

## **Timeline of the ARDC's Study Leading to the Proposal**

The ARDC's proposal is the product of more than two years of work on researching and discussing the legal services marketplace and the approaches to addressing the ambiguity of the Rules and the inefficiencies of the legal market. The ARDC has had several constructive meetings and discussions with the Illinois State Bar Association or its leadership. The ARDC has also met with leadership of the Chicago Bar Foundation and the Chicago Bar Association and with providers of lawyer-client connecting services. Those meetings and the ideas discussed therein have helped to develop the ARDC's proposal.

The initial work of a framework started in April and June 2017, when the ARDC discussed whether this Court could regulate Avvo Legal Services. On July 11, 2017, the ARDC met with senior representatives of the Illinois State Bar Association, the Chicago Bar Association, Rocket Lawyer, and Avvo Legal Services to discuss the for-profit services and their role in the marketplace.

On March 1, 2018, with the Commission's unanimous authorization, the ARDC's comprehensive Client-Lawyer Matching Services study was submitted to the Court. The ARDC published the Study on May 30, 2018. Thereafter, the ARDC received several written comments from members of the Bar, stakeholders, and the ISBA. The Study was the subject of numerous articles, including articles in the ABA Journal, AbovetheLaw.com and 2civility.org, as well as the subject of a podcast on the well-known Lawyer2Lawyer site featuring Bob Ambrogi. Generally, while some written comments and articles expressed caution, other comments and on-line discussions were more supportive of the study or offered insight into how to develop the proposed regulatory framework further.

Throughout 2018, the ARDC had several productive formal and informal discussions with the ISBA, the CBA, CBF leadership, and American Bar Association liaisons, and it discussed the study at conferences, such as at ABA National Conference on Professional Responsibility in Louisville, Kentucky, and at an ABA Bar Executive presentation. The ARDC met with the ISBA Board of Governors (July 20, 2018), the Court's Committee on Professional Responsibility (September 7, 2018), the Illinois Attorney General Consumer Fraud Bureau Chief and Supervising Attorney (October 12, 2018), and the ISBA Real Estate Law Section Council (October 17, 2018). Further, the ARDC met with the Court's Commission on Access to Justice (November 26, 2018), and the Federal Trade Commission Midwest Region Director (December 20, 2018). Also, from November 1, 2018 through November 3, 2018, Commissioner Hasara, the Administrator, and ARDC Counsel Boroughf attended the 2018 National Lawyer Referral Workshop, presented by the ABA Standing Committee on Lawyer Referral and Information Service. The Workshop provided helpful insight into the world of bar association lawyer referral and information services, including how they are managed, financed, and marketed. The ARDC continued to research and refine the framework based upon these discussions, meetings and comments.

In 2019, the ARDC continued to engage in formal and informal dialogue. On February 14, 2019, the ARDC presented a revised framework to the Court's Commission on Access to Justice. Additionally, ARDC and ISBA leadership had two comprehensive meetings in July

2019. At the second meeting, on July 18, 2019, ARDC and ISBA leadership met to discuss a further-revised draft of the framework, which addressed additional research and comments. The ISBA exhibited openness to discussing the framework. The ISBA expressed reservation and caution over the framework and its concern that the framework would allow nonlawyer interference over a lawyer's judgment and client representation. The ARDC and the ISBA engaged in a dialogue on those concerns and several other points raised by the ISBA. Those discussions and the ISBA's contributions affected the ultimate proposal that this currently before this Court.

After the July 2019 meeting, the ARDC further refined the framework to address some of the ISBA's suggestions and concerns. At the end of July 2019, the ARDC informally met with the co-chair and principal staff of the recently launched CBA/CBF Taskforce on the Sustainable Practice of Law & Innovation. The ARDC discussed the framework and received supportive comments. On September 3, 2019, the proposed framework was presented to the Commission.