

**THE EVOLUTION OF THE
ASSOCIATION OF DEFENSE TRIAL ATTORNEYS**

1941-2018

ADTA

Association of Defense Trial Attorneys

Foreword

In 2008, long time secretary Gary Peplow penned *The History* of the ADTA. Much of the first part of this work is a reprint of Gary's seminal effort, but with this updated version, we hope to afford the reader a better idea of the evolution of our organization, as well as the many changes that have occurred in the practice of the Defense Trial Attorney in the now 75+ years that we've been an association.

Introduction

From its inception – as the Association of Insurance Attorneys -- the ADTA has been comprised of some of the finest trial attorneys in the United States, Puerto Rico, the provinces of Canada, and now the United Kingdom and France. Founded in 1941, it soon established itself as one of the major defense trial lawyer organizations in the legal profession. Over the years, the ADTA has counted among its members Presidents of the American Bar Association, numerous State Bar associations, and virtually every national, state and local trial or defense association, including the American College of Trial Lawyers, the Defense Research Institute, the International Association of Defense Counsel, the Federation of Defense and Corporate Counsel, and the American Board of Trial Advocates. Likewise, many of our members have moved from private practice to serve in the judiciary, both at the state and federal level. In short, for more than three-quarters of a century, the ADTA has proudly championed the jury trial system that remains perhaps the most essential element of our American system of jurisprudence.

A look back at our history provides not only a fascinating view of the evolution of the legal profession, but demonstrates the historical commitment of our members to their clients, their communities and the law.

The Formative Years, the 1940s and 1950s

The Association of Insurance Attorneys had its origins in a suitcase or, more accurately, a number of them. All of the founding fathers were Midwesterners. Clarence Heyl of Peoria, Illinois; Howard Kopf of Davenport, Iowa; Bert Strubinger of St. Louis, Missouri; Roy Mordaunt of Minneapolis, Minnesota; and Glenn Dougherty of Milwaukee, Wisconsin, who all practiced law within a relatively close proximity to Chicago, regularly attended the Chicago Insurance Adjusters Association Christmas party held each year at the old Morrison Hotel. The Morrison, which was for many years the world's tallest and probably coldest hotel, had a huge dining room with a theater type atmosphere in the basement where, every year, the adjusters held their dinner party. Prior to the dinner, our founders and their firms would host individual cocktail parties in suites in the hotel. The Association grew out of an attempt to put together the efforts of those firms to jointly entertain insurance company clients.



(L-R) Roy Mordaunt (Founder); Glenn Dougherty (Founder); Henry Buck; Beale Rollins; Clarence Heyl (Founder), William Porteous, Jr., Frank C. Mann



(L-R) Henry Buck; Clarence Heyl (Founder); Paul Beers; Bert Strubinger (Founder)



(Back Row) William J. Voelker, Jr.; Hans J. Holtorf, Jr.; Percy McDonald
(Seated L-R) Glenn Dougherty (Founder); Jody McDonald; Mrs. and Mr. Moeller
(Best & Co.); John Royster; Clarence Heyl (Founder); Loretta Kopf

Each of the founding members was a trial attorney who not only specialized in the defense of personal injury claims, but who also provided investigative and adjusting services to the insurance carriers in the area. All had found that the materials provided to them by the carrier were inadequate for trial preparation, so their firms regularly undertook the investigation of the case. Likewise, many insurance companies did not have local adjusters in the more rural areas of the Midwest, so it was necessary for AIA members to fulfill that function as well. Since extensive discovery practice as we know it today had not yet developed, investigations and efforts to adjust a claim before suit was not only a tool being utilized for the carriers, but it proved an excellent training ground for attorneys who were expected to try the case if the claim was not settled. This aspect of handling investigations and adjustments was considered so important that in 1954 an amendment to the AIA membership requirement was added that stated *“no member is entitled to further membership in the Association once he discontinues facilities for handling investigations and adjustments of claims for insurance companies.”*

The Annual Meeting

The first meeting of the Association as a group was in 1941, at which time Bert Strubinger of St. Louis became the first president. The Association met annually in Chicago from 1941 through 1949, further evidence of its strong Midwestern influence and close association with the Chicago insurance industry. Bert Strubinger served until the end of the war in 1945, whereupon Roy J. Mordaunt became president for three years followed by Glenn Dougherty of Milwaukee who served for two years until 1950. The 1950 meeting – the first held outside of Chicago -- was in Des Moines, Iowa. The Des Moines meeting was attended by 41 lawyers, 10 wives and 66 guests. The guests were, of course, the insurance clients so highly prized by the Association.



Glenn Dougherty was followed by H. Beall Rollins of Baltimore and then Henry Buck of Kansas City. While the geographic area of the members seemed to be expanding, the annual meetings continued to be held in the Midwest with Indianapolis in 1951, Kansas City in 1952 and Milwaukee in 1953. Membership numbers also grew but more slowly. The Association emphasized that they sacrificed growth to a desire to select only the most qualified individuals as. The membership roster went from 109 in 1949 to 146 in 1953.

The first meeting for which minutes are available was in 1954 in Columbus, Ohio – also then an Insurance Company mecca -- when Melvin T. (Ted) Woods of Sioux Falls, South Dakota was President. The Columbus meeting was followed by a meeting at the Hotel Adolphus in Dallas. Two day meetings were the norm in the 1940s and 1950s. Normally a business meeting was conducted on the first morning, extending into the afternoon if necessary. A ladies' luncheon and perhaps a sightseeing trip was included. A cocktail party and buffet for members and insurance guests

was held that evening. Personal invitations to guests were extended by members who had clients or had friends in claims departments in the particular area where the convention was to be held. This event was frequently referred to as “Industry Night.” The annual meeting concluded with a grand dinner for members and their spouses.

In 1955, a discussion was held concerning whether it would be beneficial to hold a “trial panel” in connection with the annual meeting. As the minutes reflect, “It was the sense of the discussion that we were developed for another purpose, and at this point, we still do not wish to undertake this responsibility.” Thus, in 1955, marketing won out over CLE. However, the business meetings did include reports and recommendations, as well as frequent discussions of appropriate amounts to be charged for investigation and adjustment work, as well as legal fees. Such discussions for the setting of fees would be unheard of today, and if not illegal.

As far as finances were concerned, the first recorded initiation fee was \$25 for a new prime member and \$15 for an associate. Dues were \$5 annually. In 1955, then Treasurer, Howard Kopf, reported that the Association had a credit at the Depository Bank of \$1,613.67 after all of the expenses of the meeting had been paid. In March of 1956, the Association met at the Hotel Henry Grady in Atlanta. The treasury had fallen to \$1,217.95. That meeting was followed by one at the Sheraton Fontenelle in Omaha in 1957 and the Radisson Hotel in Minneapolis in 1958. By that time, the Association treasury had ballooned to \$1,933.47.

By the late 1950s, the Association was beginning to enter the “educational era” with various panel discussions. In 1959, representatives from Michigan Mutual Liability Company, Standard Accident Insurance Company, and Citizens Mutual Insurance Company gave a presentation on “Fee Discussion - What the Company Expects for the Fee.” In that year, the membership included 285 prime members and 64 associate members.

The “Exclusivity Rule”

From the very outset, the Association limited its members to one attorney per city. Since gaining business from insurance clients was the principal purpose of the early meetings, members were not interested in competing with others from their geographical practice areas. This “exclusivity rule” meant that a lawyer from Davenport or Indianapolis knew he would not have a competitor from his city schmoozing the clients, and he could solidify his contacts with confidence. This unique access to substantial potential clients attracted many lawyers from smaller communities who could not afford to entertain as eloquently as the Association could on Industry Night. Still, in an effort to increase membership, in 1958 the rule was modified to permit cities with populations in excess of one million to have two prime members.

The Origin of the “Hospitality Suite”

Beginning in the early 1950s, the Association began hosting a cocktail party for AIA members and guests at the American Bar Association meeting. In a 1956 letter to members, the secretary wrote that many claims superintendents and other high ranking claims department officials of the casualty insurance industry came to the annual ABA meeting. He noted, “So that we will not miss any of the friends we have in the claims departments over the country, we are asking that you submit a list of those you want invited.”

In 1957, the cocktail party was replaced by a “Hospitality Room” manned by member and open in the afternoon from Monday to Wednesday. Once again, the Association’s emphasis on marketing was well established. In 1959 -- when the ABA was scheduled to meet in Miami -- the decision was made not to have a “Suite” since the location would not only likely limit the number of insurance representatives present, but the AIA members would be more interested in “tourist type activities” as opposed to business opportunities. The concept was reconvened in 1960 at the ABA meeting in St. Louis, and continued until the late 1960’s when the AIA became associated with the DRI. For various reasons, not the least of which was the changing landscape of the ABA, the Association moved its marketing efforts to the annual DRI meetings. It is not clear to what extent the “hospitality suite” was continued, or just when it became a fixture at the AIA meetings, but the tradition has persisted at annual meetings for as long as any

member can remember.

At each convention, a room, first the Presidential Suite and later at more spacious and accessible locations, we have provided a gathering place for members with an open bar, snacks and a place to relax, gossip and discuss not just the activities and business of the Association, but any and all topics of interest. Sing-a-longs late into the night – although George Walker claims that they “scare the new members” – have been common. Some members seem to never leave, but all drop in at one point or another.

It has been said that more future officers received their nomination for office as a result of this venue rather than any other Association activity. However, much like today – when many significant ADTA referrals can be traced to hospitality suite conversations – the concept has always served as a significant marketing tool for Association members. This tradition is unmatched by any of the other defense groups and is the envy of others and pride of the Association.



The Poet Laurette

A significant event in the history of the ADTA occurred at the meeting at the Sheraton Cadillac Hotel in Detroit in March of 1959. At the close of the Detroit meeting and on the motion of Jim Dempsey of New York, Emerson Logee, then a relatively new member from Wooster, Ohio, was elected *Poet Laurette* of the Association. Emerson, who served in that capacity until his retirement on the late 90's and whose poems became legendary, ended each meeting with a humorous accounting of events, sometimes to the consternation and even embarrassment of attending members. In 1976, and again in 1988, his poems were memorialized in booklet form, published and distributed to the membership. (Emerson's Poems are included as Appendix 1). Still today, the poems bring back fond memories of past meetings and members affectionately remembered.

AIA Leadership

In the 1940s and 1950s, several members played significant roles in the organization, along with the various presidents. While John Randall, served as Secretary/Treasurer from 1941 to 1950, Howard Kopf, one of the founders of the AIA, served as Treasurer from 1950 until his death in 1960. Howard was succeeded by his law partner, Clarence Christensen, but much of the work of the Treasurer's office was carried on by Howard's widow, Loretta, who served as Treasurer's Assistant and later as Assistant Secretary until her health failed in the early 90's. In truth, Loretta was our first Executive Director, and the story of her appointment to that position remains a testament to the “class” of our association.

As noted, even from the beginning, members' spouses not only attended, but were an integral part of every annual meeting, no one more so than Loretta. Howard's death was unexpected and, at the funeral, Loretta expressed to the several members present not only Howard's and her love for the organization, but how genuinely devastated she was that she would no longer be a part of the AIA family. At the next meeting, on motion of future President, John Elam, the Board of Governors voted to create the position of “Treasurer's Assistant” and offered Loretta the job. For more than 30 years Loretta was a fixture at the Registration Desk, greeting every member and their spouse by name and generally providing a warm “welcome back” to one and all.

She was also a fountain of knowledge about the organization. She not only knew the history of the Association, she also knew its membership like no one else. Her death in 1998 was a true loss.

Another significant and long-serving member for the Association was Hans Holtorf of Gering, Nebraska. In 1950, the offices of Secretary and Treasurer were separated. Founder Roy Mordaunt served as Secretary from 1950 to 1955 when he was succeeded by Hans who held that position until 1968. In 1969, Hans served as President and later served as Membership Chairman for many years. Hans wrote detailed minutes during his time as Secretary and much of the information about the 40s and 50s recounted in this history came from his pen. He vigorously recruited members throughout the country and remained a loyal advocate for the Association until his death in 1992.



Loretta Kopf (March, 1956)

It is not possible to recount all the stories and contributions by the officers and members in those two decades. Needless to say, those formative years laid the foundation for the Association as we know it even today.



(L-R) Hans J. Holtorf, Jr., Howard E. Kopf (Founder), R. E. Lee Flekt, Edward W. Kuhn - Annual Meeting 1959, Detroit, MI

Years of Growth and Change - The 1960s and 1970s.

The governance of the Association was originally granted to a group known as the “Board of Governors.” This group consisted of representatives from each state who were elected and met at the annual meeting to legislate policy issues. As the group grew in size, it became more difficult to assemble at annual meetings. By 1962, it was determined that 14 governors present would constitute a quorum. In 1969, the Board of Governors was replaced by state chairmen, not elected, but appointed by the incoming President. The state chairmen were not charged with policy legislation but with a duty to oversee membership.

In the 1960s, changes in governance also occurred with the creation of an “Executive Council.” Its purpose was to manage the affairs of the Association between annual meetings. The council consisted of the retiring President, the officers of the organization and four members elected at large. Initially the at-large members served staggered terms, one for four years, one for three, one for two and one for one-year, with each succeeding a year a member being appointed for a four year term.

Another major change was a Constitutional Amendment to incorporate the AIA as a not-for-profit organization under the laws of the State of Nebraska. Selection of Nebraska was no doubt the choice of long-term Secretary Hans Holtorf of Gering, Nebraska. The amendment was passed at the St. Louis convention in 1960.



Mrs. R. E. Lee Flekt, Howard (Founder) and Loretta Kopf and Edward W. Kuhn - Annual Meeting 1959, Detroit, MI

The Association meetings in the 1960s followed the traditional format. In New York, in 1962, the meeting started with an Executive Council session at Noon on Thursday followed that evening by a welcome cocktail party for members and their ladies. On Friday, a business session commenced at 9:00 a.m. and continued until a lunch break at Noon. At 1:30, the members reconvened for a program on various insurance coverage issues. That evening, Industry Night featured a cocktail party from 5:00 p.m. to 7:00 p.m. followed by a buffet dinner for members, ladies and 100 guests. Entertainment was provided from 6:30 to 9:30 p.m. by an “orchestra of three, a pianist and two violinists.” On Saturday, the business meeting was reconvened until Noon. Members then had a choice of a theater matinee performance of *Camelot*, *Carnival*, *Milk & Honey* or *A Shot in the Dark*. On Saturday evening, the traditional banquet and dance was held featuring entertainment by a lady harpist and vocalist, a dance team and a magic act reported to have been featured on the Jack Parr Show.

The Beginning of Our Separation from the Insurance Industry

As the organization grew more national in scope, an issue developed concerning the longstanding requirement that members provide investigative and adjusting services. In 1963, efforts were made to remove that requirement largely on the basis that western and southwestern lawyers rarely provided such services for insurance clients. The argument was made that in an organization that was national in scope, and with lawyers of high principles and ethics, such services were not essential. Spirited discussion resulted with many of the older members insisting this was a fundamental aspect for founding the group. This was countered by members calling for more growth and greater emphasis on trial skills. As was so often the case, a committee was formed to study the issue. Eventually, a compromise was reached whereby members need only “have available the facilities for providing investigative services.” In 1965, that committee recommended to the Executive Council that the requirement for providing investigation services should not be further changed. However, in 1967, President Russell Talbott appointed another three person committee to analyze the organization’s Constitution and By-Laws. That committee reported back with a revised Article II changing that “Object” Article a “Purposes” and deleting all reference to the handling of claims. Thus ended one of the major tenants on which the organization was founded.

Other issues persisted throughout the 1960s. The question of insurance carriers using “house counsel” was considered a major threat. At the annual meeting in 1960, the members considered it a major ethical issue and hoped to enlist help from the American Bar Association to address the problem. Again, a committee was formed to investigate the problem. By 1962, it was still a topic of spirited discussion. Despite efforts to stop the trend to house counsel, the concept survives even today.

Membership numbers grew substantially in the 1960s. Membership in 1960 totaled 367, but grew to 556 by 1969. The group was growing nationwide and a proposal was made in 1966 to change the name to the Association of Insurance Attorneys of North America. This suggestion was intended to indicate the national scope of the AIA and distinguish it as something much more than a regional or local organization. When that proposal was presented in 1966, President Lyle Allen used his presidential power to table the motion. It was never revisited, and in 1969, the Executive Committee recommended against a name change. That issue did not surface again seriously until the 1980s.

Association with the DRI

The minutes of the 1963 mid-year Executive Council meeting in Chicago contain the first mention of what was eventually to become a close relationship between the AIA and the Defense Research Institute (DRI). President Peter McAttee reported on discussions he had with representatives of the International Association of Insurance Attorneys (now known as IADC) and the Federation of Insurance Counsel (now known as FDCC) wherein they all agreed the three organizations should lend active support to the DRI. At that meeting, the EC voted to give full support to the DRI and that DRI be requested to put a representative from each defense group on the DRI board. Also, at the meeting, it was voted that all three groups: the International, the Federation and DRI be invited to AIA annual meetings. In 1967, President Russell Talbott opened a discussion on requiring all AIA members be a member of DRI. In a vote to give guidance to the incoming Executive Council, a majority decided to require all prime members – but not associates -- to be members of DRI.

In the 1960s, several significant changes in Association leadership occurred. A new Treasurer was elected in 1967 when John Mordaunt of Minneapolis, Minnesota replaced Clarence Christiansen. In 1969, Mr. Mordaunt was elected Vice President and Harrison Smith of Garden City, Kansas became Treasurer. He served until 1978 when he graduated to the bench and was replaced by Paul Gibbs. Harrison Smith had an interesting contact with fame when he was involved in a much publicized murder trial in Kansas. That trial later became the subject of Truman Capote's famous novel, *In Cold Blood*. When the book was made into a movie, Harrison had the honor of playing himself in the movie to his everlasting pride and a topic of great interest to the AIA.



Don Ryan and J. Lloyd Wion (1968)

In 1968, longtime Secretary Hans Holtorf, was elected President-Elect requiring his relinquishing his position of Secretary. Succeeding Hans was J. Lloyd Wion who served until 1986.

The decade of the 70s saw the membership continue to grow from 585 members in 1970 to 725 members in 1979. Some change occurred but far less than in the 1960s. Unfortunately, with changes in leadership, particularly a new Secretary in 1968, records were kept in a different style and some minutes were lost from the record books. In place of the extensive minutes reported by Hans Holtorf, Secretary Lloyd Wion reported events by means of annual newsletters, a Secretary's Report, and concise executive minutes. Nevertheless, some significant events were recorded and can be recounted.

At the 1971 annual meeting in St. Louis, President Reid Curtis addressed the continuing issue of interpreting the "over 1 million" membership rule. In that year, specific questions developed as how to interpret the rule as it related to the Boston, Massachusetts area. Once again, a committee was formed to explore the issue and directed to report back with possible solutions. Another issue addressed in St. Louis was a motion made to establish a permanent nominating committee to replace the committee for that purpose selected each year at the annual meeting. That motion was tabled and the records do not reflect that it was ever resurrected or passed. The St. Louis meeting was attended by 98 members, 82 wives and 40 guests.

The Move from Insurance Centers to More Attractive Destinations

In 1972, the Association met in Miami, Florida. That meeting marked the first departure from insurance centers or big city destinations. Although not characterized as a "resort" destination, the meeting drew the largest attendance ever with 120 members, 93 wives and 84 guests. A significant constitutional change also took place when the Executive Council was expanded to consist of the officers, plus 9 council members with three elected every year to serve a three-year term. The system exists to this day. Also, in the 1971-72 term, John Mordaunt, who was President-Elect, passed away and Olin White moved up to President-Elect to fill out the term.

In 1973, the trend away from Insurance meccas continued when the group met in Las Vegas, Nevada. This was indeed a different venue, and final proof that the original purpose of entertaining insurance clients was now nothing more than a historical memory. Interestingly, this evolution did not set well with some members as evidenced by then Vice President Osmer Fitts walking out of a performance by Alan King, when the comedian made a disparaging remark about Allstate Insurance Company by gesturing with his hands that you were "in good hands" and then signaling a drop as his hands suddenly parted.

Still, the relationship between the AIA and insurance defense work remained. At that time, no fault insurance was considered a major threat to the insurance defense industry, and at the Executive Council meeting in Las Vegas, President-Elect Paul Gibbs was authorized to represent the Association and appear before a Congressional committee to outline our position in opposition to this proposed legislation. At the 1974 meeting in San Antonio, Paul reported that even though all of the Defense organizations had opposed the concept, it was likely to become the law in many states. Obviously, that occurred. Nevertheless, it marked the first time that we "weighed in", as an Association, on any national issue.

In 1975 the Association reverted back to its roots with an annual meeting in Hartford, Connecticut. A major push in advance of the meeting was made to include industry attendance by encouraging insurance personnel wives to attend and inviting 15 insurance executives to join the executive council for lunch on Thursday. The program materials were sent to insurance guests in advance to encourage attendance. "Industry Night" was again alive and well with an impressive party. However, despite all these efforts and for various reasons, the Hartford meeting marked the end of Association meetings in Insurance Centers. Likewise, while company reps were still invited to the annual meetings, fewer and fewer non-members attended, and the meetings began to take on the "look" still present today. On a more mundane topic, at Hartford the Executive Council again confronted an ever existing problem of what to do about inactive or non-participating members. As so often in the past, a solution was sought by appointing a committee to study the problem.

The following year AIA returned to a more tourist-type venue, meeting in Denver, Colorado. Several members started the meeting early by assembling in Vail for several days of skiing. The historic Brown Palace Hotel hosted the group and several constitutional changes were made that year. A new class of membership known as "emeritus" was created for members who no longer actively practiced. Also, expulsion was to be the fate for those members disciplined by a state bar association or for those members not actively engaged in the defense practice. Attendance in Denver included 110 members, 98 wives but only 26 guests.

1977 at the Stanford Court Hotel in San Francisco cemented the change that annual meetings were now going to be more for member socialization than client entertainment. President Jim Rinaman presided over a very successful meeting of 120 members, 101 wives and 24 guests which, among other things featured two hospitality suites -- a traditional raucous meeting place, and a second more-reserved wine-only venue. It's not clear why this was arranged -- perhaps to separate the "sensitive" wives from the hard-drinking members -- or whether it was ever repeated again, but clearly the San Francisco meeting was a lively affair. Quoting part of Emerson Logee's poem:

*Last night at about twelve thirty,
The telephone made me flinch.
The voice at the other end of the line
Said, "Logee, this is Bob Lynch."*

*He said that he had something
That he would like me to include
(As he put it) "In that thing, you know,
Whatever it is that you do."*

*I told him whatever it was that I did
I'd do better another time,
Especially after he said to me:
"We're just drunk—Lloyd Wion and I'm."*

Continuing legal education -- which was beginning to grow in importance nationwide -- also was now an important part of the agenda. Jim Garvey from Eau Claire, Wisconsin was appointed Chair of a committee to manage CLE for the Association, as well as the issue of practice specialization, another topic being actively discussed for the first time. 1977 also saw a change in leadership when Treasurer Harrison Smith resigned to become Judge Smith. He was succeeded by Past President Paul Gibbs who served as Treasurer until 1986. Finally, the Association's ever-evolving relationship with DRI, which had begun in 1960, was a major point of discussion. President Rinaman, who was himself active in DRI, stressed how important it was for our President to attend DRI meetings. He also expressed his hope that DRI would see fit to make our President an official member of their Board, as were the Presidents of the IAIC and FICC.

1978 found the AIA in New Orleans at the Royal Sonesta Hotel on Bourbon Street, (a venue that would be reprised 34 years later). Although no written minutes can be found, once again our Poet Laurette's description emphasizes the change from the staid business meetings of old.

*Sound flows around the Sonesta—
Trumpet and Drums and a Sax.
Barkers for strip shows
next to the bistros
Vie with the bare-breasted vamps.*

*Our window faced Bourbon Street
Across from the “Gunga Den.”
Too much proximity
to that den of iniquity
Where the “Beautiful girls” are men.*

*A Times-Picayune story told us
Of arrests in some Bingo raids.
I can't understand
the logic at hand
In this city of lewd, naked maids.*

*Those of us who attended this meeting
Really “Lockett-ed” out.
Bill and Jean's plans
were all grand slams
In New Orleans, the spark of the south.*

The following year at the Marquette Inn in Minneapolis, Minnesota, President Charlie Smith and host John Quinlivan welcomed 104 members, 89 wives and 79 guests. The big-city venue again attracted numerous clients, and the Friday night “Industry Reception” was still part of the agenda. While official records are sparse, in his original *History* Gary Peplow noted that “those of us who attended recall the usual success of a friendly, social and enjoyable meeting”. Amazingly, the Minneapolis convention was apparently the first time that the Association required its members/guests to pay their Registration fees in advance. Although in this age of advance deposits it's hard to believe that such a procedure could exist, theretofore one of Loretta Kopf's jobs at the Reception desk had been to collect each registrant's payment.

Another interesting activity that took place in 1979 was an economic survey conducted by the Association of its members. 148 members responded; 80 from cities under 50,000, 42 from cities 50,000 to 200,000, and 26 from cities 200,000 and up. The average age of respondents was 52.4 years and an average number of years in practice was 25.7 years. Rates charged for legal services ranged from \$55 an hour to \$62 an hour. Starting salaries for attorneys in cities under 50,000 population was \$12,000. In cities with 50,000 to 200,000 it was \$17,500, but surprisingly in cities with population in excess of 200,000 it averaged \$15,700, although the “median” in this category was substantially higher. Income reported by the respondents disclosed that in cities under 50,000 the (mean) average personal net income before taxes from the practice of law was \$68,200. In cities with populations of 50,000 to 200,000 that figure was \$97,500. Unlike today, in cities over 200,000 the figure was less, \$85,000, but once again the “median” income appeared to be much higher.

The Years of Accomplishment - 1980s - 1990s

As the AIA moved into the 1980s, it became clear that the Association was regarded as an equal with the other two major national defense organizations. While smaller in size than its sister organizations, its quality of membership, collegiality, and strong loyalty made it a group that the profession admired. The Association President and President-Elect were attending sister defense organization meetings; supporting DRI efforts; and participating in the national coalition for cost containment by pledging \$5,000 to help underwrite that program. In 1987, President

Ray Hasley reported on Lawyers for Civil Justice, a group championed by business and sister defense organizations to combat the ever growing strength of the plaintiff's bar and promote tort reform. AIA was asked, and did, support their initial efforts.

In 1982, President John Neeley appointed a committee consisting of Lloyd Wion, Paul Carriere and Dan Flatten to assess the long range goals of the Association by conducting a review of the Constitution and By-Laws. In 1984, numerous Amendments were made. Most simply refined language in the documents, but significantly several served to move the organization further away from its close ties to the insurance industry. In Article II of the Constitution, language was deleted that referred to the group's purpose as including a "free and frank discussion of the relationship between insurance companies and their attorneys." Article III, relating to membership, deleted any language regarding a member's experience in "preparation and "handling of insurance matters", and referred only to the trial of cases.

The 1980s continued the pattern of increasing the national and even international scope of the Association and away from its Midwest origins. The 1980 meeting was in Charleston, South Carolina at the Mills House – our venue 28 years later – and was hosted by Bobby and Bernie Hood, whose daughter Molly welcomed us in 2008. Charleston, known for its southern charm, did not disappoint, and the meeting featured – for the first and apparently only time – a Saturday afternoon picnic. Among other topics, the CLE featured a presentation on asbestos claims which many in attendance grumbled would likely bear minimal relevance to the trial practice. Little did they realize what the future would hold.



In 1981, the group met in Montreal, Canada, representing the Association's first venture outside the United States. There are few records – not even a poem -- from this meeting, but it's clear that few, if any, insurance company reps attended. Whether the Montreal meeting was the precursor of the change in philosophy codified in the Constitutional Amendments mentioned above is not known, but it clearly signaled a new direction for the AIA.

1982 represented an even further departure from the traditional AIA meetings when the group traveled to Hawaii. This first-ever true "Resort" convention came with it the risk that few members would attend, but that fear turned out to be unfounded. Despite the distance, scores of Association members and their families made the trip, and Willie and Sally Moore hosted a wildly successful meeting. Because of the remote location, the CLE consisted of a two-day "mock trial", something that has never been reprised but was nevertheless apparently a hit. More importantly, the success of the Hawaii meeting paved the way for future conventions in London, Dublin, Puerto Rico, Maui and Scotland.

The 1983 convention was at the Franklin Plaza in Philadelphia and, on the heels of the successful Honolulu meeting, surprisingly attracted only 95 members. Perhaps it was the hangover from Hawaii or the desire for more resort type locations, but the attendance was disappointing and, if future sites are any indication, clearly sent a message that the membership wanted AIA meetings to be less business and more fun. Likewise, it's not clear to what extent the Philadelphia meeting attempted to resurrect the insurance industry connection, but if it did, it would prove to be short-lived. Finally, it appears from Emerson's poem that President's Reception was short on alcohol, (*On a one-to-ten scale of rating, if that were the thing to do, I'll wager that most of you voting, would give it a real solid "Two."*), something that likely never happened again.

Continuing the east/west rotation – a policy present to this day – in 1984 the Association traveled to San Diego. A far cry from the staid business meetings of old, the President's Reception included at least one member – it was rumored to be either Jim Rinaman or Bob Lynch (both past-Presidents) – dressed as the killer-whale, Shamu. The meeting not-only featured the expected venues, Sea World and the Space Museum, but also included a bus trip to Mexico, something that likely would not be attempted today. CLE included a presentation on structured settlements which, according to Logee, left most members "more than surprised at the size".

A return to the Midwest and Chicago in 1985 saw what would prove to be a final effort to court the insurance industry when the members entertained 75 insurance guests at the Mid-America Club high atop the Standard Oil Building. Despite the size of the guest contingent, by that time more and more members had “priced themselves out” of the insurance defense market, so the enthusiasm for devoting an evening to wining and dining those industry reps was decidedly lacking. 1985 also saw another milestone in the history of the Association with the election of our first non-U.S. member President, Paul Carriere of Montreal.

In 1986, we returned to Canada in Vancouver with 127 members attending, but only five guests. Although Vancouver featured perhaps the worst weather in meeting history, we were blessed with a fabulous hospitality suite that overlooked the harbor and featured, among other things, a grand piano. The suite was packed with members – some of whom apparently never left – and the resultant liquor bill nearly brought us to the brink of bankruptcy. Still, it was a great meeting where, for one of our evening events, we were permitted to party at “86th Street”, the yet-to-be-opened night-club/pavilion of the 1986 World’s Fair.

Although the signs had been present for some time, in 1986 the Executive Council officially recognized that the legal and business climate that had created the Association of Insurance Attorneys in 1941 no longer existed. While client development was still clearly important, it was clear that our members desired a different type of meeting than had characterized the first 45 years of the Association’s existence. As a result, the decision was made to outlaw the inclusion of client-guests at our meetings. Henceforth, ADTA conventions were to be for the members and their spouses, where the attorneys could enjoy themselves without having to be “on display” to clients or potential clients. This policy has served us well for more than 30 years making our meetings the envy of all the defense groups.

The 1987 convention, at the Breakers in Palm Beach, Florida, implemented this significant change. The venue was chosen because of its resort qualities and knowingly excluded any effort to include insurance guests. Not only did the meeting attract a record number of attendees (130), it was one of the first in many years not to show a deficit. Although the weather was unseasonably cold, a beach-front hospitality suite more than made up for the chill, and the hotel itself, including the golf-course -- Palm Beach featured the very first ADTA golf tournament -- was spectacular.

The Breakers meeting also marked the beginning of what were to be lengthy terms for two office holders. Ed Curran of Hartford, Connecticut replaced Paul Gibbs as Treasurer and Gary Peplow of Peoria, Illinois replaced Lloyd Wion as Secretary. Also, Jim Garvey of Eau Claire, Wisconsin became Assistant Membership Chairman to Chairman Hans Holtorf. When Hans resigned in 1991, Jim assumed the chairmanship.

In 1988 we traveled to Scottsdale, Arizona, and perhaps the most unique venue ever to host an Association meeting. The Sunburst Resort was, in actuality, a two-story motel with every room opening on to the huge court-yard/pool complex. The relatively low cost of the rooms – especially coming off the Breakers – encouraged members to bring their families, and for the first time ever our attendees included multiple children. The result was that our group had the place all to ourselves, and the camaraderie was never better. If ever there was a meeting where the “family” nature of the ADTA was cemented, it was Scottsdale in 1988.

The 1989 meeting in Seattle was historic in a number of ways. First, the party hosted by Doug and Betsy Hofmann at the Columbia Tower Club – with the “coolest” Ladies Room on the planet – was spectacular. This was followed by a boat trip on Puget Sound to an island providing freshly grilled salmon. Finally, the “mountain was out” for almost the entirety of our stay.

But these events paled in comparison to the fundamental changes in the organization voted at the Seattle meeting. First, a By-Law Amendment was enacted to address the change in the profession resulting from the mergers of law firms and the increasing mobility of lawyers from one firm to another. The Amendment permitted a prime member to retain his prime membership when he changed firms, but terminated associate members who now lacked a prime member in their firm. Also that year, the EC implemented the long range planning committee’s recommendations 1) that all prime members should be required to have an associate member (something we’ve never been able to accomplish); 2) that since participation by members was largely dependent on the activity of state chairmen, those chair persons should be rotated every five years; 3) that there was no need to change the committee structure or have substantive law committees; and 4) making it official, that there was no need to have annual meetings

at insurance centers or host an industry night.

However, by far the most significant decision was to change our name to the “*Association of Defense Trial Attorneys*.” While founded to enhance its relationship to the insurance industry, the rise of self-insureds and corporate clients seeking good trial counsel had now rendered that relationship irrelevant to many of our members, and the



(Caption: Ann Miller, Sally Moore, Skip and Betty Hudgins)

Council rightly realized that to continue to refer to our members as “Insurance Attorneys” was misleading at best, and perhaps detrimental to our efforts to attract new members. (Interestingly, within two years both the Federation of Insurance and Corporate Counsel, and the International Association of Insurance replaced “Insurance” with “Defense” in their names.)

The decade of the 1990s began with the logo designed by Sally Moore -- wife of the President Willson “Willie” Moore and designed on the back of a cocktail napkin -- approved by the Executive Council as the official logo of the ADTA. The 1990 meeting was held in Atlanta at the fabulous Ritz Buckhead, and hosted with antebellum southern charm by Skip and Betty Ann Hudgins. Surpassing the Weedon’s and Tait’s being evicted by security from the roof-top hot tub, the highlight of the meeting was clearly the Saturday Night Gala, with ladies in flowing southern ball gowns and men in dress civil war uniforms, both Union and Confederate.

1990 also saw a change in the ADTA membership limitations. The issue – which had been raised but never addressed two decades earlier – of how to interpret the “one in one million” requirement, was becoming a problem, with potential candidates being vetoed (directly or indirectly) by current big-city members who wanted to maintain their area-exclusivity. Under the leadership of President Moore, the EC voted to consider the entire metropolitan area when determining population. This change opened membership spots in numerous cities, and immediately resulted in a spike in new members.

The 50th anniversary meeting of the ADTA, in London, England was, without a doubt, one of the most memorable in the history of our group. How hosts Dick and Mary Gilardi managed it from over 5,000 miles away (San Francisco) remains a mystery to this day, but they provided us “visitors” with an experience about which most can only dream.

On May 8, 1991, the Association met at the London Marriott Hotel for its first ever meeting outside North America. The New Member’s Reception -- hosted by DRI -- was followed by a greeting from the Lord Mayor of London. The ensuing days included tours of the Tower of London, Westminster

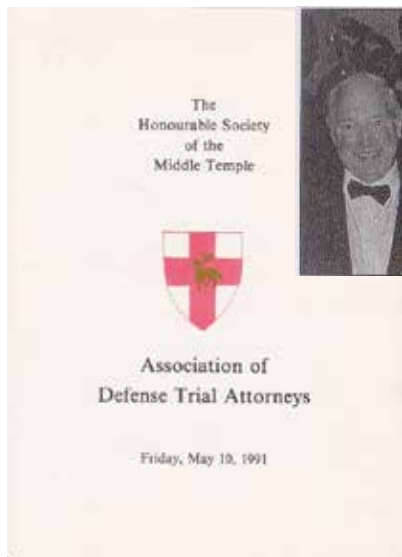


(Caption: Sally and Willie Moore with Maxine Harris)



Abbey, the British Museum, Big Ben, and Hyde Park, and shows at Piccadilly Circus and the Strand. CLE primarily focused on the British justice system, but it included a tour of the new Lloyd’s of London headquarters – described by some as the “ugliest building in the world” – and the opportunity to watch a trial at the Old Bailey. However, the highlight of the meeting was one of the greatest events ever hosted by ADTA: an evening at the Inns of Court.

We gathered for cocktails in anterooms of Middle Temple, small parlors whose walls were festooned with paintings by Rembrandt, Leonardo Di Vinci, Michelangelo and various other Old



Masters. For dinner, we were ushered into the Middle Temple Hall, seated at long tables surrounded by the Coats of Arms of all of the Inn's members – among them 24 Chief Justices, and flanked by portraits of former British Royalty, including Queen Elizabeth I, who reportedly dined many times at that very table. The 50th anniversary celebration honored all ADTA Past Presidents with a medallion and recollections of past glories, achievements, and even some exaggerations. Loretta Kopf was honored for her long service and great contributions. The majesty of the Middle Temple provided a regal atmosphere and an evening that those of us fortunate enough to be present -- despite the increased travel and hotel expense, the meeting attracted 79 members and 77 spouses -- will never forget.

1992 saw a return to Las Vegas, Nevada, at the historic Desert Inn. Vegas was undergoing a change (which proved to be short-lived) from a bacchanal venue to a family destination, and ADTA members were treated to the best of both worlds. Among other things, we enjoyed reserved seats for Siegfried and Roy, a cocktail party at the new Shadow Creek Resort and an evening drinking mead and watching jousting at the Excalibur. Unfortunately our host, former President Drake DeLanoy, was apparently a devotee of the “*whatever happens in Vegas, stays in Vegas*” philosophy, because the meeting produced not a single receipt. This, coupled with the Association's declining financial position, resulted in a major change in how its annual meetings were run.

Although it may not have been the case when the AIA met at Insurance Centers, once the Association expanded its horizons, both the selection of meeting locations and the handling of the meeting itself – from negotiating with the hotels to planning the events – fell to volunteer members. Prospective hosts (usually local to the venue) would make a presentation to the Executive Committee, most often two-years out. If your proposal was accepted, you and your spouse would be responsible for the meeting. At some point (either before or after he was President) Frank Perritt and his wife Suzanne – who apparently had some travel-related experience, would offer help in looking over the proposed contracts, but for the most part, the member hosts were on their own.



(Caption: Six future ADTA Presidents – from left Skip Hudgins, George Walker, Dan Formeller, Tony Tunney, Gordy Broom and Bob Tait – and their wives enjoy a performance by an “Elvis Impersonator”.)

In 1992, the Association was faced with a number of problems. Although membership was strong -- Membership Chairman, Jim Garvey, reported 693 members with a goal of 750 – the group was operating at a deficit. Treasurer Curran opined that the situation was due to a number of factors, not the least of which was conventions running deficits. The 1993 meeting had been planned for a resort in New Hampshire, but the prospective host had provided few details and, under any scenario, the meeting was going to be expensive and likely lightly attended. Retiring EC member O'Neill Walsh volunteered that he knew a New Orleans Convention Planner who had been

very successful in organizing events for the Louisiana Association of Defense Counsel, and offered to contact him to see if an April, 1993 meeting in New Orleans was doable. The rest is history. The New Orleans meeting was wildly successful, and Peter McClean handled every ADTA meeting for the next 15 years.

The New Orleans convention was held at the Windsor Court, an all-suite hotel just outside the French Quarter. Not only were the accommodation luxurious, but the food and activities – including a Mississippi Riverboat Cruise were fantastic. The meeting also drew a record number of attendees and precipitated a turnaround in the organization’s financial well-being.



(Caption: Peter and Cecily McClean)

At New Orleans the Executive Council focused on the Association’s financial plight. Not yet knowing that profits from the meeting would replenish the treasury – it has always been and remains the philosophy of the ADTA to try only to “break even” on annual meetings – the EC enacted the first dues increase in 15 years. It was decided not to send the President-Elect to sister organizations other than DRI who reimbursed the Association for its attendance, and also to accept a one-time \$25,000 grant from DRI to be used solely for CLE purposes. Finally, the EC struggled with the contentious issue of remaining a member of Lawyers for Civil Justice. ADTA had been a member of LCJ – as had the other defense groups – since its beginning, but annual dues had increased to \$7,500. The ultimate decision was to withdraw from LCJ, with the further rationale that DRI championed most of the same goals, and that LCJ’s corporate members did not necessarily support the interests of the trial lawyer. Although LCJ membership has since been revisited on several occasions, the ultimate decision has remained the same.

In 1993, the Council discussed and ultimately recommended a Constitutional change that was formally enacted at the 1994 meeting. EC member Bob Tait, who firm also had an office in a city without an ADTA member, inquired whether there was limitation on the number of prime members from one firm. More firms were growing by means of satellite offices, and although some members expressed the fear that large firms would “take over the organization”, membership numbers -- (especially in the smaller towns – were declining. After a spirited discussion, the Executive Council voted to make two changes: 1) A single firm could have a maximum of two prime members in different cities; and 2) A firm could have an associate member from a different city but they must be listed in the Roster in the prime member’s geographic location. In future years, these changes proved to dramatically increase ADTA membership.

In 1994, we met in Santa Fe, New Mexico. Both the hotel and the venue were perfect for our relatively small group. The Santa Fe meeting also attracted a record number of children, with the environs such that the kids could wander around by themselves. The result was friendships that last to this day. One of the evening events was a party on the set of the movie *Wyatt Earp*, compete with a reenactment of the “shootout at the OK corral.”



Although meeting attendance was on the increase, a majority of members still had never come to a meeting. As a result, in 1994 the Executive Council voted to enforce a constitutional provision that would drop members who did not actively participate. The Resolution called for dismissal of any member firm that

did not send a representative, either prime or associate, for five consecutive years. This was harsh medicine for the organization that now had 451 prime members and 209 associate members. Nevertheless, financial as well as practical reasons were deemed important for establishing such a policy. By 1995 however, this new rule was threatening membership numbers and a “selective” application was urged.

1994 also saw the first issue of the *Association Press*, the newsletter produced by EC member and future President, Patricia Kerrigan, of Houston, Texas. The editorship has moved to various members over the years, but the *Press* has remained a popular and vital source of information about the Association.

The 1995 meeting was held at the Williamsburg Inn in historic Williamsburg, Virginia. This offered members an unusual and educational venue, and again family attendance was strong. The “dine around”, which was becoming a fixture of every meeting, was especially interesting since Colonial Williamsburg offered a plethora of era-authentic restaurants. Golf on the Old Horseshoe was also especially attractive, and the tournament marked the beginning of a two-decade dominance by Alabaman George Walker.

San Francisco hosted us in 1996 at the brand-new Pan Pacific Hotel on Nob Hill. Our first big-city venue in six years did not disappoint, highlighted by a raucous bus-trip to the Napa Valley with Gordy Broom and cohorts consuming nearly all of their purchased wine before we got back to the hotel. So many members signed up for the golf – which was to be played at the famous Olympic Club – that we were forced to separate into two groups, with only the couples playing at Olympic. While those who had decided to play stag were initially chagrined, we instead were hosted at the exclusive California Club; not too shabby.



In 1996 we also welcomed Lynnette Baldwin to the organization’s management team. Loretta Kopf’s declining health finally required her to bow out, and the Association needed a replacement. At the time, Lynnette was serving as, Gary Peplow’s administrative assistant and, as such, she already had significant knowledge of the workings of the ADTA. She also was a friend of Loretta’s and with Loretta’s help, Lynette assumed the role of “Assistant Secretary”, attending Executive Council and annual meetings, performing the duties of hostess, registrar and all around assistant, and generally performing any task necessary to supplement our all-volunteer officers. Even after Gary stepped down as Secretary, Lynette remained our “Ambassador” until her retirement in 2008.

1997 saw the Association in sunny Bermuda. At that meeting, Steve Crislip was appointed Assistant Membership Chairman and upon Jim Garvey’s retirement, ascended to the Chairmanship in January of 1998. The EC also discussed the possibility of offering a professional liability insurance program through the Association, as well as the need to develop a website. Both were assigned for further study. Once again, the effort was made to solve the problem created by prime members changing firms. A Constitutional Amendment was proposed, which was later adopted, to allow an associate member of a moving prime to assume prime membership with Executive Council approval. Although the process has been invoked sparingly over the years, it has enabled us to retain several active members. Finally, in Bermuda the foundation was laid for an “Outstanding Member Award,” something that would later be realized by various recipients.



The 1998 meeting in San Antonio – “Remember the Alamo” -- was also historic for the ADTA. Presiding was President Patricia Kerrigan of Houston, the first female President of any of the defense organizations. Diversity

had been emphasized for some time and Pat's presidency reflected the changing face of the legal profession that saw more women entering the practice of law. At the meeting we also created a Women & Minorities subcommittee to the Membership Committee to further strengthen our efforts in that regard. The San Antonio venue was perfect for our organization, which saw small boats ferry us down the Riverwalk for cocktails at the Cultural Center, and an event at an actual rodeo. One of the CLE presentations – discussing the relationship between lawyers and insurance companies -- demonstrated just how far we had strayed from our roots when it was entitled: "If you want loyalty, buy a dog"!

In 1998, the Association experienced its first, and hopefully only, audit by the IRS which reaffirmed its non-profit status. Treasurer Curran also was able to report that the financial condition of the organization had stabilized and that, despite the dues increase, membership numbers remained constant. Still, recognizing that we needed to grow, the EC commissioned a survey of our existing members to determine what they liked and disliked about the organization. The results were announced the following year at the Amelia Island meeting.

Although 685 requests were sent – *Survey Monkey* had not yet been created -- only 92 responses were received. Those who did respond indicated that 94% felt CLE was an important consideration for membership, and 81% felt annual meeting location was significant. The number of meetings was satisfactory, and the concept of networking opportunities important, but members mostly expressed a strong preference for resort and family-friendly locations.

The 1999 meeting at the Ritz-Carlton on Amelia Island – "*we'll be there to greet ya, the gators won't eat ya*" – more than fit that bill. Although events were plentiful, including an oyster roast and the Jacksonville Museum of Science and History, mostly members and their families were left alone to enjoy the beaches, golf courses, and the welcome Florida sun.

A hot topic in the defense bar was the ever-increasing efforts by clients to audit attorneys' bills. President Russ Roberts reported that DRI was leading the challenge on this issue and encouraged ADTA support of their efforts. Unfortunately this issue has remained a concern for members to this day. Technology was also becoming more of an influence on both our practice and daily lives and, among other things, the EC discussed distributing CLE materials by computer disk as opposed to paper, and, at the particular urging of James Jennings, enlarging and expanding the ADTA website.



The conclusion of the 1999 meeting saw another officer change with the retirement of long-time Association Secretary, Gary Peplow and the election of Jim Gauthier as his successor. Gary's retirement prompted the recognition that the fastest growing segment of our membership was the Emeritus group, and that to remain viable, the ADTA needed to attract younger lawyers. It was also recognized, however, that with the continuing reduction in the number of jury trials, it was becoming harder and harder to find young candidates who met our membership requirements.



(Caption, Jim Gauthier with Lynette Baldwin and President, Jeff Peterson)

The New Millennium - the 2000s

The New Millennium saw the ADTA address many traditional issues, as well as confront new ones. The legal profession was changing and issues such as multi-discipline practice between lawyers and accountants, multi-jurisdictional considerations, judicial selection, and national legal legislation were brought to the Association's attention. ADTA supported DRI, ABOTA and other national groups in taking positions on these controversial issues. In 2004, technology allowed the Executive Council to meet electronically in June and September and discuss and vote on issues, rather than solely considering Association affairs at scheduled meetings. Perhaps the most historically significant electronic meeting occurred on September 1, 2005, when the ADTA passed a Resolution offering assistance to Hurricane Katrina victims. That initiative

resulted in ADTA members not only providing office space to displaced lawyers, but contributing over \$350,000 to the American Red Cross for relief to Hurricane victims. For his efforts spurring that initiative, David Zizik became the first recipient of the Bill Birmingham Service Award.

Despite the turn of the century, ADTA continued to have successful annual meetings and 2000 saw us in Tucson, Arizona at the Omni Tucson National Golf Resort & Spa. Sonoran Desert related events again predominated, although for most, the highlight was the Twilight Black-Tie dinner/dance overlooking the majestic valley.



60th Anniversary



For our 60th Anniversary, 2001 found ADTA again in the Pacific Northwest, this time in Portland, Oregon at the historic Benson Hotel. Along with exploring Portland – a truly cosmopolitan city – events included the Columbia River Gorge, cocktails at the Pittock Mansion on a night clear enough to view Mt Hood, Mt St Helens and Mt



Rainier, and a twilight dinner-cruise.

The 2002 meeting was held in historic Savannah, Georgia at the Westin Savannah Harbor Resort. Members went on a Riverboat trip to Fort Jackson for cocktails and a traditional “low country broil”, a *Midnight in the Garden of Good and Evil* tour of Bonaventure Cemetery and, of course, golf on the Harbor Course that hosts an annual Champions Tour event.

Continuing changes in the practice of law dominated the Executive Council discussions, including the ever-increasing practice of major clients, including insurance companies, to move away from small-town practitioners and consolidate their work with firms in larger cities. This trend was particularly troubling



for ADTA ongoing membership efforts, since our “one in a million” requirement was specifically intended to attract and protect the small-town lawyer. Finally, 2002 saw the retirement of Treasurer Ed Curran, who had served in that capacity since





Ed Curran, with wife Pat, receives the Outstanding Member Award from President James Jennings

1987. Bob Tait of Columbus, Ohio was selected to replace Ed.

Napa Valley, California and the Silverado Resort and Spa – home of the PGA's Safeway Open -- hosted our 2003 meeting. Luxurious accommodations, great golf, and spectacular scenery greeted us, but by far the highlight of the meeting was our Thursday night event at the Vine Cliff Winery. The winery is entirely underground, and after a tour and wine-tasting, we gathered for dinner in its cave like dining room. As we were just about to adjourn, the lights went out and, illuminated only by candles, we were startled, and then royally entertained by the San Francisco cast of *The Phantom of the Opera*. Hosts Steve and Barbara



Enochian produced an evening that those of us present will never forget.



The 2003 meeting also saw Steve Crislip step down from his position as Membership Chairman. Of all of the ADTA offices, Membership Chair is the most challenging. However, apparently recognizing that the position required a “large” presence Steve – who agreed to stay on for a year in an advisory capacity -- was replaced by Glenn Morgan. Also that year, Matt Bailey took over for Gordon Broom as Editor of the *Association Press*.

Irish eyes indeed smiled on the ADTA in 2004 as we left North America a second time traveling to Dublin, Ireland. The Westin Hotel, located on the doorstep of Trinity College and, more importantly, directly across the street from Temple Bar, proved an ideal venue for the 143 members and guests who made the trek.

Hosts Kevin and Gail Kelly and Glenn and Betsy Morgan also organized a pre-trip, and 66 members and spouses enjoyed Irish golf and sightseeing of the Emerald Isle countryside. The meeting – which also housed President Jerry Weedon in the most spectacular suite in ADTA history – ended with a spectacular “Green-Tie” dance at the Royal Hospital Kilmainham, although several members extended their European experience by attending an international seminar in Barcelona, Spain that was jointly sponsored by DRI, and the three “sister” defense organizations.



During 2004, the Association also made some administrative changes. The “Roster” was replaced with a booklet now called the “Directory”, and its distribution, which had traditionally been literally to thousands of potential clients – many of whom no longer existed – was significantly curtailed. Likewise the member’s Handbook adopted a new look with a loose-leaf format, and efforts were begun to make it accessible

on the website. The marketing committee considered programs such as hiring a media consultant and sponsored “regional meetings” to assist members in their marketing efforts. Finally, that year George Walker succeeded Jim Gauthier as Secretary.

In 2005 we traveled to Galveston Island, Texas. Many of us were not aware that before the devastating hurricane in 1900 – the deadliest in U.S. history – Galveston had been the wealthiest city in the country. Many of the grand homes that survived the storm still stand, and we were literally treated to a step-back in history. The San Luis Resort and Spa was spectacular and the food perhaps only rivalled by New Orleans. However, the Galveston meeting will be remembered most for something that had nothing to do with the venue. Then President Gordy Broom decided – much to the chagrin of the Treasurer – that to increase attendance we should feature entertainment by a celebrity and he chose, to the tune of \$50,000, Bob Newhart. Newhart was exceeding popular – among other things the movie *Elf* had premiered slightly a year before – and he gave a humorous, albeit brief performance. However, it was a meeting-feature that was never repeated and “Gordy’s Folly” took a big bite out of our treasury.



The Galveston meeting also saw a new category of membership instituted. “Affiliate” membership became available for those who retired but had not been members long enough to be granted emeritus status.

ADTA -- The Next Generation

The next generation essentially began in November, 2005 when then President Dan Formeller convened an extraordinary session of the Executive Council, including several Past Presidents, to discuss the future of the ADTA. The overriding feeling -- as it had been every time that the issue had been raised in the past -- was that the ADTA was unique among all lawyer organizations, and that we should not change. At the same time, however, all assembled recognized that (1) fewer and fewer of our members came from small towns; (2) fewer and fewer of our members actually represented insurance companies on an ongoing basis; and, most significantly (3) fewer and fewer of our members were trying cases on a regular basis. In addition, the fact that -- with one exception -- the assembled group consisted entirely of white males came with it the recognition that the ADTA's future necessarily needed to be more inclusive. For an organization of extremely limited eligibility -- i.e. "one in a million" -- that represented significant challenges going forward.

Beginning with the Puerto Rico meeting, our leadership embarked on a mission to gradually change the character of our Association and bring us into the 21st century. The result is the ADTA that you see today.

The Hiring of an Executive Director

Without question the most significant change in the modern ADTA was the hiring, development and evolution of our Executive Director. From its inception, with the exception of contributions by the "Assistant Secretary", the Association was operated entirely by its officers and volunteer members. The President, Secretary, Treasurer and Executive Council did everything from selecting the convention sites and negotiating with the hotels to collecting the dues and filing the tax returns.



While the "Assistant Secretary" position became a little less ceremonial when Lynette Baldwin assumed the job in 1994, the actual operation of the organization still fell to the officers and committee chairs, particularly the Membership and CLE committees. At the 2005 Long Range Planning Meeting, however, it became apparent that, like all of our "Sister" groups, the ADTA needed to move into the 21st Century and employ someone who actually knew how to run an organization such as ours. This need became even more paramount due the announced retirement of Peter McClean, the Convention Planner responsible for conducting every one of our meetings from 1992 to 2008.

At the 2006 meeting, we passed a Constitutional Amendment establishing the position, and a year later voted to hire our current Executive Director, Peggy Schultz. Peggy moved into the job full-time in 2009, and has developed the position so that we now have a great "blueprint" going forward for how our organization should be operated. No one can understate the importance of Peggy's efforts in advancing the interests of the ADTA.



Membership Accomplishments

Like all organizations, increasing or even maintaining our membership in this ever changing legal and social environment has been a challenge. Yet the ADTA remains strong and, borrowing the phrase coined by our first Hispanic President, Frankie Colon, "the tradition of excellence continues". National Membership Chairman has always been one of our most difficult yet underappreciated jobs, but over the years we have been blessed with hard-working, dedicated volunteers. Glenn Morgan, who took over the position from Steve Crislip in 2003, served until 2009 when he was succeeded by Bill Staples. Bill "retired" from the job in 2016, and was succeeded by our current Chairman

Johnston Cox. Through the continuing efforts of these gentlemen, assisted by our newly invigorated Regional and State Chairs, ADTA membership has remained steady so that as of February, 2018, we had 666 members (399 Prime, 131 Associate, 1 Affiliate, and 135 Emeritus), representing all fifty states, Puerto Rico, all ten Canadian Provinces, the United Kingdom and France.



International Members

As mentioned, the original ADTA (AIA) almost exclusively concerned itself with the practice of Insurance Law in the United States. As the Association evolved, the leadership recognized the importance of also including members from Canada and Puerto Rico, and for many years we have counted among our membership lawyers practicing in those jurisdictions. With the continuing globalization of the practice, it became apparent that our membership should not be limited to the Americas, and in 2012 our Constitution was amended to include the United Kingdom and the Irish Republic, and again in 2017 to include France. Our initial UK Member, Bill Perry and his wife Jane, first attended our 2013 meeting at the Greenbrier, and have not only become “regulars”, but have agreed to host the 2019 Meeting in St. Andrews, Scotland. In 2018, Sylvie Gallage-Alwis became the ADTA’s first European member.

Diversity

Our Association has always prided itself on our openness and acceptance, and we were among the first, if not the first of the Defense organizations to have a female President – Patricia Kerrigan in 1998. Yet, partly due to our membership restrictions – particularly the limit of one Prime Member per million people and the requirement that the applicant have at least “five years of *trial* experience” – for our first sixty years the membership of the ADTA remained primarily male and white. However, thanks to the renewed efforts of many of our members, in conjunction with a very active Diversity Committee, at the end of 2016, 21% of our Association members were women, and the ethnic composition of our members was 91% White, 2.5% African-American, 2.5% Hispanic, 1.25% Asian American, 1.25% Multi-Racial, and .63% Alaskan/American Indian. As far as leadership positions are concerned, for the last decade every elected Executive Council Class has included at least one female and, as of this writing, women comprised 40% of the Council’s voting members, including soon to be President-Elect, Lori Berke. Finally, for the last five years, every meeting has featured a Diversity Cocktail Reception where members can get together and celebrate the many faces of the ADTA family. Quoting from our *Diversity Statement*: “The organization’s continuing commitment is “to promote and advocate diversity, to create an atmosphere of total inclusion in the membership, leadership, speaking opportunities, and all activities and functions of the Association of Defense Trial Attorneys.”