interest Rates	Maturity
912797RG4 \$	499,850	3.78%	08/06/26
912797UU9 \$	199,699	3.52%	08/18/26
912797VC8 \$	199,133	3.56%	09/15/26
91282CLH2 \$	296,954	3.60%	08/31/26
91282CLP4 \$	199,879	3.89%	09/30/26
91282CLS8 \$	200,077	4.10%	10/31/26
91282CMH1 \$	327,224	3.74%	01/31/27
91282CNE7 \$	249,509	3.88%	05/31/27
91282CNL1 \$	199,313	3.75%	06/30/27
91282CNV9 \$	248,535	3.63%	08/31/27
US Gov MM Fund - SXX \$	405,410	3.24%	
ADS US Treasuries & Gov Money Market Total \$	3,025,583		

US Treasuries & Gov Money Market Total \$ 12,593,150 -
(not FDIC insured)

CDARS	Amount	Interest Rates	Maturity
SBM Flagstar CDARS \$	305,543	3.55%	09/03/26
SBM Flagstar CDARS \$	467,950	3.54%	09/24/26
SBM Flagstar CDARS \$	300,000	3.54%	10/08/26
SBM Flagstar CDARS \$	350,000	3.62%	12/04/26
SBM Flagstar CDARS \$	325,000	3.53%	01/14/27
SBM Flagstar CDARS \$	500,000	3.60%	03/04/27
SBM Flagstar CDARS \$	500,000	3.54%	01/13/28
SBM Flagstar CDARS \$	762,043	3.74%	02/03/28
SBM Flagstar CDARS \$	265,605	3.62%	02/17/28
SBM Flagstar CDARS \$	451,475	3.62%	02/17/28
SBM Flagstar CDARS \$	120,000	4.18%	05/18/28
SBM Flagstar CDARS \$	250,000	4.10%	06/01/28
SBM Flagstar CDARS \$	250,000	4.10%	06/01/28
SBM Flagstar CDARS \$	250,000	4.10%	06/01/28
SBM Flagstar CDARS \$	250,000	4.10%	06/01/28
CPF Flagstar CDARS \$	103,989	3.54%	09/25/26
CPF Flagstar CDARS \$	100,000	3.54%	10/08/26
CPF Flagstar CDARS \$	110,000	3.50%	11/19/26
CPF Flagstar CDARS \$	212,484	3.62%	02/17/28
ADS Flagstar CDARS \$	207,978	3.54%	09/25/26
ADS Flagstar CDARS \$	250,000	3.56%	02/18/27
ADS Flagstar CDARS \$	300,000	3.60%	03/04/27
ADS Flagstar CDARS \$	200,000	3.62%	02/18/28
ADS Flagstar CDARS \$	356,467	4.10%	06/01/28
CDARS Total \$	7,188,532		

	CDs	Amount	Interest Rates	Maturity
	SBM-FNBA	\$ 250,000	4.29%	10/29/26
	SBM-FNBA	\$ 250,000	3.95%	10/29/26
	SBM-FNBA	\$ 210,000	4.29%	10/31/26
	SBM-Flagstar	\$ 200,000	3.77%	11/12/26
	SBM-CD MSU Federal Credit Union	\$ 163,618	3.55%	12/02/26
	SBM-Grand River	\$ 261,314	3.83%	03/22/27
	SBM-Grand River	\$ 250,000	3.83%	03/22/27
	MI Schools & Govt Cr Un	\$ 200,000	4.05%	04/14/27
	MI Schools & Govt Cr Un	\$ 516,244	4.05%	04/16/27
	MI Schools & Govt Cr Un	\$ 258,373	4.05%	04/24/27
	SBM-Grand River	\$ 255,003	3.95%	04/30/27
	SBM-FNBA	\$ 267,640	4.10%	06/29/27
	SBM-FNBA	\$ 267,640	4.10%	06/30/27
	SBM-FNBA	\$ 255,835	4.10%	06/30/27
	SBM-CASE Credit Union	\$ 59,262	3.50%	07/08/27
	SBM-CD MSU Federal Credit Union	\$ 587,506	3.70%	08/12/27
	CDs Total	\$ 4,252,435		
	Total Cash & Investments	\$ 24,975,576		
Total Amount of Cash and Investments not FDIC-insured	\$	15,675,537	62.8%	
(includes Tbills and Gov MM held at JPM)				
SBM Entities Retiree Healthcare Trust (Schwab)				
	SBM - Ret Healthcare Trust	\$ 5,405,329		
	ADB - Ret Healthcare Trust	\$ 1,870,695		
	AGC - Ret Healthcare Trust	\$ 5,606,137		
	SBM Entities Retiree Healthcare Trust Total	\$ 12,882,162		
	Total Investments	\$ 37,857,737		

Monthly SBM Attorney and Affiliate Report - July 31, 2026

FY 2026

	September 30 2018	September 30 2019	September 30 2020	September 30 2021	September 30 2022	September 30 2023	September 30 2024	September 30 2025	July 31 2026	FY Increase (Decrease)
Attorneys and Affiliates In Good Standing										
Active	42,342	42,506	42,401	42,393	42,395	41,985	41,427	41,430	41,488	58
Less than 50 yrs serv	40,973	41,036	40,559	40,504	40,680	40,115	39,399	39,222	39,080	(142)
50 yrs or greater	1,369	1,470	1,842	1,889	1,715	1,870	2,028	2,208	2,408	200
Voluntary Inactive	1,169	1,139	1,192	1,097	1,072	1,106	1,262	1,195	1,158	(37)
Less than 50 yrs serv	1,142	1,105	1,149	1,055	1,030	1,059	1,217	1,151	1,109	(42)
50 yrs or greater	27	34	43	42	42	47	45	44	49	5
Emeritus	2,204	2,447	2,727	3,033	3,306	3,733	4,245	4,597	4,903	306
Total Attorneys in Good Standing	45,715	46,092	46,320	46,523	46,773	46,824	46,934	47,222	47,549	327
Fee-paying Attorneys (Active & Inactive less than 50 yrs of Serv)	42,115	42,141	41,708	41,559	41,710	41,174	40,616	40,373	40,189	(184)
Affiliates										
Legal Administrators	10	10	8	5	2	2	4	4	4	-
Legal Assistants	401	393	317	219	214	194	195	210	247	37
Total Affiliates in Good Standing	411	403	325	224	216	196	199	214	251	37
Total Attorneys and Former Attorneys in the Database										
State Bar of Michigan Attorney and Affiliate Type										
	September 30 2018	September 30 2019	September 30 2020	September 30 2021	September 30 2022	September 30 2023	September 30 2024	September 30 2025	July 31 2026	FY Increase (Decrease)
Attorneys in Good Standing:							(558)			
ATA (Active)	42,342	42,506	42,401	42,393	42,395	41,985	41,427	41,430	41,488	58
ATVI (Voluntary Inactive)	1,169	1,139	1,192	1,097	1,072	1,106	1,262	1,195	1,158	(37)
ATE (Emeritus)	2,204	2,447	2,727	3,033	3,306	3,733	4,245	4,597	4,903	306
Total Attorneys in Good Standing	45,715	46,092	46,320	46,523	46,773	46,824	46,934	47,222	47,549	327
Attorneys Not in Good Standing:					116	236	241	94	234	
ATN (Suspended for Non-Payment of Dues)	6,072	6,246	6,416	6,472	6,588	6,824	7,065	7,159	7,393	234
ATDS (Discipline Suspension - Active)	439	440	445	449	454	456	466	478	477	(1)
ATDI (Discipline Suspension - Inactive)	19	24	25	25	25	25	27	29	30	1
ATDC (Discipline Suspension - Non-Payment of Court Costs)	15	16	16	14	14	15	15	15	14	(1)
ATNS (Discipline Suspension - Non-Payment of Other Costs)	95	98	100	102	106	104	111	110	108	(2)
ATS (Attorney Suspension - Other)*	1	1	2	-	-	-	-	-	-	-
ATR (Revoked)	583	596	613	623	634	645	647	660	667	7
ATU (Status Unknown - Last known status was inactive)**	2,070	2,070	2,070	2,070	2,047	2,047	2,047	2,047	2,047	-
Total Attorneys Not in Good Standing	9,294	9,491	9,687	9,755	9,868	10,116	10,378	10,498	10,736	238
Other:										
ATSC (Former special certificate)	155	157	158	164	167	170	173	175	178	3
ATW (Resigned)	1,689	1,798	1,907	2,036	2,143	2,282	2,428	2,574	2,686	112
ATX (Deceased)	9,287	9,524	9,793	10,260	10,664	10,958	11,212	11,594	11,824	230
Total Other	11,131	11,479	11,858	12,460	12,974	13,410	13,813	14,343	14,688	345
Total Attorneys in Database	66,140	67,062	67,865	68,738	69,615	70,350	71,125	72,063	72,973	910

* ATS is a new status added effective August 2012 - suspended by a court, administrative agency, or similar authority

** ATU is a new status added in 2010 to account for approximately 2,600 attorneys who were found not to be accounted for in the iMIS database
The last known status was inactive and many are likely deceased. We are researching these attorneys to determine a final disposition.

N/R - not reported

Notes: Through July 31, 2026 a total of 913 new attorneys joined SBM, compared to 895 new attorneys who joined SBM through July 31, 2025.

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3. Upcoming Events

Presented by Lisa J. Hamameh and Peter
Cunningham

3.1. Commission on Fairness and Public Trust Pathways to the Judiciary Event*

PATHWAYS TO THE JUDICIARY



Join the Commission on Fairness and Public Trust in the Judiciary and the Oakland County Bar Association for a panel discussion featuring:

- Judge Sima G. Patel, Michigan Court of Appeals
- Chief Judge Jeffery S. Matis, 6th Circuit Court, Oakland County
- Judge Lorie N. Savin, 6th Circuit Court, Oakland County
- Judge Shelia R. Johnson, 46th District Court, Southfield

Hear directly from the judges about the pathways they took to the bench, the obstacles they overcame along the way, and their advice for others considering a career in the judiciary.

Mingle with the judges and fellow guests afterward at a social hour hosted by the Michigan State Bar Foundation (cash bar).

WHEN: Thursday, October 29, 5:00-7:30 p.m.

WHERE: [Emagine Theater, Royal Oak](#)

CONTACT: tarsine@courts.mi.gov

REGISTER: [CLICK HERE](#)

(Space is limited and registration will close Monday, October 26.)

4. President's and Executive Director's Report

Presented by Lisa J. Hamameh and Peter Cunningham

4.1. Michigan Supreme Court Commissions Updates

4.2. BOC Retreat Update

4.3. Staff Updates

5. Representative Assembly Report

Presented by Nicole A. Evans

6. Young Lawyers Section Report

Presented by Jacob G. Eccleston

7. Public Policy

Presented by Erika L. Bryant

8. Finance and Audit

Presented by David C. Anderson

8.1. Finance Report

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8.3. Budget Amendments*

For Approval

State Bar of Michigan
FY 2026 Operating Revenues and Expenses Budget Amendment
September 18, 2026

	FY 2026 Approved Budget (As amended on April 24, 2026)	FY 2026 Requested Budget	Change
Operating Revenues			
- License Fees and Related	\$ 10,462,820	\$ 10,462,820	\$ -
- All Other Operating Revenue	\$ 1,985,993	\$ 2,040,993	\$ 55,000
Total Operating Revenues	\$ 12,448,813	\$ 12,503,813	\$ 55,000
Operating Expenses			
- Labor-related Operating Expenses			
Salaries	\$ 6,733,427	\$ 6,733,427	\$ -
Employee Benefits & Payroll Taxes	\$ 2,230,107	\$ 2,230,107	\$ -
Total Labor-related Operating Expenses	\$ 8,963,534	\$ 8,963,534	\$ -
- Non-labor Operating Expenses	\$ 4,490,703	\$ 4,550,703	\$ 60,000
Total Operating Expenses	\$ 13,454,237	\$ 13,514,237	\$ 60,000
Total Operating Income/(Loss)	\$ (1,005,424)	\$ (1,010,424)	\$ (5,000)
Non-Operating Revenue/(Expense)			
- Investment Income	\$ 696,500	\$ 696,500	\$ -
- Investment Income/(Loss) - Retiree Health Care Trust	\$ -	\$ -	\$ -
- Capital Contributions	\$ -	\$ -	\$ -
- Loss on Disposal of Capital Asset	\$ -	\$ -	\$ -
- Other Non-Operating Revenues	\$ -	\$ -	\$ -
Total Non-Operating Revenue/(Expense)	\$ 696,500	\$ 696,500	\$ -
Increase/Decrease in Net Position	\$ (308,924)	\$ (313,924)	\$ (5,000)
Operating Revenues			
Division 1			
- Character & Fitness	\$ 339,935	\$ 339,935	\$ -
- Diversity	\$ 600	\$ 600	\$ -
- Ethics	\$ 3,500	\$ 3,500	\$ -
- Interim Administrator Program	\$ 200,000	\$ 200,000	\$ -
- Lawyer Referral Service	\$ 155,000	\$ 155,000	\$ -
- Unauthorized Practice of Law	\$ -	\$ -	\$ -
Total Division 1	\$ 699,035	\$ 699,035	\$ -

State Bar of Michigan
FY 2026 Operating Revenues and Expenses Budget Amendment
September 18, 2026

	FY 2026 Approved Budget (As amended on April 24, 2026)	FY 2026 Requested Budget	Change	
Division 2				
- 50 Year Golden Celebration	\$ 6,000	\$ 6,000	\$ -	
- Bar Journal	\$ 165,500	\$ 165,500	\$ -	
- Bar Journal Directory	\$ -	\$ -	\$ -	
- Digital (Website)	\$ 62,000	\$ 62,000	\$ -	
- e-Journal	\$ 32,000	\$ 32,000	\$ -	
- Great Lakes Legal Conference	\$ 40,000	\$ 40,000	\$ -	
- Inaugural and Awards Luncheon (Annual Meeting)	\$ 18,000	\$ 18,000	\$ -	
- Lawyer Services	\$ 133,000	\$ 133,000	\$ -	
- Lawyers & Judges Assistance Program	\$ 73,500	\$ 73,500	\$ -	
- Practice Management Resource Center	\$ 1,500	\$ 1,500	\$ -	
- Print & Design Center	\$ 7,370	\$ 7,370	\$ -	
- UMLI	\$ -	\$ -	\$ -	
Total Division 2	\$ 538,870	\$ 538,870	\$ -	
Division 3				
- License Fees & Related	\$ 10,462,820	\$ 10,462,820	\$ -	
- ADS Service Fee	\$ 139,488	\$ 139,488	\$ -	
- Chargeback to CPF	\$ 271,000	\$ 271,000	\$ -	
- Credit Card Fee	\$ 174,000	\$ 174,000	\$ -	
- Other Revenues	\$ 163,600	\$ 218,600	\$ 55,000	(1)
Total Division 3	\$ 11,210,908	\$ 11,265,908	\$ 55,000	
Total Operating Revenues	\$ 12,448,813	\$ 12,503,813	\$ 55,000	
Non-Labor Operating Expenses				
Division 1				
- Character & Fitness	\$ 55,200	\$ 55,200	\$ -	
- Client Protection Fund	\$ 24,530	\$ 24,530	\$ -	
- Diversity	\$ 40,650	\$ 40,650	\$ -	
- Ethics	\$ 10,680	\$ 10,680	\$ -	
- Interim Administrator Program	\$ 77,785	\$ 77,785	\$ -	
- Justice Initiatives	\$ 137,425	\$ 137,425	\$ -	
- Lawyer Referral Service	\$ 7,450	\$ 7,450	\$ -	
- Outreach	\$ 164,750	\$ 164,750	\$ -	
- Unauthorized Practice of Law	\$ 16,050	\$ 16,050	\$ -	
Total Division 1	\$ 534,520	\$ 534,520	\$ -	
Division 2				
- 50 Year Golden Celebration	\$ 48,700	\$ 48,700	\$ -	
- Bar Journal	\$ 396,350	\$ 396,350	\$ -	
- Bar Journal Directory	\$ -	\$ -	\$ -	
- Digital (Website)(1)	\$ 293,500	\$ 293,500	\$ -	
- e-Journal	\$ 16,465	\$ 16,465	\$ -	
- Facilities	\$ 446,700	\$ 446,700	\$ -	
- General Communications (Media Relations)	\$ 25,070	\$ 25,070	\$ -	
- Great Lakes Legal Conference	\$ 112,800	\$ 112,800	\$ -	
- Inaugural and Awards Luncheon (Annual Meeting)	\$ 57,500	\$ 57,500	\$ -	
- Information Technology Services	\$ 878,844	\$ 923,844	\$ 45,000	(2)
- Lawyer Services	\$ 31,850	\$ 31,850	\$ -	
- Lawyers & Judges Assistance Program	\$ 45,800	\$ 45,800	\$ -	
- Practice Management Resource Center	\$ 21,250	\$ 21,250	\$ -	
- Print & Design Center	\$ 32,200	\$ 32,200	\$ -	
- Research & Development	\$ 26,895	\$ 26,895	\$ -	
- UMLI	\$ -	\$ -	\$ -	
Total Division 2	\$ 2,433,924	\$ 2,478,924	\$ 45,000	

State Bar of Michigan
FY 2026 Operating Revenues and Expenses Budget Amendment
September 18, 2026

	FY 2026 Approved Budget (As amended on April 24, 2026)	FY 2026 Requested Budget	Change	
Division 3				
- Administration	\$ 85,090	\$ 85,090	\$ -	
- Board of Commissioners	\$ 146,100	\$ 146,100	\$ -	
- Executive Office	\$ 58,550	\$ 73,550	\$ 15,000	(1)
- General Counsel	\$ 46,400	\$ 46,400	\$ -	
- Governmental Relations	\$ 72,350	\$ 72,350	\$ -	
- Human Resources	\$ 96,200	\$ 96,200	\$ -	
- Representative Assembly	\$ 51,850	\$ 51,850	\$ -	
- Finance	\$ 425,675	\$ 425,675	\$ -	
- Depreciation	\$ 446,044	\$ 446,044	\$ -	
- Property Taxes (in lieu of)	\$ 94,000	\$ 94,000	\$ -	
Total Division 3	\$ 1,522,259	\$ 1,537,259	\$ 15,000	
Total Non-Labor Operating Expenses	\$ 4,490,703	\$ 4,550,703	\$ 60,000	

(1) The requested amendment reflects the expected revenues (\$55,000) and expenses (\$15,000) for the pilot Legal Practitioner program under the contract with State Court Administrative Office. These revenues and expenses were not previously budgeted.

(2) Staff requests a budget amendment of \$45,000 for Network Managed Services expenses. This increase is necessary due to the transition to a new IT services provider (ADNA) and the associated restructuring of the SBM IT team, as well as increased data center costs already reflected in the FY 2027 budget.

9. Strategic Planning and Engagement

Presented by Thomas H. Howlett

9.1. Event Reports

9.1.1. 50-Year Golden Celebration*

State Bar of Michigan 2026 50-Year Golden Celebration Luncheon Event Summary

Name of Event: 50-Year Golden Celebration Luncheon
Date(s) of Event: May 7, 2026
Location of Event: Saint John's Resort Plymouth, MI

TOTAL NUMBER OF ATTENDEES				
	2026 Plymouth	2025 Plymouth	2024 Plymouth	2023 Plymouth
50-Yr Honoree	165	140	156	158
Guests	179	183	215	205
Commissioners	9	12	8	7
Staff	8	8	10	10
Past Presidents	2	2	4	4
Total Attendees	384	359	393	384
Net Promotor Score (NPS)	80	82	81	85

Evaluation Summary

The 2026 50-Year Golden Celebration was a success, earning a Net Promoter Score (NPS) of 80, which represents a slight decline from the previous year. Attendance increased compared to prior years, reflecting continued interest in the event. Feedback from the previous two years indicated that the venue felt overcrowded and was difficult to navigate for attendees with mobility challenges. In response, SBM staff worked closely with the venue to secure a larger event space at no additional cost, helping to improve accessibility and enhance the overall attendee experience.

Survey respondents expressed overwhelmingly positive feedback, with fellowship and camaraderie emerging as the most frequently cited reasons for their enjoyment of the event. Attendees also praised the beautiful venue, strong organization, quality food and entertainment, and the efforts of SBM staff. When asked what they liked best about the celebration, many respondents highlighted the opportunity to reconnect with colleagues and celebrate their professional accomplishments. Comments such as, “*Meet and greet old friends and make new,*” and “*It gave us 50-year lawyers a chance to feel good about our careers. It gave us dignity and allowed us to celebrate our lives,*” reflected common themes throughout the feedback.

Prior to the luncheon, attendees had the opportunity to mingle, enjoy refreshments, have professional photographs taken, and connect with classmates and alumni association representatives in the Garden Gallery. Representatives from all five Michigan law schools were present, including the University of Michigan Law School, Michigan State University College of Law, Thomas M. Cooley Law School, the University of Detroit Mercy School of Law, and Wayne State University Law School. This marked the

first year that Thomas M. Cooley Law School alumni participated in the celebration, as the Class of 1976 was the school's inaugural graduating class.

Honorees expressed strong appreciation for the event's organization and punctuality, noting that the program ran smoothly, speeches were concise, and the focus remained on providing meaningful opportunities for attendees to connect and celebrate together. The primary suggestion for improvement echoed feedback received in previous years: reconsidering the trivia game format or finding ways to streamline its pace. Additional recommendations included color-coding name tags by law school to make it easier for attendees to identify and reconnect with classmates, reducing costs by eliminating the distribution of day planners and pens, and providing a list of participants to attendees in advance of the event.

Saint John's Resort received high marks as the event venue, and the meal selections were rated predominantly excellent or above average. Entertainment featured a performance by The Forum Shoppers barbershop quartet and an interactive game of My Trivia Live, with questions centered on events and popular culture from 1976.

Comments from honorees reflected an overwhelming sense of pride, appreciation, and gratitude. Representative remarks included, *"The SBM staff was exceptional. This event was the most organized event that I have gone to in a long time,"* *"I felt so very proud to have made the practice of law my chosen profession and to be a member of the State Bar of Michigan,"* and *"Recognition for a career of service is much appreciated."* Collectively, these responses underscore the event's success in honoring attendees' professional achievements while fostering a sense of community and celebration.

9.1.2. Great Lakes Legal Conference*

State Bar of Michigan 2026 Great Lakes Legal Conference Event Summary

Name of Event/Date:	2026 Great Lakes Legal Conference, June 12-13, 2025
Location of Event:	Grand Hotel, Mackinac Island, MI
Registration Fee:	\$225 before May 12, \$275 after May 12
Hotel Registration Fee:	\$594.27 single (tax & fees included); \$102.82 guest

TOTAL NUMBER OF ATTENDEES				
	2023	2024	2025	2026
Registered Attendees	182	168	164	154
Board of Commissioners	30	31	34	32
Speakers	13	17	14	17
Staff	12	15	15	13
Guests	145	150	161	181
Net Promotor Score (NPS)	47	65	66	46

Evaluation Summary

The 2026 Great Lakes Legal Conference (GLLC) garnered an overall positive response for its engaging and informative sessions along with its networking opportunities, receiving a Net Promoter Score (NPS) of 46, which is a decrease from the previous year. Of the number of attendees, 70 surveys were received, giving a 38% survey response rate of registered attendees and members of the Board of Commissioners.

Attendees expressed overwhelmingly positive feedback, with the Grand Hotel and Mackinac Island consistently identified as the conference's greatest strengths. Many noted that the location is a primary reason they attend and expressed hope that the event will continue to be held there. Networking opportunities were another key highlight, with participants valuing the chance to connect with colleagues, judges, bar leaders, and attorneys from across the state. Social events and informal gatherings were frequently cited as meaningful opportunities for relationship building.

Educational programming also received strong reviews. Attendees appreciated the variety of session topics and tracks, with legal updates, law firm management, artificial intelligence, mental health, and storytelling among the most frequently praised presentations. Overall, respondents valued the conference's combination of quality education, professional networking, and a unique venue.

While overall feedback was positive, several common themes emerged for improvement. Attendees expressed interest in additional networking opportunities, including more structured networking, mentorship activities, and better attendance and coordination for networking events. Many respondents also requested a broader range of topics, more workshops, longer session times, and greater variety in speakers and presenters. Several attendees noted the importance of providing presentation materials and handouts in advance, as well as incorporating more practical resources and sample forms. Cost and accessibility were also recurring concerns, with some attendees noting the expense and travel requirements associated with the Grand Hotel and Mackinac Island location, while others emphasized the importance of preserving the venue. Additional recommendations included increasing participation from younger attorneys, offering attendance incentives, and exploring scholarship opportunities to make the conference more accessible.

The 1:1 session options were popular with those that registered and provided exemplary remarks for those sessions. As the conference progressed, the number of attendees did decrease as to attendance at the sessions.

This year, the survey included a new question asking attendees what types of events or topics they would like the State Bar of Michigan to offer in future programming, as well as their preferred timing for such events. In terms of timing, the majority of respondents indicated that summer (June through August) is their preferred period for events. For programming, respondents expressed strong interest in future programming focused on practical law practice issues, with artificial intelligence emerging as the most frequently requested topic. Attendees specifically sought additional guidance on AI ethics, adoption, practical applications, and hands-on demonstrations of legal technology. Other commonly requested topics included law practice management, business development, practice management software, attorney wellness and civility, legal updates, recruitment and retention, and retirement planning.

Participants also expressed interest in more specialized substantive law content, including estate planning, real property, immigration, tax law, family law, criminal defense, evidence and forensics, and emerging legal issues. Many respondents emphasized the value of practical, skills-based sessions, advanced-level content, networking opportunities, and programming that addresses the day-to-day realities of legal practice.

9.2. Partner Program: Answering Legal*

For Approval



To: Board of Commissioners

From: Robinjit Eagleson

Date: June 12, 2026

Re: Potential Partner Program: Smith.ai

Discussions were initiated between the State Bar of Michigan and Smith.ai regarding the potential establishment of a partnership program. The proposed partnership terms are summarized below:

- Discount for State Bar of Michigan Members: \$100 off the first month of service.
- Royalty to SBM: A 10% lifetime commission to SBM, with the potential increase to 15% once \$10,000 in revenue has been reached.

Smith.ai is a 24/7 virtual receptionist and business communications platform that combines AI-driven technology with live, North America-based agents. The platform manages inbound and outbound calls, website chat, and SMS communications, while offering services such as lead screening, appointment scheduling, and payment collection to improve operational efficiency and increase lead conversion.

The platform provides both AI-powered automated agents and live receptionist support, enabling firms to screen and qualify prospective clients based on customized criteria. Smith.ai also integrates with calendars, payment platforms, CRM systems, and legal software, including Clio and LawPay, allowing firms to schedule consultations and collect payments seamlessly. In addition, the service includes spam filtering capabilities designed to block unwanted sales and spam calls, helping protect staff productivity. Additional information regarding Smith.ai may be found [here](#).

Currently, the State Bar of Michigan maintains one partnership with a virtual receptionist provider, Ruby Receptionists. However, SBM has received multiple requests from members seeking an alternative provider option. Smith.ai would provide that alternative while offering a service specifically tailored to law firms. The company positions itself as a comprehensive front-office solution for legal practices by qualifying and screening leads by practice area, capturing detailed client intake information, and scheduling consultations directly through the firm's case management system.

Recommendation: The Strategic Planning and Engagement Committee met on Tuesday, May 19, 2026 and unanimously approved forwarding this potential partner program to the Board of Commissioners for its consideration. It is recommended that the Board of Commissioners approve Smith.ai as a partner program of the State Bar of Michigan pending General Counsel review of the contract and finalization.

9.3. Awards Criteria*

For Approval



To: Board of Commissioners

From: Robinjit Eagleson

Date: September 18, 2026

Re: Awards Committee: Criteria Recommendations

At its May 19, 2026, meeting, the Awards Committee voted to recommend amendments to the criteria for each award, as detailed in the attached document. The attachment presents the original language alongside the proposed revisions, which are designed to enhance clarity and readability, with substantive changes highlighted in red for review.

Key modifications to the award criteria include:

- **Periodic Presentation:** Clarifying that awards may be presented periodically rather than annually to reinforce that they are not necessarily given every year.
- **Service Tenure Requirements:** Introducing specific years-of-service thresholds for qualification.
 - **SPEC Committee Note:** Given the existing volume of nominations, adding service requirements may further reduce the eligible pool. Additionally, this could discourage younger members from participating in the nomination process or striving to embody the ideals recognized by the awards.
- **Conduct and Contributions:** Adding a requirement that candidates have no conflicting publications or prior statements regarding their conduct or contributions.
- **Posthumous Consideration:** Explicitly allowing posthumous nominations.

At its September 9, 2026, meeting, the Strategic Planning and Engagement Committee (SPEC) discussed the proposed modifications to the award criteria, including the specified years-of-service thresholds for eligibility. Following discussion, the SPEC unanimously voted to approve the Awards Committee's recommendations, with the exception of the proposed 15-year service requirements for the Robert P. Hudson Award and the Frank J. Kelley Distinguished Public Service Award. In addition, on its own initiative, the SPEC voted to eliminate the 10-year service requirement for the Champion of Justice Award.

Recommendation: It is recommended that the Board of Commissioners adopt the proposed amendments to the award criteria as outlined in the attached document.

ROBERTS P. HUDSON AWARD

Original Criteria:

Roberts P. Hudson Award: This award is presented periodically to commend one or more lawyers for their unselfish rendering of outstanding and unique service to and on behalf of the State Bar of Michigan, the legal profession, and public. It signifies unusual and extraordinary help and assistance to the Bar and the legal profession, which has been given generously, ungrudgingly, and in a spirit of self-sacrifice. It is awarded to that member of the State Bar of Michigan who best exemplifies that which brings honor, esteem, and respect to the legal profession. The Hudson Award is considered the highest award conferred by the State Bar.

Recommended Criteria:

The **Roberts P. Hudson Award** is the highest honor conferred by the State Bar of Michigan. It is presented periodically to recognize a member of the State Bar who exemplifies exceptional service and dedication to the legal profession, the State Bar, and the public.

Nominees for the Hudson Award will be evaluated based on the following criteria:

- Must be a current member in good standing of the State Bar of Michigan ~~for at least 15 years~~.
- ~~Demonstrated~~ extraordinary and exceptional service to and on behalf of:
 - The State Bar of Michigan;
 - ⊖ The legal profession; ~~and~~
 - The public.
- The service must be distinctive in quality and not commonly expected in the normal course of professional duties.
- The service must be rendered in a selfless, generous, and voluntary manner with an emphasis on personal sacrifice, with no expectation of personal gain or recognition.
- The nominee's conduct and contributions should bring honor, esteem, and respect to the legal profession ~~consistent with the lawyer's oath and should have no publications or past statements to the contrary~~.
- The nominee should exemplify the highest standards of professionalism, ethics, and public service.
- The nominee's efforts should have a significant and lasting impact on the legal community, the administration of justice, or broader public interest.

The Hudson Award is not given annually by default, but only when an individual (or individuals) clearly meets or exceeds the above criteria.

- ~~Posthumous nominations may be considered~~.
- The selection committee may consider the totality of the nominee's contributions throughout their legal career.

FRANK J. KELLEY DISTINGUISHED PUBLIC SERVICE AWARD

Original Criteria:

Frank J. Kelley Distinguished Public Service Award: This award recognizes extraordinary governmental service by a member of the State Bar of Michigan. The criteria for the award are:

- A present or former member of the State Bar of Michigan
- Service in public office (elected or appointed official) in a way that strengthens the American system of justice under the law
- Demonstration of the highest standards of integrity, fairness, leadership, excellence, dedication to principle, and dedication to the ideals of democracy
- Has made a significant lasting contribution to the nation, the state, or the community in which the public servant lives or serves

Recommended Criteria:

The **Frank J. Kelley Award** is an award presented periodically that recognizes extraordinary governmental service by a member of the State Bar of Michigan, honoring individuals whose public service has strengthened the American system of justice and upheld the highest ideals of democracy and the legal profession. Nominees will be evaluated based on the following criteria:

- The nominee must be a present or former member of the State Bar of Michigan ~~with at least 15 years of public or governmental service.~~
- **Governmental or public** service may be at the local, state, or national level.
- Demonstrated contribution to strengthening the American system of justice under the law.
- Actions must reflect a commitment to justice, the rule of law, and democratic principles.
- The nominee's conduct and contributions should bring honor, esteem, and respect to the legal profession, **and should have no publications or past statements to the contrary.**
- The nominee's **governmental or public** service must have resulted in a significant and enduring contribution to:
 - The nation;
 - The State of Michigan; **or**
 - The local community in which the individual has served.

The Kelley award is conferred only when an individual's public service meets or exceeds these criteria.

- **Posthumous nominations may be considered.**
- The evaluation process will consider the overall impact, consistency, and legacy of the nominee's governmental service.

CHAMPION OF JUSTICE AWARD

Original Criteria:

Champion of Justice Award: Not more than five Champion of Justice Awards will be given to practicing lawyers and judges each year by the State Bar of Michigan. The criteria to be considered for the award are:

- State Bar of Michigan membership ~~for at least 10 years~~
- Integrity and adherence to the highest principles and traditions of the legal profession
- Superior professional competence
- An extraordinary professional accomplishment that benefits the nation, the state, or the local community in which the lawyer or judge lives.

Recommended Criteria:

The **Champion of Justice Award** is ~~an award presented periodically~~ by the State Bar of Michigan to no more than five practicing lawyers and judges annually. This award honors individuals who have demonstrated integrity, professional excellence, and extraordinary contributions to the law and society. Nominees will be evaluated based on the following criteria:

- Must be a current practicing lawyer or judge.
- Must ~~have been~~ a member of the State Bar of Michigan ~~for at least 10 years~~ at the time of nomination.
- Demonstrates unwavering integrity and adherence to the highest principles and traditions of the legal profession.
- Consistently upholds the ethical standards of the law and contributes to the honor and dignity of the profession ~~and should have no publications or past statements to the contrary.~~
- Exhibits outstanding legal knowledge, skill, and ability in their area(s) of practice or judicial service.
- Recognized by peers as a leader or innovator in the legal field.
- Has achieved an exceptional professional accomplishment that has resulted in a meaningful benefit to ~~one or more of the following:~~
 - The nation
 - The State of Michigan
 - Or the local community in which the lawyer or judge resides or serves
- The accomplishment should reflect leadership, impact, and distinction beyond the nominee's normal professional responsibilities.

The Champion of Justice Award is conferred on no more than five individuals in any calendar year. Nominees may include individuals from any area of legal practice or judicial service.

- The award is intended to reflect both career-long excellence and noteworthy specific achievements.

KIMBERLY M. CAHILL BAR LEADERSHIP AWARD

Original Criteria:

Kimberly M. Cahill Bar Leadership Award: This award is presented to a recognized local or affinity bar association, program, or leader for excellence in promoting the ideal of professionalism or equal justice for all, or in responding to a compelling legal need within the community during the past year or on an ongoing basis.

This award is established in memory of Kimberly M. Cahill, president of the State Bar of Michigan (2006-2007). Her volunteer leadership efforts in state and local bar organizations included serving as chair of the Representative Assembly, president of the Women Lawyer's Association of Michigan, and president of the Macomb County Bar Association. These roles displayed her commitment to the highest ideals of professionalism and community service, focusing on equal access to justice for all.

Please note that "bar leader" includes non-lawyers. "Local or affinity" applies to the bar association, the program, and the leader. A person or organization collaborating with a local or affinity bar association is eligible for this award.

Recommended Criteria:

The **Kimberly M. Cahill Award** is an award presented periodically that honors a local or affinity bar association, program, or leader for exceptional commitment to the ideals of professionalism, equal justice, and community service. This award recognizes impactful efforts made within the past year or on an ongoing basis. Established in memory of Kimberly M. Cahill, President of the State Bar of Michigan (2006 - 2007), the award reflects her enduring legacy of volunteer leadership, commitment to equal access to justice, and dedication to the highest ideals of the legal profession. Nominees will be evaluated based on the following criteria:

Nominee must be one of the following:

- A local or affinity bar association.
- A program sponsored by or working in partnership with such an association.
- A bar leader (including non-lawyers) affiliated with or supporting a local or affinity bar association or program.
- An individual or organization collaborating with a local or affinity bar association.

Nominees will be evaluated based on one or more of the following:

- Demonstrated excellence in advancing the ideals of professionalism, civility, and ethical leadership within the legal community.
- Significant efforts to promote or ensure equal access to justice for all, especially underserved or marginalized communities.
- Effective response to a pressing legal issue or unmet legal need within the community, either:
 - In the past year, or
 - As part of a sustained, ongoing initiative.

- The nominee's conduct and contributions should bring honor, esteem, and respect to the legal profession, and should have no publications or past statements to the contrary.

Selection consideration will be given to

- Impact and effectiveness of the nominee's work in promoting professionalism, equal justice, or community-based legal service.
- Innovation, collaboration, and leadership in addressing legal or social justice challenges.
- The nominee's alignment with Kimberly M. Cahill's legacy of bar leadership, volunteerism, and public service.

JOHN W. REED MICHIGAN LAWYER LEGACY AWARD

Original Criteria:

John W. Reed Michigan Lawyer Legacy Award: The John W. Reed Michigan Lawyer Legacy Award named after a professor who over the course of his decades-long career at the University of Michigan Law School earned a reputation as a pre-eminent scholar, teacher and gentleman. Professor Reed also served as Dean of both the University of Colorado Law School and Wayne State Law School. This award in his name is presented periodically to an educator from a Michigan law school whose influence on lawyers has elevated the quality of legal practice in our state.

Recommended Criteria:

The **John W. Reed Michigan Lawyer Legacy Award** is an award presented periodically that honors the profound impact of legal educators whose teaching, mentorship, and scholarship have elevated the quality of legal practice in the State of Michigan.

Named in honor of Professor John W. Reed, a preeminent legal scholar and teacher whose distinguished career included serving as Dean of both the University of Colorado Law School and Wayne State University Law School, this award celebrates those who embody his legacy of excellence in legal education and character. Nominees will be evaluated based on the following criteria:

- The nominee must be a current or former educator at a Michigan law school.
- Includes faculty, administrators, or others whose primary professional role involves legal education.
- The award may be given periodically, rather than annually, based on the selection of a deserving recipient.

Nominees will be evaluated based on the following:

- Demonstrated excellence as a teacher, mentor, and role model to Michigan law students.
- A record of inspiring and shaping future lawyers through rigorous, ethical, and compassionate legal instruction.
- Clear and measurable influence on the quality, integrity, and professionalism of legal practice in Michigan through their students and scholarship.
- Recognition as a thought leader or scholar whose work has enriched Michigan's legal community and advanced understanding of the law.
- Embodies the values of civility, humility, and professionalism for which Professor Reed was widely respected.
- Demonstrates commitment to the highest ideals of the legal profession and should have no publications or past statements to the contrary.

Selection consideration will be given to

- Impact may be demonstrated through:

- Career achievements
 - Testimonials from former students or legal professionals
 - Published works or leadership in legal education
- The award is reserved for individuals whose career-long contributions merit distinction and reflect the spirit and legacy of John W. Reed.

LIBERTY BELL AWARD

Original Criteria:

Liberty Bell Award: The Liberty Bell Award is given each year by local bar associations in conjunction with Law Day to honor outstanding citizens within the local community. The award recognizes outstanding service performed by a non-lawyer citizen who has given of his or her time and energy to strengthen the effectiveness of the American system of freedom under law, in keeping with the spirit of our Constitution. Such services may include activities which promote a better understanding of our form of government, especially the Bill of Rights; encourage greater respect for the law in the courts; educate people in the contrast between totalitarianism and freedom under law; or stimulate the deeper sense of individual responsibility to the end that citizens recognize their duties as well as their rights.

The SBM Awards Committee selects the statewide Liberty Bell Award winner from local bar winners submitted to the State Bar.

Recommended Criteria:

The **Liberty Bell Award** is presented **periodically by the State Bar of Michigan** to honor an outstanding non-lawyer citizen whose contributions have strengthened the effectiveness of the American system of freedom under law.

This award celebrates civic-minded individuals who, through their time and energy, promote a deeper understanding of the Constitution, the rule of law, and the responsibilities of citizenship.

Nominees will be evaluated based on the following criteria:

- Nominee must be a non-lawyer.
- Must be a citizen from the local community served by the presenting bar association.
- **Must be a recipient of the Liberty Bell Award from a local or affinity bar association.**
- Must have made significant contributions that support the rule of law, civic education, or the principles of the U.S. Constitution.

Nominees will be evaluated based on one or more of the following:

- Engaged in activities that promote understanding of the U.S. Constitution, particularly the Bill of Rights.
- Encouraged respect for individual rights, liberties, and responsible citizenship.
- Worked to foster greater respect for law and the courts within the community.
- Acted in ways that uphold and strengthen the legal and judicial system **and should have no publications or past statements to the contrary.**
- Educated others on the difference between totalitarianism and democracy, emphasizing the importance of freedom under law.
- Promoted awareness of the responsibilities and duties of citizenship, not just its privileges.
- Volunteered or led initiatives that contributed to the civic well-being of the community.

- Demonstrated a sustained commitment to public service, civic responsibility, or legal education for non-lawyers.

Selection consideration will be given to:

- The nominee's service should reflect a meaningful and lasting impact on the community.
- Activities may include volunteering, public speaking, education, civic leadership, or similar endeavors.
- The award is intended to inspire civic responsibility and celebrate community leadership that aligns with the spirit of Law Day.



To: Board of Commissioners

From: Robinjit Eagleson

Date: September 18, 2026

Re: Awards Committee: Number of Awards Recommendations

At its May 19, 2026, meeting, the Awards Committee voted to recommend that the number of awards for each award be revised as follows:

Name of Award	Current # of Awards Usually Awarded	Recommended # of Awards
Robert P. Hudson Award	1	Up to 2
Frank J. Kelley Award	1	Up to 2
Champion of Justice Award	4	Up to 2
Kimberly M. Cahill Award	1	Up to 2
John W. Reed Michigan Lawyer Legacy Award	1	Up to 2
Liberty Bell Award	1	Up to 1

The current criteria for each award do not specify a fixed number of recipients.

The Pro Bono Initiative Committee presents the John W. Cummiskey Pro Bono Award, while the Representative Assembly confers three additional accolades: the Michael Franck Award, the Unsung Hero Award, and the McCree Award. Currently, Board of Commissioners (BOC) policy limits the Committee to granting up to 10 awards, inclusive of the Cummiskey Award but excluding the Representative Assembly awards. Approving the recommended expansion would increase this threshold to 12 awards (again including the Cummiskey Award), necessitating a corresponding update to BOC policy.

At its September 19, 2026, meeting, the Strategic Planning and Engagement Committee (SPEC) discussed the proposed number of awards. Following discussion, the SPEC unanimously voted to approve an increase in the recommended number of awards, while also recommending that Board policy be amended to reduce the number of awards permitted from nine to seven, in addition to the Cummiskey Award.

This change will provide the Awards Committee with greater flexibility to recognize multiple deserving recipients within each award category, while reducing the overall number of awards authorized under Board policy.

Recommendation: It is recommended that the Board of Commissioners approve the increased recommended number of awards and amend Board policy to reduce the number of awards permitted from nine to seven, in addition to the Cummiskey Award.



COMMITTEES

STATE BAR OF MICHIGAN

Awards Policy

1. The number of recommendations from the State Bar of Michigan Awards Committee shall be limited to seven ~~nine~~ from among all of the award categories, with the State Bar Pro Bono Initiative limited to one John W. Cummiskey Pro Bono Award and non-SBM entities who have awards presented at the Annual Awards Banquet limited to one award and one awardee at the event.

Board of Commissioners - ~~July 22, 2016~~ September 18, 2026

2. No standing or special committee has authority to bestow an award or significant honor. Any award or significant honor recommended by a standing or special committee to be bestowed must be approved by the Board of Commissioners or Representative Assembly, as appropriate.

Board of Commissioners- January 22, 2016

Note: At its June 10, 2016 meeting, the BOC passed a motion amending the jurisdiction of the Law Related Education and Public Outreach Committee to designation of Legal Milestones. The purpose of the amendment was to make clear that the designation of Legal Milestones is a committee award that falls under the Awards Policy and thus requires BOC approval.

3. Members, advisors, or liaisons to a State Bar committee are not eligible for awards recommended or presented by that committee even if the person is excused from discussing or voting on the award. An exception to this rule may be made in extraordinary circumstances upon written approval of the State Bar President, in response to a written request from the committee, stating reasons sufficient in the determination of the President to justify an exception.

Board of Commissioners - July 25, 2008



To: Board of Commissioners

From: Robinjit Eagleson

Date: September 18, 2026

Re: Awards Committee: Liberty Bell Award Renaming

At its May 19, 2026, meeting, the Awards Committee voted to recommend renaming the Liberty Bell Award to the Nancy F. Brown Liberty Bell Award in honor of the late Nancy Brown, recognizing her fifty years of dedicated service to the State Bar of Michigan. To further celebrate her legacy, the State Bar of Michigan honored her on August 20, 2026, through a memorial tribute, the installation of a permanent plaque in the State Bar library, and the dedication of commemorative plaques honoring all departed staff members within the building's garden area.

Established in Michigan in 1962, the Liberty Bell Award was conceived by Flint attorney William P. Daniel during his tenure with the Young Lawyers Section of the State Bar of Michigan. Created to honor non-lawyers for outstanding community service, the award recognizes individuals who strengthen the rule of law and foster a deeper connection between the public and the ideals celebrated on Law Day.

While the award's name draws symbolic inspiration from the historic Liberty Bell in Philadelphia to represent the ideals of freedom and the American legal system, the program itself originated in Michigan in 1962.

Timeline of the Award

Year	Development
1962	Liberty Bell Award concept developed in Michigan; William P. Daniel is credited with conceiving the award.
1963	Young Lawyers Sections in other states begin adopting the concept.
1964	American Bar Association formally endorses the Liberty Bell Award nationally.
1986	State Bar of Michigan establishes a statewide Liberty Bell Award.
Today	Local and state bar associations across the country continue presenting Liberty Bell Awards, generally in connection with the law.

The Strategic Planning and Engagement Committee (SPEC) acknowledged and expressed its appreciation for Nancy Brown's significant contributions and dedicated service to the State Bar of Michigan. Following careful consideration of the matter, including the tributes and other formal recognition previously provided by the Bar in acknowledgment of her service, as well as the historical significance and context associated with the Liberty Bell Award name, the Committee determined that renaming the award in her honor would not be appropriate at this time. Accordingly, at its September 9, 2026, meeting, SPEC voted to oppose the proposed renaming of the Liberty Bell Award.

9.4. SPAR Recommendations*

For Approval

Strategic Planning Activities Report Review Subcommittee Recommendations

The State Bar of Michigan (SBM) adopted its current strategic plan in January 2017. Since that time, the plan has provided a valuable framework for guiding the organization's priorities and decision-making. The Strategic Planning Activities Report (SPAR) Review Subcommittee reviewed SBM's current activities and concluded that they remain strongly aligned with the existing strategic plan.

However, the legal profession and the environment in which the State Bar operates have changed significantly over the past decade. Advances in technology and artificial intelligence, changing member expectations, demographic shifts within the profession, increasing financial pressures, evolving approaches to access to justice, and broader changes affecting bar associations all present new opportunities and challenges that were not contemplated when the current plan was developed.

Rather than simply extending or making more incremental revisions to the existing strategic plan, the Subcommittee believes this is the appropriate time to undertake a comprehensive strategic planning process that reassesses the State Bar's mission, priorities, and strategic direction for the next decade.

Accordingly, the SPAR Review Subcommittee makes the following recommendations:

Recommendation 1

Develop a new strategic plan through a comprehensive strategic planning process

The Board of Commissioners should authorize a full strategic planning process rather than renewing the existing strategic plan with minor revisions. The process should evaluate the State Bar's current environment, identify emerging challenges and opportunities, engage key stakeholders, and establish strategic priorities that will guide the organization into the next decade.

To oversee this work, the Board should authorize the President to appoint a special committee of up to 15 members comprised primarily of Commissioners, together with several staff representatives who can provide organizational knowledge and implementation perspective. The committee should be responsible for guiding the planning process, reviewing data and stakeholder feedback, developing strategic priorities, and presenting a recommended strategic plan to the Board of Commissioners before the end of the 2026-2027 Bar year.

Throughout the planning process, the committee should actively seek input from a broad range of stakeholders, including SBM members, staff, section and committee leaders, the judiciary,

legal service providers, law schools, the Institute of Continuing Legal Education, the Michigan State Bar Foundation, Representative Assembly members, and other organizations and individuals whose perspectives will help inform the State Bar's strategic direction.

Recommendation 2

Engage the ABA Center for Bar Leadership to facilitate the strategic planning process

The Subcommittee recommends retaining the ABA Center for Bar Leadership as the facilitator for the strategic planning process.

The ABA Center for Bar Leadership has extensive experience working exclusively with bar associations and has facilitated strategic planning efforts for more than 100 state and local bar organizations, including for the State Bar of Michigan in 2016. The Center for Bar Leadership is familiar with the unique governance structures, operational challenges, and emerging issues facing bar associations. An experienced external facilitator will help ensure that the planning process is structured, objective, inclusive, and informed by leading practices from bar associations across the country.

Strategic Planning Activities Committee 2024-2026 Review

Executive Summary

The Strategic Planning Activities Report (SPAR) Subcommittee completed its full review of the annual report, a full year ahead of schedule. Last year, the subcommittee completed review of one-third of the report. This year, it completed the remainder of its review, which required an assessment of 53 State Bar of Michigan programs. As part of the review process, the subcommittee assessed programs' perceived alignment with the Strategic plan, evaluated its investment level, analyzed key performance indicators (KPIs), and provided general comments.

All five subcommittee members actively participated in this process. As a small subset of the full Board of Commissioners, their work is intended to provide general feedback to help shape future Strategic Plan Activities Reports. All subcommittee comments will be shared with the appropriate staff to identify potential areas for future development. Overall, the subcommittee rated every SBM activity as highly aligned with the strategic plan. The average rating was 8.6 out of 10 with a range of 7.4 to 9.4.

Below, we've detailed two central topics that were raised repeatedly by the subcommittee.

PATHWAY and YOUNG LAWYER PROGRAMS

The most prominent theme to emerge from this review focused on the State Bar of Michigan's work to establish pathway programs into the profession. Three of the four programs identified as possible areas for increased investment — Law-Related Education, Professional Pathways, and Young Lawyers Section Programming — play a vital role in the Bar's work to establish clear pathways into the profession and to provide support throughout lawyers' careers. (The fourth program identified for possible increased investment was Michigan Legal Help. The Michigan Bar Journal was the only program to be flagged for possible decreased investment.)

To support this work, the subcommittee also saw potential for additional KPIs and suggested exploring the inclusion of more data to:

- Identify the audiences our programs are serving (such as identifying student participants by their school level)
- Track the engagement of other stakeholders such as affinity bar associations, LSPs, and other partner organizations.
- Track the number of programs and reach of programs designed to engage young lawyers specifically.

The Subcommittee also noted potential for more Young Lawyers Section engagement through cross-program collaborations with programs such as Face of Justice, Law School Presentations, Professional Pathways, and Affordable Legal Services.

The committee also noted areas for possible program expansion, including tracking young lawyers' pathways into leadership to identify ways to support and sustain the development of future leaders.

COMMUNICATIONS and OUTREACH

The subcommittee raised concerns about awareness of many SBM programs. In particular, they cited potential opportunities for more promotion around Modest Means, volunteer opportunities, Preferred Partner Programs, and Unauthorized Practice of Law.

Additional KPIs also could be explored to see if they might help assess the Bar's representativeness, equal consideration, and inclusive engagement. Attention and equal consideration of the diverse and unique cultural needs of Michigan's legal professionals were discussed. Activities related to career pathways may especially benefit from improved reporting on the representativeness of participation. As noted previously, tracking the engagement of partner organizations and working to tighten the relationships between stakeholder groups would support the Bar's goal "to help promote connections and networking within the profession."

RECOMMENDATIONS

- The subcommittee supported the Bar's continued use of the Net Promoter Score as an indicator of performance. While not perfect, the standard application throughout the organization is helpful.
- An annual SPAR is a valuable tool for commissioners as fiduciaries of the Bar.
- A detailed annual review of the SPAR (as conducted by this committee) does not seem necessary. However, a full review is recommended as a preliminary step to a Strategic Planning process.

State Bar of Michigan Strategic Planning Process Proposal

July 2026

1. Introduction

The ABA Center for Bar Leadership is pleased to provide the State Bar of Michigan with a proposal to provide assistance with its next iteration of strategic planning.

As a leader in the bar community for fifty years, the ABA Center for Bar Leadership (previously the ABA Division for Bar Services) is uniquely qualified to assist the SBM with the entire planning process. The most significant benefit of using the ABA Center for Bar Leadership in the strategic planning process is our intensive knowledge of bar organizations and the issues facing the profession and justice system. Clients who have used our services always observe that the process is significantly streamlined because we already are deeply engaged with the major issues facing bars, we understand the complex relationships among justice system stakeholders, and know the pertinent questions to ask. As bar specialists, we also have access to extensive benchmarking data and cutting-edge programmatic developments.

2. Observations about the Future of Bar Organizations

Bars continue to be important stakeholders and leaders in the legal profession in the United States. Still, we are at a critical moment. The profession is experiencing unprecedented change. The pandemic accelerated the transformation of legal practice in many ways. Technology and AI are revolutionizing discovery, legal research, the way legal advice is given, and the way disputes are settled. And yet we still have a justice gap where consumers cannot — or feel that they cannot — afford personal legal services. Bars are returning with new intensity to questions about how they will build the capacity and expertise of lawyers and facilitate consumer access to legal services.

On the organizational side, the challenges are equally plentiful. The mandatory bar model continues to be challenged. Membership among many mandatory bars is either leveling off or declining, after years of growth. With increasing levels of specialization, cultivating engagement within the existing membership is challenging. Individuals have myriad ways to create community and affiliate with one another outside of the organized bar. Younger generations are interested in affiliating with organizations that move swiftly, that experiment and that make an impact. Most of our bars (both voluntary and mandatory) are not structured to facilitate that kind of experimentation

and are certainly not designed for speed. How will our bars continue to be relevant to new lawyers with these different levels of expectation? How will bars continue to be relevant to all lawyers who are increasingly pressed for time? These are just a few of the questions with which bars are grappling in their planning processes.

3. Overview of the Proposed Process & Deliverables

The Center for Bar Leadership would be delighted to assist the SBM in its next iteration of planning. We recommend the significant parts of the process include:

a. Initial Meeting(s) with Planning Group Leadership to Discuss the Current State of the Organization, Expectations for the Process and the Process Schedule

(initial call conducted on June 24)

b. Kick-off Meeting of the Strategic Planning Committee (Ideally an in-person meeting in Lansing; 3-4 hours)

c. An Evaluation of the SBM's Unique Context

Planning processes are an important opportunity to engage members and other stakeholders in the work of the organization. It is an education opportunity for everyone; as the bar asks for feedback, members often learn about bar priorities and activities of which they were previously unaware. Asking for feedback also can surface strategic opportunities for the bar. Below are several feedback-gathering opportunities that we can discuss in more detail:

- If the SBM has not conducted a membership survey recently, I would recommend doing so to evaluate members' opinions regarding the bar's reputation, value of programs and services and emerging challenges. The survey also would include opportunities to obtain feedback from key stakeholder groups within the bar, such as the board, committee/section chairs and members of the Representative Assembly. The CBL staff can work in collaboration with SBM staff to develop a membership survey. SBM would be responsible for conducting the survey and compiling the results.
- We recommend selected constituent outreach to key stakeholders who are directly relevant to the areas of focus for the plan. The facilitator will work with the committee to determine where outreach efforts would be most helpful for the current planning process.
- Finally, an evaluation of critical membership and program data is invaluable. That may include data such as:

- 5-year review of overall membership/licensee data (e.g., total membership trends; breakdown of membership categories)
- Demographic data about current members: age, gender, race/ethnicity, practice area, practice setting, office location; attrition due to retirement, as available
- Inventory of programs, data on program use, as available
- Data relating to member engagement (e.g., participation in entities, other metrics as available)

d. Planning Retreat

I recommend a planning session for the SBM that would span parts of two days, for a total of approximately 8-9 hours of working time.

e. Deliverables

The facilitator will provide the bar with a final report that includes a brief narrative overview, a strategic planning matrix that serves a working document for board and staff's use; and appendices that include background resources and examples from other bars that have tackled similar issues.

f. Follow-up Conference Call to Discuss the Plan and Next Steps

Once the working plan matrix has been organized, the facilitator will organize a follow-up call to review the draft, make adjustments and discuss next steps in the approval and implementation process.

4. Personal History and Selected Recent Clients

Jennifer Lewin has worked as a consultant with the Center for Bar Leadership since 2000. During that time, she has facilitated more than 100 bar strategic plans, operational reviews and board retreats. A few selected clients are listed below:

Kentucky Bar Association 2025 – 2028 Strategic Plan

Contact: John Meyers, Executive Director, jmeyers@kybar.org

The D.C. Bar 2025 – 2028 Strategic Plan

Contact: Bob Spagnoletti, CEO, rspagnoletti@dcbar.org

State Bar of South Dakota 2024 – 2027 Strategic Plan + annual updates

Contact: Dick Casey, Strategic Planning Committee Co-chair, deloscassey@gmail.com or Jennifer Williams (other co-chair), Jennifer.Williams@ujs.state.sd.us

The SBM Strategic Planning Process

Proposed Planning Timeline

Draft 6/2026

Summer 2026

Conversation(s) with SBM Planning Committee Chair and Executive Director to discuss expectations for the planning process, key issues of concern, and planning schedule (underway)

September

Confirmation by both parties

Member survey development/construction begins. Survey to include a leadership section that gathers input from Board of Bar Commissioners, section/committee chairs and members of the Representative Assembly

October

Meeting with full Planning Committee (in person, 4 hours)

- Introductions, planning process overview and Planning Committee role
- Review of the previous plan
- Environmental scanning discussion
- Membership survey, stakeholders to engage in the process and other information we need to inform the process

November

Finalize and distribute SBM Member Survey no later than mid-November; response deadline mid-December

CBL conducts survey of the SBM staff

Other stakeholder outreach conducted by committee members, as determined during October kickoff meeting

December-January

SBM staff compiles and analyzes member survey results

Other stakeholder outreach conducted by committee members, as determined during October kickoff meeting

February

CBL reviews member survey results and compiles and analyzes stakeholder feedback

TIMELINE, CONTINUED

March

Strategic Planning Group discussion of survey results and stakeholder feedback, and preliminary identification of areas of focus (2 hours via Zoom)

April

CBL circulates meeting agenda, preliminary strategic framework and additional information gathering on areas of focus, as needed. Subgroup meetings to discuss individual goal areas can be organized, if needed.

May

Strategic Planning Session

June

Draft strategic framework circulated to the Strategic Planning Committee + conference call to discuss draft

July

Final report delivered to the SBM Strategic Planning Committee

Strategic Plan presented to the Board of Bar Commissioners for discussion and approval at the July 23rd meeting

ABA Center for Bar Leadership Fees

Consulting fee of \$13,000 includes:

- Conduct initial meetings with SBM leadership
- Review key data and resources (membership data, strategic plan KPIs, board minutes)
- Consult on development of the SBM Member Survey
- Develop and conduct the SBM Staff Survey
- Provide relevant background resources from the bar community
- Facilitate midpoint session to discuss survey and stakeholder feedback
- Develop retreat agenda and background materials
- Facilitate planning retreat (approximately 8-9 hours)
- Create a planning report that includes an executive summary and working matrix

Estimated travel expenses: \$800 for kickoff meeting; \$1,200 for planning retreat

Total cost, including consultant travel: \$15,000

10. Professional Standards

Presented by Suzanne C. Larsen

11. Recognition of Outgoing Board Members

Presented by Lisa J. Hamameh

11.1. Hon. David A. Perkins

Presented by Darnell T. Barton

11.2. Gerrow (Gerry) Mason

Presented by Nicholas M. Ohanesian

11.3. Nicole Evans

Presented by Alena Clark

11.4. Hon. B. Chris Christenson

Presented by David C. Anderson

11.5. Silvia A. Mansoor

Presented by Jacob G. Eccleston

12. Recognition of President Lisa J. Hamameh

Presented by Erika L. Bryant

13. For the Good of the Public and the
Profession

13.1. Comments or Questions from Commissioners

13.2. Public Comment

Any member of the public who wishes to address the commissioners during public comment must sign up before 9:00 a.m. on the date of the meeting using the “Public Comment Sign Up” sheet.

14. Adjournment