



The State Bar *of California*

OPEN SESSION

AGENDA ITEM

III.A. SEPTEMBER 2019

DATE: September 4, 2019

TO: Members, California Board of Legal Specialization

FROM: Amy C. Nuñez, Director, Office of Admissions

SUBJECT: Financial and Operational Key Indicators

SUMMARY

A report on financial and operational key indicators is attached for consideration during the September 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

At the last CBLS Meeting, staff provided the Board of Trustees (BOT) First Quarter financial statement report through March 30, 2019, which indicated that expenditures aligned with projections. The Second Quarter financial statement is being prepared for the mid-September BOT meeting and currently not available. We anticipate providing the Second and Third Quarter financial statement reports at the December CBLS meeting.

Total Number of Certified Specialists

As of August 30, 2019, there are 4,978 current certified specialists, an increase of 67 certified specialists versus the same time last year (Attachment A). Family law saw the largest increase in number of specialists with 34 new specialists, and workers' compensation law saw the largest decrease with 8 specialists.

Total Number of Resignations by Reason

There have been 95 resignations of certificates of specialization through August 30, 2019 versus 161 in all of last year, and 78 in 2017 (Attachment B). There has been an ongoing increase of specialists resigning, specifically due to retirements: 44 in all of 2017, 77 in 2018, and 49 through the first eight 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 C). The reporting period for Compliance Group 1 ended on February 1, 2019, and as of that date, 356 (19.6 percent) of those specialists did not report their LSCLE compliance. At its February meeting, the CBLS voted to extend that deadline to July 2, 2019. Since announcing the extension, 127 more specialists have submitted their LSCLE compliance. Compliance statistics by specialty area are noted on the attachment. Staff recommends action for those specialists still pending compliance, to be discussed in a later item.

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. Total Number of Certified Specialists as of August 30, 2019**
- B. Total Number of Resignations by Reason, 2017 and 2018 Annual v 2019 Year to Date**
- C. Total Number of Certified Specialists in Compliance Group 1**