



The State Bar of California

**OPEN SESSION
AGENDA ITEM
III.A. FEBRUARY 2019**

DATE: February 11, 2019

TO: Members, California Board of Legal Specialization

FROM: Amy C. Nuñez, Director, Admissions

SUBJECT: FINANCIAL AND OPERATIONAL KEY INDICATORS

SUMMARY

A report on financial and operational key indicators is attached for consideration during the February 2019 California Board of Legal Specialization (CBLS) meeting.

BACKGROUND

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

DISCUSSION

Year-to-Date Financial Report

The financial operating statement through November 30, 2018 indicates that expenditures are in line with projections (Attachment A). The professional service drafting expenses that were accruing were paid through December.

The revenues through November represent the majority of annual revenues. Both revenue and expenses are expected to be within budget.

Total Number of Certified Specialists

As of February 1, 2019, there are 4,929 current certified specialists, an increase of 63 certified specialists versus the same time last year (Attachment B). Criminal and family saw the largest increases in number of specialists with 55 new specialists between the two overall, and estate planning saw the largest decrease with a difference of 13 specialists since last year.

Total Number of Resignations by Reason

There have been 47 resignations of certificates of specialization since February 1, 2019 versus 161 in all of last year, and 78 in 2017 (Attachment C). There has been an ongoing increase of specialists resigning specifically for retiring: 44 in all of 2017, 77 in 2018, and 29 in just the first month of 2019. With the legal specialization program now in its 37th year since issuing its first certificates of specialization, it is expected to see an increase of resignations specifically for retiring attorneys. Of those that did retire this year, we received a number of requests for a retired or emeritus specialist status.

Legal Specialist Continuing Legal Education (LSCLE) Compliance Reporting

There are 1,813 specialists (including dual specialists) in Compliance Group 1 (Attachment D). The reporting period for Compliance Group 1 ended on February 1, 2018, and as of that date, 356 (19.6%) of those specialists did not report their LSCLE compliance. Staff recommends an extension of the original deadline, to be discussed in a later item. Compliance statistics by specialty area are noted on the attachment.

RECOMMENDATION

It is recommended that the California Board of Legal Specialization approve the following motion:

MOVE, that the report regarding financial and operational key indicators is received and filed.

ATTACHMENT(S) LIST

- A.** Operating Statement through November 30, 2018
- B.** Total Number of Certified Specialists as of February 1, 2019
- C.** Total Number of Resignations by Reason, 2017 and 2018 Annual v 2019 Year to Date
- D.** Total Number of Certified Specialists in Compliance Group 1