

STATE BAR OF NEW MEXICO  
MEMBER SERVICES DEPARTMENT



State Bar *of*  
New Mexico  
Est. 1886

**Section and  
Committee  
Annual Reports**

**REPORTS FOR 2023**





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State Bar of New Mexico  
Alternative Methods of  
Dispute Resolution

ADR Committee  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Tamara Couture  
Rachel Donovan  
2023 ADR Committee Co-Chairs

**SUBJECT:** Annual Report

**DATE:** January 5, 2024

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The Alternative Methods of Dispute Resolution Committee of the State Bar of New Mexico conducted and accomplished the following in 2023:

1. Board of Directors:
  - a. As a committee, the ADR Committee does not have a board of directors. There is an active steering committee of approximately 12 people. A typical steering committee meeting will include approximately 6-8 of them.
  - b. 2023 steering committee members: Peter Merrill, Laura Bassein, Tamara Couture, Rachel Donovan, Abril Trujillo, Layla Dehaiman, Laura Hudman, Krista Garcia, Kenneth Owen, Dynette Palomares, Alondra Granodos, and Brandon Ilgen.
  - c. The steering committee met in February, April, July, and October, the 2<sup>nd</sup> Thursday of the month.
2. Committee Meetings:
  - a. The regular committee meetings were held February, April, July and October, the third Thursday of the month.
3. Continuing Education Presentations:



- a. The ADR Institute was held on 11/29/23. It was a full day of presentations.
    - i. Dathan Weems taught on the Mediation Procedures Act, titled, “The Mediation Procedures Act turns 16. 1 General CLE
    - ii. Peter Merrill made a presentation on “Unique and Unusual Alternative Dispute Resolution Processes. 1 General CLE
    - iii. Mark Bennett - Integrity in Action: The Structure and Practice of Ethics in Alternative Dispute Resolution. 1.5 Ethics CLE
    - iv. Panel - 4 on the panel + the moderator. Ethical Neutrality- Managing Power Disparities in Alternative Dispute Resolution. 1.5 Ethics CLE
  - b. There were approximately 51 attendees with the largest portion of them attorneys.
  - c. The event was co-hosted by Tamara Couture and Rachel Donovan with an introduction of Raynard Struck the Chair of the NM Supreme Court Commission who spoke about the goal of the Supreme Court to get ADR options available throughout the state.
4. Committee Outreach/Initiatives/Events
- a. The ADR Committee held 4 general membership meetings. Each meeting had a brief 15–20-minute business meeting and then a presentation to the attendees for the remaining 40-45 minutes.
  - b. Rachel Donovan is also the liaison for the NM State Bar and the NM Supreme Court so that the State Bar and the Supreme Court can collaborate to offer ADR options throughout the state.
  - c. We also had opportunities to present information to the new mediators taking classes with the UNM School of law giving them opportunities to become involved with the State Bar.
5. Scholarships
- a. Not Applicable at this time.
6. Ongoing Section/Committee Items:
- a. Forward moving plans for 2024 are for Lunch N Learns a few times throughout the year as well as another full day ADR Institute in November and the quarterly presentations during the general meetings. We have increased the number of people and groups receiving information for meetings and presentations.

Conclusion:

2023 allowed us to build on the forward movement from 2022 when the committee was rebuilt after the Covid slowdown of programs and progress. We have increased those who attend both the steering committee and those attending the general meetings. We are grateful for the support we have received from the state bar staff in sending out

marketing emails announcing the meetings as well as the support of the CLE department in promoting and structuring a successful annual institute. We would not be able to increase the presence and visibility of the state bar ADR work and activities without it. Many agencies and court systems recognize the benefits of Alternative Dispute Resolution in allowing healthier options of conflict resolution.

Respectfully,  
Tamara Couture,  
Rachel Donovan  
2023 ADR Committee Chairs



State Bar of New Mexico  
Appellate Practice Section

**APPELLATE PRACTICE SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Anastasia S. Stevens, Chair  
Appellate Practice Section  
State Bar of New Mexico

**SUBJECT:** 2023 Annual Report

**DATE:** January 3, 2024

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The Appellate Practice Section conducted and accomplished the following in 2023:

1. Board of Directors
  - a. Anastasia S. Stevens, Chair
  - b. Jocelyn C. Drennan, Chair-Elect
  - c. Rosalind B. Bienvenu, Past Chair
  - d. Randy Taylor, Secretary
  - e. Marcos D. Martinez, Budget Officer
  - f. Jazmine J. Johnston
  - g. Alicia C. Lopez
  - h. Larry J. Montaño
  - i. Lysette Romero Córdova

Our Young Lawyers' Division liaison was Seth Montgomery.

2. Meetings
  - a. January 17, 2023
  - b. February 21, 2023
  - c. April 18, 2023
  - d. May 16, 2023
  - e. June 20, 2023

- f. July 18, 2023
  - g. August 15, 2023
  - h. September 19, 2023
  - i. September 21, 2023 (Annual Meeting of Section membership)
  - j. October 17, 2023
  - k. November 21, 2023
  - l. December 19, 2023
3. Continuing Education Presentations
- a. The Section conducted the 34<sup>th</sup> Annual Appellate Practice Institute on September 21, 2023. This full-day CLE program has been held annually on a continuous basis for a third of a century. Due to the COVID-19 pandemic, the 2023 API was the first time since 2019 that we were able to hold our signature CLE program in a combined live/virtual format. It is devoted to appellate practice issues and related ethics and professionalism matters. The keynote speaker was the Honorable Jeffrey S. Sutton, Chief Judge of the United States Court of Appeals for the Sixth Circuit. He is a nationally recognized scholar and jurist on state constitutional law, who presented remotely from his office at the University of Notre Dame Law School. New Mexico Supreme Court Chief Justice Shannon Bacon and Court of Appeals Chief Judge Jennifer Attrep also spoke, as did Justice Julie Vargas and the Chief Clerks of the New Mexico appellate courts. Dr. Amanda Parker, the State Bar's Equity in Justice Director, explained the activities and goals of that program.
  - b. The Section joined forces with the New Mexico Supreme Court and the New Mexico Court of Appeals to hold our first Bench and Bar Conference since 2011 on October 20, 2023. This informal, half-day event was held in the Supreme Court Courtroom, followed by lunch. The format comprised less formal panel discussions, and the number of participants was limited to the capacity of the historic courtroom. Chief Justice Shannon Bacon offered prefatory remarks and participated in one of the panels, on extraordinary writs. The other panel topics included brief writing, oral argument, and miscellaneous issues of concern. In addition to the Chief Justice, the panelists included Justices David Thomson, Julie Vargas, and Briana Zamora, Chief Judge Jennifer Attrep and Judges Zachary Ives, Megan Duffy, and Jacqueline Medina, Chief Clerks Elizabeth Garcia and Mark Reynolds and Deputy Chief Clerk Lysette Romero Córdova, Supreme Court Chief Appellate Counsel Neil Bell, Court of Appeals Attorney Supervisor Cyndi Hernandez Madrid, Appellate Defender Kim Chavez Cook, and practitioners Tom Bird, Anne Kelly, and Caren Friedman.
4. Section Annual Meeting
- a. The Section's Annual Meeting was held in person on September 21, 2023, during the Appellate Practice Institute, with the option for Section members to participate by telephone.

5. Section Outreach/Initiatives/Events

- a. The Section did not hold any Lunch and Learn meetings, a/k/a Brown Bag lunches, during 2023. These get-togethers with one or two appellate judges or justices over lunch were held in person at the State Bar Center before the COVID-19 pandemic, then shifted to a virtual format. While the Board considered reinstating these meetings in a mixed live/virtual format, we concluded that offering both the API and the Bench and Bar Conference in the fall brought many of the Justices and Judges in front of our Section members, and we did not want to make further demands on their time.
- b. The Section continues to support and promote the Volunteer Attorney Program's Appellate Pro Bono Program by encouraging Section members to participate. We also utilized the Section membership mailing list to assist the State Bar in seeking volunteers for New Mexico Youth and Government's moot court program and to help the New Mexico Supreme Court distribute its Order No. S-1-AO-2023-00023, In the Matter of Electronic Devices in the Supreme Court Building, to appellate attorneys on November 29, 2023.

6. Scholarships (if applicable)

- a. The Section offered partial stipends for the registration fee for the Appellate Practice Institute, but no requests were made for such financial assistance.
- b. In light of the State Bar's recently revised practice of allowing Sections to retain surpluses in their budgets, the Board opted to defer making a contribution to the Supreme Court's Judicial Clerkship program and potentially to the University of New Mexico Law School's moot court programs until 2024, after we assess the options and costs of bringing a paid keynote speaker to Albuquerque for the 2024 API.

7. Media (includes website and/or social media if applicable)

- a. The Section did not prepare a newsletter this year and intends to update its webpage on the State Bar's website in early 2024.

8. Ongoing Section/Committee Items:

In 2024, the Appellate Practice Section intends to:

- a. hold the 35<sup>th</sup> Annual Appellate Practice Institute;
- b. resume its Lunch and Learn program;
- c. continue to support appellate-related programs in the state;
- d. update its webpage on the State Bar's website;
- e. prepare and distribute a newsletter; and
- f. begin planning for another bench and bar conference, possibly at the Court of Appeals in Albuquerque and probably in 2025.

Conclusion: The Appellate Practice Section remains a very active group that provides important services to its members, to the New Mexico bar in general, and to the public. Our membership has grown to approximately 185 members, and we receive several inquiries annually from attorneys interested in joining the Section and from Section members who wish to become more active in our programs.



Please feel free to contact me or any other Section Board member with any questions regarding this report.

Sincerely,

/s/ Anastasia S. Stevens

Anastasia S. Stevens

2023 Appellate Practice Section Chair



State Bar of New Mexico  
Bankruptcy Law Section

**BANKRUPTCY LAW SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Daniel A. White, Chair  
Bankruptcy Law Section  
State Bar of New Mexico

**SUBJECT: Bankruptcy Law Section 2023 Annual Report**

**DATE: December 11, 2023**

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The bankruptcy law section conducted and accomplished the following in 2023:

1. Board of Directors
  - a. Daniel A. White, Chair
  - b. Sam Roybal, Past Chair
  - c. Justin Sawyer, Chair Elect
  - d. Tom Walker
  - e. Karen Weaver
  - f. Grieta Gilchrist
  - g. Angela Swenson
  - h. Mike Daniels
  - i. Ron Holmes
  - j. Mike Lash
  - k. Spencer Edelman
2. Meetings
  - a. The board of the bankruptcy section held meetings once a month each calendar month throughout 2023.
3. Continuing Education Presentation(s)

- a. In March 2023, the Bankruptcy Section held its annual year in review, a full day CLE program.
  - b. On June 15, 2023, the section presented a lunch-time CLE on the amendments to the New Mexico exemptions.
  - c. On October 7, at its annual picnic, the Bankruptcy Section presented a CLE by both sitting bankruptcy judges.
  - d. On December 2, the Bankruptcy Section presented a program on foreclosure and bankruptcy at the Paralegal Institute.
  - e. On December 5, the Bankruptcy Section presented a brownbag CLE with national speakers on Student Loans in bankruptcy.
4. Section Annual Meeting
    - a. The Bankruptcy Section held its annual meeting in March 2023 at lunchtime during its annual year in review CLE.
  5. Section Events
    - a. On May 20, the Bankruptcy Section held an outing to an Isotopes game.
    - b. On August 26, the Bankruptcy Section held an outing to a New Mexico United game.
    - c. On October 7, the Bankruptcy Section held its annual picnic.
    - d. On December 15, the Section held its annual holiday and retirement party.
  6. Scholarships
    - a. The bankruptcy section funds a \$250 scholarship to the best student in bankruptcy law at University of New Mexico, available each semester when bankruptcy law is taught.
  7. Media
    - a. Due to inability to reach its entire membership through State Bar e-blasts, the Bankruptcy Section configured a separate e-mail service to ensure its membership receives notice of its events.
  8. Ongoing Section/Committee Items:
    - a. For 2024, the section intends to:
      - i. Host the Year in Review at Tamaya, with nationally-recognized guest speakers.
      - ii. Continue to host group outings to local sporting events.
      - iii. Continue to host its annual picnic.
      - iv. Continue to host its annual winter holiday and retirement party.

Conclusion:

The Bankruptcy Section continues to be highly active, with numerous social and educational events held throughout the year.

Sincerely,

Daniel A. White  
2023 Section Chair



# State Bar of New Mexico Business Law Section

## Business Law Section OF THE STATE BAR OF NEW MEXICO 2023 ANNUAL REPORT

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Joaquín Sánchez-Leal, Chair

**SUBJECT:** Annual Report

**DATE:** February 6, 2024

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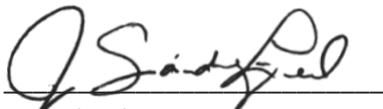
The Business Law Section conducted and accomplished the following in 2023:

1. Board of Directors
  - 1) Joaquín Sánchez-Leal, Chair
  - 2) Isaac Leon, Secretary
  - 3) Ryan Walters, CLE Liaison
  - 4) Raquel Koch Vaz, YLD Liaison
  - 5) Tony A. Andrade, Director
  - 6) Taylor Duffney, Director
  - 7) Amanda Cvinar, Director (inactive)
2. Meetings were held on the following months in 2023:
  - a. January, February, March, April, May, June, July, August, September, October, and November. Quorum was met for all meetings except for the month of September.
3. Continuing Education Presentation
  - a. Organized the Section's Annual Business Law Institute on November 1, 2023
    - i. 6 credits (2 Ethics, 4 General)
    - ii. 55 participants (43 in person, 12 online)
4. Section's Annual Meeting
  - a. Held the Section's Annual Meeting during the lunch hour of the Business Law Institute
    - i. 0 participants
5. Section Outreach/Initiatives/Events

- a. The Board engaged in outreach to Section members in the planning of the Business Law Institute by inviting members to present on business law topics at the Institute.
  - b. The Board engaged in online outreach with UNM Law School students by offering scholarships for books and bar exam preparation in the Spring and Fall semesters.
  - c. The Board organized and sponsored a Networking Mixer in Santa Fe where members of the Business Law Section were invited to enjoy a night at the interactive museum with other members of the Section and the Young Lawyers Division.
6. Scholarships
- a. The Board offered Book and Bar Prep Scholarships in the Spring and Fall semesters
  - b. \$1500 total was awarded to 3 students
7. Website
- a. The Board updated the Section's page on the State Bar's website to include current announcements regarding CLEs and events organized by the Section.
8. Ongoing Section/Committee Items
- a. For 2024, the section intends to:
    - i. Organize the Section's Annual Business Law Institute in November of 2024.
    - ii. Organize a Networking event at the UNM Law School to engage current law students and recruit prospective student representatives for the Section.
    - iii. Offer Book and Bar Exam Preparation Scholarships to UNM Law students.
    - iv. Update the Section's website.
    - v. Identify opportunities to collaborate with other sections, committees or division within the State Bar of New Mexico.
9. Elections
- a. The Board held elections in accordance with its bylaws and elected Ryan M Walters as its incoming Chair.
  - b. The Chair appointed Section member Tony Andrade a vacancy on the Board for a two-year term, commencing January 2024 and concluding December 2026, after Mr Andrade expressed and confirmed his interest in joining the Board on October 6, 2023.

On behalf of the Board of Directors for the Business Law Section, I hereby submit this Annual Report regarding the Section's activities in the year 2023.

Respectfully Submitted.



Joaquín Sánchez-Leal

2023 Business Law Section Chair





State Bar of New Mexico  
Cannabis Law Section

**CANNABIS LAW SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM: CARLOS N. MARTINEZ**

**SUBJECT: 2023 Annual Report**

**DATE: 1.2.24**

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The (section/committee name) conducted and accomplished the following in (year):

1. Board of Directors
  - a. Carlos Martinez
  - b. Patricia Monaghan
  - c. Tina Gooch
  - d. Brett Phelps
  - e. Benjamin Feuchter
  - f. Johnn Osborn
  - g. Tracy Ahr
  - h. Diana Martwick
  - i. Terence Jones
  - j. Kenneth Shiau
  - k. Savannah Hoover; Appointed December 2023
2. Meetings
  - a. Meetings were held every second Tuesday of the Month from 9-10 via Zoom
3. Continuing Education Presentation(s)
  - a. We put on our annual CLE in November 2023, live at the State Bar
4. Section/committee Annual Meeting
  - a. We had our annual meeting on December 15, 2023
5. Section/committee Outreach/Initiatives/Events
  - a. Our CLE committee put on our fifth annual CLE in November 2023; next year we have
6. Scholarships (if applicable)
  - a. We created a scholarship for law students and solicited submissions of interest; upon completion of review, we will be able to award our first scholarship

7. Media (includes website and/or social media if applicable)
  - a. We rely on our website for media, and we heavily rely on the State Bar to maintain our website.
8. Ongoing Section/Committee Items:
  - a. For (next year), the (section/committee) intends to: host the cannabis law section's first golf outing

Conclusion: this year has noticeably been more difficult communicating with members services. Due to inaction on the part of member services this year, our advertisements for meetings, scholarships, and our annual meeting were unreasonably delayed, arguably preventing greater participation in section activities.

Sincerely,  
Carlos N. Martinez  
Chairperson and Founder  
Cannabis Law Section  
2023



State Bar of New Mexico  
Children's Law Section

Children's Law Section  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Allison P. Pieroni, Chair

**SUBJECT:** 2023 Children's Law Section Annual Report

**DATE:** January 8, 2024

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The Children's Law Section conducted and accomplished the following in 2023:

1. Board of Directors
  - Allison Pieroni, Chair
  - Twila Hoon, Past Chair
  - Amanda Lauphmeimer, Director
  - Amy DeLaney-Hernandez, Director
  - Cassandra Brulotte, Director
  - Alison Endicott-Quiñones, Director
  - Harlena Reed, Director
  - Elizabeth Hess, Director (incoming chair, 2024)
  
2. Meetings (if applicable)
  - a. CLS Annual Meeting, January 12, 2023
  - b. February 20, 2023
  - c. March 20, 2023
  - d. April 17, 2023
  - e. May-cancelled
  - f. June 27, 2023
  - g. July 17, 2023
  - h. August 21, 2023
  - i. September 18, 2023

- j. October 16, 2023
  - k. November 20, 2023
  - l. December 2023 cancelled due to Holiday Schedule
3. Continuing Education Presentation(s) (if applicable)
- a. N/A
4. Section/committee Annual Meeting (if applicable)
- a. January 12, 2023
5. Section/committee Outreach/Initiatives/Events (if applicable)
- a. Provided support to the Children’s Law Institute and combined efforts surrounding the Children Law Section Art Contest and the Children’s Law Institute to provide for outcome announcement and artwork display. Additionally presented to the UNM Law School lunch and learn on October 3, 2023. Provided support for Reunification celebration.
6. Scholarships (if applicable) (if applicable)
- a. N/A
7. Media (includes website and/or social media if applicable)
- a. Worked with the State Bar to maintain our Website
8. Ongoing Section/Committee Items:
- a. For 2024, the Children’s Law Section intends to:
    - i. Resume lunch and learn sessions
    - ii. Continue efforts with the Children’s Art Contest
    - iii. Continue efforts to involve attorneys and law students in Children’s law
    - iv. Investigate opportunities for outreach to potential members

Conclusion: The Children’s Law Section thanks the State Bar for its support and guidance over the last year and looks forward to future endeavors. The section believes its focus in the upcoming year will be oriented to recruiting additional members who are practicing in underserved areas as well as conducting outreach to assure potential members are aware of upcoming opportunities as well as resumed trainings.

Sincerely,

**/s/ ALLISON P. PIERONI**

Allison P. Pieroni

2023 Children’s Law Section



State Bar of New Mexico  
Elder Law Section

**ELDER LAW SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Ami Jaeger, chair

**SUBJECT:** ELDER LAW SECTION, 2023 ANNUAL REPORT

**DATE:** January 23, 2024

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The Elder Law Section conducted and accomplished the following in 2023:

1. Board of Directors

Jennifer Brannen
Marina Tapia Cansino
Abby Foster
Ami Jaeger
Diana Llewellyn
Bob McCrea
Michael McGuire
Audrey McKee
Bethany Peterson
Gary Johnson
William Dunn

2. Meetings

- a. The Board met monthly, first Friday of each month at 12 noon, via zoom.
- b. At our Board meetings, which are open to out section members, we had trend discussions. There were invited speakers on legal issues and resources relevant



to our area of practice. This was in part designed to serve our goal for the year, which was to provide value to our section members.

- a. 2023 in review.
  - i. Board's Goal was to increase services to Elder Law Section Members. At our monthly board meetings, we included an invited speaker to talk about a trend to topic in elder law. Our speakers were:
    1. Joe Turk, Legal Director, NM Office of Guardianship -Supported Decision Making (SDM) partnering: Trends in Supported Decisionmaking as Alternative to Guardianship.
    2. Cris Munoz - Medicare and Medicaid Options for Seniors.
    3. Abby Foster and Ami Jaeger: Trends in Burial Options.
    4. Joseph Martinez, NMAG, A Power of Attorney Is **NOT** a Power to Steal.
    5. Kimberly Golucke, Considerations and Challenges in Elder Long-term Care Placement.
    6. Ellen Leitzer: The status of Financial Exploitation of Elders and other Vulnerable Adults bills introduced during the 2023 Legislative Session and Next Steps.

### 3. Continuing Education Presentation(s)

- a. We prepared and presented 5 CLE programs.
  - i. We hosted 4 one-hour CLE programs. The leader and topics were:
    1. June, Ami Jaeger. 80 is not the new 40: Divorce for Elders (with the Family Law Section)
    2. July. Ami Jaeger. Medical Aid in Dying challenges and legislative responses
    3. August. Abby Foster: Guardianships and Supported Decisionmaking
    4. September. Jen Brannen: Using Trusts as an Integral Component of Elder Law Services (with the Young Lawyer Section)
  - ii. November 17 CLE host/organizer is Michael McGuire: Corporate Barriers to Resolving Elder Client Issues

### 4. Section/committee Annual Meeting

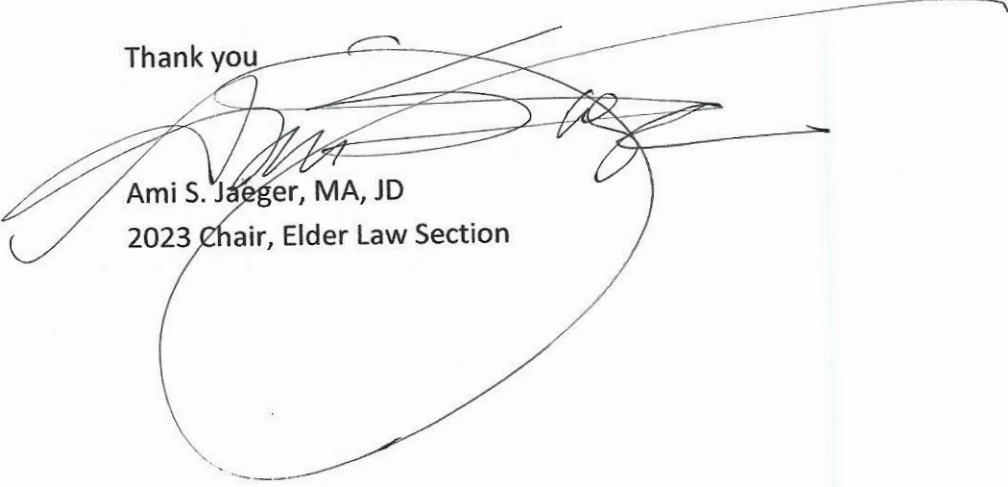
- a. We held our annual meeting on October 20, 2023.

### 5. Section/committee Outreach/Initiatives/Events

- a. We held a program at the UNMSOL for students with a student panel discussion on elder law practice for their Career paths program on November 9, 2023.
  - b. We hosted a Law Student mixer with the NMSB Trust and Estate section, and the American College of Trust and Estate Counsel in April, 2023.
  - c. We had a Board thank you event in December, 2023
6. Scholarships
- a. We sponsored two book scholarships of \$500 each to NMSOL Students – the Board created a subcommittee to review submissions from the students. The award was granted at our Annual Meeting
7. Media (includes website and/or social media if applicable)
- a. Not part of our plan this year.
8. Ongoing Section/Committee Items:
- a. For next year, the section intends to develop and present CLE programs, and continue outreach with the elder community.

Conclusion: We need more support from NM Bar. We asked for our members to be invited to our Board meetings, because we arranged speakers for the meetings, but there was no follow-up for us to know when and if section members were ever invited or informed of our programs. Otherwise, please share the email list of our members so we can include them on the email with our agenda.

Thank you



Ami S. Jaeger, MA, JD  
2023 Chair, Elder Law Section



State Bar of New Mexico  
Employment Law Section

**EMPLOYMENT AND LABOR LAW SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Alana De Young, Chair, Employment and Labor Law Section 2023

**SUBJECT:** 2023 Annual Report

**DATE:** January 3, 2024

The Employment and Labor Law Section (“ELLS”) Board conducted and accomplished the following in 2023:

1. Board of Directors

<b>Name</b>	<b>Position</b>
Alana De Young	Chair
Caryn Carson	Past-Chair
Amanda Krasulick	Director, Secretary
Melissa Kountz	Director, Budget Officer & Chair-Elect
Cristin Heyns-Bousliman	Director
Eric Dixon	Director
Jennifer Kittleson	Director
Samantha Adams	Director
Vacant	UNM Student
Taylor Duffney	YLD Liaison

2. Meetings

The ELLS Board held monthly meetings on the first Wednesday of the month from January through October and elected to forgo the meetings in November and December due to the conclusion of necessary activities.

3. Continuing Education Presentations:

The ELLS Board planned and hosted its annual Labor & Employment Law institute on September 15, 2023, which was offered both in-person and virtually. We had some great speakers, both new and veteran, who presented on a range of employment and labor law issues including: an update from the EEOC, with a focus on the Pregnant Workers Fairness Act, New Mexico's Healthy Workplaces Act, non-compete agreements, independent contractor issues, a labor law update, and ethical settlement and dispute resolution strategies.

The Section was also invited to present at the State Bar's Annual CLE event at the Tamaya in Summer 2023 and two ELLS members provided attendees an overview of a recent supreme court decision implicating the Fair Labor Standard Act provisions for overtime pay for certain workers.

4. Section/Committee Annual Meeting

Our Section's annual meeting was held on September 15, 2023 (in person) in connection with the Labor & Employment Law Institute. The annual meeting's luncheon was well-attended. The ELLS Board invited members to join the board, reviewed the group's financials, and discussed community outreach with the Young Lawyers Division and UNM School of Law.

5. Section/committee Outreach/Initiatives/Events

The ELLS Board focused its efforts on the Annual Institute. In connection with the CLE, the ELLS Board hosted a kick-off "meet and greet" at Marble Brewery which was open to all Section Members who could mingle with the speakers of the annual CLE. In addition, the ELLS Board worked with the community in various ways. It sponsored the YLD's Swearing-In Mixer and enjoyed welcoming new attorneys to the profession. The Board also worked with UNM School of Law throughout the year, including by awarding the annual Richard Gonzales Scholarship to a dedicated student interested in employment and labor law issues and coordinating a panel of employment attorneys to present to students on aspects of the field and practicing law.

6. Scholarships (if applicable)

The ELLS Board awarded one scholarship in the amount of \$1,000 to an UNMSOL student.

7. Media (includes website and/or social media if applicable)

Our ELLS Board Coordinators were helpful in assisting the Board with e-mail blasts regarding the Labor & Employment Law Institute and other Section activities.

8. Ongoing Section/Committee Items:

For 2023, the ELLS Board is looking forward to offering its Labor & Employment Law Institute in the fall. It is also hoped that more in-person section activities and community events will be possible and that new members of the section will participate in the Board and/or section activities.

Conclusion: The 2023 ELLS Board accomplished its primary goal of providing Section members with interesting and educational opportunities, primarily through a successful Annual Institute. In addition, 2023 offered the opportunity to continue to work with UNMSOL and other sections of the Bar. Interest has been expressed in doing more in-person events while continuing some online activities, which are likely a draw for those members outside of the state's metro areas. There will be some budget funds carrying over to 2024, and the ELLS Board hopes to expand the Section's offerings and activities in the new year.

Sincerely,

A handwritten signature in cursive script that reads "Alana M. De Young".

Alana M. De Young  
Chair, Employment and Labor Law Section 2023





State Bar of New Mexico  
Family Law Section

**FAMILY LAW SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM: KYMBERLEIGH G. DOUGHERTY**

**SUBJECT: FAMILY LAW SECTION 2023 ANNUAL REPORT**

**DATE: JANUARY 17, 2024**

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The Family Law Section conducted and accomplished the following in 2023:

1. Board of Directors
  - a. KyMBERLEIGH Dougherty (Chair)
  - b. Carlos Martinez (Budget Officer)
  - c. Lucy Sinkular (Secretary)
  - d. Amber Macias-Mayo (Past Chair/CLE Committee Chair)
  - e. Sarah Armstrong (Legislative Committee Chair)
  - f. Bridget Mullins (Scholarship Committee Chair)
  - g. Amy Bailey
  - h. Linda Ellison
  - i. Larry Heyeck
  - j. Larry Kronen
  - k. Bob Matteucci
  - l. Dynette Palomares
2. Meetings

Board meetings were held via video/teleconference on the 3<sup>rd</sup> Friday of each month. This has historically been when the Family Law Section's Board meetings have been held and will continue for 2024.
3. Continuing Legal Education Presentation(s)

The Family Law Section had a busy and productive year with continuing education presentations that included:

- a. The Spring Family Law Institute on April 7, 2023 presented by various professionals on the custody evaluation crisis.
  - b. The Fall Family Law Institute on September 29, 2023 presented by Marshal Willick on domestic relations orders.
  - c. The Guardian ad Litem training on December 8, 2023 presented by various professionals.
  - d. A Lunch and Learn on June 8, 2023 presented by Lawrence and Joni Jones on Family Practice and Children with Autism Spectrum Disorder.
  - e. A Lunch and Learn on July 13, 2023 presented by Brad Yablonsky on Savvy Social Security.
  - f. A Lunch and Learn on October 25, 2023 presented by Brad Yablonsky on Planning for Healthcare in Retirement.
4. Section/committee Annual Meeting
- a. All Board meetings are open to members.
  - b. November 17, 2023 was specifically held as an annual meeting this year and several section members attended including Tamara Couture, Renee Lewis, Mariah Poole, Lauren Riley, Sheryl Saavedra, and Anthony Spratley.
5. Section/committee Outreach/Initiatives/Events
- a. The “Committee on the Road” held events in Law Cruces on August 25, 2023 and in Taos on September 15, 2023. Such events were co-sponsored by the Solo and Small Firm Section and included an educational component as well as a social component.
  - b. The Section solicited articles and published same in the NM Lawyer in October of 2023.
  - c. The Section monitored family-law related legislation.
6. Scholarships
- a. Scholarships for attendance at Continuing Legal Education Presentations were provided to members of the judiciary.
7. Media (includes website and/or social media if applicable)
- a. The Family Law Section listserv is utilized to share information and send eBlasts regarding upcoming events.
8. Ongoing Section/Committee Items:
- For 2024, the Family Law Section intends to:
- a. Continue to hold monthly meetings and provide updates from those meetings to Family Law Section members by way of quarterly bullet points or posting on the website;
  - b. Continue to offer a Spring Family Law Institute (focused on custody issues) and a Fall Family Law Institute (focused on financial issues);
  - c. Continue developing the GAL training and begin alternating a basic GAL training in odd-numbered years and an advanced GAL training in even-numbered years;
  - d. Continue providing Lunch and Learn presentations;
  - e. Continue providing scholarships for the judiciary to attend Continuing Legal Education Presentations;

- f. Continue planning and creating additional continuing education and/or trainings throughout the year statewide;
- g. Foster inclusivity within the Section for family law practitioners throughout the state;
- h. Continue monitoring of family-law related legislation; and
- i. Work to improve the Section website.

The Family Law Section of the New Mexico State Bar is the most active section in the state, and I have been honored to lead the Section and Board of Directors in 2023. The Section's members are active and engaged, willing to share their knowledge and give back to their community. I look forward to serving as Chair of the Family Law Section for another year, as we work to accomplish our goals and provide value to Section members.

Sincerely,  
Kymberleigh Dougherty  
Family Law Section Chair, 2023



State Bar of New Mexico  
Health Law Section

**HEALTH LAW SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Sun W. Vega, Past Chair

**SUBJECT:** Health Law Section Board Annual Report

**DATE:** January 15, 2024

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The Health Law Section conducted and accomplished the following in 2023:

1. Board of Directors

	<b>Name</b>	<b>Position</b>
1	Sun Vega	Chair
2	Erin Marshall	Director, Chair Elect
3	Kevin Pierce	Director, Secretary
4	Margie McNett	Director, Budget Officer
5	Harlena Reed	Director
6	Don Daniels	Director
7	Cassandra Brulotte	Director
8	Paige Duhamel	Director
9	Erica Chavez	Director
10	Elinor Rushforth	Director
11	Katy DelBene	Past Chair
12	Melanie Coffing (3L)	Law Student Member
13	VACANT	Law Student Member
14	VACANT	Law Student Member
15	VACANT	Director

2. Meetings

- a. Next meeting January 16, 2024
- b. No meeting in December 2023
- c. November 7, 2023 at 9:00 a.m.
- d. October 3, 2023 at 9:00 a.m.
- e. September 5, 2023 at 9:00 a.m.
- f. August 1, 2023 at 9:00 a.m.
- g. No meeting in July 2023



- h. June 6, 2023 at 9:00 a.m.
  - i. May 2, 2023 at 9:00 a.m.
  - j. April 4, 2023 at 9:00 a.m.
  - k. March 7, 2023 at 9:00 a.m.
  - l. February 7, 2023 at 9:00 a.m.
  - m. January 10, 2023 at 9:00 a.m.
3. Continuing Education Presentation(s)
- a. 2023 HLS Annual Health Law Symposium, October 6, 2023, 9:30 a.m. to 4:00 p.m.
    - i. Healthcare Antitrust, Speakers Adam Falcone and Don Daniel
    - ii. Healthcare Artificial Intelligence, Speakers Ryan Portwood and Erica Chavez
    - iii. Post PHE Impacts on Providers & Patients, Panelists Sun Vega and Harlena Reed
    - iv. Reproductive Health & Gender Affirming Care, Speakers Adrian Lawyer and Elinor Rushforth
  - b. 2023 Health Law Legislative Update, April 14, 2023, Noon to 1:00 p.m.
    - i. Health Insurance Legislative Update,
      - 1. Office of Insurance: Speakers Cass Brulotte and Paige Duhamel
      - 2. Presbyterian Healthcare Services: Speaker Christy Calderwood
4. Section/committee Annual Meeting
- a. October 6, 2023, Noon to 1:00 p.m.
5. Section/committee Outreach/Initiatives/Events
- a. UNM School of Law, Health Law Panel, September 19, 2023, Noon to 12:50 p.m.
6. Scholarships (if applicable)
- a. Judicial Clerkship Scholarship, \$800.00
  - b. UNM Health Law Moot Court Team Scholarship, \$1,000.00
7. Media (includes website and/or social media if applicable)
- a. None
8. Ongoing Section/Committee Items:
- a. For 2024, the HLS Board intends to continue annual programming:
    - i. 2024 HLS Annual Health Law Symposium
    - ii. 2024 Health Law Legislative Update

Conclusion: The Health Law Section Board has continued its annual tradition providing education to its membership regarding emerging health law issues impacting practicing attorneys and health policy advocates in the State of New Mexico. We have a strong core leadership team and active participation from student representatives. We are looking forward to another good year!

Sincerely,

A handwritten signature in black ink, appearing to read "Sun W. Vega".

Sun W. Vega, Esq.

2023, Health Law Section Chair





State Bar of New Mexico  
Immigration Law Section

**IIMMIGRATION LAW SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Deshawnda Chaparro, Esq. – Chair

**SUBJECT:** Immigration Law Section 2023 Annual Report

**DATE:** January 13, 2024

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The (section/committee name) conducted and accomplished the following in (year):

1. Board of Directors
  - a. Deshawnda Chaparro – Chair, Director
  - b. Owen James – Past Chair
  - c. Jessica Aguirre – Director
  - d. Gabriela Ibañez Guzman – Director
  - e. Andrés Santiago – Director
  - f. Jessica Martinez – Director
  - g. Jessica Perez – YLD Liaison
  - h. Bella Bjornstad – UNM Law Student Representative
2. Meetings
  - a. The Board met monthly, typically on the last Friday on the month. Altogether, we had ten (10) meetings to discuss ongoing business of the Section.
3. Continuing Education Presentation(s)
  - a. This year, we organized and collaborated seven (7) Continuing Education Presentations (CLE), including our annual immigration institute where we hosted three (3) CLEs. Our CLEs hosted local practitioners and local community partners who educated the Immigration Law Section on the following topics:
    - i. “2023 Legislative Update: Laws Impacting Immigrants” presented on June 16, 2023;
    - ii. “Advanced Topics in Naturalization” presented on July 7, 2023;

- iii. “Special Immigrant Juvenile Update” presented on August 18, 2023;
  - iv. “Life at the Border After the End of Title 42” a collaboration with the Border Justice Initiative at UNMSOL, presented on October 20, 2023;
  - v. “To Naturalize or Not to Naturalize: Clients with Criminal History” presented on November 30, 2023;
  - vi. “VAWA and Good Moral Character, potential consequences of criminal history” presented on November 30, 2023; and
  - vii. “Overcoming burnout & staying on top of ethical obligations” presented on November 30, 2023.
4. Section Annual Meeting
- a. On October 19, 2023, we hosted our annual membership meeting at Nexus Brewery where the Board of Directors presented a summary of our activities for the 2022 term. This was our first in person membership meeting in several years. We invited students from UNMSOL as a casual networking opportunity with our section members.
5. Section Outreach/Initiatives/Events
- a. The Immigration Law Section advertised several pro bono opportunities in collaboration with New Mexico Immigrant Law Center.
6. Scholarships
- a. The Immigration Law Section awarded five (5) scholarships to students at UNMSOL this year. Of those scholarships, three (3) students were awarded book scholarships, and two (2) students were awarded bar study scholarships.
7. Media (includes website and/or social media if applicable)
- a. The Immigration Law Section’s capacity was limited this year and we relied on the State Bar’s support to maintain the Section’s website. We did not utilize social media other than directors using their own pages to share information about upcoming CLEs.
8. Ongoing Section Items:
- a. For 2024 the Immigration Law Section intends to continue focusing our efforts on hosting CLEs that inform our membership on changing laws and policies affecting our practices and further awarding scholarships to law students intent on practicing immigration law.

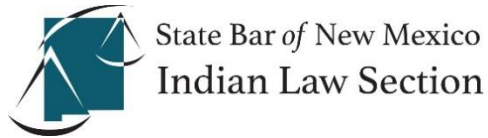
Conclusion: The 2023 term presented an opportunity to host an in-person membership meeting where members were able to reconnect over food and drinks while networking with law students interested in our practices. Throughout our term, we focused our CLEs on legislative changes affecting our clients and advanced topics in common areas of practice.

P.O. Box 8009, Santa Fe NM 87504



Deshawnda Chaparro

2023, Immigration Law Section Chair



**INDIAN LAW SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Jordan Oglesby, 2023 Chair of the Indian Law Section

**SUBJECT:** 2023 Annual Report

**DATE:** January 25, 2024

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The Indian Law Section conducted and accomplished the following in 2023:

1. Board of Directors
  - a. Jordan Oglesby, 2023 Chair
  - b. Tierra Marks, 2024 Chair Elect, Outreach Committee Chair
  - c. Lyman S. Paul, Past Chair
  - d. Thomas Peckham, Budget Officer
  - e. Reed Bienvenu, Secretary, Scholarship Committee Chair
  - f. Diana Kicking Woman, Media Committee Chair
  - g. Colleen Adams, CLE Committee Chair
  - h. Krista Thompson, Mentorship Committee Chair
  - i. Garret Davey
  - j. Samuel Winder, UNM Faculty Liaison
  - k. Alex Alvarado & Amber Reano, UNM Student Liaison(s)
2. Meetings
  - a. The ILS Board met a total of 7 times during 2023 starting in January, and on a bimonthly basis thereafter, with the exception of one supplementary meeting in February. Additionally, the ILS Board met on November 4, 2023, coinciding with the Indian Law Section Annual CLE for its Annual Meeting, open to the membership. ILS met quorum for all meetings.
3. Continuing Education Presentation(s)
  - a. The 2023 CLE Committee consisted of four members of the ILS Board of Directors: Colleen Adams, Krista Thompson, Tom Peckham, and Sam Winder. In July, the

CLE Committee successfully planned two breakout session CLE presentations at the State Bar's Annual Meeting. Professor Vanessa Racehorse of the University of New Mexico School of Law ("UNMSOL") presented on *Indian Law 101* and Judge Bruce Fox presented on *Practicing in Tribal Courts*. The CLE Committee also planned a successful 2023 Annual ILS CLE conference on Thursday, November 2, 2023. The Committee arranged for five panels with 12 speakers and want to thank Melody Delmar, Josett Monette, Darlene Gomez, Donna M. Connolly, Lindsay Cutler, Ellen Venegas, Sam Winder, Tom Peckham, Van Billops, Gwenellen Janov, Andrew DeLoris, Reed Bienview, and Denten Robinson for sharing their expertise with our section members.

4. Section/committee Mentorship

- a. The Mentorship Committee met and discussed the existing mentorship opportunities with students at UNMSOL. Early in the year, the committee met with Rodina Cave Parnell of the American Indian Law Center, Inc. to discuss key ways the Committee could benefit students at the law school. The Committee has identified goals such as facilitating attorney-coaches for students before graduation, specifically to students in their first year of law school. The Committee plans on further discussing their goals with staff at the law school for the upcoming Spring 2024 semester.

5. Section/committee Outreach/Initiatives/Events

- a. The Outreach Committee met intermittently throughout the year and scheduled several events to engage with membership and the legal community. The Committee sponsored two UNM NALSA events at Bow & Arrow Brewery in the spring and fall. The Committee also made sure to schedule or support member events held both in Albuquerque and Santa Fe throughout the year to increase networking opportunities: two were section-specific events held during the summer and fall. In addition to scheduling the section's mixers, the Committee planned the first ever joint social mixer with the New Mexico Hispanic Bar Association and sponsored the 1<sup>st</sup> Judicial District Bar Association's Holiday Party. The Outreach Committee was also happy to sponsor the reception celebrating the swearing in of attorneys planned by the Young Lawyers Division.

6. Scholarships

- a. On May 12, 2023, the Scholarship Committee awarded *bar preparation scholarships* in the amount of \$500 to five 3L students at UNMSOL. These scholarships are intended to help defray the costs of preparing for and taking the New Mexico bar exam. In December 2023, the Scholarship Committee awarded *Karl E. Johnson Memorial Scholarships* in the amount of \$1,000 to three students at the UNMSOL. The Karl E. Johnson Memorial Scholarships are awarded to students at the law school who have a demonstrated interest in practicing in the field of federal Indian law. The Scholarship Committee thanks the generous donors who helped to support both of these scholarships.

7. Media

- a. In 2023, the Media Committee revised and updated the Indian Law Section's website, which is available here: <https://www.sbnm.org/Leadership/Sections/Indian-Law>. Additionally, the Media Committee worked with the Outreach Committee to organize an award presentation event for Thomas Luebben, who was the 2022 recipient of the

Indian Law Section's annual Attorney Achievement Award. The award event for Mr. Luebben was held on April 18, 2023, at the State Bar Center. The Media Committee also announced that Alan Taradash is the recipient of the 2023 Attorney Achievement Award. An award event will be held for him in 2024.

8. Ongoing Section/Committee Items:

- a. For 2024, the Media and Outreach Committee intend to coordinate an award ceremony to honor and recognize Alan Taradash, the Indian Law Section's 2023 Attorney Achievement Award recipient. The Section also looks forward to continuing the work completed by the Media Committee to compile a yearly newsletter and hopes to publish the newsletter in 2024.

Chair's Conclusions:

This year, the Section enjoyed invitations from other sections and associations to collaborate and network, and hopes to continue that trend in 2024. The Section looks forward to finding new ways to engage with our membership, especially as it is an important way to provide a forum for the discussion of Indian law issues and other matters pertaining to this practice. As our Board roles change, we hope to retain institutional knowledge and continue to build upon the success of our annual ILS CLE conference. Last, we are immensely appreciative of the support we received from our member services team in 2023, and extend our thanks to Addie Sanchez and Marissa Carbone.

Ahéhee',

*/s/ Jordan Oglesby*

Jordan Oglesby

Chair, 2023 Indian Law Section



State Bar of New Mexico  
Intellectual Property  
Law Section

Intellectual Property Law Section  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Gina Constant, Chair of the Intellectual Property (IP) Law Section

**SUBJECT:** 2023 Annual Report

**DATE:** January 8, 2023

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The IP Law Section conducted and accomplished the following in 2023:

1. Board of Directors:

Gina Constant	Chair
Jose Garcia	Director
Justin Muehlmeier	Director/Secretary
Talia Kosh	Director/Chair-Elect
Helen Baca	Director
Ian Bezpalko	Director/Treasurer
Steven Pederzani	Director
Liz Natal Tonigan	Director
Svitlana Anderson	Past Chair
Kevin Soules	Director
Daniel Berringer-Russell	UNM Student
Billy Trabaudo	YLD Liaison

2. Meetings:

The IP Law Section holds monthly meetings on the fourth Tuesday of the month. In 2023, meetings were held by Zoom, except the Board met in person at the State Bar Center quarterly.

3. Continuing Education Presentation(s):

On September 25, 2023, the IP Section held its annual CLE day on the topic of Copyright and Artificial Intelligence. In order to accommodate and attract our section members and IP practitioners in the Santa Fe area and northern New Mexico, it was decided to hold the CLE in Santa Fe. Numerous issues caused disappointing attendance at the CLE, despite the high-quality speakers. The Board identified those issues as follows:

- The State Bar and MCLE's lack of assistance in promoting the event, which appears to be due to an unspoken State Bar policy not to assist with offsite events. Despite the CLE Coordinators' great efforts to get the State Bar's attention to promote the event, the State Bar ignored and/or delayed and stated such is "not something we do."
- The State Bar no longer identifies individuals in their communications with members, so it is impossible to determine who we are communicating with.
- Despite many efforts, the State Bar's only promotional support was a small note buried in the Bar Bulletin with an incorrect title that went uncorrected after numerous attempts.
- The Board feels that the State Bar penalized the IP Section for going to the trouble of an off-site event, or at the very least treated us like a nuisance.
- CLE Coordinators, presenters, and attendees had to have multiple communications with MCLE to ensure the correct CLE credits were given.

The IP Section has historically held an IP CLE annually. It is not clear if we will move forward with this in 2024 given the above experience. Several Board members, included the undersigned chair, reached out to various people, including the Bar Commissioner for Santa Fe, but got no meaningful responses to explain how poorly we, and our event, were treated.

#### 4. Section/committee Annual Meeting

The Section held its annual meeting on December 1, 2023, at a local restaurant. Most of the Board and several section members attended.

#### 5. Section/committee Outreach/Initiatives/Events

On October 31-November 4, 2023, the IP Law Section held its annual Fall Pro Bono IP Fair. This Fair included fifteen (15) registered clients, who were served by seven (7) attorney volunteers and shadowed by eight (8) law students from the University of New Mexico School of Law. While client registration was down this year from last year's 21 clients, additional marketing beyond what was historically done was not employed given that we had fewer attorneys available to volunteer. Law students reported great appreciation in attending consultations. The Board provided attorney volunteers a \$25 Starbucks gift certificate to show appreciation.



On Thursday, November 16, 2023, several Board members attended the UNM Law Lawyering Panel at the University of New Mexico School of Law. UNM Law School Lab students met with panels of attorneys to talk about their careers in (or out of) law after graduation. Each class had about 18 students, primarily 1Ls, who were in the early stages of developing their own professional identities. The goal with the panels was to give some additional context to their development through interactions with people besides their individual professors.

6. Scholarships (if applicable): The IP Section has not yet decided to move forward with scholarship opportunities, though the possibility is regularly discussed at Board Meetings.
7. Media (includes website and/or social media if applicable)

The IP Section was very active with its updates and announcements on its NM State Bar website and on the individual social media platforms of the Directors of the IP Section.

Additionally, The Board decided to initiate an IP Section LinkedIn account. We believe this would be a good way to connect with our members and other sections and provide a platform to post updates about the IP Section and possibly link to articles written by Section members. This effort will continue into 2024.

8. Ongoing Section/Committee Items:
  - Organize and conduct our annual Fall Pro Bono IP Fair in coordination with the UNMSOL and with the student-led IP Society at UNMSOL.
  - Reach out to NMSU with a possibility of organizing a Spring Pro Bono IP Fair, thereby serving entrepreneurs outside of Albuquerque and Santa Fe.
  - Continue to support UNMSOL students in fostering their interest in IP counseling and in IP careers.
  - Consider organizing another CLE day for the bar membership.
  - Coordinate and conduct an Annual Meeting of the IP Law Section.
  - Encourage Section members to participate in Bridge the Gap Mentorship Program.

**Conclusion:** The IP Law Section has continued to be an active group that is dedicated to supporting IP attorneys in the state of New Mexico, mentoring UNMSOL students, and providing pro bono legal advice for creatives, inventors, and businesses in New Mexico.

Gina Constant  
2023 Chair of the Intellectual Property (IP) Law Section



**LAWYERS PROFESSIONAL LIABILITY INSURANCE  
COMMITTEE  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Jerry Dixon/William Slease

**SUBJECT:** Annual Report from the LPLI Committee

**DATE:** December 14, 2023

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The LPLI Committee conducted and accomplished the following in 2023:

1. Committee Chair: Jerry Dixon; SBNM Staff Liaison: William Slease
2. Meetings
  - a. The Committee held 2 regular meetings and several unofficial subcommittee meetings related to CLEs.
3. Continuing Education Presentation(s) (if applicable):
  - a. The Committee presented a 1-hour CLE on December 14, 2023, titled *What a Startling Discovery: Judicial Perspectives on Discovery in Federal and State Courts*. The CLE was moderated by Committee member James Wilkey and panelists included State District Court Judge Joshua Allison and U.S. Magistrate Judge Gregory Fouratt.
  - b. The Committee partnered with the Professional Development Program to present at the monthly Lunch & Learn Seminars from April 2023 through December, 2023. Topics included best practices, professional liability insurance issues, and compliance with the Rules of Professional Conduct.
4. Section/committee Outreach/Initiatives/Events
  - a. The Committee Chair and Staff Liaison plan on attending either the Spring or Fall ABA Malpractice Conference or the ABA CPR Annual Conference in 2024.
5. Media (includes website and/or social media if applicable)
  - a. N/A

5. Ongoing Section/Committee Items:

- a. In 2024 the Committee will continue to work with the PDP to offer monthly CLEs, as well as contribute content for articles in the Bar Bulletin, and information on the SBNM website.



State Bar of New Mexico  
Natural Resources, Energy  
and Environmental Law Section

**NREEL SECTION OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Melinda A. Branin  
Hinkle Shanor LLP

**SUBJECT:** 2023 NREEL Annual Report

**DATE:** January 5, 2023

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The Natural Resources, Energy and Environmental Law Section conducted and accomplished the following in 2023:

1. Board of Directors
  - a. Melinda A. Branin, Hinkle Shanor LLP, Chair
  - b. Bidtah Becker, Navajo Nation Division of Natural Resources, Chair Elect
  - c. Kari E. Olson, Montgomery & Andrews
  - d. Louis W. Rose, Montgomery & Andrews, Past Chair
  - e. Thomas W. Paterson, Susman Godfrey LLP
  - f. Zachary Ogaz, New Mexico Environment Department
  - g. Kristen Burby, Sandia National Laboratories
  - h. Steven Hernandez, Law Office of Steven L Hernandez PC
  - i. Adrian Oglesby, UNM School of Law, Faculty Liaison
  - j. Vanessa Springer, UNM School of Law, Student Liaison
  - k. Chandler Farnworth, YLD Liaison
2. Meetings
  - a. The Section Board met by zoom every fourth Tuesday of the month except December 2023.
  - b. The Board held a half day retreat at the State Bar of New Mexico on July 8, 2023. The retreat was attended in person and virtually.

3. Continuing Education Presentation(s)
  - a. 2023 Legislative Update. The Section held its third annual legislative update on May 5, 2023. Paula Vance provided a brief bill overview followed by a panel discussion. Gavriel Pacyniak was the moderator and Sen. Peter Wirth, Sen. Steven Neville, Rikki-Lee Chavez, and James Povijua were the panelists. The update was held virtually and there were 35 attendees.
  - b. Texas v. New Mexico: How We Got Here and Where We Are Now. The Section held a one-hour webinar on August 31, 2023, on the water case Texas v. New Mexico. The speakers were Steven Hernandez, Law Office of Steven Hernandez PC and Jeffrey Wechsler, Montgomery & Andrews, and there were 23 attendees.
  - c. Administrative Hearings: A View From One Agency. The Section held a one-hour webinar on November 17, 2023, on the administrative hearings process with a special focus on Oil and Gas Act. The speaker was Bill Brancard, UNM School of Law, and there were 25 attendees.
  - d. Annual CLE: Earth, Air, Water, Fire. The Section held an in-person all day event at the State Bar of New Mexico with the option for virtual attendance. The CLE was held on December 15, 2023. There were 30 in-person attendees (including speakers) and 76 virtual attendees.
4. Section/committee Annual Meeting
  - a. The Section held its annual meeting on December 15, 2023, in conjunction with its annual CLE. During the meeting, the Section awarded two Career Achievement Awards for 2023 to Bill Brancard, UNM School of Law, and Gregory J. Nibert, Hinkle Shanor LLP.
5. Section/committee Outreach/Initiatives/Events
  - a. The UNM outreach committee was formed and the committee members for 2023 were Adrian Oglesby, UNM Faculty Liaison, Kari E. Olson, Montgomery & Andrews, Vanessa Springer, UNM Student Liaison, and Melinda A. Branin, Hinkle Shanor LLP
  - b. The Section sponsored the NREEL/UNM School of Law Environmental Law Society Mentorship Mixer on September 27, 2023.
  - c. The Section sponsored the Young Lawyers Division Swearing-in Mixer on October 12, 2023.
  - d. The Section sponsored a lunch and panel discussion at the UNM School of Law on what it's like to practice in NREEL. The event was held on November 14, 2023, and the panelists were Paula Vance, Holland and Hart, Kari E. Olson, Montgomery & Andrews, Zachary Ogaz, General Counsel NMED. The moderator was Vanessa Springer, UNM Student Liaison.
6. Scholarships (if applicable)
  - a. The Section made a gift to UNM Law's Natural Resources and Environmental Law Program that provided partial funding for the NREL Program's summer stipend program, which supports UNM students who do otherwise-unpaid summer work for a government agency or nonprofit organization.
7. Media (includes website and/or social media if applicable)

- a. The website was maintained monthly with the help of Zachary Ogaz.

Conclusion: The Section had a productive year in 2023. The Section placed a special focus on outreach and membership opportunities for law students and new attorneys by forming a UNM Outreach Committee, hosting an Administrative Law 101 CLE, sponsoring a swearing-in mixer, and sponsoring a lunch and panel discussion on practicing in NREEL. These opportunities were in addition to those offered previously by the Section including grant funding internships for UNM law students, sponsoring the yearly mentorship mixer, and offering high quality CLEs to our members. Th Section remains financially sound and in a position to continue providing excellent resources and educational services to its members.

Respectfully,  
Melinda A. Branin  
2023 NREEL Section Chair



State Bar of New Mexico  
Prosecutors Section

**PROSECUTORS SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Jessica A. Perez

**SUBJECT:** Annual Report

**DATE:** 11/14/2023

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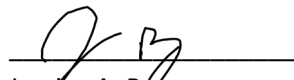
The (section/committee name) conducted and accomplished the following in (year):

1. Board of Directors
  - a. Jessica Perez
  - b. Zach Jones
  - c. Jonathan Gardner
  - d. Mark Probasco
  - e. Sean Sullivan
  - f. Steven Diamond
  - g. Kyle Hibner
  - h. Joey Montoya
  - i. Andoni Garrote
2. Meetings
  - a. Meets are the second Friday each month. The Section met approximately 10 times this year due to cancellations.
3. Continuing Education Presentation(s)
  - a. N/A
4. Section/committee Annual Meeting
  - a. Annual meeting took place as part of the NMDA Fall Conference
5. Section/committee Outreach/Initiatives/Events
  - a. The board went to the UNM School of Law to host a panel.

- b. Section presented yearly prosecutorial excellence awards at the NMDA Fall Conference.
  - c. Section held a social event at the NM United soccer game in October where approximately 13 prosecutors attended.
- 6. Scholarships (if applicable)
  - a. Book scholarship application is pending sending out this the Spring semester.
- 7. Media (includes website and/or social media if applicable)
  - a. N/A
- 8. Ongoing Section/Committee Items:
  - a. For 2024, the section intends to continue and structure the scholarship so that it is a yearly occurrence. We shall also continue our partnership with NMDA to present the annual awards during Fall Conference.

Conclusion:

Sincerely,

  
\_\_\_\_\_  
Jessica A. Perez  
2023 Section Chair





State Bar of New Mexico  
Public Law Section

**PUBLIC LAW SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Ken Swain, Public Law Section Chair

**SUBJECT:** 2023 Annual Report

**DATE:** 01/08/2024

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The (section/committee name) conducted and accomplished the following in (year):

1. Board of Directors
  - a. Nathan Eckberg, Past Chair
  - b. Ken Swain, Chair
  - c. Geraldine Garduno, Budget Officer
  - d. Diego Trujillo, Director
  - e. Ramona Martinez, Director
  - f. Rebecca Mnuk, Secretary
  - g. John Kreienkamp, Director
  - h. Clifford Rees, Director
  - i. Jocelyn Torres, Director
  - k. Ethan Watson, Director
  - l. Griffin Arellano, UNM Liaison
  - m. Vacant YLD Liaison
2. Meetings
  - a. January 19, 2023
  - b. February 16, 2023
  - c. May 18, 2023
  - d. August 16, 2023
  - e. October 12, 2023

- f. October 25, 2023
  - g. November 15, 2023
3. Continuing Education Presentation(s)
    - a. October 12, 2023 Procurement Code Institute
      - New Mexico Legislative Session Overview of Procurement Legislation
      - The Role of the Chief Procurement Officer
      - The Role of the Public Attorney in the Review and Approval of Solicitations and Public Contracts for Legal Sufficiency
      - Ethics in Procurement
    - b. December 14, 2023 Managing Federal Awards
  4. Section/committee Annual Meeting
    - a. The Section held its Annual Meeting following the procurement CLE on October 12, 2023.
  5. Section/committee Outreach/Initiatives/Events
    - a. The Section partnered with UNM School of Law's Association of Public Interest Law (APIL) for a social event at High and Dry in Albuquerque. The event was well attended by public law attorneys and law school students.
    - b. The Section held its annual Public Lawyer of the Year Ceremony on November 4th at the State Capitol. This year's recipient was Pam Stokes. The event was well attended and included remarks from State Bar President Benjamin Sherman, and a keynote address by the Attorney General for the State of New Mexico, Raul Torrez. The event also honored Camilla Allison as this year's Othmer Scholarship Recipient
  6. Media (includes website and/or social media if applicable)
    - a. The Public Law Section webpage on the State Bar's website is periodically updated with public lawyer of the year recipient information and Othmer Scholarship recipient information.
    - b. The Section issued a press release about the Public Lawyer of the Year Award Ceremony at the State Capitol however, there did not appear to be any coverage of the event.
  7. Ongoing Section/Committee Items:
    - a. For 2023 the section intends to:
      - i. Continue to hold CLEs and brownbag lunch discussions on topics of importance and interest to its membership;
      - ii. Continue to perform outreach to membership about the benefits of becoming a section member and increasing available opportunities for member benefits; and
      - iii. Continue to plan and implement our annual programs and help ensure that the Section is a relevant and useful organization for our membership and the State Bar.

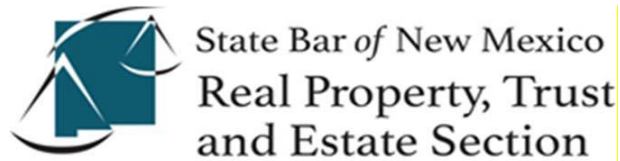
Conclusion: The Section was honored to participate in the 2023 Procurement Code Institute in October and hope to continue to provide other CLE and brown bag events for our members.

Respectfully submitted,

*Ken Swain*

Ken Swain

2023 Public Law Section Chair



**REAL PROPERTY TRUST AND ESTATE SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Gregory W. MacKenzie, Section Chair

**SUBJECT:** 2023 Annual Report

**DATE:** January 8, 2024

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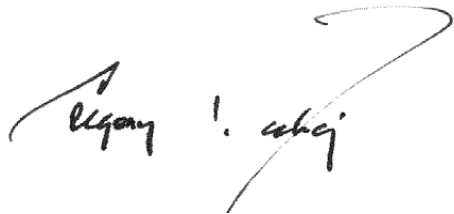
The Real Property Trust & Estate Section conducted and accomplished the following in 2023:

1. Board of Directors
  - a. Gregory MacKenzie, Chair  
Scott Turner, Secretary  
Lalita Devarakonda, Treasurer  
Vince Haslam, Director  
Joshua Chappell, Director  
Linda Leyba, Director  
Amber Cash, Director  
Joshua Dwyer, Director
2. Meetings
  - a. The Section met every other month in February, April, June, August (Annual Meeting), October and December
  - b. The Trust & Estate Division met in February, March, April, July and October
  - c. The Real Property Division met in January, March, June and September
3. Continuing Education Presentations
  - a. Ghost Ranch Retreat, May 19, 2023, ½ day, in person program, 25 attendees
  - b. Real Property Institute, November 3, 2023, ½ day, virtual program, 34 attendees
  - c. Probate Institute, November 16, 2023, full day, virtual program, 80 attendees

Honorariums for non-board speakers were provided to 4 in-state speakers (\$75) and 2 out-of-state speakers (\$125)

4. Section/committee Outreach/Initiatives/Events
  - a. The Trust & Estate Division is developing a “Fundamentals” CLE to be offered quarterly throughout the state. The goal is to encourage younger lawyers to pursue these areas of law
5. Scholarships
  - a. Two scholarships (1 for each Division) were awarded to law school students, each in the amount of \$1000.
6. Ongoing Section/Committee Items:
  - a. Continued development of the “Fundamentals” CLEs
  - b. Continued focus on the Ghost Ranch Retreat and Institute CLEs

The Section continues to offer value to members by providing CLEs. The Section has board position vacancies. Ideally more Real Property practitioners need to be involved in both the division and the Section. The functioning of the Section with the two distinct divisions presents issues of communication and continuity.

A handwritten signature in black ink, appearing to read "Gregory W. MacKenzie". The signature is stylized and includes a large, sweeping flourish that extends upwards and to the right.

Gregory W. MacKenzie, Esq.  
2023 RPT&E Section Chair



State Bar of New Mexico  
Solo and Small Firm  
Section

**TO:** Richard Spinello, Executive Director, and  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Charles Gurd, SSFS Past -Chair

**SUBJ:** 2023 SSFS Annual Report

**DATE:** January 6, 2024

The following report outlines the SSFS activities and accomplishments in 2023.

1. **2023 Board of Directors:** Charles Gurd (chair), Deian McBryde (chair-elect), Marissa Crowlett (secretary), Ian Bezpalko (budget officer), Rebecca Mulcahy, Brendan O'Reilly, Ashlea Crumley, Kymberleigh Dougherty, Gwen Shaw, Patrick Barry, and Erin Marshall.
- 

Amara Aaron and Lucy River departed the board before the completion of their terms. The YLD Liaison resigned but that Division did not appoint a new liaison. However, the YLD did not appoint a new liaison.

2. **Meetings:** The section board held regular meetings throughout the year.

3. **Continuing Education and Outreach:**

"This year the SSF decided to forgo an all-day institute and focus on the "CLE round-tables" throughout the year. As many events and benefits tend to focus on the Albuquerque area, these round-tables were created with emphasis on providing access to these events to attorneys throughout New Mexico. As such, we held events in both Las Cruces and Taos, which included social events with attorneys and judges, and collaboration with other sections, such as the Family Law Section for the Taos roundtable. We can attribute much of our Board's success in managing these events through our efforts in previous years to ensure a diversified Board for representation throughout New Mexico. The SSF Section also hosted a CLE in Albuquerque for the mandatory trust accounting credit, which was well attended and the Section was able to provide this CLE at no cost for its attending members.

4. **Section Annual Meeting: Tuesday, December 19, 2023, 9:00 a.m.**

5. **Fellowships:**

- a. The section awarded a 2023 fellowship to James Owens that included paid registration to the 2023 Annual Meeting. The section may continue to grow this opportunity.

6. **Media:**

1. SSF maintains a Facebook group for members that remained largely inactive except for occasional posts of events made by the chair-elect.
- b. The section's listserv remains active, although the "mailing list" functionality provided by the Bar is antiquated and inadequate. Nevertheless, members use the list to request support and referrals from one another, although they also continue to ask about more modern and effective technology.

7. **Ongoing Section Items:**

- a. The SSFS continues to work with other Sections, Divisions, and Committees. For example, at the request of SSFS member, Laura Johnson, the Chair requested an e-blast be sent to SSFS members about a Family Leave Project developed by the Committee on Women in the Legal Profession.

The SSFS contributed to the YLD's Swearing in Reception that was held on October 12, 2023. Three Board members attended the Reception: Deian McBryde spoke on behalf of the Section and Erin Marshall and Charles Gurd spoke with recently admitted attorneys.

Representatives from the SSFS – Deian McBryde and Erin Marshall – spoke with law students on October 17, 2023.

- b. The section continues to support solo and small firm attorneys to comply with the new mandatory succession planning rules in close cooperation with William Slease.



## KEY PLANS FOR 2024:

Deian McBryde, our current Chair, previously had a motto, "Lawyers Serving Lawyers." As Chair, I continued that Moto. I believe that in 2024, Deian McBryde will continue that Moto. Deian has stated: "Being solo shouldn't mean feeling alone." I hope we have made an impact here, too. The larger issues of attorney loneliness, business anxiety and development, and personal and financial well-being are ones that our Bar should embrace more fully. We should not leave any members feeling as though they are alone.

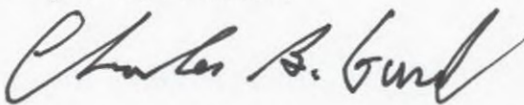
### Specific Focus:

- In 2024 under the excellent leadership of Deian McBryde, the SSFS will continue to work with various Sections, Divisions, and other Bar and non Bar legal organizations.
- Furthermore, because the vast majority of New Mexico attorneys are solo and small firm attorneys the SSFS is planning to conduct Round-table CLE programs from around the State. It is the goal of the SSFS to be able to listen to, assist, and work with as many solo and small firm attorneys as possible.
- While the Board paid for one Fellow to attend the 2023 Annual Meeting, the Board is contemplating the possibility of paying for more fellows or it may create a Fellowship program so that the individual can attend one of the ABA conferences.
- Early in the year, the Board will decide whether to do a half day or full day CLE Institute.
- The SSFS Board will continue to work on a system that will allow it to communicate better with its members.

### CONCLUSION:

Although in 2023, the SSFS continued to work with its members and continued to do projects to help solo and small firm attorneys I strongly believe that in 2024, the Section will do even more – especially since the vast majority of attorneys licensed in New Mexico are solo attorneys or work in a small practice.

Respectfully Submitted,



Charles B. Gurd  
2023 Chair --Solo & Small Firm Section





State Bar of New Mexico  
Tax Law Section

**TAX SECTION  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Frank Crociata, Chair

**SUBJECT:** 2023 Annual Report

**DATE:** January 8, 2024

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The Taxation Section of the New Mexico State Bar conducted and accomplished the following in 2024:

1. Board of Directors
  - a. Frank Crociata, Chair
  - b. Mandeep (“Manny”) Talwar, Chair-Elect (2024)
  - c. Patricia Tucker, Past-Chair/Secretary
  - d. Grace Allison, Budget Officer
  - e. Scott Woody, Director
  - f. Charles Spence, Director
  - g. John Dragovits, Director
  - h. Janette Duran, Director/Young Lawyers Division Liaison
  - i. Robert Johnston, Director
  - j. Vanessa Kaczmarek, Director
  - k. Jeanette Contreras, CPA Liaison
  - l. Mary Pareja, UNM Law School Faculty Liaison (part year)
  - m. Luisa Sanchez- Carrera, UNM Law School Student Liaison (part year)
2. Meetings
  - a. **January – December:** The Section held regular meetings monthly, on the second Tuesday of each month. Meetings were held via Zoom and quorums were met for each meeting.
  - b. **December:** The Annual Meeting of the Membership was held in conjunction with the Tax Symposium on December 13, 2023 (see below).
3. Continuing Education Presentation
  - a. **General:** Building on the momentum from 2022, the Tax Section, together with the New Mexico Society of CPAs, held an annual Joint Tax Symposium on December 13, 2023 with speakers from both the legal and CPA communities. The day-long program



- a. For 2024, the Tax Section seeks to continue to improve and expand the joint Tax Symposium with the NMSCPA. In January 2024, the Section intends on conducting a detailed review of revenues, expenses, and attendance at 2023 Tax Symposium with the State Bar.
- b. Due to its success in 2023, the Tax Section also intends on hosting another Tax Lawyer Career Day at UNM Law School.

This report is respectfully submitted on behalf of the Tax Section of the New Mexico State Bar.



By: \_\_\_\_\_  
Frank Crociata, Chair (2023)

Cc: Manny Talwar, Chair-Elect (2024)



**WELL-BEING COMMITTEE  
OF THE STATE BAR OF NEW MEXICO  
2023 ANNUAL REPORT**

**TO:** Richard Spinello, Executive Director  
Board of Bar Commissioners  
State Bar of New Mexico

**FROM:** Sean M. FitzPatrick and Tony Long, Co-Chairs, SBNM Well-Being Committee

**SUBJECT:** SBNM Well-Being Committee Annual Report, 2023

**DATE:** January 4, 2024

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The Well-Being Committee (WBC) was created at the end of 2019, prior to the beginning of the Covid 19 Pandemic, in an effort to encourage health and well-being among New Mexico lawyers. This committee was also created with the intention of following the steps laid out by the National Task Force on Lawyer Well-Being. The NM Well-Being Committee is comprised of stakeholders from the bar, regulation, the law school, the Judiciary, and the paralegal community. All of its members are from around the state and have an interest in legal well-being.

Four subcommittees met regularly through the first half of 2023 to work on different aspects of well-being programming: Strategic Planning, Events/CLE, Yearly Campaign, and Judicial Wellness. There was a re-organization of sub-committees toward the mid/end of 2023 and is detailed below. The subcommittees met as needed between the larger Well-Being Committee meeting which met every other month.

The Well Being Committee conducted and accomplished the following in 2023:

1. Board of Directors
  - a. The Well Being Committee does not have a Board of Directors.
2. Meetings
  - a. Meetings were held every other month.
    - i. Jan. 31, March 28, May 30, July 25, September 26, and November 28, 2023.
3. Continuing Education Presentation(s)
  - a. No CLE presentations conducted by WBC in 2023.
4. Section/committee Annual Meeting

- a. The WBC had a brainstorming retreat on Tuesday, Aug. 8, to discuss and come to agreement on a 3-5 year plan for goals/projects/initiatives. *See attached document for results of the retreat.*
  - b. The WBC reorganized its sub-committees eliminating the Strategic Planning Sub-Committee and agreeing to move that work into the larger committee. The CLE/Events Sub-Committee was combined with the Yearly Campaign Sub-Committee. At the end of 2023, the WBC has two working sub-committees – the Yearly Campaign Sub-Committee and the Judicial Wellness Sub-Committee.
5. Section/Committee Outreach/Initiatives/Events
- a. The WBC co-sponsored a Pumpkin Run/Walk event in October paying \$500. Other co-sponsors were the Lawyer’s Assistance Program (LAP) and the Young Lawyer’s Division (YLD). The event yielded a total of 40 participants signing up under the WBC. The participant breakdown is as follows: 30 participants for the 5K/10K: \$900, 3 participants for Youth 5K: \$54, and 7 participants for Kids 1K: \$105.
  - b. The Strategic Planning Sub-Committee of the WBC presented on three different occasions in Professor Natalie Martin’s class at the UNM School of Law. Presenters were Sean Fitzpatrick, Dr. Amanda Parker, and Bill Slease. Topics were varied, but centered around how to maintain or increase well-being while being a practicing attorney.
  - c. The Yearly Campaign Sub-Committee continued to plan, record and publicize monthly podcasts and accompanying articles under the 2023 Campaign title of A Deeper Dive. Some of our highlighting presenters and authors were: Dr. Evelyn Sandeen, Elizabeth Lynch Phillips, William Slease, Brian Nichols, Sean Fitzpatrick, Aja Brooks, Alexander Uballez, United States Attorney for New Mexico, Dr. Amanda Parker, and Judith Gordon, UCLA School of Law faculty....to name a few.
  - d. The Judicial Wellness Sub-Committee also planned, recorded and published two podcasts on the following topics – Resiliency for Judges with speakers Hon. Sandra Engel (ret.), Hon. Senior Justice Barbara Vigil (ret.), Hon. Shammara Henderson, and Hon. Brett Loveless; and (2<sup>nd</sup> topic) Resources and Services for NM Judges with speakers Pam Moore, Hon. Justice David Thomson, Hon. Shammara Henderson, and Hon. David Murphy.
  - e. The WBC was present at the Annual Meeting by offering swag in the form of fidget spinners and inviting attendees to write down and post what they are thankful for on a Gratitude Board. This was a fun and popular item on Friday, July 28, 2023.
6. Scholarships (if applicable)
- a. Not applicable
7. Media (includes website and/or social media if applicable)
- a. The WBC maintains information on the SBNM website updating its portion with current podcasts, bar bulletin articles, events, upcoming meetings and well-being information. Click here for information: <https://www.sbnm.org/Leadership/Committees/NM-Well-Being-Committee>
8. Ongoing Section/Committee Items:
- a. For 2024, the WBC intends to add Natalie Martin as a committee member in May.

- b. With the re-organization of its sub-committee's, the WBC hopes to be more efficient in planning, organizing and accomplishing it's work in an effort to have a deeper and wide-reaching impact on the wellness of the NM legal community.

Conclusion:

The NM Well-Being Committee continues to serve the legal community by educating and providing resources and services that enable legal professionals from all areas of the legal community to prioritize their well-being. Please see accompanying document that highlights our 2024 goals.

Best Regards,  
Sean M. FitzPatrick, Esq.  
Tony Long, Esq.  
2023 Well-Being Committee Co-Chairs

## WBC STRATEGIC PLANNING BRAINSTORMING SESSION

The WBC Strategic Planning Subcommittee met on August 8, 2023, and recommends that the WBC adopt a two-tiered strategic plan for the next 3 to 5 years, beginning January 1, 2024. The two identified tiers are:

**Tier I - Education, Awareness and Activities**

**Tier II - Advocacy and Community Support and Engagement**

The Subcommittee recommends dissolving the current subcommittees and reforming two working groups to develop and work on well-being programs and initiatives within the above-two tiers.

The group then identified the following goals and action items:

1. **Goal -** Work with the UNM School of Law to support integration of well-being into the curricula on a sustained basis.

**Action item** – invite UNM Faculty member to join WBC.

- Meet with the Dean to discuss this.

2. **Goal –** Increase WBC engagement with law firms, including lawyers, paralegals, and support staff.

**Action items** – develop well-being toolkits for solo and small firms.

- target firm leadership for well-being initiatives
- Do we add Judicial wellness as a bucket?

3. **Goal -** Examine and possibly advocate for rule changes that promote well-being.

**Action items** - work with Bridge-the-Gap to include well-being in mandatory curricula

- consider MCLE change
- consider commentary change for Rules of Professional Conduct (similar to ABA suggestion - competence includes well-being)

4. **Goal -** Continue to develop and deliver effective CLEs and activities for the legal community.

**Action items** - develop sustained well-being curricula.

- target law firm leadership for well-being initiatives and offerings
- Look at how our CLE content is delivered and structured
- What content is useful/ not useful

5. **Goal** - Develop well-being programs that address and are tailored to different career stages.

- New lawyers might need different benefits and well-being programs than retiring lawyers
- How do we determine what those programs are?

6. **Goal** - Determine how to incentivize well-being.

**Action items** - coordinate with State Bar Members Services to determine if it is possible to offer well-being incentives or benefits, including things like a discounted gym memberships, yoga classes, etc.

- target law firm leadership for well-being initiatives and offerings
- Wellbeing discounts: Define fitness, yoga

7. **Goal** - Develop metrics to determine progress/success.

- Sending out a survey- as needed to members of the committee to check on progress and or success