



The State Bar *of California*

OPEN SESSION AGENDA ITEM IV.A. JUNE 2020

DATE: June 2, 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 June 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 through December 31, 2019 indicates that expenditures are in line with projections (Attachment A). The Legal Specialization budget also demonstrates a 0.5 percent revenue decrease when compared to 2018. However, based on expenses for 2019, there was an overall \$969,284 positive change in net position for the year.

Total Number of Certified Specialists

As of May 1, 2020, there are 5,015 current certified specialists, an increase of 26 certified specialists versus the same time last year (Attachment B). Estate Planning, Trust & Probate Law, Immigration & Nationality Law, and Workers' Compensation Law saw the largest increases in number of specialists with 36 new specialists between the three overall, and the largest decrease in specialists came from Admiralty & Maritime Law and Family Law with a total difference of 11.

Total Number of Resignations by Reason

There have been 88 resignations of certificates of specialization through May 1, 2020 versus 160 in all of last year, and 158 in 2018 (Attachment C). Based on the current resignation pattern, staff expect the total number of resignations for 2020 to be comparable to the previous two years.

Legal Specialist Continuing Legal Education (LSCLE) Compliance Reporting

There are 1,949 specialists (including dual specialists) in Compliance Group 3 (Attachment D). The reporting period for Compliance Group 3 ended on February 1, 2020, however, at its last meeting the CBLS approved an extension of time through June 30, 2020 for specialists to report their LSCLE compliance. As of May 1, 2020, 839 (43 percent) of those specialists have not reported their LSCLE compliance. Staff will continue to reach out to pending specialists throughout this extension period. Compliance statistics by specialty area are noted on the attachment.

ATTACHMENT(S) LIST

- A. Board of Trustees Financial Report: Quarter Four Through December 31, 2019
- B. Total Number of Certified Specialists as of May 1, 2020
- C. Total Number of Resignations by Reason, 2018 and 2019 Annual v 2020 Year to Date
- D. Total Number of Certified Specialists in Compliance Group 3