

THE STATE BAR OF CALIFORNIA



2016 Proposed Final Budget

February 13, 2015

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Admissions

The Office of Admissions is responsible for all activities pertaining to the admission of attorneys to the practice of law in the State of California. Its principal activities include developing, administering and grading the Bar Exam as well as conducting moral character investigations. The Office also carries out the Bar's responsibility to accredit and register law schools. Finally, Admissions administers programs to allow non-members to practice in certain defined, limited areas, as well as programs to certify specialists in areas of legal practice.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Admissions Administration	10.0	10.0	10.0	1,354	1,772	1,863
Examination Development	2.0	2.0	2.0	892	1,037	1,077
Application Processing	14.0	14.0	14.0	1,286	1,375	1,449
Admissions Operations	14.0	14.0	14.0	7,397	7,636	7,928
Examination Grading	6.0	6.0	6.0	2,518	2,734	2,840
Moral Character Determinations	13.0	13.0	13.0	1,330	1,633	1,706
Law School Regulation	2.0	2.0	2.0	281	322	341
Special Admissions	2.0	2.0	2.0	172	180	187
Specialization	8.0	8.0	8.0	914	1,546	1,482
MCLE Providers	2.0	2.0	2.0	150	170	181
Admissions Projects	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	73.0	73.0	73.0	16,294	18,404	19,054
FUNDING				2014*	2015*	2016*
General Fund				0	0	0
Admissions Fund				15,380	16,858	17,572
Legal Specializations Fund				914	1,546	1,482
TOTAL (All Funds)				16,294	18,404	19,054

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6046, 6063 and 6060-67.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSAdmissions Administration

Staff in this area provides general oversight and management of the Office of Admissions. The responsibilities of this area include: developing and implementing policies and procedures; supporting the activities of the Committee of Bar Examiners, Board of Governors and its Committee on Regulation, Admissions and Discipline Oversight; compiling and monitoring the departmental budget; interacting with law schools and communicating with applicants and the public; coordinating the production of Admissions certificates for new admittees; monitoring and implementing the IT projects for the office; and processing and determining reasonable testing accommodations for applicants with disabilities taking the examinations.

Examination Development

Staff in this area is responsible for the acquisition, development, editing and production of examination questions. The primary goal of this service area is to ensure that the questions administered on the First-Year Law Students' Examination and the California Bar Examination are valid, reliable, appropriately edited and printed.

Application Processing

Staff in this area is responsible for the receipt and processing of applications for registration, the First-Year Law Students' Examination, the California Bar Examination, moral character determinations, moral character determination extension, multi-jurisdictional practice moral character applications, and eligibility of applicants to take the examinations administered by the Committee of Bar Examiners. The primary goal of this service area is to ensure that applications received are processed correctly and timely.

Admissions Operations

Staff in this area is responsible for oversight of the Los Angeles application processing and examination administration functions. In addition, this area is responsible for the reception and telephone services provided by the Los Angeles office, development of the overall Office of Admissions budget and processing petitions for relief from Committee of Bar Examiners' policies. One of the primary goals of this service area is to ensure that the examinations administered by the Committee of Bar Examiners are done so consistently, efficiently, in conformance with established policies and protocols, and without any major incidents.

Examination Grading

Staff in this area is responsible for ensuring that examinations administered by the Committee of Bar Examiners are graded using the standards and protocols adopted by the Committee, and that the results provided to applicants are error free and on time. In addition to the permanent employees in this area, for each bar examination grading cycle (of which there are 2), approximately 120 Graders are retained as independent contractors. For the First-Year Law Students' Examination, 8 independent contractors are hired to lead the grading groups. Temporary employees are hired to assist in the sorting, processing and entry of data related to handling the examination answers.

Moral Character Determinations

Staff in this area is responsible for completing the moral character investigations of applicants seeking admission to practice law in California and scheduling and coordinating informal conferences for applicants with the Committee of Bar Examiners' Subcommittee on Moral Character. The primary goal of this service area is to ensure that the moral character investigation of applicants is thorough and complies with the standards and protocols required by the Committee of Bar Examiners, within specified time constraints.

Law School Regulation

Staff in this area is responsible for the registration of unaccredited law schools and the accreditation of law schools in California. The workload of the staff includes monitoring applications received, reviewing annual reports, completing law school visitations and reporting findings and recommendations to the Committee of Bar Examiners. The primary goal of this service area is to ensure that law schools meet the requirements for registration or accreditation.

Special Admissions

Staff in this area process applications for the Pro Hac Vice, Out-of-State Attorney Arbitration Counsel, Foreign Legal Consultants, and Multijurisdictional Practice programs, which allow attorneys from other jurisdictions to practice law in California in a limited way. Eligibility requirements are set by the California Rules of Court and the State Bar Rules. Staff also process applications from law students who wish to expand their legal training by participating in the Practice Training of Law Students' Program. Law students eligible for the program must have completed at least one year of law study, taken certain law school courses and have a designated Supervising Attorney, who is responsible for overseeing the work of the law student and ensuring that the student only engages in the activities permitted by the California Rules of Court. The primary goal of this department is to ensure that applications are timely processed and only those persons qualified for the programs are certified.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Specialization

Staff in this area support the work of the Legal Specialization department, which is responsible for administering the requirements for certification in 11 different areas of law. They facilitate meetings of the Board of Legal Specialization, which is responsible for setting policies and rules for the program, and the Legal Specialization Advisory Commissions, which are responsible for the development and grading of questions for the legal specialization examinations. In addition, staff coordinate the administration of the legal specialization examinations that are administered every other year. Legal Specialists must demonstrate proficiency in their specialty area, which includes completion of tasks and standards, engaging in extensive legal education, rigorous peer review and passage of an examination. The primary goal of this department is to ensure that only qualified attorneys are certified as legal specialists.

MCLE Providers

Staff in this area process applications from Mandatory Continuing Legal Education (MCLE) providers seeking certification as single or multiple educational activity providers. Certification is required in order for the legal education to count toward an attorney's MCLE requirements. The department ensures that the appropriate documentation is submitted by the providers that allows the State Bar to exercise its audit and compliance functions. Consistent criteria are applied so only qualified education programs are approved. The primary goal of this department is to ensure only legal education programs that have met the established standards are eligible for MCLE credit.

Admissions Projects

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Admissions Administration</u>			
Admissions Fund	1,354	1,772	1,863
Total Admissions Administration	1,354	1,772	1,863
<u>Examination Development</u>			
Admissions Fund	892	1,037	1,077
Total Examination Development	892	1,037	1,077
<u>Application Processing</u>			
Admissions Fund	1,286	1,375	1,449
Total Application Processing	1,286	1,375	1,449
<u>Admissions Operations</u>			
Admissions Fund	7,397	7,636	7,928
Total Admissions Operations	7,397	7,636	7,928
<u>Examination Grading</u>			
Admissions Fund	2,518	2,734	2,840
Total Examination Grading	2,518	2,734	2,840
<u>Moral Character Determinations</u>			
Admissions Fund	1,330	1,633	1,706
Total Moral Character Determinations	1,330	1,633	1,706
<u>Law School Regulation</u>			
Admissions Fund	281	322	341
Total Law School Regulation	281	322	341
<u>Special Admissions</u>			
General Fund	0	0	0
Admissions Fund	172	180	187
Total Special Admissions	172	180	187
<u>Specialization</u>			
Legal Specializations Fund	914	1,546	1,482
Total Specialization	914	1,546	1,482
<u>MCLE Providers</u>			
Admissions Fund	150	170	181
Total MCLE Providers	150	170	181
<u>Admissions Projects</u>			
Admissions Fund	0	0	0
Total Admissions Projects	0	0	0
TOTAL	16,294	18,404	19,054

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	73.0	73.0	73.0	6,393	7,647	8,062
Supplemental Staffing				883	692	714
Travel & Training				455	664	678
Supplies and Postage				407	448	463
Professional Services				367	620	639
Exam & Software Licensing				1,494	1,588	1,607
Exam Room Rental				1,665	1,734	1,743
Exam Proctors				1,650	1,677	1,735
Exam Graders				862	917	949
Occupancy				183	197	194
Telecommunications				97	108	111
Other Outside Services				1,804	1,914	1,955
Computers & Software				0	30	30
Buildings & Equipment				9	135	140
Retiree Medical Funding				0	0	0
Other Expenditures				25	33	34
TOTAL	73.0	73.0	73.0	16,294	18,404	19,054

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Chief Trial Counsel

The Office of the Chief Trial Counsel has primary responsibility for carrying out the disciplinary functions of the State Bar. This includes receiving and investigating complaints from members of the public, and, where necessary, acting as the prosecution in the quasi-judicial proceedings leading to the suspension and/or disbarment of attorneys in California.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Management	6.0	6.0	6.0	-79	126	168
Intake	38.8	37.8	37.8	4,778	4,879	5,070
Investigation	53.0	52.0	52.0	6,110	6,775	6,995
Trial	61.6	69.0	69.0	10,103	11,995	12,544
Audit & Review	3.0	3.6	3.6	530	600	629
Central Administration	62.0	64.0	64.0	5,422	6,099	6,390
Abandoned and Unauthorized Practices	5.0	3.0	3.0	337	270	285
TOTAL (All Programs)	229.4	235.4	235.4	27,200	30,744	32,081
FUNDING				2014*	2015*	2016*
General Fund				27,200	30,744	32,081
TOTAL (All Funds)				27,200	30,744	32,081

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6043, 6044, 6044.5, 6049, 6077, 6078, 6092.5, subd (f) et seq

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSManagement

OCTC Management is responsible for the overall leadership of the department including ensuring compliance with statutes, rules and procedures, as well as specific duties including statistics gathering and performance reporting, employee supervision, fiscal oversight and management team development, case involvement and outreach activities.

Intake

Intake functions and responsibilities play a critical role in ensuring that the State Bar fulfills its public protection responsibilities. Intake provides direct customer support services to members of the public. Staff interactions with consumers and other individuals is a significant portion of the State Bar's direct consumer contact. Therefore, the quality of services provided has the potential to significantly affect public opinion about the State Bar and the legal profession. Intake operates as a legal "triage" function by identifying areas in which potential action needs to be taken, while effectively and efficiently pursuing appropriate remedies for those who have been harmed. Intake includes the complaint hotline, complaint processing in all its forms, other information sharing and consumer support services and mediation referral and monitoring.

Investigation

In previous years, the investigative function has been budgeted as an integral component of the Enforcement service area. In practice, drawing a precise line between the investigative and prosecutorial activities is necessarily somewhat artificial. However, in an effort to more clearly present the relative balance of resources committed to the investigation and trial phases of the enforcement process, the State Bar has begun presenting Investigation, Trial and Audit & Review as distinct service areas within the Office of Chief Trial Counsel. The division presented in 2010 is a "first pass" at this task, and modifications are to be expected.

The Investigation service area encompasses staff and other resources dedicated primarily (though not exclusively) to the investigative phase of the enforcement process.

Trial

In previous years, the investigative, prosecutorial (trial) and internal review phases of the enforcement process have been presented as a single service area in the budget, called Enforcement. This reflected the integrated nature of these functions as well as the Office's flexibility in assigning staff as needed to meet shifting workloads. However, in an effort to more clearly present the relative balance of resources committed to the investigation, trial and review phases of the enforcement process, the State Bar has begun presenting Investigation, Trial and Audit & Review as distinct service areas within the Office of Chief Trial Counsel. The division presented in 2010 is a "first pass" at this task, and modifications are to be expected.

The Trial service area encompasses staff and other resources dedicated primarily (though not exclusively) to the prosecutorial phase of the enforcement process.

Audit & Review

When the Office of Chief Trial Counsel decides to close a complaint against a member of the Bar without disciplinary action, the complainant may request a review ("second look") of the decision. These requests are handled by the Audit & Review unit, which was formed in OCTC in 2004. The unit also conducts random audits of OCTC's files twice each year and engages in other specifically designated audit and quality assurance measures.

In previous years, the Audit & Review unit was budgeted within the Enforcement service area. However, in an effort to more clearly present the relative balance of resources committed to the investigation, trial and review phases of the enforcement process, the State Bar has begun presenting Investigation, Trial and Audit & Review as distinct service areas within the Office of Chief Trial Counsel. The division presented in 2010 is a "first pass" at this task, and modifications are to be expected.

Central Administration

OCTC's Central Administration Unit ("Central Admin") provides critical support to the work of OCTC. It is the intention of Central Admin to develop and maintain consistency in administrative support practices between the two offices to the extent possible. Central Admin provides administrative and clerical assistance to all other professionals in OCTC. Like all good administrative operations, Central Admin staff must multi-task and trouble shoot to complete a wide range of duties. Administrative services are categorized as case/litigation support, office and financial services and training and technical support.

In previous years, Central Administration was budgeted separately only in the Los Angeles office, with administrative staff in San Francisco being included in the San Francisco trial unit budget. In an effort to improve comparability between SF and LA presentations, the Central Administration service area now includes administrative support staff from both Los Angeles and San Francisco.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Abandoned and Unauthorized Practices

The State Bar is authorized by law to petition the courts to assume jurisdiction over abandoned law practices, and over the practices of non-attorneys engaged in the unauthorized practice of law. In past years, the costs associated with these duties were not shown separately. Beginning in 2009, these activities will be identified as a separate service area in the Office of Chief Trial Counsel.

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Management</u>			
General Fund	-79	126	168
Total Management	-79	126	168
<u>Intake</u>			
General Fund	4,778	4,879	5,070
Total Intake	4,778	4,879	5,070
<u>Investigation</u>			
General Fund	6,110	6,775	6,995
Total Investigation	6,110	6,775	6,995
<u>Trial</u>			
General Fund	10,103	11,995	12,544
Total Trial	10,103	11,995	12,544
<u>Audit & Review</u>			
General Fund	530	600	629
Total Audit & Review	530	600	629
<u>Central Administration</u>			
General Fund	5,422	6,099	6,390
Total Central Administration	5,422	6,099	6,390
<u>Abandoned and Unauthorized Practices</u>			
General Fund	337	270	285
Total Abandoned and Unauthorized Practices	337	270	285
TOTAL	27,200	30,744	32,081

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	229.4	235.4	235.4	25,573	29,300	30,637
Supplemental Staffing				1,526	1,096	1,096
Travel & Training				132	187	187
Supplies and Postage				413	397	397
Professional Services				45	57	57
Occupancy				7	4	4
Telecommunications				162	225	225
Other Outside Services				362	427	427
Computers & Software				0	1	1
Buildings & Equipment				6	5	5
Retiree Medical Funding				0	0	0
Other Expenditures				42	64	64
Reimbursements				-1,065	-1,019	-1,019
TOTAL	235.4	235.4	235.4	27,200	30,744	32,081

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

Probation

The Office of Probation monitors probationer compliance with court orders, providing timely information to Superior Court, State Bar Court and probationers regarding non-compliance, and assisting probationers to successfully return to the practice of law.

	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
SUMMARY OF PROGRAM REQUIREMENTS						
Probation	8.0	8.0	8.0	958	943	985
TOTAL (All Programs)	8.0	8.0	8.0	958	943	985
FUNDING				2014*	2015*	2016*
General Fund				958	943	985
TOTAL (All Funds)				958	943	985

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6043, 6044, 6044.5, 6049, 6077, 6078, 6092.5, subd (f) et seq

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Probation

The Office of Probation (OP) aims to timely and accurately open and maintain files. In order to do so, OP staff must receive the order or stipulation to be monitored, create a physical file, contact the attorney to ensure compliance, and monitor non/compliance. The monitoring may require the OP staff to contact other departments of the State Bar and/or third parties.

OP also aims to timely and accurately obtain and receive information. In order to do so, OP staff must regularly receive updated information and provide information to people both internal and external to the State Bar.

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Probation</u>			
General Fund	958	943	985
Total Probation	958	943	985
TOTAL	958	943	985

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	8.0	8.0	8.0	834	882	923
Supplemental Staffing				87	5	5
Travel & Training				1	13	13
Supplies and Postage				16	13	13
Professional Services				0	1	1
Occupancy				0	5	5
Telecommunications				7	5	5
Other Outside Services				2	9	9
Computers & Software				0	0	0
Buildings & Equipment				10	9	9
Other Expenditures				1	1	1
TOTAL	8.0	8.0	8.0	958	943	985

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Client Security Fund

The main purpose of CSF is to reimburse victims of attorney theft by processing, investigating, reviewing and making decisions on applications for reimbursement. There are four main areas that encompass the work of CSF: (a) case processing; (b) support for the CSF Commission, the Board of Governors and other State Bar departments; (c) financial management; and (d) basic internal administrative functions.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Client Security Fund	11.0	11.0	11.0	10,239	7,213	7,262
TOTAL (All Programs)	11.0	11.0	11.0	10,239	7,213	7,262
FUNDING				2014*	2015*	2016*
Client Security Fund				10,239	7,213	7,262
TOTAL (All Funds)				10,239	7,213	7,262

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6140.5, 6028 and 6029.

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Client Security Fund

The main purpose of CSF is to reimburse victims of attorney theft by processing, investigating, reviewing and making decisions on applications for reimbursement. There are four main areas that encompass the work of CSF: (a) case processing; (b) support for the CSF Commission, the Board of Governors and other State Bar departments; (c) financial management; and (d) basic internal administrative functions.

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Client Security Fund</u>			
Client Security Fund	10,239	7,213	7,262
Total Client Security Fund	10,239	7,213	7,262
TOTAL	10,239	7,213	7,262

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	11.0	11.0	11.0	1,377	1,470	1,519
Supplemental Staffing				239	50	50
Travel & Training				11	17	17
Supplies and Postage				24	24	24
Professional Services				1	24	24
Telecommunications				11	9	9
Other Outside Services				19	18	18
CSF Applications				9,004	6,000	6,000
Computers & Software				2	3	3
Buildings & Equipment				0	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				-47	-1	-1
Reimbursements				-403	-399	-399
TOTAL	11.0	11.0	11.0	10,239	7,213	7,262

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Mandatory Fee Arbitration

The Mandatory Fee Arbitration program provides arbitration in cases of attorney-client disputes over legal fees, primarily through local bar associations.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Mandatory Fee Arbitration	5.0	5.0	5.0	627	747	782
TOTAL (All Programs)	5.0	5.0	5.0	627	747	782
FUNDING				2014*	2015*	2016*
General Fund				627	747	782
TOTAL (All Funds)				627	747	782

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6200, 6203, 6203(d)

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Mandatory Fee Arbitration

The Mandatory Fee Arbitration program provides arbitration in cases of attorney-client disputes over legal fees, primarily through local bar associations.

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Mandatory Fee Arbitration</u>			
General Fund	627	747	782
Total Mandatory Fee Arbitration	627	747	782
TOTAL	627	747	782

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	5.0	5.0	5.0	518	551	586
Supplemental Staffing				0	64	64
Travel & Training				34	37	37
Supplies and Postage				11	11	11
Professional Services				0	0	0
Telecommunications				4	4	4
Other Outside Services				60	80	80
Computers & Software				0	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				0	0	0
TOTAL	5.0	5.0	5.0	627	747	782

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

State Bar Court

The California State Bar is the only state bar in the United States with independent professional judges dedicated to ruling on attorney disciplinary and regulatory cases. The independent State Bar Court hears the charges and has the power to recommend that the California Supreme Court suspend or disbar those attorneys found to have committed acts of professional misconduct or convicted of serious crimes. For lesser offenses, public or private reprimands may be issued.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Administration	2.8	2.8	2.8	571	574	602
Hearing Department & Effectuations Unit	31.0	31.0	31.0	4,921	5,174	5,351
Review Department	8.6	8.6	8.6	1,624	1,833	1,904
TOTAL (All Programs)	42.4	42.4	42.4	7,116	7,581	7,858
FUNDING				2014*	2015*	2016*
General Fund				7,116	7,581	7,858
TOTAL (All Funds)				7,116	7,581	7,858

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6007, 6086.5, Cal Rules of Ct, rules 951, 952.6; Rules Proc.Of State Bar, rules 680-687, 700, 711, 4602-4304

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Administration

Administration encompasses the day-to-day administration of the State Bar Court, as well as the State Bar Court Reporter.

Hearing Department & Effectuations Unit

The Hearing Department of the State Bar Court hears disciplinary cases brought by the Office of the Chief Trial Counsel, regulatory matters brought by petitioners, motions for modification and revocation of attorney probation and other matters. The Effectuations Unit of the State Bar Court transmits cases to the California Supreme Court and processes all other cases not requiring Supreme Court action.

Review Department

The Review Department of the State Bar Court decides cases on appeal, exercises suspension and other powers delegated pursuant to Rule 9.10, California Rules of Court, and conducts interlocutory review on issues materially affecting the outcome of Hearing Department cases.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Administration</u>			
General Fund	571	574	602
Total Administration	571	574	602
<u>Hearing Department & Effectuations Unit</u>			
General Fund	4,921	5,174	5,351
Total Hearing Department & Effectuations Unit	4,921	5,174	5,351
<u>Review Department</u>			
General Fund	1,624	1,833	1,904
Total Review Department	1,624	1,833	1,904
TOTAL	7,116	7,581	7,858

	Positions			Expenditures		
EXPENDITURES BY CATEGORY	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	42.4	42.4	42.4	6,321	6,885	7,161
Supplemental Staffing				342	185	185
Travel & Training				120	164	164
Supplies and Postage				128	126	126
Professional Services				13	35	35
Occupancy				12	31	31
Telecommunications				64	63	63
Other Outside Services				80	65	65
Computers & Software				2	8	8
Buildings & Equipment				23	11	11
Retiree Medical Funding				0	0	0
Other Expenditures				11	10	10
TOTAL	42.4	42.4	42.4	7,116	7,581	7,858

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Member Records & Compliance

The Office of Member Records and Compliance maintains the official roll of attorneys for the State of California, and it manages the registration of law corporations and of LLPs providing legal services. It is also responsible for ensuring the compliance of all bar members with the requirements for mandatory continuing legal education (MCLE).

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Member Service Center	19.0	19.0	19.0	2,309	2,540	2,642
TOTAL (All Programs)	19.0	19.0	19.0	2,309	2,540	2,642
FUNDING				2014*	2015*	2016*
General Fund				2,309	2,540	2,642
TOTAL (All Funds)				2,309	2,540	2,642

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6002.1

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Member Service Center

The Member Service Center (MSC) (which includes Membership Records services) is dedicated solely to improving service to members beyond traditional fee payment processing and discipline proceedings. MSC is dedicated to bringing a positive State Bar experience to all members thus enhancing the State Bar's relationships with its members.

The State Bar maintains, on behalf of the Supreme Court, the official "Roll of Attorneys," i.e., the list of all attorneys who are licensed to practice law in the State of California. Upon admission to the practice of law in California, an attorney becomes a "member" of the State Bar. That "membership" or licensing record is a public record accessible to the public.

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Member Service Center</u>			
General Fund	2,309	2,540	2,642
Total Member Service Center	2,309	2,540	2,642
TOTAL	2,309	2,540	2,642

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	19.0	19.0	19.0	1,704	1,843	1,944
Supplemental Staffing				220	227	227
Travel & Training				11	23	23
Supplies and Postage				183	185	185
Professional Services				0	0	0
Telecommunications				25	26	26
Other Outside Services				153	221	221
Computers & Software				0	0	0
Buildings & Equipment				0	2	2
Retiree Medical Funding				0	0	0
Other Expenditures				13	13	13
TOTAL	19.0	19.0	19.0	2,309	2,540	2,642

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Professional Competence

The Office of Professional Competence is responsible for developing and publishing standards and guidelines pertaining to ethics in the practice of law in California.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Ethics Hotline	0.0	0.0	0.0			
COPRAC & RRC	0.0	0.0	0.0	119	242	242
Outreach & Education	13.0	13.0	13.0	1,455	1,603	1,666
Publications	0.0	0.0	0.0	24	28	28
TOTAL (All Programs)	13.0	13.0	13.0	1,597	1,873	1,936
FUNDING				2014*	2015*	2016*
General Fund				1,597	1,873	1,936
TOTAL (All Funds)				1,597	1,873	1,936

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSEthics Hotline

The Ethics Hotline, a confidential research service for attorneys only, helps lawyers identify and analyze their professional responsibilities. Although staff members cannot provide legal counsel, advice, or opinions, they can discuss issues and authorities with lawyers. By referring callers to statutes, rules, cases, and bar opinions, staff members strive to assist attorneys in reaching informed decisions about their professional responsibility questions.

COPRAC & RRC

Professional Competence staff provides a full range of staffing support for issues related to ethics and professional competence for the Board of Governors, the Committee on Professional Responsibility and Conduct, the State Bar Rules Revision Commission, and other special task forces and committees as directed. These supports services include developing meetings agendas, attending meetings, distributing assignments, making logistical arrangements for meetings, completing legal research and writing, maintaining records of all official materials, assisting in the appointment process for members of COPRAC, implementing approved work product (such as distributing ethics opinions and submitting rules to the Supreme Court for approval, etc.), serving as liaison between groups and others both inside and outside the State Bar, tracking commission/committee expenditures, facilitating the development of work plans, and facilitating development of year to date accomplishment reports.

Outreach & Education

Professional Competence staff regularly participates in outreach and educational activities to enhance the awareness of ethics issues and professional competence resources in an effort to help prevent ethics violations and to protect the public. Professional Competence's outreach and educational activities include: preparing and presenting the State Bar's Annual Ethics Symposium; staffing an exhibit booth and providing educational programs for MCLE credit at the State Bar Annual Meeting; preparing and making presentations to local and specialty bar associations, related legal professional associations, and law schools; hosting and making presentations to out-of-state or out-of-country delegations visiting the State Bar; making presentations and providing information to other State Bar Departments; and writing articles for publication in the California Bar Journal. To complete delivery of these educational and outreach services, Professional Competence staff identifies speakers, compiles written materials, completes legal research, prepares and updates slide presentations, attends programs, arranges for program publicity, produces materials, makes speaker travel and other logistical arrangements, updates mailing lists, updates and sets-up/tears down Professional Competence annual meeting booth, and solicits and reviews feedback about the quality of services.

Publications

Professional Competence staff produces, updates, and distributes publications related to attorney professional responsibility including: The California Compendium on Professional Responsibility; The Handbook on Client Trust Accounting for California Attorneys; and Publication 250 - The California Rules of Professional Conduct, The State Bar Act, and Related Statutes.

DETAILED EXPENDITURES BY PROGRAM

	2014*	2015*	2016*
<u>COPRAC & RRC</u>			
General Fund	119	242	242
Total COPRAC & RRC	119	242	242
<u>Outreach & Education</u>			
General Fund	1,455	1,603	1,666
Total Outreach & Education	1,455	1,603	1,666
<u>Publications</u>			
General Fund	24	28	28
Total Publications	24	28	28
TOTAL	1,597	1,873	1,936

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	13.0	13.0	13.0	1,405	1,541	1,604
Supplemental Staffing				1	2	2
Travel & Training				66	153	153
Supplies and Postage				15	23	23
Professional Services				57	88	88
Occupancy				0	3	3
Telecommunications				21	22	22
Other Outside Services				21	29	29
Computers & Software				0	0	0
Buildings & Equipment				0	1	1
Retiree Medical Funding				0	0	0
Other Expenditures				11	12	12
TOTAL	13.0	13.0	13.0	1,597	1,873	1,936

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Education

The Office of Education provides opportunities for continuing legal education and professional development. It encompasses the Sections of the State Bar as well as the bar's Annual Meeting.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Sections	21.0	21.0	21.0	6,632	8,143	8,254
Annual Meeting	0.0	0.0	0.0	893	772	781
Affinity & Insurance	1.8	1.8	1.8	475	558	573
CYLA	0.0	0.0	0.0	135	151	157
TOTAL (All Programs)	22.8	22.8	22.8	8,134	9,624	9,766
FUNDING				2014*	2015*	2016*
General Fund				135	151	157
Admin of Justice Fund				475	558	573
Annual Meeting Fund				893	772	781
Sections Funds				6,632	8,143	8,254
TOTAL (All Funds)				8,134	9,624	9,766

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Sections 6025, 6026 and 6031.5

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSSections

The Sections are voluntary organizations of attorneys and associates who share an area of interest. The Sections help their members maintain expertise in their various fields of law, expand their professional contacts, and serve the profession, the public and the legal system. The State Bar of California has 16 Sections. Each Section is governed by an executive committee of members appointed by the State Bar Board of Governors.

Annual Meeting

In addition to its formal functions, such as the swearing in of newly elected and appointed trustees, the Annual Meeting of the State Bar offers an wide variety of continuing legal education opportunities for attorneys.

Affinity & Insurance

The State Bar of California sponsors several insurance programs specifically designed to serve the needs of State Bar members. These programs are monitored by Standing Committees of the State Bar comprised of volunteer attorney members who work with carriers and underwriters to provide competitive products at reasonable rates. These Standing Committees monitor carrier performance for each line of insurance.

CYLA

CYLA is the nation's largest association of young lawyers. A young lawyer has been in practice for five years or less or is 36 years old or younger.

DETAILED EXPENDITURES BY PROGRAM

	2014*	2015*	2016*
<u>Sections</u>			
Sections Funds	6,632	8,143	8,254
Total Sections	6,632	8,143	8,254
<u>Annual Meeting</u>			
Annual Meeting Fund	893	772	781
Total Annual Meeting	893	772	781
<u>Affinity & Insurance</u>			
Admin of Justice Fund	475	558	573
Total Affinity & Insurance	475	558	573
<u>CYLA</u>			
General Fund	135	151	157
Total CYLA	135	151	157
TOTAL	8,134	9,624	9,766

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	22.8	22.8	22.8	2,299	2,646	2,787
Supplemental Staffing				205	145	145
Travel & Training				3,044	3,100	3,100
Supplies and Postage				372	307	307
Professional Services				683	689	689
Occupancy				8	0	0
Telecommunications				69	47	47
Other Outside Services				1,262	1,104	1,104
Computers & Software				1	1	1
Buildings & Equipment				16	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				175	1,485	1,486
Indirect Costs				0	100	100
TOTAL	22.8	22.8	22.8	8,134	9,624	9,766

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Legal Services

The Office of Legal Services operates several programs intended to ensure that all Californians have appropriate access to the legal system, regardless of income.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Access To Justice	0.0	0.0	0.0	31	360	52
Program Development	8.0	9.0	9.0	1,168	1,334	1,386
Legal Services Funding	11.0	11.0	11.0	31,485	26,666	26,646
TOTAL (All Programs)	19.0	20.0	20.0	32,683	28,361	28,084
FUNDING				2014*	2015*	2016*
General Fund				1,181	1,386	1,438
Grants Fund				17	308	0
Justice Gap Fund				0	0	0
Legal Services Trust Fund				31,485	26,666	26,646
TOTAL (All Funds)				32,683	28,361	28,084

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Sections 6210 - 6228

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSAccess To Justice

This Service Area addresses the development of policy and initiatives in collaboration with other institutions working to expand access to justice for low income Californians (e.g. Judicial Council; legal services entities; local, state and national organizations such as the American Bar Association and National Legal Aid and Defender Association). Services are provided through the Legal Services Outreach Unit and the California Commission on Access to Justice.

Program Development

This Service Area supports and promotes the direct delivery of legal services to low and middle income Californians with an emphasis on increasing and enhancing pro bono participation by members of the bar. The services are provided through the Program Development Unit, the Standing Committee on the Delivery of Legal Services and a comprehensive, statewide legal services conference ("Pathways to Justice") held every three years. The Program Development Unit provides technical assistance and resources to legal services providers, pro bono programs and certified lawyer referral services, oversees the certification process for lawyer referral services, and administers the Emeritus Attorney Pro Bono Participation program and Wiley Manuel certificate program. The Unit also coordinates a statewide Disaster Legal Services Response network, administers the Standing Committee on the Delivery of Legal Services, and presents the Pathways to Justice conference.

Legal Services Funding

This Service Area focuses on the administration of grants generated through Interest on Lawyer Trust Accounts (IOLTA) and the state Equal Access Fund to fund the provision of free legal services to low income Californians.

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Access To Justice</u>			
General Fund	13	52	52
Grants Fund	17	308	0
Total Access To Justice	31	360	52
<u>Program Development</u>			
General Fund	1,168	1,334	1,386
Total Program Development	1,168	1,334	1,386
<u>Legal Services Funding</u>			
Justice Gap Fund	0	0	0
Legal Services Trust Fund	31,485	26,666	26,646
Total Legal Services Funding	31,485	26,666	26,646
TOTAL	32,683	28,361	28,084

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	19.0	20.0	20.0	2,116	2,379	2,486
Supplemental Staffing				27	133	133
Travel & Training				117	119	111
Supplies and Postage				30	35	34
Professional Services				132	281	266
Occupancy				0	0	0
Telecommunications				25	23	23
Other Outside Services				5	13	13
Legal Services Grants				30,180	25,189	25,004
Computers & Software				48	75	0
Buildings & Equipment				0	4	4
Retiree Medical Funding				0	0	0
Other Expenditures				2	10	10
Indirect Costs				0	0	0
Interfund Transfers				0	100	0
TOTAL	20.0	20.0	20.0	32,683	28,361	28,084

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Diversity & Bar Relations

Diversity & Bar Relations encompasses programs aimed at eliminating bias in the legal system as well as the State Bar's relationships with voluntary bar associations and related groups. Programs in this area are financed with non-mandatory dues revenues, with the exception of support for the California Young Lawyers Association (CYLA).

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Elimination of Bias	2.0	2.0	2.0	436	456	466
Bar Relations	2.0	2.0	2.0	264	265	278
TOTAL (All Programs)	4.0	4.0	4.0	700	722	744
FUNDING				2014*	2015*	2016*
Admin of Justice Fund				678	722	744
Grants Fund				23	0	0
TOTAL (All Funds)				700	722	744

LEGAL CITATIONS & AUTHORITY

(n/a)

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Elimination of Bias

This Service Area focuses on local and statewide programs and initiatives to diversify the legal profession and to eliminate bias in the practice of law. The activity in this area is funded solely through voluntary contributions to the State Bar. Services are provided by the Center for Access & Fairness and the Council on Access & Fairness. The Center staff supports and promotes local and statewide programs and projects to increase diversity and eliminate bias in the legal profession. Staff also compiles and disseminates demographic information and other materials to inform and facilitate diversity efforts by the State Bar and other organizations.

Bar Relations

This Service Area focuses on supporting the work of the 240 local, minority and specialty voluntary bar associations in California and providing support to the California Young Lawyers Association Board and members. Activity in conjunction with voluntary bar associations is funded solely through voluntary contributions to the State Bar.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Elimination of Bias</u>			
Admin of Justice Fund	419	456	466
Grants Fund	17	0	0
Total Elimination of Bias	436	456	466
<u>Bar Relations</u>			
Admin of Justice Fund	259	265	278
Grants Fund	5	0	0
Total Bar Relations	264	265	278
TOTAL	700	722	744

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	4.0	4.0	4.0	477	501	524
Supplemental Staffing				0	0	0
Travel & Training				122	131	131
Supplies and Postage				22	15	15
Professional Services				37	41	41
Occupancy				0	1	1
Telecommunications				6	8	8
Other Outside Services				32	24	24
Computers & Software				2	0	0
Buildings & Equipment				0	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				3	0	0
TOTAL	4.0	4.0	4.0	700	722	744

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Lawyer Assistance Program

The Lawyer Assistance Program (LAP) seeks to rehabilitate attorneys with impairment due to abuse of drugs or alcohol, or due to mental illness, affecting competency so that attorneys so afflicted may be treated and returned to the practice of law in a manner that will not endanger the public health and safety.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Lawyer Assistance Program	9.0	8.0	8.0	1,103	1,349	1,410
TOTAL (All Programs)	9.0	8.0	8.0	1,103	1,349	1,410
FUNDING				2014*	2015*	2016*
Lawyer Asst Program Fund				1,103	1,349	1,410
TOTAL (All Funds)				1,103	1,349	1,410

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Sections 6230 - 6232

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Lawyer Assistance Program

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Lawyer Assistance Program</u>			
Lawyer Asst Program Fund	1,103	1,349	1,410
Total Lawyer Assistance Program	1,103	1,349	1,410
TOTAL	1,103	1,349	1,410

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	9.0	8.0	8.0	879	1,000	1,061
Supplemental Staffing				5	21	21
Travel & Training				70	85	85
Supplies and Postage				9	16	16
Professional Services				128	188	188
Occupancy				1	1	1
Telecommunications				16	26	26
Other Outside Services				-14	10	10
Computers & Software				4	0	0
Buildings & Equipment				1	1	1
Retiree Medical Funding				0	0	0
Other Expenditures				4	1	1
TOTAL	8.0	8.0	8.0	1,103	1,349	1,410

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Executive Director

The Office of the Executive Director is responsible for the overall direction and administration of the day-to-day operations of the State Bar, as well as for legislative activities on behalf of the Bar.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Management, Oversight and Planning	7.0	7.0	7.0	1,605	1,522	1,577
Board Support - Secretariat	2.0	2.0	2.0	607	557	562
Judicial Evaluations	4.0	4.0	4.0	642	735	754
Governmental Affairs	2.0	2.0	2.0	558	509	525
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	15.0	15.0	15.0	3,412	3,323	3,419
FUNDING				2014*	2015*	2016*
General Fund				2,854	2,358	2,425
Admin of Justice Fund				558	546	563
Admissions Fund				0	190	195
Client Security Fund				0	22	23
Grants Fund				0	0	0
Lawyer Asst Program Fund				0	14	14
Legal Services Trust Fund				0	21	22
Legal Specializations Fund				0	35	36
Annual Meeting Fund				0	10	11
Sections Funds				0	126	129
TOTAL (All Funds)				3,412	3,323	3,419

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSManagement, Oversight and Planning

OED, through the Deputy Executive Director's office (DED) provides support and direction to all management within the State Bar regarding personnel administration, facilities operation and all other management related matters. In its management leadership role, OED staff leads the Senior Management Team in establishing and effectively completing operational/programmatic oversight. OED establishes Bar-wide operating policies and procedures, communicates those policies and procedures to all staff through Administrative Advisories, and follows-up on those advisories to ensure that policies and practices are being followed. OED leads the State Bar's efforts to ensure accountability for the use of resources and compliance with all mandated functions and/or requirements. OED takes the lead in working with the union to reach agreeable memoranda of understanding between the union and management. OED oversees facilities, security, and related functions. OED in collaboration with the Senior Management Team serves as the focus for problem-solving analysis and resolution Bar-wide.

Board Support - Secretariat

OED provides staff support to the Board of Governors to support its effective and efficient operation. In fulfilling the Secretariat responsibilities, OED staff sets the schedule of Board meetings, oversees production of Board agendas, travels to and attends all Board meetings, oversees production of minutes and action summaries, maintains the Board Book and all official permanent records of the State Bar, and timely processes Board member expense reports. OED staff provides expert assistance to Board members and ensures that appropriate State Bar staff timely responds to all Board member inquiries.

In addition to providing support for regular Board meetings and business, OED staff coordinates all Board appointments to commissions, committees, and special task forces, administers annual Board elections, and prepares and conducts orientations for Board candidates, Board members & Committee Chairs. OED staff ensures effective relationships are developed between Board members and State Bar staff and clearly inform board and staff about and enforce policies related to lines of authority. OED staff is responsible for ensuring that all Board directives are carried out.

Judicial Evaluations

The Commission on Judicial Nominees Evaluation (JNE), established pursuant to Government Code Section 12011.5, is the State Bar agency which evaluates all candidates who are under consideration for a judicial appointment by the Governor. The mission of the Commission is to assist the Governor in the judicial selection process and thereby to promote a California judiciary of quality and integrity by providing independent, comprehensive, accurate, and fair evaluations of candidates for judicial appointment and nomination.

Governmental Affairs

The Office of Governmental Affairs serves as the liaison between the State Bar and the Legislative and Executive Branches of Government. Using only non-mandatory, voluntarily-contributed funds, the office identifies and tracks legislative bills affecting or of interest to the State Bar; and advocates the position of the State Bar's Board of Governors on non-ideological issues of significance relating to the Bar, the ethical duties of attorneys, consumer protection relating to the practice of law by lawyers and non-lawyers, increasing access to legal services for the people of California, maintaining and improving the operation of the state's judicial/dispute resolution system, and related issues dealing with the administration of justice. The office also provides technical assistance and information to Legislators and to the Governor on issues of relevance to the practice of law, the legal profession, and consumers of legal services, and responds to inquiries from Legislative and Executive Branch staff. The office also initiates and implements education and assistance programs to increase state policy-makers' understanding of the legal profession, the practice of law and the State Bar's role in the administration of justice.

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Management, Oversight and Planning</u>			
General Fund	1,605	1,522	1,577
Total Management, Oversight and Planning	1,605	1,522	1,577
<u>Board Support - Secretariat</u>			
General Fund	607	557	562
Grants Fund	0	0	0
Total Board Support - Secretariat	607	557	562
<u>Judicial Evaluations</u>			
General Fund	642	735	754
Total Judicial Evaluations	642	735	754
<u>Governmental Affairs</u>			
Admin of Justice Fund	558	509	525
Total Governmental Affairs	558	509	525
<u>Cost Recovery</u>			
General Fund	0	-456	-468
Admin of Justice Fund	0	37	38
Admissions Fund	0	190	195
Client Security Fund	0	22	23
Lawyer Asst Program Fund	0	14	14
Legal Services Trust Fund	0	21	22
Legal Specializations Fund	0	35	36
Annual Meeting Fund	0	10	11
Sections Funds	0	126	129
Total Cost Recovery	0	0	0
TOTAL	3,412	3,323	3,419

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	15.0	15.0	15.0	2,246	2,335	2,432
Supplemental Staffing				27	125	125
Travel & Training				671	503	501
Supplies and Postage				95	74	74
Professional Services				262	313	313
Occupancy				8	5	5
Telecommunications				23	21	21
Other Outside Services				49	36	36
Computers & Software				8	0	0
Buildings & Equipment				14	5	5
Retiree Medical Funding				0	0	0
Other Expenditures				8	7	7
Indirect Costs				0	-100	-100
TOTAL	15.0	15.0	15.0	3,412	3,323	3,419

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

Finance

The Finance department is responsible for accounting, payroll, financial reporting and financial analysis for the State Bar.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Financial Planning and Analysis	4.0	4.0	4.0	816	1,201	967
Accounting	6.6	7.0	7.0	771	1,011	1,048
Procurement & Risk	4.0	4.0	4.0	1,205	1,323	1,348
Member Billing	6.0	6.0	6.0	1,607	1,816	1,851
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	20.6	21.0	21.0	4,400	5,351	5,213
FUNDING				2014*	2015*	2016*
General Fund				4,400	3,508	3,429
Admin of Justice Fund				0	110	107
Admissions Fund				0	723	688
Client Security Fund				0	249	248
Lawyer Asst Program Fund				0	94	93
Legal Services Trust Fund				0	165	163
Legal Specializations Fund				0	52	50
Annual Meeting Fund				0	40	38
Sections Funds				0	410	397
TOTAL (All Funds)				4,400	5,351	5,213

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSFinancial Planning and Analysis

This service area is responsible for the Bar's budgeting, financial planning, financial analysis and accounting. It also works closely with the Bar's outside auditors and the California Bureau of State Audits to ensure the implementation of sound financial controls and public accountability.

Accounting

This service area is responsible for making accurate and timely payments to the State Bar's employees (payroll) and outside vendors (accounts payable), and for implementing related procedures and internal controls.

Procurement & Risk

A key area of Office of Finance service is organizational support of its contracting for the purchase of goods and service agreements to ensure effective and appropriate use of State Bar resources.

Providing procurement services encompasses a wide range of activities including: developing and implementing general procurement policies and procedures; developing equipment and service standards for acquisition, purchasing specific products and services; documenting deviations from standard procedures; maintaining and developing standardized forms and contract templates; and management of Bar-wide master purchasing agreements with vendors.

Member Billing

Member Billing is responsible for ensuring attorneys are billed appropriately for annual fees and other costs. The primary task for the Member Billing Staff is the collection and recording of the annual membership fees. In addition to the primary task, staff responds to member's billing inquiries, calculates and tracks discipline and CSF cost assessments, assists in the annual suspension process, and reinstates members previously suspended for failure to pay annual fees upon payment of delinquent costs.

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM				2014*	2015*	2016*
<u>Financial Planning and Analysis</u>						
General Fund				816	1,201	967
Total Financial Planning and Analysis				816	1,201	967
<u>Accounting</u>						
General Fund				771	1,011	1,048
Total Accounting				771	1,011	1,048
<u>Procurement & Risk</u>						
General Fund				1,205	1,323	1,348
Total Procurement & Risk				1,205	1,323	1,348
<u>Member Billing</u>						
General Fund				1,607	1,816	1,851
Total Member Billing				1,607	1,816	1,851
<u>Cost Recovery</u>						
General Fund				0	-1,843	-1,784
Admin of Justice Fund				0	110	107
Admissions Fund				0	723	688
Client Security Fund				0	249	248
Lawyer Asst Program Fund				0	94	93
Legal Services Trust Fund				0	165	163
Legal Specializations Fund				0	52	50
Annual Meeting Fund				0	40	38
Sections Funds				0	410	397
Total Cost Recovery				0	0	0
TOTAL				4,400	5,351	5,213

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	20.6	21.0	21.0	1,988	2,412	2,550
Supplemental Staffing				190	308	308
Travel & Training				40	33	33
Supplies and Postage				147	151	151
Professional Services				188	537	262
Occupancy				838	770	770
Telecommunications				25	27	27
Other Outside Services				980	1,109	1,109
Computers & Software				0	0	0
Buildings & Equipment				2	1	1
Retiree Medical Funding				0	0	0
Other Expenditures				1	2	2
Indirect Costs				0	0	0
TOTAL	21.0	21.0	21.0	4,400	5,351	5,213

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

Budget & Performance Analysis

The Office of Budget & Performance Analysis develops and monitors the budget for the State Bar, assists in the development and implementation of the bar's Five-Year Strategic Plan, and develops systems and processes to measure and improve the performance of the organization.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Budget & Performance	3.0	3.0	3.0	667	821	856
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	3.0	3.0	3.0	667	821	856
FUNDING				2014*	2015*	2016*
General Fund				667	499	520
Admin of Justice Fund				0	17	18
Admissions Fund				0	168	175
Client Security Fund				0	19	20
Lawyer Asst Program Fund				0	12	12
Legal Services Trust Fund				0	16	16
Legal Specializations Fund				0	12	13
Annual Meeting Fund				0	9	10
Sections Funds				0	69	72
TOTAL (All Funds)				667	821	856

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Budget & Performance

(n/a)

Cost Recovery

(n/a)

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Budget & Performance</u>			
General Fund	667	821	856
Total Budget & Performance	667	821	856
<u>Cost Recovery</u>			
General Fund	0	-322	-336
Admin of Justice Fund	0	17	18
Admissions Fund	0	168	175
Client Security Fund	0	19	20
Lawyer Asst Program Fund	0	12	12
Legal Services Trust Fund	0	16	16
Legal Specializations Fund	0	12	13
Annual Meeting Fund	0	9	10
Sections Funds	0	69	72
Total Cost Recovery	0	0	0
TOTAL	667	821	856

	Positions			Expenditures		
EXPENDITURES BY CATEGORY	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	3.0	3.0	3.0	519	540	575
Travel & Training				11	26	26
Supplies and Postage				0	3	3
Professional Services				134	250	250
Telecommunications				0	0	0
Other Outside Services				0	2	2
Computers & Software				2	0	0
Buildings & Equipment				0	0	0
Other Expenditures				0	0	0
Indirect Costs				0	0	0
TOTAL	3.0	3.0	3.0	667	821	856

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

General Counsel

The General Counsel functions as the State Bar's lawyer, and the OGC is responsible for providing legal advice and counsel to all departments of the Bar. In addition to its general legal duties, OGC also provides such services in specialty areas such as insurance/group insurance, real property, Lawyer Assistance Program, Admissions, Lawyer Referral Services, membership, and discipline.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
General Counsel	25.0	22.0	22.0	4,114	4,631	4,560
Law Library & Archives	2.0	2.0	2.0	503	534	547
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	27.0	24.0	24.0	4,617	5,165	5,107
FUNDING				2014*	2015*	2016*
General Fund				4,617	3,892	3,853
Admin of Justice Fund				0	79	78
Admissions Fund				0	606	597
Client Security Fund				0	124	123
Lawyer Asst Program Fund				0	85	84
Legal Services Trust Fund				0	104	103
Legal Specializations Fund				0	76	75
Sections Funds				0	199	196
TOTAL (All Funds)				4,617	5,165	5,107

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSGeneral Counsel

OGC provides contract, litigation and legal opinion services for a wide range of matters for the State Bar. In addition to its general legal duties, OGC also provides such services in specialty areas such as insurance/group insurance, real property, Lawyer Assistance Program, Admissions, Lawyer Referral Services, membership, and discipline.

Law Library & Archives

This unit maintains the State Bar's law library, including hardcopy and electronic materials; provides legal research assistance to the Bar's attorney staff; and provides institutional archive services to maintain the Bar's historical records.

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM

	2014*	2015*	2016*
<u>General Counsel</u>			
General Fund	4,114	4,631	4,560
Total General Counsel	4,114	4,631	4,560
<u>Law Library & Archives</u>			
General Fund	503	534	547
Total Law Library & Archives	503	534	547
<u>Cost Recovery</u>			
General Fund	0	-1,273	-1,254
Admin of Justice Fund	0	79	78
Admissions Fund	0	606	597
Client Security Fund	0	124	123
Lawyer Asst Program Fund	0	85	84
Legal Services Trust Fund	0	104	103
Legal Specializations Fund	0	76	75
Sections Funds	0	199	196
Total Cost Recovery	0	0	0
TOTAL	4,617	5,165	5,107

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	27.0	24.0	24.0	3,153	3,636	3,829
Supplemental Staffing				183	206	206
Travel & Training				105	66	66
Supplies and Postage				341	354	354
Professional Services				752	826	576
Telecommunications				32	27	27
Other Outside Services				39	39	39
Computers & Software				3	3	3
Buildings & Equipment				4	2	2
Retiree Medical Funding				0	0	0
Other Expenditures				5	5	5
Indirect Costs				0	0	0
TOTAL	24.0	24.0	24.0	4,617	5,165	5,107

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Human Resources

The Human Resources department is responsible for policies governing the compensation of Bar employees, for negotiation with the Bar's collective bargaining units, and for advising Bar staff with regard to personnel matters.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
HR Administration	0.0	0.0	0.0	0	43	43
Compensation Administration	1.0	1.0	1.0	269	195	201
Recruiting and Development	2.0	2.0	2.0	316	518	530
Employee Relations	2.0	1.0	1.0	196	768	780
Records and Information Systems	6.0	6.0	6.0	579	654	683
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	11.0	10.0	10.0	1,360	2,178	2,237
FUNDING				2014*	2015*	2016*
General Fund				1,360	1,589	1,632
Admin of Justice Fund				0	35	36
Admissions Fund				0	286	294
Client Security Fund				0	49	50
Lawyer Asst Program Fund				0	40	41
Legal Services Trust Fund				0	49	50
Legal Specializations Fund				0	36	37
Sections Funds				0	94	96
TOTAL (All Funds)				1,360	2,178	2,237

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSHR Administration

This service area provides overall management and administrative support for the Office of Human Resources.

Compensation Administration

The Office of Human Resources plays the leading role in developing, benchmarking and administering the Bar's employee compensation structure, including its salary schedules, benefit offerings and retirement alternatives. This service area also includes day-to-day operations of the Bar's payroll and benefit programs.

Recruiting and Development

This service area encompasses recruiting new staff, institutional training, and administering the Bar's system of performance reviews for current employees. This service area also handles employee separations.

Employee Relations

Employee relations encompasses activities ranging from health and wellness promotion to collective bargaining. It includes workplace safety efforts, contract negotiations, and management of the employee grievance process.

Records and Information Systems

This service area is responsible for maintaining required employment records, processing security clearances, and operating the Bar's Human Resources Information System (HRIS).

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>HR Administration</u>			
General Fund	0	43	43
Total HR Administration	0	43	43
<u>Compensation Administration</u>			
General Fund	269	195	201
Total Compensation Administration	269	195	201
<u>Recruiting and Development</u>			
General Fund	316	518	530
Total Recruiting and Development	316	518	530
<u>Employee Relations</u>			
General Fund	196	768	780
Total Employee Relations	196	768	780
<u>Records and Information Systems</u>			
General Fund	579	654	683
Total Records and Information Systems	579	654	683
<u>Cost Recovery</u>			
General Fund	0	-589	-605
Admin of Justice Fund	0	35	36
Admissions Fund	0	286	294
Client Security Fund	0	49	50
Lawyer Asst Program Fund	0	40	41
Legal Services Trust Fund	0	49	50
Legal Specializations Fund	0	36	37
Sections Funds	0	94	96
Total Cost Recovery	0	0	0
TOTAL	1,360	2,178	2,237

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	11.0	10.0	10.0	994	1,167	1,226
Supplemental Staffing				187	153	153
Travel & Training				41	51	51
Supplies and Postage				17	14	14
Professional Services				97	154	154
Telecommunications				19	14	14
Other Outside Services				2	57	57
Computers & Software				1	0	0
Buildings & Equipment				1	1	1
Retiree Medical Funding				0	567	567
Other Expenditures				1	0	0
Indirect Costs				0	0	0
TOTAL	10.0	10.0	10.0	1,360	2,178	2,237

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

Information Technology

The Information Technology department is responsible for the Bar's IT infrastructure (including PC's, networks, servers, and mini-computers), for custom software development, for maintenance and administration of the Bar's existing software, and for the Bar's public-facing internet presence.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
IT Admin	30.0	2.0	2.0	1,609	395	418
IT Operations	0.0	11.0	11.0	1,831	2,942	2,924
IT Applications	0.0	15.0	15.0	1,386	2,863	2,954
IT Project Mgt	0.0	1.0	1.0	137	210	222
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	30.0	29.0	29.0	4,963	6,410	6,518
FUNDING				2014*	2015*	2016*
General Fund				4,963	4,676	4,755
Admin of Justice Fund				0	103	104
Admissions Fund				0	842	856
Client Security Fund				0	145	147
Lawyer Asst Program Fund				0	118	120
Legal Services Trust Fund				0	145	147
Legal Specializations Fund				0	105	107
Sections Funds				0	276	281
TOTAL (All Funds)				4,963	6,410	6,518

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSIT Admin

(n/a)

IT Operations

(n/a)

IT Applications

(n/a)

IT Project Mgt

(n/a)

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM

	2014*	2015*	2016*
<u>IT Admin</u>			
General Fund	1,609	395	418
Total IT Admin	1,609	395	418
<u>IT Operations</u>			
General Fund	1,831	2,942	2,924
Total IT Operations	1,831	2,942	2,924
<u>IT Applications</u>			
General Fund	1,386	2,863	2,954
Total IT Applications	1,386	2,863	2,954
<u>IT Project Mgt</u>			
General Fund	137	210	222
Total IT Project Mgt	137	210	222
<u>Cost Recovery</u>			
General Fund	0	-1,733	-1,762
Admin of Justice Fund	0	103	104
Admissions Fund	0	842	856
Client Security Fund	0	145	147
Lawyer Asst Program Fund	0	118	120
Legal Services Trust Fund	0	145	147
Legal Specializations Fund	0	105	107
Sections Funds	0	276	281
Total Cost Recovery	0	0	0
TOTAL	4,963	6,410	6,518

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	30.0	29.0	29.0	3,276	4,178	4,381
Supplemental Staffing				380	50	50
Travel & Training				63	136	136
Supplies and Postage				9	5	5
Professional Services				48	335	335
Occupancy				58	183	183
Telecommunications				38	150	150
Other Outside Services				1	0	0
Computers & Software				1,087	1,260	1,165
Buildings & Equipment				3	115	115
Retiree Medical Funding				0	0	0
Other Expenditures				0	0	0
Indirect Costs				0	0	0
TOTAL	29.0	29.0	29.0	4,963	6,410	6,518

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Communications

Media & Information Services is primarily responsible for communications between the Bar and both its members and the general public. MIS produces the California Bar Journal, a major channel of communication with the membership. In addition, MIS is responsible for public outreach, press relations, and the content of the Bar's website.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Media Relations	6.4	7.6	7.6	1,276	1,393	1,457
California Bar Journal	1.0	1.0	1.0	267	280	289
Public Education	0.0	0.0	0.0	12	0	0
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	7.4	8.6	8.6	1,555	1,673	1,746
FUNDING				2014*	2015*	2016*
General Fund				1,543	1,536	1,603
Admin of Justice Fund				0	7	8
Admissions Fund				0	71	74
Client Security Fund				0	8	8
Grants Fund				12	0	0
Lawyer Asst Program Fund				0	5	5
Legal Services Trust Fund				0	7	7
Legal Specializations Fund				0	5	5
Annual Meeting Fund				0	4	4
Sections Funds				0	29	31
TOTAL (All Funds)				1,555	1,673	1,746

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6092.5 subd. (h)

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSMedia Relations

Media Relations is the State Bar's principal day-to-day liaison with the news media. Media Relations staff are responsible for fielding inbound inquiries from the press and electronic media and for actively communicating the Bar's message via press releases and other means. Media Relations also provides support and training for other Bar staff who may have contact with the press.

California Bar Journal

Prepared and distributed monthly, the California Bar Journal is a primary communication tool between the State Bar and its members. Staff researches and writes stories, compiles monthly discipline summaries, solicits articles from outside authors, hires and oversees freelance writers, edits/rewrites submissions, identifies opportunities for and takes or obtains photographs relevant to stories, completes design and layout of stories and advertising, and solicits MCLE self-study tests. Staff in this area also obtains advertisers, oversees advertising and other contracts, and collects advertising and other revenue.

Public Education

Staff in this service area participates in the development of consumer education pamphlets, brochures and guides. These public education materials are initially researched and written by staff whose work is then reviewed by volunteer attorneys for completeness and accuracy. Staff designs, lays out, edits, and oversees the translation of the final materials in multiple languages. In addition, staff also organizes and attends public education forums throughout the state and helps to market those forums to encourage attorney participation and public attendance.

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Media Relations</u>			
General Fund	1,276	1,393	1,457
Total Media Relations	1,276	1,393	1,457
<u>California Bar Journal</u>			
General Fund	267	280	289
Total California Bar Journal	267	280	289
<u>Public Education</u>			
Grants Fund	12	0	0
Total Public Education	12	0	0
<u>Cost Recovery</u>			
General Fund	0	-137	-143
Admin of Justice Fund	0	7	8
Admissions Fund	0	71	74
Client Security Fund	0	8	8
Lawyer Asst Program Fund	0	5	5
Legal Services Trust Fund	0	7	7
Legal Specializations Fund	0	5	5
Annual Meeting Fund	0	4	4
Sections Funds	0	29	31
Total Cost Recovery	0	0	0
TOTAL	1,555	1,673	1,746

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	7.4	8.6	8.6	1,001	1,270	1,344
Supplemental Staffing				87	4	4
Travel & Training				65	37	37
Supplies and Postage				11	24	24
Professional Services				220	147	147
Telecommunications				11	6	6
Other Outside Services				157	197	197
Computers & Software				6	0	0
Buildings & Equipment				0	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				-4	-13	-13
Indirect Costs				0	0	0
TOTAL	8.6	8.6	8.6	1,555	1,673	1,746

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

General Services

The Office of Operations provides a comprehensive range of administrative and facilities services that support the work of all State Bar departments.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Administrative Services	22.0	22.0	22.0	2,006	2,246	2,336
Facilities Management	0.0	0.0	0.0	2,891	5,036	5,036
Library & Research Services	0.0	0.0	0.0			
Cost Recovery	0.0	0.0	0.0	0	-30	-30
TOTAL (All Programs)	22.0	22.0	22.0	4,898	7,251	7,342
FUNDING				2014*	2015*	2016*
General Fund				4,898	3,559	3,629
Admin of Justice Fund				0	12	13
Admissions Fund				0	1,001	1,015
Building Assessment Fund				0	0	0
Client Security Fund				0	61	62
Lawyer Asst Program Fund				0	55	56
Legal Services Trust Fund				0	17	18
Legal Specializations Fund				0	121	123
180 Howard Street Fund				0	0	0
LA Facilities Fund				0	2,302	2,302
Annual Meeting Fund				0	18	19
Sections Funds				0	104	105
TOTAL (All Funds)				4,898	7,251	7,342

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSAdministrative Services

As the organization's administrative support arm, the Office of Operations manages mail and courier services; reception and public inquiry; document imaging and printing; fax and copier support; meeting and conference support; and travel services.

Facilities Management

The Office of Operations manages over 300,000 square feet of owned and leased office space for Bar staff and tenants. Operations maintains the Bar's facilities and safeguards its physical assets by managing engineering and janitorial services; landlord/tenant relations; space planning and use; safety and security programs; parking; and recycling programs.

Library & Research Services

This unit maintains the State Bar's law library, including hardcopy and electronic materials; provides legal research assistance to the Bar's attorney staff; and provides institutional archive services to maintain the Bar's historical records.

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM

	2014*	2015*	2016*
<u>Administrative Services</u>			
General Fund	2,006	2,246	2,336
Total Administrative Services	2,006	2,246	2,336
<u>Facilities Management</u>			
General Fund	2,891	2,734	2,734
Building Assessment Fund	0	0	0
180 Howard Street Fund	0	0	0
LA Facilities Fund	0	2,302	2,302
Total Facilities Management	2,891	5,036	5,036
<u>Cost Recovery</u>			
General Fund	0	-1,421	-1,442
Admin of Justice Fund	0	12	13
Admissions Fund	0	1,001	1,015
Client Security Fund	0	61	62
Lawyer Asst Program Fund	0	55	56
Legal Services Trust Fund	0	17	18
Legal Specializations Fund	0	121	123
Annual Meeting Fund	0	18	19
Sections Funds	0	104	105
Total Cost Recovery	0	-30	-30
TOTAL	4,898	7,251	7,342

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits	22.0	22.0	22.0	1,925	1,996	2,086
Supplemental Staffing				45	59	59
Travel & Training				57	53	53
Supplies and Postage				-86	186	186
Professional Services				416	271	271
Occupancy				2,447	2,364	2,364
Telecommunications				40	27	27
Other Outside Services				53	95	95
Computers & Software				3	0	0
Buildings & Equipment				63	5	5
Retiree Medical Funding				0	0	0
Debt Service				0	2,302	2,302
Other Expenditures				-64	-76	-76
Indirect Costs				0	-30	-30
Reimbursements				0	0	0
TOTAL	22.0	22.0	22.0	4,898	7,251	7,342

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Technology Projects

This category includes telecommunications and IT infrastructure upgrades as well as upgrades to and replacement of software applications.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Technology Projects	0.0	0.0	0.0	645	1,402	1,030
TOTAL (All Programs)	0.0	0.0	0.0	645	1,402	1,030
FUNDING				2014*	2015*	2016*
IT Assessment Fund				0	0	0
Technology Projects Fund				645	1,402	1,030
TOTAL (All Funds)				645	1,402	1,030

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Section 6001

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Technology Projects

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Technology Projects</u>			
IT Assessment Fund	0	0	0
Technology Projects Fund	645	1,402	1,030
Total Technology Projects	645	1,402	1,030
TOTAL	645	1,402	1,030

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Supplemental Staffing				81	211	0
Travel & Training				36	61	0
Supplies and Postage				0	0	0
Professional Services				141	750	450
Telecommunications				4	0	0
Other Outside Services				0	50	0
Computers & Software				283	330	580
Buildings & Equipment				99	0	0
TOTAL				645	1,402	1,030

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Facilities Projects

This category includes capital improvement projects at the State Bar's headquarters at 180 Howard Street in San Francisco as well as at its recently acquired offices at 845 South Figueroa in Los Angeles.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Facilities Projects	0.0	0.0	0.0	1,898	4,923	3,123
TOTAL (All Programs)	0.0	0.0	0.0	1,898	4,923	3,123
FUNDING				2014*	2015*	2016*
General Fund				1,806	1,623	1,623
180 Howard Street Fund				0	2,500	1,500
LA Facilities Fund				91	800	0
TOTAL (All Funds)				1,898	4,923	3,123

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Section 6001

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Facilities Projects

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Facilities Projects</u>			
General Fund	1,806	1,623	1,623
180 Howard Street Fund	0	2,500	1,500
LA Facilities Fund	91	800	0
Total Facilities Projects	1,898	4,923	3,123
TOTAL	1,898	4,923	3,123

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits				14	12	12
Travel & Training				2	0	0
Supplies and Postage				37	16	16
Professional Services				104	50	50
Occupancy				1,670	1,529	1,529
Telecommunications				9	9	9
Other Outside Services				2	0	0
Buildings & Equipment				60	3,308	1,508
TOTAL				1,898	4,923	3,123

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Non-Departmental

The Non-Departmental budget accounts for a variety of line items which are not associated with specific departments, programs or Bar operations.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2014	2015	2016	2014*	2015*	2016*
Bar-Wide Accounts	0.0	0.0	0.0	35	137	137
Fund Level Accounts	0.0	0.0	0.0	13,778	3,964	5,793
Fixed Assets	0.0	0.0	0.0			
Obsolete Accounts	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	0.0	0.0	0.0	13,814	4,101	5,930
FUNDING				2014*	2015*	2016*
General Fund				-3,887	1,586	1,836
Admin of Justice Fund				1,196	709	609
Admissions Fund				3,703	642	642
Building Assessment Fund				0	0	0
Client Security Fund				615	73	73
Discipline Fund				0	0	0
Grants Fund				0	0	0
IT Assessment Fund				3,500	0	0
Justice Gap Fund				1,081	800	800
Lawyer Asst Program Fund				434	72	72
Legal Services Trust Fund				470	87	87
Legal Specializations Fund				336	58	58
180 Howard Street Fund				1,715	906	2,586
LA Facilities Fund				3,696	400	400
Technology Projects Fund				-191	0	0
Annual Meeting Fund				77	9	9
Sections Funds				1,070	-1,241	-1,242
Public Protection Fund				0	0	0
TOTAL (All Funds)				13,814	4,101	5,930

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSBar-Wide Accounts

Bar-Wide Accounts includes a number of revenue and expenditure lines which are meaningful for the Bar as a whole, but which are not connected with specific departments, programs or operations.

Fund Level Accounts

Fund level accounts reflect charges attributed to particular State Bar funds, but not to the operations of specific departments. Major examples include indirect costs and inter-fund transfers.

Fixed Assets

In previous years, the Fixed Assets fund included a budget for depreciation expense. However, most government agencies do not budget for non-cash expenses such as depreciation. In keeping with prevailing government accounting practice, depreciation is not shown as a budgeted item in 2008.

Obsolete Accounts

The Obsolete Accounts budget is a "holding area" for certain accounts which are no longer in use, but which may have small historical amounts associated with them (so that they do not drop out of the presentation altogether).

DETAILED EXPENDITURES BY PROGRAM	2014*	2015*	2016*
<u>Bar-Wide Accounts</u>			
Admin of Justice Fund	35	137	137
Total Bar-Wide Accounts	35	137	137
<u>Fund Level Accounts</u>			
General Fund	-3,887	1,586	1,836
Admin of Justice Fund	1,160	573	473
Admissions Fund	3,703	642	642
Building Assessment Fund	0	0	0
Client Security Fund	615	73	73
Discipline Fund	0	0	0
IT Assessment Fund	3,500	0	0
Justice Gap Fund	1,081	800	800
Lawyer Asst Program Fund	434	72	72
Legal Services Trust Fund	470	87	87
Legal Specializations Fund	336	58	58
180 Howard Street Fund	1,715	906	2,586
LA Facilities Fund	3,696	400	400
Technology Projects Fund	-191	0	0
Annual Meeting Fund	77	9	9
Sections Funds	1,070	-1,241	-1,242
Public Protection Fund	0	0	0
Total Fund Level Accounts	13,778	3,964	5,793
<u>Obsolete Accounts</u>			
General Fund	0	0	0
Grants Fund	0	0	0
Total Obsolete Accounts	0	0	0
TOTAL	13,814	4,101	5,930

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
Regular Salary & Benefits				0	-729	-479
Travel & Training				45	61	61
Supplies and Postage				2	0	0
Professional Services				-64	0	0
Occupancy				0	0	0
Telecommunications				-211	-200	-200
Other Outside Services				16	55	55
CSF Applications				0	0	0
Legal Services Grants				0	0	0
Computers & Software				-180	0	0
Buildings & Equipment				1,618	0	0
Retiree Medical Funding				1,700	1,333	1,333
Debt Service				998	0	0
Other Expenditures				177	-851	1,628
Indirect Costs				1,913	2,332	2,332
Reimbursements				-18	0	0
Interfund Transfers				5,319	2,100	1,200
TOTAL				11,316	4,101	5,930

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Non-Bar Programs

(n/a)

	Positions			Expenditures		
	2014	2015	2016	2014*	2015*	2016*
SUMMARY OF PROGRAM REQUIREMENTS						
Access & Education Foundation	0.0	0.0	0.0			
TOTAL (All Programs)	0.0	0.0	0.0			

LEGAL CITATIONS & AUTHORITY

(n/a)

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Access & Education Foundation

(n/a)

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Statements of Fund Condition

General Fund	2014*	2015*	2016*
Beginning Balance	2,587	3,625	2,153
<u>Revenues</u>			
Mandatory Dues	62,795	63,875	64,925
Administrative Fees	2,144	2,083	2,083
Penalties and Late Fees	2,354	2,235	2,311
Lease Revenues	0	408	408
Other Fees and Charges	239	190	190
Grants	0	0	0
Interest Income	93	60	60
Other Revenues	430	371	371
Interfund Transfers	500	100	0
Total Revenues	68,555	69,321	70,347
<u>Expenditures</u>			
Admissions	0	0	0
Chief Trial Counsel	27,200	30,744	32,081
Probation	958	943	985
Mandatory Fee Arbitration	627	747	782
State Bar Court	7,116	7,581	7,858
Member Records & Compliance	2,309	2,540	2,642
Professional Competence	1,597	1,873	1,936
Education	135	151	157
Legal Services	1,181	1,386	1,438
Executive Director	2,854	2,358	2,425
Finance	4,400	3,508	3,429
Budget & Performance Analysis	667	499	520
General Counsel	4,617	3,892	3,853
Human Resources	1,360	1,589	1,632
Information Technology	4,963	4,676	4,755
Communications	1,543	1,536	1,603
General Services	4,898	3,559	3,629
Facilities Projects	1,806	1,623	1,623
Non-Departmental	-3,887	1,586	1,836
Total Expenditures	64,346	70,793	73,183
Ending Balance	6,797	2,153	-683

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Admin of Justice Fund	2014*	2015*	2016*
Beginning Balance	1,256	1,692	2,825
<u>Revenues</u>			
Voluntary Dues & Donations	1,574	1,540	1,540
Insurance Commissions	1,188	1,995	1,995
Other Fees and Charges	1	0	0
Interest Income	6	6	6
Other Revenues	264	490	490
Interfund Transfers	0	0	0
Total Revenues	3,033	4,031	4,031
<u>Expenditures</u>			
Education	475	558	573
Diversity & Bar Relations	678	722	744
Executive Director	558	546	563
Finance	0	110	107
Budget & Performance Analysis	0	17	18
General Counsel	0	79	78
Human Resources	0	35	36
Information Technology	0	103	104
Communications	0	7	8
General Services	0	12	13
Non-Departmental	1,196	709	609
Total Expenditures	2,905	2,898	2,853
Ending Balance	1,383	2,825	4,003

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Admissions Fund	2014*	2015*	2016*
Beginning Balance	3,708	3,250	2,120
<u>Revenues</u>			
Administrative Fees	716	627	636
Penalties and Late Fees	460	476	489
Student Registration Fees	1,157	1,131	1,185
Exam Fees	12,861	13,574	14,251
Moral Character Fees	4,114	4,192	4,401
Other Fees and Charges	271	237	249
Interest Income	24	20	20
Other Revenues	0	0	0
Total Revenues	19,603	20,256	21,231
<u>Expenditures</u>			
Admissions	15,380	16,858	17,572
Executive Director	0	190	195
Finance	0	723	688
Budget & Performance Analysis	0	168	175
General Counsel	0	606	597
Human Resources	0	286	294
Information Technology	0	842	856
Communications	0	71	74
General Services	0	1,001	1,015
Non-Departmental	3,703	642	642
Total Expenditures	19,083	21,386	22,108
Ending Balance	4,228	2,120	1,243
Building Assessment Fund	2014*	2015*	2016*
Beginning Balance	0	0	0
<u>Revenues</u>			
Mandatory Dues	10	0	0
Interest Income	0	0	0
Other Revenues	0	0	0
Total Revenues	10	0	0
<u>Expenditures</u>			
General Services	0	0	0
Non-Departmental	0	0	0
Total Expenditures	0	0	0
Ending Balance	10	0	0

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Client Security Fund	2014*	2015*	2016*
Beginning Balance	5,576	2,526	2,276
<u>Revenues</u>			
Mandatory Dues	7,579	7,708	7,839
Interest Income	18	5	5
Other Revenues	14	0	0
Total Revenues	7,612	7,713	7,844
<u>Expenditures</u>			
Client Security Fund	10,239	7,213	7,262
Executive Director	0	22	23
Finance	0	249	248
Budget & Performance Analysis	0	19	20
General Counsel	0	124	123
Human Resources	0	49	50
Information Technology	0	145	147
Communications	0	8	8
General Services	0	61	62
Non-Departmental	615	73	73
Total Expenditures	10,854	7,963	8,017
Ending Balance	2,334	2,276	2,104
Discipline Fund	2014*	2015*	2016*
Beginning Balance	0	0	0
<u>Revenues</u>			
Interest Income	0	0	0
Total Revenues	0	0	0
<u>Expenditures</u>			
Non-Departmental	0	0	0
Total Expenditures	0	0	0
Ending Balance	0	0	0

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Grants Fund	2014*	2015*	2016*
Beginning Balance	230	380	72
<u>Revenues</u>			
Grants	283	0	0
Other Revenues	27	0	0
Total Revenues	310	0	0
<u>Expenditures</u>			
Legal Services	17	308	0
Diversity & Bar Relations	23	0	0
Executive Director	0	0	0
Communications	12	0	0
Non-Departmental	0	0	0
Total Expenditures	52	308	0
Ending Balance	489	72	72
IT Assessment Fund	2014*	2015*	2016*
Beginning Balance	3,700	0	0
<u>Revenues</u>			
Mandatory Dues	5	0	0
Interest Income	7	0	0
Other Revenues	0	0	0
Interfund Transfers	0	0	0
Total Revenues	12	0	0
<u>Expenditures</u>			
Technology Projects	0	0	0
Non-Departmental	3,500	0	0
Total Expenditures	3,500	0	0
Ending Balance	211	0	0
Justice Gap Fund	2014*	2015*	2016*
Beginning Balance	407	200	150
<u>Revenues</u>			
Voluntary Dues & Donations	699	750	750
Interest Income	2	0	0
Other Revenues	0	0	0
Total Revenues	701	750	750
<u>Expenditures</u>			
Legal Services	0	0	0
Non-Departmental	1,081	800	800
Total Expenditures	1,081	800	800
Ending Balance	28	150	100

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Lawyer Asst Program Fund	2014*	2015*	2016*
Beginning Balance	1,401	1,476	1,652
<u>Revenues</u>			
Mandatory Dues	1,994	2,017	2,051
Interest Income	6	4	4
Other Revenues	1	0	0
Total Revenues	2,001	2,021	2,055
<u>Expenditures</u>			
Lawyer Assistance Program	1,103	1,349	1,410
Executive Director	0	14	14
Finance	0	94	93
Budget & Performance Analysis	0	12	12
General Counsel	0	85	84
Human Resources	0	40	41
Information Technology	0	118	120
Communications	0	5	5
General Services	0	55	56
Non-Departmental	434	72	72
Total Expenditures	1,537	1,845	1,908
Ending Balance	1,865	1,652	1,799
Legal Services Trust Fund	2014*	2015*	2016*
Beginning Balance	931	1,000	864
<u>Revenues</u>			
Mandatory Dues	178	50	50
Voluntary Dues & Donations	4,842	5,800	5,800
Administrative Fees	499	475	475
Grants	14,198	14,600	14,600
IOLTA	5,225	5,000	5,000
Interest Income	7	15	15
Other Revenues	0	0	0
Interfund Transfers	1,069	1,200	1,200
Total Revenues	26,019	27,140	27,140
<u>Expenditures</u>			
Legal Services	31,485	26,666	26,646
Executive Director	0	21	22
Finance	0	165	163
Budget & Performance Analysis	0	16	16
General Counsel	0	104	103
Human Resources	0	49	50
Information Technology	0	145	147
Communications	0	7	7
General Services	0	17	18
Non-Departmental	470	87	87
Total Expenditures	31,955	27,276	27,259
Ending Balance	-5,005	864	745

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Legal Specializations Fund	2014*	2015*	2016*
Beginning Balance	1,244	1,665	2,076
<u>Revenues</u>			
Administrative Fees	1,939	1,935	1,935
Penalties and Late Fees	0	0	0
Exam Fees	93	395	60
Other Fees and Charges	16	11	11
Interest Income	6	7	7
Other Revenues	4	109	2,589
Interfund Transfers	0	0	0
Total Revenues	2,057	2,458	4,603
<u>Expenditures</u>			
Admissions	914	1,546	1,482
Executive Director	0	35	36
Finance	0	52	50
Budget & Performance Analysis	0	12	13
General Counsel	0	76	75
Human Resources	0	36	37
Information Technology	0	105	107
Communications	0	5	5
General Services	0	121	123
Non-Departmental	336	58	58
Total Expenditures	1,250	2,046	1,984
Ending Balance	2,052	2,076	4,695
180 Howard Street Fund	2014*	2015*	2016*
Beginning Balance	7,378	6,200	3,621
<u>Revenues</u>			
Mandatory Dues	0	0	0
Penalties and Late Fees	0	0	0
Lease Revenues	1,431	827	827
Interest Income	14	0	0
Other Revenues	-7	0	0
Interfund Transfers	0	0	0
Total Revenues	1,439	827	827
<u>Expenditures</u>			
General Services	0	0	0
Facilities Projects	0	2,500	1,500
Non-Departmental	1,715	906	2,586
Total Expenditures	1,715	3,406	4,086
Ending Balance	7,102	3,621	363

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

LA Facilities Fund	2014*	2015*	2016*
Beginning Balance	-113	0	0
<u>Revenues</u>			
Lease Revenues	397	400	400
Interest Income	-1	0	0
Other Revenues	1,971	2,302	2,302
Interfund Transfers	0	800	0
Total Revenues	2,367	3,502	2,702
<u>Expenditures</u>			
General Services	0	2,302	2,302
Facilities Projects	91	800	0
Non-Departmental	3,696	400	400
Total Expenditures	3,787	3,502	2,702
Ending Balance	-1,534	0	0
Technology Projects Fund	2014*	2015*	2016*
Beginning Balance	1,780	4,750	3,348
<u>Revenues</u>			
Interest Income	6	0	0
Other Revenues	0	0	0
Interfund Transfers	3,500	0	0
Total Revenues	3,506	0	0
<u>Expenditures</u>			
Technology Projects	645	1,402	1,030
Non-Departmental	-191	0	0
Total Expenditures	454	1,402	1,030
Ending Balance	4,832	3,348	2,318

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Annual Meeting Fund	2014*	2015*	2016*
Beginning Balance	-15	0	86
<u>Revenues</u>			
Other Fees and Charges	508	482	482
Interest Income	8	8	8
Other Revenues	305	360	375
Interfund Transfers	250	100	0
Total Revenues	1,071	949	864
<u>Expenditures</u>			
Education	893	772	781
Executive Director	0	10	11
Finance	0	40	38
Budget & Performance Analysis	0	9	10
Communications	0	4	4
General Services	0	18	19
Non-Departmental	77	9	9
Total Expenditures	970	863	872
Ending Balance	85	86	78
Sections Funds	2014*	2015*	2016*
Beginning Balance	7,434	6,733	6,470
<u>Revenues</u>			
Sections Member Dues	5,386	5,394	5,394
Grants	0	0	0
Interest Income	25	28	28
Other Revenues	2,856	2,525	2,510
Total Revenues	8,267	7,946	7,931
<u>Expenditures</u>			
Education	6,632	8,143	8,254
Executive Director	0	0	0
Finance	0	0	0
Budget & Performance Analysis	0	0	0
General Counsel	0	0	0
Human Resources	0	0	0
Information Technology	0	0	0
Communications	0	0	0
General Services	0	66	66
Non-Departmental	1,070	0	0
Total Expenditures	7,702	8,209	8,320
Ending Balance	8,000	6,470	6,081

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Public Protection Fund	2014*	2015*	2016*
Beginning Balance	6,494	6,494	6,494
<u>Revenues</u>			
Interest Income	4	0	0
Total Revenues	4	0	0
<u>Expenditures</u>			
Non-Departmental	0	0	0
Total Expenditures	0	0	0
Ending Balance	6,498	6,494	6,494

* 2014 Pre-close Actual, 2015 and 2016 Budget, \$ thousands

Wages & Salary Supplement

	Budgeted FTE			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
Admissions						
<u>Admissions Administration</u>						
Senior Director Admissions	1.00	1.00	1.00	11,672 - 17,182	191,328	202,641
Section Chief	2.00	2.00	2.00	6,594 - 8,682	168,598	178,650
Program/Court Sys Anlst (Conf)	1.00	1.00	1.00	5,741 - 7,639	84,565	90,616
Administrative Specialist Conf	1.00	1.00	1.00	5,137 - 6,946	70,062	74,444
Administrative Assistant II	2.00	2.00	2.00	4,466 - 5,949	113,332	120,735
Admissions Analyst III	1.00	1.00	1.00	4,466 - 5,949	71,370	72,098
Administrative Assistant I	2.00	2.00	2.00	4,041 - 5,387	102,273	108,940
Admissions Administration Total	10.00	10.00	10.00	665,904	801,528	848,124
<u>Examination Development</u>						
Director, Examinations	1.00	1.00	1.00	8,769 - 12,716	137,416	146,005
Examinations Technician	1.00	1.00	1.00	6,001 - 7,911	94,851	95,862
Examination Development Total	2.00	2.00	2.00	224,073	232,267	241,867
<u>Application Processing</u>						
Section Chief	3.00	3.00	3.00	6,594 - 8,682	282,534	294,052
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	76,712	81,262
Admis Eligibility Analyst III	1.00	1.00	1.00	4,912 - 6,546	78,042	79,326
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	63,302	67,064
Admis Eligibility Analyst II	2.00	2.00	2.00	4,466 - 5,949	125,094	130,844
Coordinator Of Records	6.00	6.00	6.00	4,041 - 5,387	335,621	355,985
Application Processing Total	14.00	14.00	14.00	919,671	961,305	1,008,533
<u>Admissions Operations</u>						
Director, Operations & Mgmt	1.00	1.00	1.00	8,769 - 12,716	137,416	146,005
Deputy Dir, Operations & Mgmt	1.00	1.00	1.00	7,972 - 11,565	127,844	135,675
Section Chief	1.00	1.00	1.00	6,594 - 8,682	89,176	94,415
Technology Svce Analyst Techn	1.00	1.00	1.00	6,001 - 7,911	94,101	95,862
Sr Administrative Assistant	2.00	2.00	2.00	5,457 - 7,201	160,902	166,978
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	66,380	70,156
Admissions Analyst III	1.00	1.00	1.00	4,466 - 5,949	71,370	72,098
Accounting Technician	1.00	1.00	1.00	4,041 - 5,387	56,138	59,537
Administrative Assistant I	2.00	2.00	2.00	4,041 - 5,387	118,495	124,566
Admissions Analyst II	1.00	1.00	1.00	4,041 - 5,387	55,829	59,222
Admissions Analyst I	2.00	2.00	2.00	3,317 - 4,424	98,933	102,236
Admissions Operations Total	14.00	14.00	14.00	1,081,182	1,076,584	1,126,750

NOTE: FTEs show are as of January 1 of each year.

	Positions (FTE)			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
<u>Examination Grading</u>						
Director, Admissions Admin	1.00	1.00	1.00	8,769 - 12,716	124,818	132,622
Sr Administrative Assistant	2.00	2.00	2.00	5,457 - 7,201	134,212	142,424
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	55,068	58,746
Admissions Coordinator	1.00	1.00	1.00	3,648 - 4,861	58,318	58,916
Admissions Processing Clerk II	1.00	1.00	1.00	2,999 - 3,999	47,996	48,464
Examination Grading Total	6.00	6.00	6.00	365,447	420,412	441,172
<u>Moral Character Determinations</u>						
Dir, Moral Char Determinations	1.00	1.00	1.00	8,769 - 12,716	125,552	133,409
Section Chief	2.00	2.00	2.00	6,594 - 8,682	189,407	195,468
Moral Character Analyst	9.00	9.00	9.00	5,457 - 7,201	698,326	726,855
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	71,202	72,098
Moral Character Determinations Total	13.00	13.00	13.00	1,065,216	1,084,487	1,127,830
<u>Law School Regulation</u>						
Director, Educational Standards	1.00	1.00	1.00	8,769 - 12,716	136,104	144,632
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	68,366	72,492
Law School Regulation Total	2.00	2.00	2.00	201,094	204,470	217,124
<u>Special Admissions</u>						
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	71,370	72,098
Administrative Assistant I	1.00	1.00	1.00	4,041 - 5,387	55,520	58,907
Special Admissions Total	2.00	2.00	2.00	120,904	126,890	131,005
<u>Specialization</u>						
Director, Legal Specialization	1.00	1.00	1.00	8,769 - 12,716	137,416	146,005
Section Chief	1.00	1.00	1.00	6,594 - 8,682	86,895	91,910
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	67,106	71,212
Administrative Assistant II	3.00	3.00	3.00	4,466 - 5,949	176,884	188,029
Administrative Assistant I	2.00	2.00	2.00	4,041 - 5,387	100,828	107,484
Specialization Total	8.00	8.00	8.00	553,687	569,129	604,640
<u>MCLE Providers</u>						
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	62,048	65,786
Administrative Assistant I	1.00	1.00	1.00	4,041 - 5,387	50,258	53,586
MCLE Providers Total	2.00	2.00	2.00	114,963	112,306	119,372
Admissions Total	73.00	73.00	73.00	5,312,141	5,589,378	5,866,417

NOTE: FTEs show are as of January 1 of each year.

	Positions (FTE)			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
Chief Trial Counsel						
<u>Management</u>						
Chief Trial Counsel	1.00	1.00	1.00	12,839 - 18,900	222,032	229,060
Deputy Chief Trial Counsel	1.00	1.00	1.00	10,612 - 15,528	185,316	188,188
Special Asst. Chief Trial Cnsl	1.00	1.00	1.00	9,646 - 14,189	150,605	161,620
Executive Secretary	2.00	2.00	2.00	5,137 - 6,946	164,652	168,324
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	71,370	72,098
Management Total	6.00	6.00	6.00	757,730	793,975	819,290
<u>Intake</u>						
Assistant Chief Trial Counsel	1.00	1.00	1.00	9,646 - 14,189	170,248	171,938
Senior Attorney	2.00	2.00	2.00	8,682 - 13,079	300,248	310,152
Attorney	7.75	5.75	5.75	7,041 - 10,976	720,126	739,992
Complaint Analyst	17.00	17.00	17.00	5,457 - 7,201	1,330,373	1,381,759
Paralegal	4.00	5.00	5.00	5,457 - 7,201	431,990	436,280
Complaint Analyst I	6.00	6.00	6.00	4,912 - 6,546	399,378	423,978
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	60,908	64,636
Intake Total	38.75	37.75	37.75	3,459,667	3,413,271	3,528,735
<u>Investigation</u>						
Managing Dir Investigation	0.00	1.00	1.00	7,972 - 11,565	117,110	124,424
Managing Dir Investigation	1.00	0.00	0.00	7,972 - 11,565		
Investigator Supervisor	5.00	4.00	4.00	6,594 - 8,682	355,420	371,528
Investigator II	46.00	45.00	45.00	6,001 - 7,911	4,070,781	4,164,462
Investigator I	0.00	1.00	1.00	5,457 - 7,201	68,366	72,492
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	61,934	65,680
Investigation Total	53.00	52.00	52.00	4,741,331	4,673,611	4,798,586
<u>Trial</u>						
Assistant Chief Trial Counsel	4.00	4.00	4.00	9,646 - 14,189	617,183	656,798
Senior Attorney	24.00	26.00	26.00	8,682 - 13,079	3,660,419	3,796,088
Attorney	20.60	26.00	26.00	7,041 - 10,976	2,566,773	2,709,783
Paralegal	10.00	10.00	10.00	5,457 - 7,201	783,798	819,304
Administrative Secretary	3.00	3.00	3.00	4,466 - 5,949	197,080	202,942
Trial Total	61.60	69.00	69.00	7,230,934	7,825,253	8,184,915
<u>Audit & Review</u>						
Attorney	3.00	3.60	3.60	7,041 - 10,976	432,717	451,566
Audit & Review Total	3.00	3.60	3.60	417,260	432,717	451,566

NOTE: FTEs show are as of January 1 of each year.

	Positions (FTE)			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
<u>Central Administration</u>						
Director Of Administration	0.00	1.00	1.00	8,769 - 12,716	117,434	124,795
Director, Central Admin, Ctc	1.00	1.00	1.00	8,769 - 12,716	138,708	147,397
Managing Director Admin	1.00	0.00	0.00	7,972 - 11,565	0	0
Sr Administrative Supervisor	1.00	2.00	2.00	6,594 - 8,682	170,118	180,320
Lead Data Analyst	0.00	1.00	1.00	6,001 - 7,911	74,357	78,742
Complaint Analyst	1.00	1.00	1.00	5,457 - 7,201	74,918	79,442
Program Court Sys Analyst	3.00	2.00	2.00	5,457 - 7,201	151,906	160,984
Sr Administrative Assistant	3.00	3.00	3.00	5,457 - 7,201	244,540	254,540
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	71,370	72,098
Administrative Secretary	2.00	2.00	2.00	4,466 - 5,949	122,728	130,203
Legal Secretary	16.00	16.00	16.00	4,466 - 5,949	1,021,757	1,070,361
Administrative Assistant I	2.00	2.00	2.00	4,041 - 5,387	129,272	130,572
Coordinator Of Records	14.00	15.00	15.00	4,041 - 5,387	880,207	914,385
Secretary II	11.00	12.00	12.00	4,041 - 5,387	699,638	731,280
General Clerk II	4.00	0.00	0.00	3,317 - 4,424		
General Clerk III	2.00	5.00	5.00	3,317 - 4,424	227,276	238,820
Central Administration Total	62.00	64.00	64.00	3,735,637	4,124,229	4,313,939
<u>Abandoned and Unauthorized Practices</u>						
Paralegal	1.00	0.00	0.00	5,457 - 7,201		
Coordinator Of Records	4.00	3.00	3.00	4,041 - 5,387	168,430	178,611
Abandoned and Unauthorized Practices Total	5.00	3.00	3.00	304,617	168,430	178,611
Chief Trial Counsel Total	229.35	235.35	235.35	20,647,176	21,431,486	22,275,642
Probation						
<u>Probation</u>						
Senior Attorney	1.00	1.00	1.00	8,682 - 13,079	156,936	158,496
Probation Deputy	6.00	6.00	6.00	4,912 - 6,546	422,905	443,951
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	63,188	66,949
Probation Total	8.00	8.00	8.00	607,050	643,029	669,396
Probation Total	8.00	8.00	8.00	607,050	643,029	669,396
Client Security Fund						
<u>Client Security Fund</u>						
Director, Client Security Fund	1.00	1.00	1.00	9,646 - 14,189	164,968	171,938
Senior Attorney	2.00	2.00	2.00	8,682 - 13,079	312,696	316,992
Sr Administrative Supervisor	1.00	1.00	1.00	6,594 - 8,682	104,182	105,222
Paralegal	2.00	2.00	2.00	5,457 - 7,201	161,040	166,418
Administrative Assistant II	2.00	2.00	2.00	4,466 - 5,949	135,242	139,724
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	71,370	72,098
Legal Secretary	1.00	1.00	1.00	4,466 - 5,949	61,934	65,680
Coordinator Of Records	1.00	1.00	1.00	4,041 - 5,387	64,636	65,286
Client Security Fund Total	11.00	11.00	11.00	1,024,612	1,076,068	1,103,358

NOTE: FTEs show are as of January 1 of each year.

	Positions (FTE)			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
Client Security Fund Total	11.00	11.00	11.00	1,024,612	1,076,068	1,103,358
Mandatory Fee Arbitration						
<u>Mandatory Fee Arbitration</u>						
Director, Fee Arbitration	1.00	1.00	1.00	8,769 - 12,716	112,356	119,395
Sr Administrative Assistant	3.00	3.00	3.00	5,457 - 7,201	224,754	238,326
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	66,618	70,388
Mandatory Fee Arbitration Total	5.00	5.00	5.00	379,749	403,728	428,109
Mandatory Fee Arbitration Total	5.00	5.00	5.00	379,749	403,728	428,109
State Bar Court						
<u>Administration</u>						
Sr Director State Bar Court	1.00	1.00	1.00	11,672 - 17,182	183,710	195,205
Admin Specialist III (Conf)	0.00	1.00	1.00	6,312 - 8,397	76,656	83,611
Admin Specialist II (Conf)	1.00	0.00	0.00	6,311 - 8,396		
Sr Admin Secretary	0.75	0.80	0.80	4,912 - 6,546	62,092	63,466
Administration Total	2.75	2.80	2.80	308,167	322,458	342,282
<u>Hearing Department & Effectuations Unit</u>						
Hearing Judge	5.00	5.00	5.00	14,049 - 15,384	860,380	880,750
Chief Assistant Court Counsel	1.00	1.00	1.00	9,646 - 14,189	161,846	170,285
Court Administrator	2.00	2.00	2.00	8,769 - 12,716	290,100	303,853
Senior Attorney	5.00	5.00	5.00	8,682 - 13,079	725,301	744,376
Case Administrator	10.00	10.00	10.00	6,001 - 7,911	914,557	932,840
Court Services Analyst/Tech	1.00	1.00	1.00	6,001 - 7,911	94,926	95,862
Lead Data Analyst	1.00	1.00	1.00	6,001 - 7,911	87,048	92,062
Program Court Sys Analyst	2.00	2.00	2.00	5,457 - 7,201	139,816	148,414
Deputy Court Clerk IV	2.00	2.00	2.00	4,912 - 6,546	146,534	151,434
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	59,425	63,128
Legal Secretary	1.00	1.00	1.00	4,466 - 5,949	71,370	72,098
Hearing Department & Effectuations Unit Total	31.00	31.00	31.00	3,402,395	3,551,303	3,655,102
<u>Review Department</u>						
Presiding Judge	1.00	1.00	1.00	14,049 - 15,384	188,428	192,894
Review Judge	1.60	1.60	1.60	14,049 - 15,384	285,128	291,876
Chief Court Counsel	1.00	1.00	1.00	10,612 - 15,528	181,236	188,188
Senior Attorney	3.00	3.00	3.00	8,682 - 13,079	348,991	370,037
Case Administrator	2.00	2.00	2.00	6,001 - 7,911	171,362	176,914
Review Department Total	8.60	8.60	8.60	1,094,098	1,175,145	1,219,909
State Bar Court Total	42.35	42.40	42.40	4,804,660	5,048,906	5,217,293

NOTE: FTEs show are as of January 1 of each year.

	Positions (FTE)			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
Member Records & Compliance						
<u>Member Service Center</u>						
Managing Dir Member Rec & Comp	1.00	1.00	1.00	7,972 - 11,565	111,772	118,757
Sr Administrative Supervisor	2.00	2.00	2.00	6,594 - 8,682	190,738	201,954
Lead Data Analyst	1.00	1.00	1.00	6,001 - 7,911	79,058	83,902
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	72,572	77,062
Membership Services Rep	3.00	3.00	3.00	4,912 - 6,546	209,834	218,825
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	71,370	72,098
Member Services Associate	6.00	6.00	6.00	4,466 - 5,949	392,787	410,314
Administrative Assistant I	4.00	4.00	4.00	4,041 - 5,387	219,957	233,428
Member Service Center Total	19.00	19.00	19.00	1,255,641	1,348,088	1,416,340
Member Records & Compliance Total	19.00	19.00	19.00	1,255,641	1,348,088	1,416,340
Professional Competence						
<u>Outreach & Education</u>						
Director, Professnl Competnce	1.00	1.00	1.00	9,646 - 14,189	169,368	171,938
Attorney	1.00	1.00	1.00	7,041 - 10,976	97,558	104,177
Sr Administrative Specialist	1.00	1.00	1.00	6,935 - 9,170	110,032	111,124
Paralegal	7.00	7.00	7.00	5,457 - 7,201	544,403	566,004
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	84,673	87,256
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	66,503	70,274
Data Analyst II	1.00	1.00	1.00	3,648 - 4,861	58,318	58,916
Outreach & Education Total	13.00	13.00	13.00	1,077,211	1,130,855	1,169,689
Professional Competence Total	13.00	13.00	13.00	1,077,211	1,130,855	1,169,689
Education						
<u>Sections</u>						
Senior Director Education	1.00	1.00	1.00	11,672 - 17,182	170,710	181,392
Dir, Section Educ & Mtg Svcs	1.00	1.00	1.00	8,769 - 12,716	119,506	126,981
Managing Dir Sec Ed & Mtg Svcs	1.00	1.00	1.00	7,972 - 11,565	123,422	132,458
Meeting & Event Administrator	2.00	2.00	2.00	6,594 - 8,682	199,307	205,946
Section Coordinator	6.00	6.00	6.00	6,594 - 8,682	589,700	611,054
Web Administrator	1.00	1.00	1.00	6,001 - 7,911	84,906	89,921
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	66,980	71,084
Administrative Assistant II	7.00	7.00	7.00	4,466 - 5,949	424,336	447,693
Administrative Assistant I	0.00	1.00	1.00	4,041 - 5,387	50,882	54,210
Data Analyst II	1.00	0.00	0.00	3,648 - 4,861		
Sections Total	21.00	21.00	21.00	1,297,970	1,829,749	1,920,739
<u>Affinity & Insurance</u>						
Sr Administrative Assistant	1.80	1.80	1.80	5,457 - 7,201	149,418	154,846
Affinity & Insurance Total	1.80	1.80	1.80	140,004	149,418	154,846
Education Total	22.80	22.80	22.80	1,748,337	1,979,167	2,075,585

NOTE: FTEs show are as of January 1 of each year.

	Positions (FTE)			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
Legal Services						
<u>Program Development</u>						
Sr Director Admin Justice	1.00	1.00	1.00	11,672 - 17,182	170,710	181,392
Program Developer	3.00	3.00	3.00	6,594 - 8,682	312,460	315,666
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	81,420	85,866
Program Coordinator	1.00	1.00	1.00	4,912 - 6,546	66,224	70,316
Administrative Assistant II	2.00	3.00	3.00	4,466 - 5,949	195,804	203,992
Program Development Total	8.00	9.00	9.00	889,078	826,618	857,232
<u>Legal Services Funding</u>						
Mngng Dir, Lgl Svcs Trust Fnd	1.00	1.00	1.00	7,972 - 11,565	131,734	138,658
Senior Accountant/Auditor	2.00	2.00	2.00	6,594 - 8,682	188,874	199,917
Senior Grants Administrator	1.00	1.00	1.00	6,594 - 8,682	104,182	105,222
Sr Administrative Assistant	3.00	3.00	3.00	5,457 - 7,201	246,472	252,694
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	55,068	58,746
Compliance Auditor I	3.00	3.00	3.00	4,466 - 5,949	191,564	199,748
Legal Services Funding Total	11.00	11.00	11.00	852,214	917,894	954,985
Legal Services Total	19.00	20.00	20.00	1,741,292	1,744,512	1,812,217
Diversity & Bar Relations						
<u>Elimination of Bias</u>						
Managing Dir Diversity Outreac	1.00	1.00	1.00	7,972 - 11,565	138,762	140,140
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	72,710	77,202
Elimination of Bias Total	2.00	2.00	2.00	202,483	211,472	217,342
<u>Bar Relations</u>						
Managing Director Bar Relation	1.00	1.00	1.00	7,972 - 11,565	128,110	135,884
Program Court Sys Analyst	1.00	1.00	1.00	5,457 - 7,201	84,742	87,256
Bar Relations Total	2.00	2.00	2.00	138,523	212,852	223,140
Diversity & Bar Relations Total	4.00	4.00	4.00	341,006	424,324	440,482
Lawyer Assistance Program						
<u>Lawyer Assistance Program</u>						
Director, Lawyers Assist Prgm	1.00	1.00	1.00	8,769 - 12,716	117,110	124,424
Case Specialist	1.00	1.00	1.00	6,594 - 8,682	99,723	104,178
Case Manager	5.00	4.00	4.00	6,001 - 7,911	339,201	358,612
Program Court Sys Analyst	1.00	1.00	1.00	5,457 - 7,201	74,228	78,742
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	61,478	65,216
Lawyer Assistance Program Total	9.00	8.00	8.00	729,625	691,740	731,172
Lawyer Assistance Program Total	9.00	8.00	8.00	729,625	691,740	731,172

NOTE: FTEs show are as of January 1 of each year.

	Positions (FTE)			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
Executive Director						
<u>Management, Oversight and Planning</u>						
Executive Director/Ceo	1.00	1.00	1.00	19,750 - 19,750	236,990	236,990
Deputy Ceo/Chief Ops Officer	1.00	1.00	1.00	12,839 - 18,900	222,032	229,060
Assistant Secretary	1.00	1.00	1.00	8,769 - 12,716	142,202	150,435
Managing Dir Planning Admin	1.00	1.00	1.00	7,972 - 11,565	117,298	124,632
Special Asst To Exec Director	1.00	1.00	1.00	7,972 - 11,565	97,758	103,871
Sr Administrative Specialist	1.00	1.00	1.00	6,935 - 9,170	110,032	111,124
Admin Specialist II (Conf)	1.00	0.00	0.00	6,311 - 8,396		
Administrative Specialist Conf	0.00	1.00	1.00	5,137 - 6,946	75,088	79,785
Management, Oversight and Planning Total	7.00	7.00	7.00	939,344	1,001,400	1,035,897
<u>Board Support - Secretariat</u>						
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	86,398	87,256
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	71,370	72,098
Board Support - Secretariat Total	2.00	2.00	2.00	149,338	157,768	159,354
<u>Judicial Evaluations</u>						
Sr Administrative Specialist	1.00	1.00	1.00	6,935 - 9,170	105,012	110,364
Executive Secretary	1.00	1.00	1.00	5,137 - 6,946	83,356	84,162
Administrative Assistant II	2.00	2.00	2.00	4,466 - 5,949	125,123	132,593
Judicial Evaluations Total	4.00	4.00	4.00	243,212	313,491	327,119
<u>Governmental Affairs</u>						
Attorney III Conf	1.00	1.00	1.00	9,217 - 13,383	149,332	158,084
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	85,294	87,256
Governmental Affairs Total	2.00	2.00	2.00	295,982	234,626	245,340
Executive Director Total	15.00	15.00	15.00	1,627,876	1,707,285	1,767,710
Finance						
<u>Financial Planning and Analysis</u>						
Chief Financial Officer	1.00	1.00	1.00	12,839 - 18,900	222,032	229,060
Director, Finance	1.00	1.00	1.00	9,646 - 14,189	144,754	153,806
Senior Financial Analyst	1.00	1.00	1.00	6,935 - 9,170	96,784	102,843
Administrative Specialist Conf	1.00	1.00	1.00	5,137 - 6,946	76,349	81,936
Financial Planning and Analysis Total	4.00	4.00	4.00	421,868	539,919	567,645
<u>Accounting</u>						
Senior Financial Analyst	1.00	1.00	1.00	6,935 - 9,170	94,576	100,501
Payroll Specialist	1.00	1.00	1.00	5,741 - 7,639	84,452	89,634
Auditor/Accountant	1.00	1.00	1.00	4,912 - 6,546	61,966	66,004
Payroll Technician I	1.00	1.00	1.00	4,224 - 5,717	68,588	69,290
Accounting Technician	1.55	2.00	2.00	4,041 - 5,387	100,932	107,588
Accounting Clerk	1.00	1.00	1.00	3,317 - 4,424	40,911	43,636
Accounting Total	6.55	7.00	7.00	346,384	451,425	476,653

NOTE: FTEs show are as of January 1 of each year.

	Positions (FTE)			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
Procurement & Risk						
Dir Procurement & Risk Mgmt	1.00	1.00	1.00	8,769 - 12,716	127,876	135,888
Finance Manager	1.00	0.00	0.00	7,972 - 11,565	0	0
Purchasing Assistant	2.00	2.00	2.00	4,912 - 6,546	139,126	143,946
Administrative Assistant II	0.00	1.00	1.00	4,466 - 5,949	55,410	59,094
Procurement & Risk Total	4.00	4.00	4.00	261,166	322,412	338,928
Member Billing						
Finance Manager	1.00	1.00	1.00	7,972 - 11,565	107,908	114,652
Sr Administrative Supervisor	1.00	1.00	1.00	6,594 - 8,682	87,200	92,244
Membership Billing Technician	4.00	4.00	4.00	4,466 - 5,949	259,225	271,196
Member Billing Total	6.00	6.00	6.00	429,670	454,333	478,092
Finance Total	20.55	21.00	21.00	1,459,088	1,768,089	1,861,318
Budget & Performance Analysis						
Budget & Performance						
Director, Budget & Perf. Anls	1.00	1.00	1.00	10,612 - 15,528	170,476	181,132
Director Is & Bus Solutions	1.00	1.00	1.00	8,769 - 12,716	142,228	150,454
Budget & Performance Analyst	1.00	1.00	1.00	6,311 - 8,396	85,264	90,592
Budget & Performance Total	3.00	3.00	3.00	378,924	397,968	422,178
Budget & Performance Analysis Total	3.00	3.00	3.00	378,924	397,968	422,178
General Counsel						
General Counsel						
Chief Legal Officer	1.00	1.00	1.00	12,839 - 18,900	222,032	229,060
Deputy General Counsel	0.00	1.00	1.00	11,672 - 17,182	205,254	208,208
Chief Assist. General Counsel	2.00	1.00	1.00	10,612 - 15,528	179,028	187,846
Attorney III Conf	8.00	6.00	6.00	9,217 - 13,383	871,556	901,398
Senior Attorney	1.00	0.00	0.00	8,682 - 13,079	0	0
Director, Administration	1.00	1.00	1.00	7,972 - 11,565	123,422	132,458
Attorney	1.00	0.00	0.00	7,041 - 10,976	0	0
Attorney I	0.00	3.00	3.00	6,958 - 8,678	276,776	293,416
Admin Specialist III (Conf)	0.00	1.00	1.00	6,312 - 8,397	76,656	83,611
Admin Specialist II (Conf)	1.00	1.00	1.00	6,311 - 8,396	69,692	74,047
Investigator II	2.00	0.00	0.00	6,001 - 7,911	0	0
Legal Assistant (Confidential)	1.00	1.00	1.00	5,741 - 7,639	84,565	90,616
Program/Court Sys Anlst (Conf)	1.00	1.00	1.00	5,741 - 7,639	82,400	87,560
Administrative Secretary (Conf)	1.00	1.00	1.00	4,668 - 6,316	69,420	74,486
Legal Secretary (Confidential)	2.00	2.00	2.00	4,668 - 6,316	138,840	148,972
Legal Secretary	1.00	0.00	0.00	4,466 - 5,949	0	0
Admin Assistant II (Conf)	1.00	1.00	1.00	4,224 - 5,717	63,068	66,991
Coordinator Rec Conf	1.00	1.00	1.00	4,224 - 5,717	56,522	60,052
General Counsel Total	25.00	22.00	22.00	2,265,187	2,519,231	2,638,721

NOTE: FTEs show are as of January 1 of each year.

	Positions (FTE)			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
<u>Law Library & Archives</u>						
Senior Librarian/Archivist	1.00	1.00	1.00	6,001 - 7,911	86,755	91,758
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	67,308	70,958
Law Library & Archives Total	2.00	2.00	2.00	143,180	154,063	162,716
General Counsel Total	27.00	24.00	24.00	2,408,367	2,673,294	2,801,437
Human Resources						
<u>Compensation Administration</u>						
Hr Specialist	1.00	1.00	1.00	5,741 - 7,639	91,650	92,560
Compensation Administration Total	1.00	1.00	1.00	63,381	91,650	92,560
<u>Recruiting and Development</u>						
Hr Specialist	1.00	1.00	1.00	5,741 - 7,639	91,650	92,560
Human Resources Coordinator	1.00	1.00	1.00	4,668 - 6,316	56,678	60,208
Recruiting and Development Total	2.00	2.00	2.00	175,932	148,328	152,768
<u>Employee Relations</u>						
Director Hr & Labor Relations	1.00	1.00	1.00	8,769 - 12,716	143,546	151,461
Mgr Hr & Emp/Labor Relations	1.00	0.00	0.00	7,972 - 11,565	0	0
Employee Relations Total	2.00	1.00	1.00	131,792	143,546	151,461
<u>Records and Information Systems</u>						
Senior Hr Specialist	1.00	1.00	1.00	6,935 - 9,170	99,914	106,168
Human Resources Administrator	1.00	1.00	1.00	5,137 - 6,946	73,484	78,100
Human Resources Coordinator	3.00	3.00	3.00	4,668 - 6,316	204,706	214,244
Admin Assistant II (Conf)	1.00	1.00	1.00	4,224 - 5,717	62,816	67,414
Records and Information Systems Total	6.00	6.00	6.00	315,537	440,920	465,926
Human Resources Total	11.00	10.00	10.00	686,642	824,444	862,715
Information Technology						
<u>IT Admin</u>						
Senior Director It	1.00	1.00	1.00	11,672 - 17,182	177,528	188,640
Director Of Applications	1.00	0.00	0.00	8,769 - 12,716		
Director, Project Management	1.00	0.00	0.00	8,769 - 12,716		
Director, Technology Systems	1.00	0.00	0.00	8,769 - 12,716		
Managing Director Telecom	1.00	0.00	0.00	7,972 - 11,565		
Computer Analyst/Programmer	10.00	0.00	0.00	7,384 - 9,637		
Webmaster	2.00	0.00	0.00	7,384 - 9,637		
Technical Support Administratr	8.00	0.00	0.00	6,594 - 8,682		
Technology Svce Analyst Techn	3.00	0.00	0.00	6,001 - 7,911		
Program/Court Sys Anlst (Conf)	1.00	1.00	1.00	5,741 - 7,639	76,828	81,633
Administrative Specialist Conf	1.00	0.00	0.00	5,137 - 6,946	0	0
IT Admin Total	30.00	2.00	2.00	234,002	254,356	270,273

NOTE: FTEs show are as of January 1 of each year.

	Positions (FTE)			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
<u>IT Operations</u>						
Director, Technology Systems	0.00	1.00	1.00	8,769 - 12,716	136,104	144,632
Managing Director Telecom	0.00	1.00	1.00	7,972 - 11,565	120,902	128,477
Technical Support Administratr	0.00	8.00	8.00	6,594 - 8,682	726,348	755,872
Technology Svce Analyst Techn	0.00	1.00	1.00	6,001 - 7,911	85,531	90,542
IT Operations Total	0.00	11.00	11.00	1,220,049	1,068,885	1,119,523
<u>IT Applications</u>						
Director Of Applications	0.00	1.00	1.00	8,769 - 12,716	152,568	154,102
Computer Analyst/Programmer	0.00	10.00	10.00	7,384 - 9,637	1,045,725	1,089,690
Webmaster	0.00	2.00	2.00	7,384 - 9,637	221,180	227,928
Technology Svce Analyst Techn	0.00	2.00	2.00	6,001 - 7,911	187,147	191,344
IT Applications Total	0.00	15.00	15.00	1,326,796	1,606,620	1,663,064
<u>IT Project Mgt</u>						
Director, Project Management	0.00	1.00	1.00	8,769 - 12,716	136,104	144,632
IT Project Mgt Total	0.00	1.00	1.00	127,370	136,104	144,632
Information Technology Total	30.00	29.00	29.00	2,908,217	3,065,965	3,197,492
Communications						
<u>Media Relations</u>						
Chief Executive Communications	1.00	1.00	1.00	12,839 - 18,900	207,328	220,312
Director Communications	1.00	1.00	1.00	8,769 - 12,716	125,454	133,305
Web Editor	1.00	1.00	1.00	6,594 - 8,682	88,416	93,580
Public Information Officer	3.40	3.60	3.60	6,001 - 7,911	291,899	304,796
Web Administrator	0.00	1.00	1.00	6,001 - 7,911	73,801	78,322
Media Relations Total	6.40	7.60	7.60	750,933	786,898	830,315
<u>California Bar Journal</u>						
Program Court Sys Analyst	1.00	1.00	1.00	5,457 - 7,201	82,948	87,256
California Bar Journal Total	1.00	1.00	1.00	136,574	82,948	87,256
Communications Total	7.40	8.60	8.60	887,507	869,846	917,571

NOTE: FTEs show are as of January 1 of each year.

	Positions (FTE)			Expenditures		
	2014	2015	2016	2014 Range	2015 Budget	2016 Budget
General Services						
<u>Administrative Services</u>						
Director, Operations	1.00	1.00	1.00	10,612 - 15,528	170,476	181,132
Deputy Director, Operations	1.00	1.00	1.00	7,972 - 11,565	101,596	107,957
Admin Specialist III (Conf)	0.00	1.00	1.00	6,312 - 8,397	76,656	83,611
Admin Specialist II (Conf)	1.00	0.00	0.00	6,311 - 8,396		
Supervisor, Off. & Recep. Svcs	2.00	2.00	2.00	6,001 - 7,911	189,027	191,724
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	71,370	72,098
Printing Technician II	2.00	2.00	2.00	4,466 - 5,949	142,740	144,196
Travel & Info Svcs Coordinator	2.00	2.00	2.00	4,041 - 5,387	120,774	124,823
Maintenance Technician	1.00	1.00	1.00	3,648 - 4,861	55,071	58,164
Printing Technician I	2.00	2.00	2.00	3,648 - 4,861	111,495	115,198
Sr Office Services Coordinator	1.00	1.00	1.00	3,648 - 4,861	58,318	58,916
Sr Office Services Clerk	5.00	5.00	5.00	3,317 - 4,424	227,701	239,250
Receptionist/Reservation Coord	3.00	3.00	3.00	2,999 - 3,999	129,870	135,382
Administrative Services Total	22.00	22.00	22.00	1,401,711	1,455,094	1,512,451
General Services Total	22.00	22.00	22.00	1,401,711	1,455,094	1,512,451

NOTE: FTEs show are as of January 1 of each year.