

# **THE STATE BAR OF CALIFORNIA**



**2016 Proposed Final Budget**

**February 1, 2016**

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## Projected Working Capital Rollover 2016-2018

Fund Description	2015 Adopted Budget Expenditure	Projected 12/31/2015 Working Capital	2016 Budget Revenue	2016 Budget Expense	Projected 12/31/2016 Working Capital	2017 Budget Revenue	2017 Budget Expenses	Projected 12/31/2017 Working Capital	2018 Budget Revenue	2018 Budget Expenses	Projected 12/31/2018 Working Capital
		(B)									
<b>Consolidated General Fund:</b>	(A) (83,000,700)	10,083,200	72,954,900	(74,776,500)	8,261,600	73,599,700	(73,857,300)	8,004,000	74,251,000	(74,607,000)	7,648,000
<b>Special Revenue Fund Group:</b>											
Admissions Fund (20)	(22,267,300)	1,512,600	21,161,000	(21,624,000)	1,049,600	21,161,000	(21,840,000)	370,600	21,161,000	(22,123,000)	(591,400)
Annual Mtg Fund (14)	(968,200)	-	678,400	(678,400)	-	678,400	(678,400)	-	678,400	(678,400)	-
Grant Fund (12)	(308,397)	376,800	40,000	(68,800)	348,000	40,000	(68,800)	319,200	40,000	(68,800)	290,400
Sections (70-89)	(8,115,100)	7,586,400	8,601,200	(8,131,400)	8,056,200	8,601,200	(8,110,900)	8,546,500	8,601,200	(8,213,500)	8,934,200
<b>Total Special Revenue Fund Group:</b>	<b>(31,658,997)</b>	<b>9,475,800</b>	<b>30,480,600</b>	<b>(30,502,600)</b>	<b>9,453,800</b>	<b>30,480,600</b>	<b>(30,698,100)</b>	<b>9,236,300</b>	<b>30,480,600</b>	<b>(31,083,700)</b>	<b>8,633,200</b>
<b>Restricted Fund Group:</b>											
Legislative Activities Fund (16)	(640,400)	427,900	761,900	(594,400)	595,400	761,900	(603,900)	753,400	761,900	(616,600)	898,700
Elimination of Bias Fund (17)	(1,118,400)	409,900	785,200	(1,158,800)	36,300	785,200	(1,175,400)	(353,900)	785,200	(1,198,600)	(767,300)
Lawyer Assistance Program (21)	(1,948,300)	1,982,600	2,064,100	(1,651,900)	2,394,800	2,084,600	(1,679,300)	2,800,100	2,105,300	(1,713,700)	3,191,700
Legal Specialization Fund (24)	(2,043,000)	5,321,100	2,115,800	(1,415,600)	6,021,300	2,115,800	(1,439,500)	6,697,600	2,115,800	(1,470,400)	7,343,000
Client Security Fund (27)	(8,085,300)	1,526,000	7,847,100	(7,831,400)	1,541,700	7,925,000	(7,875,000)	1,591,700	8,003,700	(7,932,500)	1,662,900
Info. Tech Special Assessment Fund (31)	-	1,211,400	-	-	1,211,400	-	-	1,211,400	-	-	1,211,400
Legal Service Trust Fund (28)	(11,830,000)	10,818,800	11,522,400	(12,973,900)	9,367,300	11,522,400	(13,008,600)	7,881,100	11,522,400	(13,053,200)	6,350,300
Equal Access Fund (29)	(15,462,100)	335,800	15,165,100	(15,192,800)	308,100	15,165,100	(15,192,800)	280,400	15,165,100	(15,192,800)	252,700
Justice Gap Fund (32)	-	938,300	625,800	-	1,564,100	625,800	-	2,189,900	625,800	-	2,815,700
<b>Total Restricted Fund Group:</b>	<b>(41,127,500)</b>	<b>22,971,800</b>	<b>40,887,400</b>	<b>(40,818,800)</b>	<b>23,040,400</b>	<b>40,985,800</b>	<b>(40,974,500)</b>	<b>23,051,700</b>	<b>41,085,200</b>	<b>(41,177,800)</b>	<b>22,959,100</b>
<b>Grand Total:</b>	<b>(155,787,197)</b>	<b>42,530,800</b>	<b>144,322,900</b>	<b>(146,097,900)</b>	<b>40,755,800</b>	<b>145,066,100</b>	<b>(145,529,900)</b>	<b>40,292,000</b>	<b>145,816,800</b>	<b>(146,868,500)</b>	<b>39,240,300</b>

### Notes:

(A) Consolidated General Fund includes: 180 Howard Building Fund, Legal Education and Development Fund, LA Facility Fund, Public Protection Fund, Support & Admin Fund, Technology Fund, Fixed Asset Fund, Benefit Reserve Fund and the original unconsolidated General Fund.

(B) As of 12/31/15, General Fund Working Capital balance consists of \$4.6 million restricted cash and \$2.1 million designated OPEB benefit cost balance, which leaves a Spendable reserve of \$ 3.38 million.

## 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 Examination and the First-Year Law Students' Examination, as well as conducting moral character investigations. The Office also carries out the Committee of Bar Examiners' 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.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Admissions Administration	8.0	8.0	8.0	1,625	1,605	1,635
Examination Development	2.0	2.0	2.0	974	983	993
Admissions Operations and Processing	28.0	28.0	28.0	9,250	9,338	9,428
Examination Grading	7.0	7.0	7.0	2,632	2,650	2,666
Moral Character Determinations	13.0	13.0	13.0	1,626	1,670	1,717
Law School Regulation	2.0	2.0	2.0	332	340	350
Special Admissions	2.0	2.0	2.0	190	195	201
Specialization	8.0	8.0	8.0	1,017	1,036	1,060
MCLE Providers	2.0	2.0	2.0	176	181	186
Admissions Overhead				5,214	5,277	5,353
<b>TOTAL</b>	<b>72.0</b>	<b>72.0</b>	<b>72.0</b>	<b>23,036</b>	<b>23,275</b>	<b>23,589</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Legal Specialization Fund				2,114	2,114	2,114
Admissions Fund				21,161	21,161	21,161
<b>TOTAL REVENUE (All Funds)</b>				<b>23,275</b>	<b>23,275</b>	<b>23,275</b>

\* Budget, \$ thousands

## PROGRAM DESCRIPTIONS

### Admissions Administration

Staff in this area provides general oversight and management of the Office of Admissions, which carries out the functions delegated to the Committee of Bar Examiners by statute. The responsibilities of this area include: developing and implementing policies and procedures; supporting the activities of the Committee of Bar Examiners, Board of Trustees and its Committee on Admissions and Education; compiling and monitoring the departmental budget; interacting with law schools and communicating with applicants and the public; and monitoring and implementing IT projects for the office.

### Examination Development

Staff in this area is responsible for the acquisition, development, editing and production of examination questions. This area also processes petitions and determines reasonable testing accommodations for applicants with disabilities, and coordinates the production of Admission certificates for new admits.

### Admissions Operations

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 program, Foreign Legal Consultant program, determining the eligibility of applicants to take the examinations and administering examinations on behalf of Committee of Bar Examiners. In addition, this area is responsible for the reception and telephone services provided by the Los Angeles office.

### 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.

### 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.

### 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.

### Special Admissions

Staff in this area process applications for the Pro Hac Vice and Out-of-State Attorney Arbitration Counsel, which allow attorneys from other jurisdictions to practice law in California in limited ways. Staff also process applications from law students who wish to enhance their legal training by participating in the Practical Training of Law Students Program.

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\* 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. In addition, staff coordinate the administration of the legal specialization examinations that are administered every other year.

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.

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\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	72.0	72.0	72.0	7,653	7,823	8,055
Supplemental Staffing				745	751	757
Travel & Training				496	496	496
Supplies and Postage				425	425	425
Professional Services				452	452	452
Exam & Software Licensing				1,844	1,844	1,844
Exam Room Rental				1,716	1,716	1,716
Exam Proctors				1,668	1,668	1,668
Exam Graders				686	686	686
Occupancy				185	185	185
Telecommunications				98	98	98
Other Outside Services				1,812	1,812	1,812
Computers & Software				20	20	20
Buildings & Equipment				7	7	7
Retiree Medical Funding				146	146	146
Other Expenditures				16	16	16
Indirect Costs				5,067	5,130	5,206
<b>TOTAL</b>	<b>72.0</b>	<b>72.0</b>	<b>72.0</b>	<b>23,036</b>	<b>23,275</b>	<b>23,589</b>

\* Budget, \$ thousands

## Chief Trial Counsel

The Office of Chief Trial Counsel (OCTC) is the prosecutorial arm of the State Bar, responsible for investigating and prosecuting attorneys for violations of the Rules of Professional Conduct and State Bar Act. In addition to its core attorney regulatory function, OCTC is responsible for regulatory proceedings before the State Bar Court, such as representing the Committee of Bar Examiners in moral character appeals to the State Bar Court and representing the Board of Legal Specialization in specialization certification appeals to the State Bar Court. OCTC is also responsible for ancillary proceedings such as superior court proceedings involving the assumption of a law practice and conducting certain investigations of non-attorneys who may be engaging in the unauthorized practice of law.

OCTC has an Intake Unit responsible for receiving and initiating new cases involving attorney violations of ethical rules and complaints against non-attorneys alleging the unauthorized practice of law. The Intake Unit conducts the initial review of complaints and determines whether the matters should be forwarded to OCTC's Enforcement Unit for further action. The Intake Unit also services the State Bar's complaint hotline.

OCTC's Enforcement Unit handles the investigation and prosecution of matters before the State Bar Court and superior court proceedings involving the assumption of a law practice.

OCTC's Audit and Review Unit handles the review of closed cases. More specifically, 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. The "second look" requests and reviews are handled by the Audit & Review Unit.

OCTC is staffed with executive, attorney and non-attorney staff. Non-attorney staff includes investigators, paralegals, complaint analysts, administrative assistants, secretaries, record coordinators and clerks.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Chief Trial Counsel	233.1	233.1	233.1	30,063	30,701	31,588
<b>TOTAL</b>	<b>233.1</b>	<b>233.1</b>	<b>233.1</b>	<b>30,063</b>	<b>30,701</b>	<b>31,588</b>

  

<b>REVENUE</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
General Fund	61	61	61
<b>TOTAL REVENUE (All Funds)</b>	<b>61</b>	<b>61</b>	<b>61</b>

\* Budget, \$ thousands



EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	233.1	233.1	233.1	29,356	29,994	30,881
Supplemental Staffing				820	820	820
Travel & Training				109	109	109
Supplies and Postage				331	331	331
Professional Services				58	58	58
Telecommunications				153	153	153
Other Outside Services				227	227	227
Buildings & Equipment				3	3	3
Other Expenditures				6	6	6
Reimbursements				-1,000	-1,000	-1,000
<b>TOTAL</b>	<b>233.1</b>	<b>233.1</b>	<b>233.1</b>	<b>30,063</b>	<b>30,701</b>	<b>31,588</b>

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\* Budget, \$ thousands

## Probation

The Office of Probation (OP) monitors disciplined attorneys who have been ordered to comply with probation or reprobation conditions pursuant to orders issued by the California Supreme Court and/or the State Bar Court. The OP also monitors compliance with Rule 9.20 of the California Rules of Court; Agreements in Lieu of Discipline; some Alternative Discipline Program matters; and conditions imposed pursuant to Business and Professions Code, section 6007(h). Once these orders or agreements become effective, the OP establishes its own case files to maintain a record of compliance or non-compliance for each attorney.

OP staff monitor participating attorneys' compliance. The monitoring requires OP staff to contact the attorney being monitored and third parties such as former clients, service providers, and other departments of the State Bar. OP staff provides timely information to the attorney, Office of Chief Trial Counsel, and State Bar Court regarding non-compliance and are available to testify regarding such under oath in court.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Probation	8.0	8.0	8.0	939	959	985
<b>TOTAL</b>	<b>8.0</b>	<b>8.0</b>	<b>8.0</b>	<b>939</b>	<b>959</b>	<b>985</b>

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\* Budget, \$ thousands

	Positions			Expenditures		
EXPENDITURES BY CATEGORY	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	8.0	8.0	8.0	918	938	964
Supplemental Staffing				2	2	2
Supplies and Postage				12	12	12
Telecommunications				7	7	7
<b>TOTAL</b>	<b>8.0</b>	<b>8.0</b>	<b>8.0</b>	<b>939</b>	<b>959</b>	<b>985</b>

\* Budget, \$ thousands

## Client Security Fund

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

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Client Security Fund	11.0	11.0	11.0	6,990	7,023	7,069
Indirect Cost				840	851	863
<b>TOTAL</b>	<b>11.0</b>	<b>11.0</b>	<b>11.0</b>	<b>7,830</b>	<b>7,874</b>	<b>7,932</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Client Security Fund				7,846	7,924	8,003
<b>TOTAL REVENUE (All Funds)</b>				<b>7,846</b>	<b>7,924</b>	<b>8,003</b>

\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	11.0	11.0	11.0	1,497	1,530	1,576
Supplemental Staffing				5	5	5
Travel & Training				13	13	13
Supplies and Postage				20	20	20
Telecommunications				10	10	10
Other Outside Services				17	17	17
CSF Applications				6,000	6,000	6,000
Computers & Software				1	1	1
Retiree Medical Funding				21	21	21
Other Expenditures				-99	-99	-99
Indirect Costs				819	830	842
Reimbursements				-474	-474	-474
<b>TOTAL</b>	<b>11.0</b>	<b>11.0</b>	<b>11.0</b>	<b>7,830</b>	<b>7,874</b>	<b>7,932</b>

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\* 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. The program also assists clients in enforcing those awards where an attorney has been ordered to return unearned fees to the client, but fails to do so.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Mandatory Fee Arbitration	5.0	5.0	5.0	678	691	709
<b>TOTAL</b>	<b>5.0</b>	<b>5.0</b>	<b>5.0</b>	<b>678</b>	<b>691</b>	<b>709</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
General Fund				48	48	48
<b>TOTAL REVENUE (All Funds)</b>				<b>48</b>	<b>48</b>	<b>48</b>

\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	5.0	5.0	5.0	576	589	607
Travel & Training				29	29	29
Supplies and Postage				10	10	10
Telecommunications				4	4	4
Other Outside Services				58	58	58
Other Expenditures				1	1	1
<b>TOTAL</b>	<b>5.0</b>	<b>5.0</b>	<b>5.0</b>	<b>678</b>	<b>691</b>	<b>709</b>

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\* 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.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Administration	2.9	2.9	2.9	589	601	616
Hearing Department & Effectuations Unit	31.0	31.0	31.0	5,249	5,358	5,509
Review Department	8.6	8.6	8.6	1,730	1,765	1,812
<b>TOTAL</b>	<b>42.5</b>	<b>42.5</b>	<b>42.5</b>	<b>7,568</b>	<b>7,724</b>	<b>7,937</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
General Fund				16	16	16
<b>TOTAL REVENUE (All Funds)</b>				<b>16</b>	<b>16</b>	<b>16</b>

\* Budget, \$ thousands



## 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

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.

### 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.

### Effectuations Unit

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.

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\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	42.5	42.5	42.5	7,037	7,193	7,406
Supplemental Staffing				177	177	177
Travel & Training				135	135	135
Supplies and Postage				94	94	94
Professional Services				1	1	1
Occupancy				12	12	12
Telecommunications				65	65	65
Other Outside Services				32	32	32
Buildings & Equipment				14	14	14
Other Expenditures				1	1	1
<b>TOTAL</b>	<b>42.5</b>	<b>42.5</b>	<b>42.5</b>	<b>7,568</b>	<b>7,724</b>	<b>7,937</b>

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\* Budget, \$ thousands

## Member Records & Compliance

The State Bar of California's Office of Member Records and Compliance 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 official "membership" or licensing record is public information.

The Office also manages the registration of law corporations and of LLPs providing legal services, and is responsible for ensuring the compliance of all bar members with the requirements for mandatory continuing legal education (MCLE). Member Records and Compliance staff is responsible for answering all calls and emails to the Member Services Center, and is dedicated to efficiently providing reliable information to State Bar members.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Member Service Center	19.0	19.0	19.0	2,545	2,587	2,646
<b>TOTAL</b>	<b>19.0</b>	<b>19.0</b>	<b>19.0</b>	<b>2,545</b>	<b>2,587</b>	<b>2,646</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
General Fund				713	713	713
<b>TOTAL REVENUE (All Funds)</b>				<b>713</b>	<b>713</b>	<b>713</b>

\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	19.0	19.0	19.0	1,909	1,951	2,009
Supplemental Staffing				179	179	180
Travel & Training				9	9	9
Supplies and Postage				216	216	216
Professional Services				28	28	28
Telecommunications				19	19	19
Other Outside Services				173	173	173
Buildings & Equipment				1	1	1
Other Expenditures				11	11	11
<b>TOTAL</b>	<b>19.0</b>	<b>19.0</b>	<b>19.0</b>	<b>2,545</b>	<b>2,587</b>	<b>2,646</b>

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\* Budget, \$ thousands

## Professional Competence

The Office of Professional Competence administers the State Bar's attorney professional responsibility programs and resources. These activities assist practicing attorneys in complying with their professional duties.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
COPRAC & RRC				208	208	208
Outreach & Education	13.0	13.0	13.0	1,621	1,654	1,704
Publications				25	25	25
<b>TOTAL</b>	<b>13.0</b>	<b>13.0</b>	<b>13.0</b>	<b>1,854</b>	<b>1,887</b>	<b>1,937</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
General Fund				21	21	21
<b>TOTAL REVENUE (All Funds)</b>				<b>21</b>	<b>21</b>	<b>21</b>

\* Budget, \$ thousands

## PROGRAM DESCRIPTIONS

### Ethics Hotline

The Ethics Hotline is a confidential legal research service that helps lawyers identify and analyze professional responsibility issues. Although legal advice is not provided, lawyers receive research assistance that helps them make informed decisions on issues such as: conflicts of interest; fee arrangements; advertising; and ex parte communications. Among the types of information provided are references to: Rules of Professional Conduct; State Bar Act sections; Rules of Court; bar committee advisory ethics opinions; and case law citations, including published opinions of the State Bar Court.

### Board of Trustees, Ethics Opinion Committee (COPRAC), and Rules Revision Commission (RRC) Support

As needed, Professional Competence staff provides a full range of staffing support to the Board of Trustees for issues related to attorney professional responsibility. On an ongoing basis, staffing support also is provided to the Standing Committee on Professional Responsibility and Conduct (COPRAC), the State Bar Rules Revision Commission (RRC), and other special task forces and committees as directed. These support 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, implementing approved work product (such as distributing ethics opinions and submitting proposed amended Rules of Professional Conduct to the Supreme Court for approval, etc.), serving as liaison between groups and others, both inside and outside, the State Bar, tracking staff and volunteer meeting expenditures, facilitating policy input and legal advice, and preparing annual committee accomplishment reports.

### Outreach & Education

Professional Competence staff participates in, and coordinates, outreach and educational activities that enhance attorney awareness of issues in professional conduct, including recent developments. This education and outreach also disseminates information on State Bar resources that facilitate compliance with the Rules of Professional Conduct and the State Bar Act. This helps to protect the public from violations, such as inadvertent violations of the Board of Trustees' client trust account recordkeeping standards. Professional Competence's outreach and educational activities include: preparing and presenting the State Bar's Annual Ethics Symposium; 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; making presentations and providing information to other State Bar departments; writing articles for publication in the California Bar Journal; and staffing a booth at the State Bar Annual Meeting exhibit hall. To complete delivery of these educational and outreach services, Professional Competence staff identify speakers, compile written materials, complete legal research, prepare and update slide presentations, attend programs, arrange for program publicity, produce materials, make speaker travel and other logistical arrangements, update mailing lists, and solicit and review feedback about the quality of educational programs and presentations.

### Publications

Professional Competence staff produce, update and distribute 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. The latter book also is offered as an e-Book for any device compatible with the Amazon.com Kindle reader application. Staff's publication work includes extensive online professional responsibility resources on topics such as: ethics and technology; judicial ethics; civility and professionalism; and senior lawyer resources. These online resources are continually updated by Professional Competence staff.

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\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	13.0	13.0	13.0	1,572	1,605	1,654
Supplemental Staffing				3	3	4
Travel & Training				121	121	121
Supplies and Postage				21	21	21
Professional Services				84	84	84
Occupancy				3	3	3
Telecommunications				20	20	20
Other Outside Services				23	23	23
Buildings & Equipment				1	1	1
Other Expenditures				6	6	6
<b>TOTAL</b>	<b>13.0</b>	<b>13.0</b>	<b>13.0</b>	<b>1,854</b>	<b>1,887</b>	<b>1,937</b>

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\* 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, the California Young Lawyers Association (CYLA), and the California Solo & Small Firm Summit.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Sections	19.5	19.5	19.5	8,049	8,057	8,158
Annual Meeting	1.6	1.6	1.6	627	634	641
Affinity & Insurance	0.8	0.8	0.8	296	300	302
CYLA	0.9	0.9	0.9	169	170	175
Indirect Cost				159	161	163
<b>TOTAL</b>	<b>22.8</b>	<b>22.8</b>	<b>22.8</b>	<b>9,300</b>	<b>9,322</b>	<b>9,439</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
General Fund				16	16	16
Annual Meeting Fund				677	682	690
Legal Educ. and Dev. Fund				1,312	1,312	1,312
Sections Funds				8,595	8,595	8,595
<b>TOTAL REVENUE (All Funds)</b>				<b>10,600</b>	<b>10,605</b>	<b>10,613</b>

\* Budget, \$ thousands



**PROGRAM DESCRIPTIONS**Sections

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 Trustees.

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.

California Solo & Small Firm Summit

The Summit content is geared to California attorneys who are in a solo or small firm practice and offers a wide variety of education and networking opportunities for solo practitioners.

CYLA

CYLA is the nation's largest association of young lawyers.. A California young lawyer is defined as a member in good standing of the State Bar of California who is in his or her first five (5) years of practice in California or whose age is 36 or under.

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\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	22.8	22.8	22.8	2,743	2,805	2,887
Supplemental Staffing				145	146	147
Travel & Training				2,348	2,348	2,348
Supplies and Postage				381	381	381
Professional Services				574	574	574
Occupancy				1	1	1
Telecommunications				59	59	59
Other Outside Services				984	984	984
Computers & Software				-1	-1	-1
Buildings & Equipment				1	1	1
Retiree Medical Funding				42	42	42
Other Expenditures				123	123	123
Indirect Costs				1,708	1,726	1,752
Interfund Transfers				192	133	141
<b>TOTAL</b>	<b>22.8</b>	<b>22.8</b>	<b>22.8</b>	<b>9,300</b>	<b>9,322</b>	<b>9,439</b>

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\* 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		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Access To Justice				21	21	21
Program Development	9.0	9.0	9.0	1,232	1,258	1,292
Legal Services Funding	11.0	11.0	11.0	27,722	27,749	27,787
Indirect Cost				443	451	458
<b>TOTAL</b>	<b>20.0</b>	<b>20.0</b>	<b>20.0</b>	<b>29,418</b>	<b>29,479</b>	<b>29,558</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Equal Access Fund				15,165	15,165	15,165
General Fund				60	60	60
Justice Gap Fund				626	626	626
Legal Svcs. Trust Fund				11,523	11,523	11,523
<b>TOTAL REVENUE (All Funds)</b>				<b>27,374</b>	<b>27,374</b>	<b>27,374</b>

\* Budget, \$ thousands

**PROGRAM DESCRIPTIONS**Access To Justice

This 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 Office of Legal Services and the California Commission on Access to Justice.

Program Development

This 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 Pro Bono Practice program and Wiley Manuel pro bono 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 and other training programs for legal services and pro bono attorneys.

Legal Services Funding

This Service Area focuses on the administration of grants generated through Interest on Lawyer Trust Accounts (IOLTA), the state Equal Access Fund, the Justice Gap Fund, and other revenue sources to fund the provision of free legal services to low income Californians. Services are provided through the Legal Services Trust Fund Program and the Legal Services Trust Fund Commission.

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\* Budget, \$ thousands

	Positions			Expenditures		
EXPENDITURES BY CATEGORY	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	20.0	20.0	20.0	2,377	2,430	2,502
Supplemental Staffing				36	36	36
Travel & Training				91	91	91
Supplies and Postage				25	25	25
Professional Services				240	240	240
Telecommunications				21	21	21
Other Outside Services				2	2	2
Legal Services Grants				26,108	26,108	26,108
Computers & Software				75	75	75
Retiree Medical Funding				21	21	21
Indirect Costs				422	430	437
<b>TOTAL</b>	<b>20.0</b>	<b>20.0</b>	<b>20.0</b>	<b>29,418</b>	<b>29,479</b>	<b>29,558</b>

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\* Budget, \$ thousands

## Diversity & Bar Relations

Diversity & Bar Relations encompasses programs aimed at increasing diversity in the legal profession and eliminating bias in the legal system, as well as strengthening the State Bar's relationships with voluntary bar associations and related groups. Programs in this area are financed with voluntary contributions and non-mandatory dues revenues.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Elimination of Bias	2.0	2.0	2.0	518	525	534
Bar Relations	2.0	2.0	2.0	353	361	370
Indirect Cost				352	356	361
<b>TOTAL</b>	<b>4.0</b>	<b>4.0</b>	<b>4.0</b>	<b>1,223</b>	<b>1,242</b>	<b>1,265</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Grants Fund				40	40	40
Elimination of Bias Fund				785	785	785
<b>TOTAL REVENUE (All Funds)</b>				<b>825</b>	<b>825</b>	<b>825</b>

\* Budget, \$ thousands

**PROGRAM DESCRIPTIONS**Elimination of Bias

Elimination of Bias 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, and is largely conducted by the Council on Access & Fairness (COAF). Staff also compiles and disseminates demographic information and other resource materials to inform and facilitate diversity efforts by the State Bar and other organizations. COAF is a State Bar appointed entity that serves as the Bar's diversity think tank to advise the Board of Trustees on strategies to enhance diversity opportunities and advancement in the legal profession along the full diversity pipeline (e.g. from pre-K to high school, community colleges to law school and the bar exam, to the legal profession and the judiciary).

Bar Relations

Bar Relations focuses on supporting the work of the 280 local, minority, specialty and women's voluntary bar associations in California. In addition to working with California bar associations, the Bar Relations team serves as liaison to external organizations including the American Bar Association, National Association of Bar Executives, National Conference of Bar Presidents, Executives of California Legal Associations as well as individual state and local bar associations throughout the country. Bar Relations conducts annual leadership training for bar leaders and executive directors. Bar Relations maintains a clearinghouse of program and governance information which is drawn upon to assist organizations within the state. Activity in conjunction with voluntary bar associations is funded solely through voluntary contributions to the State Bar.

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\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	4.0	4.0	4.0	636	651	669
Travel & Training				126	126	126
Supplies and Postage				23	23	23
Professional Services				9	9	9
Occupancy				3	3	3
Telecommunications				6	6	6
Other Outside Services				23	23	23
Legal Services Grants				40	40	40
Computers & Software				5	5	5
Retiree Medical Funding				42	42	42
Indirect Costs				310	314	319
<b>TOTAL</b>	<b>4.0</b>	<b>4.0</b>	<b>4.0</b>	<b>1,223</b>	<b>1,242</b>	<b>1,265</b>

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\* Budget, \$ thousands



## Lawyer Assistance Program

The Lawyer Assistance Program provides substance abuse and mental health support services to members of the bar.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Lawyer Assistance Program	7.0	7.0	7.0	1,080	1,099	1,126
Indirect Cost				544	552	559
<b>TOTAL</b>	<b>7.0</b>	<b>7.0</b>	<b>7.0</b>	<b>1,624</b>	<b>1,651</b>	<b>1,685</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Lawyer Assistance Program Fund				2,065	2,085	2,106
<b>TOTAL REVENUE (All Funds)</b>				<b>2,065</b>	<b>2,085</b>	<b>2,106</b>

\* Budget, \$ thousands

## PROGRAM DESCRIPTIONS

### Orientation and Assessment

All members of the bar are eligible to receive a free professional mental health assessment by a LAP case manager without making a longer-term commitment to participate in the program. Members are also entitled to attend up to three free sessions of LAP group with obligation to continue further.

### Monitored LAP

Monitored LAP is for attorneys who want to satisfy a specific monitoring or verification requirement imposed by an employer, the Office of the Chief Trial Counsel, State Bar Court, Committee of Bar Examiners, or another entity. It is also available to attorneys seeking help independently. The program offers long-term structure and the support of a professional case manager. Attendance at LAP group meetings and lab testing are typically required as conditions of participating in Monitored LAP. There is a fee for group participation.

### Support LAP

Support LAP is for attorneys who are interested in participating in a weekly group meeting with other lawyers and would like the support of a qualified mental health professional. There is a fee for group participation.

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\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	7.0	7.0	7.0	908	927	954
Supplemental Staffing				20	20	20
Travel & Training				71	71	71
Supplies and Postage				6	6	6
Professional Services				67	67	67
Occupancy				1	1	1
Telecommunications				16	16	16
Other Outside Services				-10	-10	-10
Retiree Medical Funding				21	21	21
Other Expenditures				1	1	1
Indirect Costs				523	531	538
<b>TOTAL</b>	<b>7.0</b>	<b>7.0</b>	<b>7.0</b>	<b>1,624</b>	<b>1,651</b>	<b>1,685</b>

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\* 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. In addition, the OED is responsible for supporting the Board of Trustees and its task forces and working groups and the Judicial Nominees Evaluation (JNE) Commission.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Management, Oversight and Planning	9.0	9.0	9.0	2,224	2,253	2,309
Board Support - Secretariat	1.0	1.0	1.0	383	385	388
Judicial Evaluations	4.0	4.0	4.0	677	687	701
Governmental Affairs	2.0	2.0	2.0	441	447	458
Law Library & Archives	2.0	2.0	2.0	699	707	713
Indirect Cost				155	157	159
<b>TOTAL</b>	<b>18.0</b>	<b>18.0</b>	<b>18.0</b>	<b>4,579</b>	<b>4,636</b>	<b>4,728</b>

  

REVENUE	2016*	2017*	2018*
Legislative Activities Fund	762	762	762
<b>TOTAL REVENUE (All Funds)</b>	<b>762</b>	<b>762</b>	<b>762</b>

\* Budget, \$ thousands

## PROGRAM DESCRIPTIONS

### Management, Oversight and Planning

OED, through the Chief Operating Officer's Office (COO) provides support and direction to all management within the State Bar regarding personnel administration, budget, facilities, and all other management related matters. In its management leadership role, OED staff leads the Senior Management Team in establishing and effectuating operational/programmatic oversight. OED establishes Bar-wide operating policies and procedures, communicates and reinforces those policies and procedures to all staff. 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 in collaboration with the Senior Management Team serves as the focus for problem-solving analysis and resolution Bar-wide.

### Board Support

OED provides staff support to the Board of Trustees 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, 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.

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\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	18.0	18.0	18.0	3,061	3,116	3,205
Supplemental Staffing				19	19	20
Travel & Training				478	478	478
Supplies and Postage				329	329	329
Professional Services				392	392	392
Occupancy				4	4	4
Telecommunications				22	22	22
Other Outside Services				201	201	201
Computers & Software				8	8	8
Indirect Costs				65	67	69
<b>TOTAL</b>	<b>18.0</b>	<b>18.0</b>	<b>18.0</b>	<b>4,579</b>	<b>4,636</b>	<b>4,728</b>

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\* Budget, \$ thousands

## Finance

The Finance Department is responsible for the following areas: financial reporting, analysis and budget; the accounting functions of payroll, accounts payable, accounts receivable, and general ledger; and member billing for the State Bar.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Finance	10.6	10.6	10.6	2,936	2,965	3,005
Member Billing	7.0	7.0	7.0	2,037	2,053	2,074
Procurement & Risk	2.0	2.0	2.0	1,059	1,063	1,068
<b>TOTAL</b>	<b>19.6</b>	<b>19.6</b>	<b>19.6</b>	<b>6,032</b>	<b>6,081</b>	<b>6,147</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Support and Admin. Fund				4	4	4
<b>TOTAL REVENUE (All Funds)</b>				<b>4</b>	<b>4</b>	<b>4</b>

\* Budget, \$ thousands

**PROGRAM DESCRIPTIONS**Financial Reporting, Budgeting, and Analysis

This service area is responsible for the Bar's budgeting, financial planning, financial analysis and accounting, 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. 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.

Member Billing

Member billing is responsible for ensuring attorneys are billed appropriately for annual fees and other costs. The primary task for Member Billing staff is the collection and recording of annual membership fees, discipline costs, and CSF reimbursements. In addition to the primary task, staff responds to members' 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.

Payroll

Payroll constitutes one of the most important and sensitive areas in the Office of Finance. Payroll is responsible for processing and delivering paychecks to employees. The Payroll function includes balancing, analyzing, and reconciling payroll data and depositing and reporting taxes. The Payroll process involves calculating time cards, salaries, overtime, retroactive pay, severance pay, holiday pay and benefit time such as vacation, sick and personal days. Payroll also makes employee deductions for taxes, wage garnishment, health and life insurance, flexible spending accounts and retirement.

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\* Budget, \$ thousands



EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	19.6	19.6	19.6	2,187	2,236	2,301
Supplemental Staffing				212	212	213
Travel & Training				16	16	16
Supplies and Postage				162	162	162
Professional Services				1,200	1,200	1,200
Occupancy				849	849	849
Telecommunications				28	28	28
Other Outside Services				1,375	1,375	1,375
Buildings & Equipment				2	2	2
Other Expenditures				1	1	1
<b>TOTAL</b>	<b>19.6</b>	<b>19.6</b>	<b>19.6</b>	<b>6,032</b>	<b>6,081</b>	<b>6,147</b>

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\* Budget, \$ thousands

## General Counsel

The Office of the General Counsel (OGC) functions as the State Bar's lawyer, and is responsible for providing legal advice and counsel to the Board of Trustees, its working groups, taskforces, and committees, and all departments and programs of the State Bar.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
General Counsel	23.0	23.0	23.0	4,847	4,932	5,046
<b>TOTAL</b>	<b>23.0</b>	<b>23.0</b>	<b>23.0</b>	<b>4,847</b>	<b>4,932</b>	<b>5,046</b>

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\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	23.0	23.0	23.0	3,777	3,862	3,976
Supplemental Staffing				53	53	53
Travel & Training				47	47	47
Supplies and Postage				32	32	32
Professional Services				900	900	900
Telecommunications				29	29	29
Other Outside Services				9	9	9
<b>TOTAL</b>	<b>23.0</b>	<b>23.0</b>	<b>23.0</b>	<b>4,847</b>	<b>4,932</b>	<b>5,046</b>

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\* Budget, \$ thousands

## Human Resources

The Human Resources Department is responsible for recruitment, classification, compensation, and performance management, labor relations, and benefits administration.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Human Resources	9.0	9.0	9.0	1,531	1,556	1,590
<b>TOTAL</b>	<b>9.0</b>	<b>9.0</b>	<b>9.0</b>	<b>1,531</b>	<b>1,556</b>	<b>1,590</b>

\* Budget, \$ thousands

**PROGRAM DESCRIPTIONS**Compensation Administration

The Human Resources Department 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.

Recruitment and Retention

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, labor 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).

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\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	9.0	9.0	9.0	1,186	1,211	1,245
Supplemental Staffing				153	153	153
Travel & Training				21	21	21
Supplies and Postage				10	10	10
Professional Services				132	132	132
Telecommunications				19	19	19
Other Outside Services				5	5	5
Computers & Software				1	1	1
Buildings & Equipment				3	3	3
Other Expenditures				1	1	1
<b>TOTAL</b>	<b>9.0</b>	<b>9.0</b>	<b>9.0</b>	<b>1,531</b>	<b>1,556</b>	<b>1,590</b>

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\* Budget, \$ thousands

## Information Technology

The Information Technology (IT) 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		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
IT Admin and Operations	27.0	27.0	27.0	6,451	6,540	6,661
<b>TOTAL</b>	<b>27.0</b>	<b>27.0</b>	<b>27.0</b>	<b>6,451</b>	<b>6,540</b>	<b>6,661</b>

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\* Budget, \$ thousands

**PROGRAM DESCRIPTIONS**IT Admin

Responsible for the management and oversight of the IT Department. This includes planning and organizing activities of the department, and to promote and facilitate the effective use of technology in order to improve cost effectiveness and service quality that supports the Bar's Strategic Plan and Mission.

IT Applications

Responsible for providing leadership, direction and guidance for the implementation, maintenance, enhancement, improvement, and security and integrity of the State Bar's enterprise information systems, including:

- In-house developed mid-range applications (i5/AS400)
- Oracle/JDE (HR/Finance)
- Database management systems (DB2 and Microsoft SQL)
- Web applications and portals
- Case management systems
- Enterprise content management systems

IT Operations

Responsible for providing leadership, direction and guidance for the implementation, maintenance, support, enhancement, improvement, and security and integrity of the State Bar's Enterprise Infrastructure Systems, including:

- Service Desk and Desktop Support
- Servers and Microsoft SQL database management
- Networks and Telecommunications
- Infrastructure Security
- Audio/Visual systems

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\* Budget, \$ thousands



EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	27.0	27.0	27.0	4,027	4,115	4,235
Supplemental Staffing				215	216	217
Travel & Training				87	87	87
Supplies and Postage				6	6	6
Professional Services				91	91	91
Occupancy				120	120	120
Telecommunications				35	35	35
Other Outside Services				4	4	4
Computers & Software				1,788	1,788	1,788
Buildings & Equipment				78	78	78
<b>TOTAL</b>	<b>27.0</b>	<b>27.0</b>	<b>27.0</b>	<b>6,451</b>	<b>6,540</b>	<b>6,661</b>

\* Budget, \$ thousands

## Communications

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

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Media Relations	4.8	4.8	4.8	1,050	1,067	1,093
California Bar Journal	1.0	1.0	1.0	166	169	173
<b>TOTAL</b>	<b>5.8</b>	<b>5.8</b>	<b>5.8</b>	<b>1,216</b>	<b>1,236</b>	<b>1,266</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
General Fund				231	231	231
<b>TOTAL REVENUE (All Funds)</b>				<b>231</b>	<b>231</b>	<b>231</b>

\* Budget, \$ thousands

## PROGRAM DESCRIPTIONS

### Media Relations

Communications 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. In addition, a daily legal news roundup, the Daily News Digest, is compiled and sent to subscribers and posted to the website.

### Public Education

Staff develop and update consumer education pamphlets, brochures and guides. These public education materials are initially researched and written by staff whose work is then reviewed by attorneys for completeness and accuracy. Staff designs, lays out, edits, and oversees the translation of the final materials in multiple languages. Staff coordinates printing and contracts for storage and fulfillment. 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.

### Social Media

Staff maintains the Bar's official social media accounts and assist the Bar in developing best practices and policies for its use.

### Website

The website is the State Bar's primary communications channel with attorneys and the public. In overseeing the content, staff works to ensure the information is accessible and assists the public in finding the information they are looking for.

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\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	5.8	5.8	5.8	855	874	902
Supplemental Staffing				45	46	48
Travel & Training				20	20	20
Supplies and Postage				8	8	8
Professional Services				82	82	82
Telecommunications				7	7	7
Other Outside Services				203	203	203
Other Expenditures				-4	-4	-4
<b>TOTAL</b>	<b>5.8</b>	<b>5.8</b>	<b>5.8</b>	<b>1,216</b>	<b>1,236</b>	<b>1,266</b>

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\* Budget, \$ thousands

## General Services

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

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
General Services	22.0	22.0	22.0	6,475	6,525	6,587
<b>TOTAL</b>	<b>22.0</b>	<b>22.0</b>	<b>22.0</b>	<b>6,475</b>	<b>6,525</b>	<b>6,587</b>
<b>REVENUE</b>				<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Building Fund				1,351	1,351	1,351
<b>TOTAL REVENUE (All Funds)</b>				<b>1,351</b>	<b>1,351</b>	<b>1,351</b>

\* Budget, \$ thousands

**PROGRAM DESCRIPTIONS**Administrative Services

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

Facilities Management

The Office of General Services manages over 300,000 square feet of office space for Bar staff and tenants. It 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.

Procurement & Risk

The Office of General Services provides organizational support for the purchase of goods and services to ensure effective and appropriate use of State Bar resources. Procurement services includes 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; and maintaining and developing standardized forms and contract templates.

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\* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
Regular Salary & Benefits	22.0	22.0	22.0	2,119	2,169	2,230
Supplemental Staffing				42	42	43
Travel & Training				22	22	22
Supplies and Postage				26	26	26
Professional Services				347	347	347
Occupancy				3,742	3,742	3,742
Telecommunications				47	47	47
Other Outside Services				130	130	130
Computers & Software				5	5	5
Buildings & Equipment				36	36	36
Other Expenditures				-41	-41	-41
<b>TOTAL</b>	<b>22.0</b>	<b>22.0</b>	<b>22.0</b>	<b>6,475</b>	<b>6,525</b>	<b>6,587</b>

\* Budget, \$ thousands

## Information 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	2016	2017	2018	2016*	2017*	2018*
Technology Projects				335	18	18
<b>TOTAL</b>				<b>335</b>	<b>18</b>	<b>18</b>
REVENUE				2016*	2017*	2018*
Technology Fund				1,224	12	12
<b>TOTAL REVENUE (All Funds)</b>				<b>1,224</b>	<b>12</b>	<b>12</b>

### PROGRAM DESCRIPTIONS

#### Enterprise Technology Projects

##### **Discipline Case Management System (CMS) for the Office of the Chief Trial Counsel and State Bar Court**

The CMS project will improve the level of automation, functionality, and connectivity for OCTC/SBC.

##### **Website Redesign**

Website redesign will facilitate modern and enhanced content delivery – including facilitating views on mobile/smart devices, easy navigation and searches, and supports the Bar's web communication strategy for its users.

#### Operational Technology Projects

##### **Judicial Nominees Evaluation**

IT is implementing a number of automation strategies to support the Evaluation process including automation of the Confidential Comment Form process.

##### **KOALA Billing Application Rewrite**

The current billing system was custom developed using a proprietary product called ASNA Visual RPG and is used by Finance to process various member fees payments. KOALA will be re-written to a Microsoft .NET web platform that can be better supported by in-house developers.

##### **Credit Card Consolidation Services**

The State Bar currently uses Wells Fargo Merchant Services, Authorize.Net and U.S. Bank to process credit cards. IT will oversee the consolidation to one credit card processor this year.

##### **IT Security Assessment (Infrastructure)**

IT will conduct a security assessment to include internal and external vulnerability assessments, IT

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\* Budget, \$ thousands



controls review and security architecture assessment, policy procedure and gap analysis, wireless and phone systems.

#### **SF Courtroom AV**

Web and video conferencing capability will be added to the SF courtrooms.

#### **SF Boardroom AV**

This project is to replace end-of-life and failing AV equipment in the SF 4th floor conference rooms.

#### **IT Service Management System**

This project is to replace an outdated software tool and process for the intake and management of IT service tickets.

	Positions			Expenditures		
EXPENDITURES BY CATEGORY	2016	2017	2018	2016*	2017*	2018*
Professional Services				335	18	18
<b>TOTAL</b>				<b>335</b>	<b>18</b>	<b>18</b>

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\* Budget, \$ thousands

## Facilities Projects

This category includes capital improvement projects at the State Bar's headquarters at 180 Howard Street in San Francisco and its southern California office at 845 South Figueroa Street in Los Angeles. Capital improvement projects are undertaken, when necessary, to preserve these major physical assets and ensure that the buildings function efficiently and safely. Capital improvement projects are managed by the Office of General Services.

	Positions			Expenditures		
<b>SUMMARY OF PROGRAM REQUIREMENTS</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2016*</b>	<b>2017*</b>	<b>2018*</b>
Facilities Projects - San Francisco				4,600	2,800	1,880
<b>TOTAL</b>				<b>4,600</b>	<b>2,800</b>	<b>1,880</b>

\* Budget, \$ thousands

## PROGRAM DESCRIPTIONS

### Facilities Projects at 180 Howard Street, San Francisco

The Bar is progressing through a multi-year capital improvement plan for 180 Howard Street, focused primarily on upgrades to the building's Heating, Ventilation & Air Conditioning system. These upgrades are required due to normal aging, wear and tear and technical obsolescence of existing equipment.

### Facilities Projects at 845 South Figueroa Street, Los Angeles

At this time there are no additional capital improvement projects scheduled at 845 South Figueroa Street.

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\* Budget, \$ thousands

	Positions			Expenditures		
	2016	2017	2018	2016*	2017*	2018*
<b>EXPENDITURES BY CATEGORY</b>						
Buildings & Equipment				4,600	2,800	1,880
<b>TOTAL</b>				<b>4,600</b>	<b>2,800</b>	<b>1,880</b>

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\* Budget, \$ thousands

# Admissions

SUMMARY OF COST CENTER REQUIREMENTS		Positions			Expenditures		
		2016	2017	2018	2016*	2017*	2018*
20	Admissions Assets BU				4,816	4,873	4,943
20001	Admissions Overhead	3.0	3.0	3.0	701	667	683
20002	Admission Operations	28.0	28.0	28.0	9,250	9,338	9,428
20004	Admissions Administration	5.0	5.0	5.0	924	938	952
20007	Law School Regulation	2.0	2.0	2.0	332	340	350
20011	Examination Development	2.0	2.0	2.0	974	983	993
20013	Examination Grading	7.0	7.0	7.0	2,632	2,650	2,666
20019	Moral Character Determinations	13.0	13.0	13.0	1,626	1,670	1,717
20022	MCLE Provider Certification	2.0	2.0	2.0	176	181	186
20023	Special Admissions	2.0	2.0	2.0	190	195	201
24	Legal Specialization -Asset BU				398	404	410
24001	Legal Specialization	8.0	8.0	8.0	1,017	1,036	1,060
<b>TOTAL</b>		<b>72.0</b>	<b>72.0</b>	<b>72.0</b>	<b>23,036</b>	<b>23,275</b>	<b>23,589</b>

## Chief Trial Counsel

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
10310	OCTC-Enforcement (Consolidated)	233.1	233.1	233.1	30,063	30,701	31,588
<b>TOTAL</b>		<b>233.1</b>	<b>233.1</b>	<b>233.1</b>	<b>30,063</b>	<b>30,701</b>	<b>31,588</b>

## Probation

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
10601	Probation	8.0	8.0	8.0	939	959	985
<b>TOTAL</b>		<b>8.0</b>	<b>8.0</b>	<b>8.0</b>	<b>939</b>	<b>959</b>	<b>985</b>

## Client Security Fund

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
27	Client Security -Asset BU				840	851	863
27001	CSF Administration	11.0	11.0	11.0	6,981	7,014	7,060
27002	CSF Commission				9	9	9
<b>TOTAL</b>		<b>11.0</b>	<b>11.0</b>	<b>11.0</b>	<b>7,830</b>	<b>7,874</b>	<b>7,932</b>



## Mandatory Fee Arbitration

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
10503	Mandatory Fee Arb Committee				24	24	24
10504	Mandatory Fee Arbitration (Consolidated)	5.0	5.0	5.0	654	667	685
<b>TOTAL</b>		<b>5.0</b>	<b>5.0</b>	<b>5.0</b>	<b>678</b>	<b>691</b>	<b>709</b>

## State Bar Court

SUMMARY OF COST CENTER REQUIREMENTS		Positions			Expenditures		
		2016	2017	2018	2016*	2017*	2018*
10401	SBC Sr. Executive	2.9	2.9	2.9	589	601	616
10402	Hearing Admin.-SF	8.0	8.0	8.0	1,088	1,111	1,142
10403	Hearing Counsel LA/SF	7.0	7.0	7.0	1,346	1,375	1,416
10404	Hearing Judges	5.0	5.0	5.0	1,271	1,297	1,333
10405	Hearing/Effec./Admin.-LA	11.0	11.0	11.0	1,544	1,575	1,618
10407	Presiding/Review Judges	2.6	2.6	2.6	787	803	823
10408	Review Counsel/Clerk	6.0	6.0	6.0	943	962	989
<b>TOTAL</b>		<b>42.5</b>	<b>42.5</b>	<b>42.5</b>	<b>7,568</b>	<b>7,724</b>	<b>7,937</b>

## Member Records & Compliance

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
10201	Child & Family Support				4	4	4
10251	Member Services Center	19.0	19.0	19.0	2,513	2,555	2,614
10252	Transition Assistance Services				28	28	28
<b>TOTAL</b>		<b>19.0</b>	<b>19.0</b>	<b>19.0</b>	<b>2,545</b>	<b>2,587</b>	<b>2,646</b>

## Professional Competence

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
10702	COPRAC				46	46	46
10706	Prof. Resp. & Conduct	13.0	13.0	13.0	1,621	1,654	1,704
10708	Rules Revision Committee				162	162	162
10709	OPC Publications (Consolidated)				25	25	25
<b>TOTAL</b>		<b>13.0</b>	<b>13.0</b>	<b>13.0</b>	<b>1,854</b>	<b>1,887</b>	<b>1,937</b>

# Education

SUMMARY OF COST CENTER REQUIREMENTS		Positions			Expenditures		
		2016	2017	2018	2016*	2017*	2018*
10912	Calif. Young Lawyers Assoc. (Consolidate	0.9	0.9	0.9	169	170	175
14	Annual Meeting Asset BU				52	51	52
14001	Annual Meeting Admin.	1.6	1.6	1.6	627	634	641
18	Affinity & Insurance Fund				107	110	111
18001	Group Insurance Programs	0.4	0.4	0.4	117	119	120
18002	Professional Liab Insurance	0.4	0.4	0.4	116	118	119
18004	Affinity Programs				63	63	63
70	Sections OH -Asset BU				1,501	1,517	1,541
70001	Sections Administration	17.2	17.2	17.2	2,529	2,574	2,637
70002	SEMS Pcard Default				4	4	4
71001	Antitrust Section Admin.				1	1	1
71200	Antitrust - Newsletter				20	20	20
71300	Antitrust - Publication				2	2	2
71400	Antitrust - GG Institute				19	19	19
71403	Antitrust-Online CLE				1	1	1
71600	Antitrust - ExCom Mtg				65	65	65
72001	Business Law Section Admin.				7	7	7
72200	BusLaw Newsletter				101	101	101
72300	BusLaw General Publications				1	1	1
72400	BusLaw Section Retreat				24	24	24
72403	BusLaw Online CLE				3	3	3
72500	BusLaw Annual Meeting				13	13	13
72600	BusLaw Exec. Comm. Mtg.				39	39	39
72700	BusLaw AgriBus. Ctee. Mtgs.				11	11	11
72701	BusLaw Cons. Fin. Svcs. Comm.				7	7	7
72702	BusLaw Corp. Comm. Mtgs.				8	8	8
72704	BusLaw InsolvencyLaw Ctee.Mtgs				14	14	14
72705	BusLaw Educ. Comm. Mtg.				4	4	4
72706	BusLaw Fin. Inst. Comm.				4	4	4
72708	BusLaw Insurance Comm. Mtg.				3	3	3
72709	BusLaw Nonprofit Comm. Mtg.				21	21	21
72711	BusLaw Comm.Trans Comm. Mtg				1	1	1
72712	BusLaw Opinions Report Comm.				6	6	6
72713	BusLaw Cyberspace Law				3	3	3
72717	BusLaw Litigation Committee				4	4	4
73001	Criminal Law Section Admin.				5	5	5
73200	Criminal Law Journal				14	14	14
73400	Crim Law Stand-Alone				2	2	2
73403	Crim Law Online CLE Edu				1	1	1

\* Budget \$ thousands

# Education

SUMMARY OF COST CENTER REQUIREMENTS		Positions			Expenditures		
		2016	2017	2018	2016*	2017*	2018*
73500	Criminal Law SB Annual Mtg				3	3	3
73600	Criminal Law ExCom Mtgs				24	24	24
74001	Enviro Law Sections Admin				18	18	18
74200	Enviro Law Newsletter				8	8	8
74400	Enviro Law One Day Edu Program				10	10	10
74401	Enviro Law Multi Day Edu Progr				4	4	4
74402	Enviro Law Out Reach Program				17	17	17
74403	Enviro Law Online CLE				1	1	1
74404	Enviro Law Student Negotiation				10	10	10
74405	Enviro Law Yosemite Conference				24	24	24
74500	EnviroLaw State Bar Annual Mtg				1	1	1
74600	Enviro Law ExCom Meeting				15	15	15
74601	Enviro Law ExCom Retreat				39	39	39
75200	Trust&Estate Newsletter				79	79	79
75300	Trust&Easte Other Publications				6	6	6
75400	Trust&Estate Fall Program				7	7	7
75401	Trust&Estate Other Programs				62	62	62
75402	Trust&Estate Sr. Projects				3	3	3
75403	Trust&Estate Online CLE				1	1	1
75500	Trust&Estate SBC-AM				21	21	21
75600	Trust&Estate ExCom Meeting				114	114	114
75605	Trust&Estate Retreat				20	20	20
76001	Family Law Section Admin.				12	12	12
76200	Family Law Newsletter				41	41	41
76403	Family Law Online CLE				2	2	2
76500	Family Law SB Annual Mtg				15	15	15
76600	Family Law ExCom Mtg				162	162	162
76700	Family Law Sub Committees				31	31	31
77001	Intel. Prop. Sections Admin.				10	10	10
77200	Intel. Prop-Publication				59	59	59
77300	Intel. Prop-Treatise				14	14	14
77401	Intel. Prop-Institute				105	105	105
77403	Intel. Prop-Online CLE				4	4	4
77406	Intel. Prop-Trademark				51	51	51
77409	Intel. Prop Federal Circuit				19	19	19
77410	Intel. Prop-WIPO/EPO/JPO/CPO				4	4	4
77411	Intel. Prop-Issue Entertainmnt				11	11	11
77500	Intel. Prop. Annual Mtg				1	1	1
77600	Intel. Prop. ExCom Mtg				65	65	65

\* Budget \$ thousands

# Education

SUMMARY OF COST CENTER REQUIREMENTS		Positions			Expenditures		
		2016	2017	2018	2016*	2017*	2018*
77814	Intel. Prop. Wash DC Program				9	9	9
78001	Intl. Law Section Admin				5	5	5
78200	Int'l Law Journal				14	14	14
78401	Int'l Law Multi-Day Program				7	7	7
78403	Int'l Law Online CLE				2	2	2
78500	Int't Law State Bar Annual Mtg				17	17	17
78600	Int'l Law ExCom Meeting				13	13	13
78603	Int'l Law ExCom Retreat				3	3	3
79001	Labor & Empl. Administration				51	51	51
79200	Labor & Empl. Newsletter				77	77	77
79300	Labor & Empl. Publication				23	23	23
79401	Labor & Empl. Section AN Mtg.				166	166	166
79402	Labor & Empl. Pub. Sector Conf				77	77	77
79405	Labor & Empl. New Lawyer Prog				13	13	13
79600	Labor & Empl. ExCom Mtg.				57	57	57
80600	LPMT - ExCom Mtg				27	27	27
81001	Lit.-Administration				4	4	4
81200	Lit.- CA Litigation Journal				96	96	96
81201	Lit.-Litigation update E-news				3	3	3
81300	Lit.-Litigation Review				29	29	29
81400	Lit.-Week in Legal London				153	153	153
81401	Lit.-Insurance Staff Counsel				1	1	1
81402	Lit.-Best Practices Program				9	9	9
81403	Lit.-Online CLE Programs				2	2	2
81600	Lit.-ExCom Mtg				30	30	30
81700	Lit.-SubCommittees				1	1	1
82001	Public Law Section Admin				2	2	2
82200	Public Law Journal				8	8	8
82400	Public Law Programs				45	45	45
82403	Public Law Online CLE				1	1	1
82500	Public Law SB Annual Meeting				1	1	1
82600	Public Law ExCom Meeting				38	38	38
82700	PLOY				8	8	8
83001	Real Property - Sec Admin				7	7	7
83200	Real Property - Journal				51	51	51
83400	Real Property - Retreat				143	143	143
83401	Real Property - Boot Camp				8	8	8
83402	Real Property - Subsection CLE				9	9	9
83403	Real Property - Online CLE				10	10	10

# Education

SUMMARY OF COST CENTER REQUIREMENTS		Positions			Expenditures		
		2016	2017	2018	2016*	2017*	2018*
83404	Real Property - REAL Symposium				40	40	40
83405	Real Property - Education				1	1	1
83500	Real Property - Annual Mtgs				4	4	4
83600	Real Property - ExCom Mtgs				96	96	96
83700	Real Property - Subscetion				4	4	4
84300	Solo - Big News				21	21	21
84400	Solo - Programs				2	2	2
84500	Solo-SB Annual Mtg				5	5	5
84600	Solo-ExCom Mtg				35	35	35
85001	Taxation Law- Sec Admin				2	2	2
85200	California Tax Lawyer Journal				33	33	33
85400	Tax AM & Cal Tax Policy Conf				46	46	46
85401	Tax - Estate & Gift Tax Conf				43	43	43
85402	Income & "Other" Tax Program				13	13	13
85403	Tax - Online CLE Programs				1	1	1
85404	Young Tax Lawyers Program				4	4	4
85600	Tax-ExCom Mtgs				80	80	80
85700	Wash D.C. Delegation				18	18	18
85701	Eagle Ldge W-State Tax Cte Con				15	15	15
85706	Tax Procedure&Litigation Comm				1	1	1
85720	Sacramento Delegation				2	2	2
86001	Workers' Comp - Sec Admin				2	2	2
86200	Workers' Comp Newsletter				22	22	22
86400	Workers' Comp Spring Programs				63	63	63
86401	Workers' Comp Central Coast				13	13	13
86402	Workers' Comp Summer Programs				49	49	49
86403	Workers' Comp Online CLE				2	2	2
86404	Workers' Comp Education				27	27	27
86405	Workers' Comp Fall Programs				12	12	12
86500	Workers' Comp - SB Ann. Mtg				8	8	8
86600	Workers' Comp - Exec. Comm Mtg				18	18	18
87001	Council of SB Sections				-2	-2	-2
88	Education Fund				192	133	141
88001	Officewide Education	2.4	2.4	2.4	291	297	303
89002	Solo Summit (Odd Years)				135	135	135
<b>TOTAL</b>		<b>22.8</b>	<b>22.8</b>	<b>22.8</b>	<b>9,300</b>	<b>9,322</b>	<b>9,439</b>



## Legal Services

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
10901	Commission on Access to Justic				21	21	21
10905	Comm. on Delivery of Legal Svc	9.0	9.0	9.0	1,232	1,258	1,292
28	LSTF Asset BU				443	451	458
28002	LSTF Grants				11,108	11,108	11,108
28005	LSTF Administration (Consolidated)	11.0	11.0	11.0	1,422	1,449	1,487
29001	Equal Access -Admin				192	192	192
29002	Equal Access -Grants				15,000	15,000	15,000
<b>TOTAL</b>		<b>20.0</b>	<b>20.0</b>	<b>20.0</b>	<b>29,418</b>	<b>29,479</b>	<b>29,558</b>

## Diversity & Bar Relations

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
12441	10th Anniversary Programs				18	18	18
12445	Incubator/Modest Means Project				51	51	51
17	Elim. of Bias Assets BU				352	356	361
17001	Voluntary Bar Support	2.0	2.0	2.0	328	336	345
17007	Center for Access & Fairness	2.0	2.0	2.0	358	365	374
17008	Spring Summit				28	28	28
17009	Bar Leaders Conference				25	25	25
17012	Council on Access & Fairness				23	23	23
17020	Bar-Wide Charges				40	40	40
<b>TOTAL</b>		<b>4.0</b>	<b>4.0</b>	<b>4.0</b>	<b>1,223</b>	<b>1,242</b>	<b>1,265</b>

## Lawyer Assistance Program

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
21	Lawyer Assist Program-Asset BU				544	552	559
21000	Lawyer Assist Program (Consolidated)	7.0	7.0	7.0	1,080	1,099	1,126
<b>TOTAL</b>		<b>7.0</b>	<b>7.0</b>	<b>7.0</b>	<b>1,624</b>	<b>1,651</b>	<b>1,685</b>

## Executive Director

SUMMARY OF COST CENTER REQUIREMENTS		Positions			Expenditures		
		2016	2017	2018	2016*	2017*	2018*
10001	Executive Director	9.0	9.0	9.0	2,224	2,253	2,309
10002	Appointments Administration	1.0	1.0	1.0	101	103	106
10003	Board of Trustees				181	181	181
10005	Elections				55	55	55
10010	Public Interest Task Force				46	46	46
10101	Judicial Evaluation	4.0	4.0	4.0	677	687	701
16	Leg. Activities -Assets BU				155	157	159
16001	Legal Activities Assistance	2.0	2.0	2.0	338	344	355
16002	Leg. Affairs & Activities				79	79	79
16003	Comm. on Admin. of Justice				5	5	5
16004	Comm. on Appellate Courts				8	8	8
16005	Comm. on Federal Courts				4	4	4
16006	Comm. on Alt. Dispute Resol.				7	7	7
23602	Library/Archives-SF&LA	2.0	2.0	2.0	696	704	710
23604	Library-LA				3	3	3
<b>TOTAL</b>		<b>18.0</b>	<b>18.0</b>	<b>18.0</b>	<b>4,579</b>	<b>4,636</b>	<b>4,728</b>

## Finance

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
23101	Finance	10.6	10.6	10.6	2,936	2,965	3,005
23103	Member Billing	7.0	7.0	7.0	2,037	2,053	2,074
23105	Procurement	2.0	2.0	2.0	210	214	219
23321	Risk Management/Insurance				849	849	849
<b>TOTAL</b>		<b>19.6</b>	<b>19.6</b>	<b>19.6</b>	<b>6,032</b>	<b>6,081</b>	<b>6,147</b>

## General Counsel

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
23001	General Counsel	23.0	23.0	23.0	4,847	4,932	5,046
<b>TOTAL</b>		<b>23.0</b>	<b>23.0</b>	<b>23.0</b>	<b>4,847</b>	<b>4,932</b>	<b>5,046</b>

## Human Resources

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
23206	Human Resources (Consolidated)	9.0	9.0	9.0	1,531	1,556	1,590
<b>TOTAL</b>		<b>9.0</b>	<b>9.0</b>	<b>9.0</b>	<b>1,531</b>	<b>1,556</b>	<b>1,590</b>

## Information Technology

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
23600	IT (Consolidated)	27.0	27.0	27.0	6,451	6,540	6,661
<b>TOTAL</b>		<b>27.0</b>	<b>27.0</b>	<b>27.0</b>	<b>6,451</b>	<b>6,540</b>	<b>6,661</b>



## Communications

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
10801	Media & Info. Svcs.	4.8	4.8	4.8	1,050	1,067	1,093
10802	Calif. Bar Journal	1.0	1.0	1.0	166	169	173
<b>TOTAL</b>		<b>5.8</b>	<b>5.8</b>	<b>5.8</b>	<b>1,216</b>	<b>1,236</b>	<b>1,266</b>

## General Services

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
23310	General Services LA	8.0	8.0	8.0	2,309	2,330	2,351
23350	General Services SF	11.0	11.0	11.0	3,979	3,999	4,032
23358	SF Print Shop	3.0	3.0	3.0	187	196	204
<b>TOTAL</b>		<b>22.0</b>	<b>22.0</b>	<b>22.0</b>	<b>6,475</b>	<b>6,525</b>	<b>6,587</b>

## Technology Projects

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
19009	OCTC System Replacement				317	0	0
19022	IT Hardware				18	18	18
<b>TOTAL</b>					<b>335</b>	<b>18</b>	<b>18</b>

## Facilities Projects

		Positions			Expenditures		
SUMMARY OF COST CENTER REQUIREMENTS		2016	2017	2018	2016*	2017*	2018*
26	Building -Asset BU				4,600	2,800	1,880
<b>TOTAL</b>					<b>4,600</b>	<b>2,800</b>	<b>1,880</b>

## 2016 Indirect Cost Allocation Budget

<b>Fund Description</b>	<b>Indirect Cost Transfer Out</b>	<b>Indirect Cost Allocated</b>	<b>Net Allocation</b>
<b>Consolidated General Fund</b>			
General Fund (10)	(2,776,600)	22,431,100	19,654,500
Building Fund (26)	-	-	-
Legal Educ. And Dev. Fund (18)	-	106,900	106,900
LA Facility Fund (35)	(2,300,000)	-	(2,300,000)
Public Protection Fund (25)	-	-	-
Support & Adm (23)	(26,269,300)	-	(26,269,300)
Technology Fund (19)	-	-	-
Fixed Asset Fund (15)	-	-	-
Benefit Reserve Fund (34)	-	-	-
<b>Total Consolidated General Fund:</b>	<b>(31,345,900)</b>	<b>22,538,000</b>	<b>(8,807,900)</b>
<b>Special Revenue Fund Group:</b>			
Admissions Fund (20)	-	4,690,300	4,690,300
Annual Mtg Fund (14)	-	51,800	51,800
Grant Fund (12)	-	-	-
Sections (70-89)	-	1,458,700	1,458,700
<b>Total Special Revenue Fund Group:</b>	<b>-</b>	<b>6,200,800</b>	<b>6,200,800</b>
<b>Restricted Fund Group:</b>			
Legislative Activities Fund (16)	-	155,000	155,000
Elimination of Bias Fund (17)	-	310,100	310,100
Lawyer Assistance Program (21)	-	523,200	523,200
Legal Specialization Fund (24)	-	376,900	376,900
Client Security Fund (27)	-	819,500	819,500
Info. Tech Special Assessment Fund (31)	-	-	-
Legal Service Trust Fund (28)	-	414,200	414,200
Equal Access Fund (29)	-	8,200	8,200
Justice Gap Fund (32)	-	-	-
<b>Total Restricted Fund Group:</b>	<b>-</b>	<b>2,607,100</b>	<b>2,607,100</b>
<b>Grand Total:</b>	<b>(31,345,900)</b>	<b>31,345,900</b>	<b>-</b>