



The State Bar *of California*

OPEN SESSION AGENDA ITEM IV.A. MARCH 2020

DATE: March 9, 2020

TO: Members, California Board of Legal Specialization

FROM: Amy C. Nuñez, Director, Office of Admissions

SUBJECT: Report on Financial and Operational Key Indicators

SUMMARY

A report on financial and operational key indicators is attached for consideration during the March 2020 California Board of Legal Specialization (CBLS) meeting.

BACKGROUND

The CBLS is provided with key operational indicators at each meeting to assist with program oversight.

DISCUSSION

Year-to-Date Financial Report

The Board of Trustees Financial Report for the fourth quarter has not been completed. The State Bar typically allows three months for the processing of all invoices before “closing” out the fiscal year. Thus, the final financial statement for Calendar Year 2019 will be available at the upcoming California Board of Legal Specialization meeting.

Total Number of Certified Specialists

As of March 1, 2020, there are 5,004 current certified specialists, an increase of 89 certified specialists versus the same time last year (Attachment A). Workers’ Compensation Law and

Estate Planning, Trust & Probate Law saw the largest increases in number of specialists with 60 new specialists between the two overall, and the largest decrease in specialists came from Admiralty & Maritime Law with a difference of four.

Total Number of Resignations by Reason

There have been 75 resignations of certificates of specialization through March 1, 2020 versus 160 in all of last year, and 158 in 2018 (Attachment B). There has been an ongoing increase of specialists resigning, specifically due to retirements: 77 in all of 2018, 74 in 2019, and now 41 through the first two months of 2020. With the legal specialization program now in its 39th year since issuing its first certificates of specialization, it is expected to see an increase of resignations specifically for retiring attorneys.

Legal Specialist Continuing Legal Education (LSCLE) Compliance Reporting

There are 1,949 specialists (including dual specialists) in Compliance Group 3 (Attachment C). The reporting period for Compliance Group 3 ended on February 1, 2020, and as of March 1, 2020, 864 (44.3 percent) of those specialists did not report their LSCLE compliance. Staff recommends extending the deadline to allow those remaining specialists to report their compliance, which will be discussed in a later item. Compliance statistics by specialty area are noted on the attachment.

ATTACHMENT(S) LIST

- A. Total Number of Certified Specialists as of March 1, 2020
- B. Total Number of Resignations by Reason, 2018 and 2019 Annual v 2020 Year to Date
- C. Total Number of Certified Specialists in Compliance Group 3