



The State Bar *of California*

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

DATE: March 29, 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 April 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 December 31, 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 March 1, 2019, there are 4,915 current certified specialists, an increase of 66 certified specialists versus the same time last year (Attachment B). Estate planning, trust & probate and family saw the largest increases in number of specialists with 53 new specialists between the

two overall, and workers' compensation saw the largest decrease with a difference of 11 specialists since last year.

Total Number of Resignations by Reason

There have been 62 resignations of certificates of specialization since March 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 34 in just the first two months 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, 2019, and as of that date, 356 (19.6%) of those specialists did not report their LSCLE compliance. At its last meeting, the CBLS voted to extend that deadline to July 2, 2019. Since announcing the extension, 78 more specialists have submitted their LSCLE compliance. 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 December 31, 2018
- B.** Total Number of Certified Specialists as of March 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