



## LOCAL PROFESSIONALISM PANEL REPORT FORM

<b>Chief Judge of Circuit:</b>	Chief Judge Lisa T. Munyon
<b>Name of Submitter:</b>	Lauren Heatwole, Chair
<b>Date:</b>	12-12-24

**\*Reports must be filed by June 15 and December 15 each year.**

### SC 2023-0884 - Appendix A Code for Resolving Professionalism Referrals 3.7 Reporting

- a) Each LPP must file a written report with the chief judge of its circuit, the Florida Supreme Court, and The Florida Bar identifying all professionalism referrals received against a member of The Florida Bar in June and December of each calendar year.
- b) The biannual reports must include the following information for each referral for the six (6) calendar months preceding the month in which the report is due:
  1. The date of the referral;
  2. The circuit in which the issue arose;
  3. A short summary detailing the substance of the referral;
  4. The relationship of the respondent voluntarily participated in the process;
  5. Whether or not the respondent voluntarily participated in the process;
  6. The resolution, if any, of the referral; and
  7. Whether there were previous referrals against the respondent.
- c) The reports must not include identifying information for the respondent or the party who submitted the referral.

## **INFORMATION FOR SUBMITTERS**

1. **Purpose and Use:** This form collects information about your Circuit's Local Professionalism Panel and its activity for the last six (6) months. This form also asks for updates to the contact information for your Local Professionalism Panel. The information about your Circuit's Local Professionalism Panel will be used to update the Center's Local Professionalism Panel contact list, as well as to gauge how each Circuit is carrying out panel activities.
  
2. **Reporting Period:** Reports must be filed by June 15th and December 15th and include information for the six (6) calendar months preceding the month in which the report is due.
  
3. **Where to Submit:** Submit this form and any attachments by email to [cfp@floridabar.org](mailto:cfp@floridabar.org) or by regular mail to:

The Florida Bar  
Henry Latimer Center for Professionalism  
651 E. Jefferson Street  
Tallahassee, FL 32399

4. **Questions:** Direct all questions about this form to [cfp@floridabar.org](mailto:cfp@floridabar.org).

**June Reports should include information from January 1 to June 15.**  
**December Reports should include information from June 16 to December 15.**

## **LOCAL PROFESSIONALISM PANEL QUESTIONS**

Please complete the information below regarding any activity within your Local Professionalism Panel. Additional pages may be attached as needed.

- 1. Please describe the process by which complaints are addressed.** You may attach a link to the complaint form or link to where information is located on your website that advises the consumers, attorneys, and judges how to file a complaint.

The complaint form can be found at the following link:

<https://ninthcircuit.org/resources/local-professionalism-panel>

The complaint is sent to the Chief Judge for review. The Chief Judge then refers the complaint as applicable to the professionalism panel.

- 2. Please describe what types of professionalism issues are seen most often in this Circuit?**

Historically, the most common issues are relating to professionalism issues/behavior in the courtroom or failing to respond to court orders/notices of hearings. This reporting period included a complaint as to settlement negotiations.

**3. What are believed to be the causes of professionalism issues within your Circuit?**

Historically, a large amount of complaints stem from criminal matters where the attorneys have less experience and appeared to have little mentoring prior to the complaint. For the complaints involving civil matters, the attorneys are generally sole practitioners or with small offices. We've found that encouraging mentoring has been helpful. For this reporting period, we had one complaint involving a settlement issue/debate with a seven year lawyer.

**4. How often does your Circuit's Local Professionalism Panel meet?**

The Chair meets with new panel members as they rotate on (from our 3 tiered terms), and a group meeting is scheduled yearly.

**5. Please describe any training provided to committee members.**

Each complaint case is assigned to a sub-panel of three members chaired by a member selected by the Chair, Lauren Heatwole. The cases are discussed when necessary. Templates/forms for the documents/letters are provided to the sub-chair with an explanation/reminder of the process. The members are reminded of the principals from Chief Judge Munyon's and Florida Supreme Court administrative orders at the regular meetings. The sub-panel discusses the proposed resolutions with the Chair.

The panel members have also been provided the information for the required Local Professionalism Panel Training program.

The Chair is also available at any time to meet/discuss with the members regarding their role and responsibilities.

**6. How is your Circuit's Local Professionalism Panel promoted?**

The Ninth Circuit Professionalism Panel has a link on the Ninth Judicial Circuit website, including information and links to the complaint forms. In addition, the Orange County Bar Association's Professionalism Committee helps to promote the Panel at local CLE's on professionalism. The local bar association professionalism committee also has appointed members on the Panel at the different terms/rotations. Information about the Professionalism Panel is also provided at local bar meetings and through word of mouth. Chief Judge Munyon is also actively involved and advises the Judges of the availability and usefulness of the Professionalism Panel.

7. Please provide information regarding all complaint intake for the appropriate dates. If filing in June, the information should be from January 1<sup>st</sup> – June 15<sup>th</sup>. If filing in December, the information should be from June 16<sup>th</sup> – December 15<sup>th</sup>.

1.

<b>Date of Referral:</b> 10/31/2024 initial referral	<b>Circuit in which issue arose:</b> 1st
<b>Short Summary detailing the substance of the referral</b>	
The complaint was received in the 1st circuit and then referred to the 9th circuit Chief Judge who referred it to the local Professionalism Panel.	
<b>The relationship of the respondent to the person submitting the referral.</b>	
The person submitting the complaint referral was a Judge in the 1st district presiding over a hearing on the issue to enforce a settlement agreement. The attorney/subject of the complaint referral works at a law firm located in the 9th circuit, and it was therefore referred to the 9th circuit to address the attorney whose law practice is in the 9th circuit.	
<b>Whether or not the respondent voluntarily participated in the process.</b>	
The sub-panel is actively working on this complaint referral.	
<b>The resolution, if any, of the referral;*</b>	
The sub-panel is actively working on this complaint referral.	
<b>Whether there were previous referrals against the respondent</b>	
Yes, one time in 2022.	

- 8. Please provide the contact information for all current panel members.** Please include: name(s), email(s), address(es), and phone number(s), and title if applicable.

SEE NEXT PAGE

## 2024 PANEL MEMBER CONTACT LIST

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**The Florida Bar will publish on its website the LPP biannual reports. The Chief Judge, or the Chief Judge's designee, will publish on the judicial Circuit's website the LPP biannual reports from that Circuit.**