



BOARD OF LEGAL SPECIALIZATION

State Bar of Arizona
4201 N. 24th Street, Suite 100
Phoenix, Arizona 85016

Wednesday, June 14, 2023 - 4:00 p.m.
via **Zoom**

MINUTES

Approved July 12, 2023

MEMBER ATTENDANCE:

P = Present; Z = Present via Zoom; T = Present Telephonically; A = Absent

Wendi Sorensen - Z

James Cross - Z

James Anderson - Z

Cynthia Braun - A

Robert Denison - Z

Michael Goldberg - A

Heather Spielmaker - A

Kimberly Heldt - Z

Phoebe Moffatt - Z

Blake Moscatello - A

Jeffrey Neff - Z

Elizabeth Ortiz - Z

Teresa Welborn - A

State Bar Staff: Randal Westbury

Minutes taken by: Randal Westbury

1. Call to Order

Meeting was called to order by Wendi Sorensen
4:03 p.m.

2. Call to the Public –

Bob Willis – Chair, Construction Defect Advisory Commission - Z

3. New Board Member – Heather Spielmaker

Wendi Sorensen announced the new member of the Board of Legal Specialization. Heather Spielmaker was not present for the meeting. Wendi continued that she, the BLS Administrator, and Member Services manager, Kendra Johnson, met Heather Spielmaker via zoom and provided orientation to the BLS. The Board is excited to have Heather joining and they are looking forward to working with her.

4. Approval of minutes

The minutes of the May 10, 2023 General Session meeting were reviewed.

Motion for approval by: Jeff Neff

Second by: Jim Cross

Chair calls for vote: Unanimous, motion passes

The minutes of the May 10, 2023 Executive Session meeting were reviewed.

Motion for approval by: Jeff Neff

Second by: Jim Cross

Chair calls for vote: Unanimous, motion passes

5. Review of Construction Defect Exam and Study Material:

4:03 pm – Bob Willis presents-

BLS Chair, Wendi Sorensen, opens the discussion thanking Bob for taking the time to present the exam and study materials. Wendi stated that the Construction Defect materials were circulated to the Board members prior to the meeting and that everyone had a chance to review them.

Bob begins with thanking the Board for reviewing the materials and that both John Jozwick and Stephen Weber maybe joining him. He wanted to thank John Jozwick, Stephen Weber, and Jill Ann Herman for their hard work in compiling the exam and study materials. The committee worked hard to ensure what they've concluded is a fair and appropriate exam.

Bob noted that he may seek retirement in the next few years and that his goal is to have the exam study material and a bank of exam questions prepared for the next member panel if he decides to retire. Having a large bank of exam questions will ensue that the next Commission Chair will have a good start and only small revisions will need to be provided.

The exam committee broke the exam into 4 parts with each committee member contributing a list of questions. After compiling the list of questions, the committee has enough questions for maybe 4 exams without recycling the same questions. Bob confirmed with Randal Westbury that the initial certification application cycle will be open for a few more months.

In addition, Bob noted that the Commission expects a passing grade of 75-80% on the exam and the Commission voted on 75% as the passing expectation. The Commission agreed that a knowledgeable and experienced attorney should be able to pass the exam with a grade of at least 75%. A specialist is expected to have more knowledge than the average attorney.

The exam consists of (50) Multiple Choice and (25) True or False questions of which, each question is worth 1-point. There is one Essay Question. The Essay question is worth (25) points. Bob concluded that the Commission spent a lot of time preparing the exam and is confident that the exam is a fair test. Bob thanks the Board for their time and will wait on the Board's decision.

4:11 – End of Presentation

Bob Will exits the meeting.

6. Motion to move into Executive Session for purposes of reviewing recommendations for Certification and Recertification:

Motion made by: Robert Denison
Second by: James Cross
Chair calls for vote: Unanimous, motion passes

Convene into Executive Session
4:11 pm.

Reconvene to General Session
4:12 pm

7. Motion to approve the Intent to Deny Initial Certification recommendation of Estate and Trust Law Advisory Commission for:

A) Christopher Siegle

Motion made by: James Anderson
Second by: Jeff Neff
Chair calls for recusals: none
Chair calls for discussion: none
Chair call for vote: Unanimous, motion passes

8. Motion to approve the Initial Certification recommendation of Estate and Trust Law Advisory Commission for:

A) Lauren Talkington

B) Allyson Teply

Motion made by: James Cross
Second by: Jeff Neff
Chair calls for recusals: Phoebe Moffatt
Chair calls for discussion: none
Chair call for vote: Unanimous, motion passes

9. Administrator Updates:

Randal Westbury opened with the notice that the State Bar of Arizona has filed its Response to the Kinghorn Petition. The Supreme Court's decision will be communicated to the BLS once the decision has been received by the State Bar. The 2023 Initial Certification and Recertification application cycle is officially open.

Randal commented that as of today, there are no withdrawal notices from those who are required to recertify. This is great news as at the same time last year, there were 9 notices of withdrawals. The stats are also higher this year with 9 recertification applications already received by the BLS Administrator. The anticipated recertification rate is 80% in 2023 as opposed to 72% in 2022.

As a follow up to the SOS meeting held in March, 2023, the Personal Injury and Wrongful Death Advisory Commission as well as the Workers' Compensation Advisory Commission are revising their Standards and Application. Once the revisions are completed, the BLS Administrator will circulate the revised material to the BLS for review.

10. Date of next meeting: **July 12, 2023**

11. Adjourn – 4:19 pm