



The State Bar *of California*

OPEN SESSION

AGENDA ITEM

IV.A. DECEMBER 2019

DATE: December 9, 2019

TO: Members, California Board of Legal Specialization

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

SUBJECT: Report on Financial and Operational Key Indicators

SUMMARY

A report on financial and operational key indicators is attached for consideration during the December 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 Board of Trustees Financial Report for the 3rd quarter through September 30, 2019 indicates that expenditures are in line with projections (Attachment A). The Legal Specialization budget also demonstrates a 3.0 percent revenue increase when compared to 2018. Based on the current expenditure pattern, staff expect to be within budget for this fiscal year.

Total Number of Certified Specialists

As of December 1, 2019, there are 5,067 current certified specialists, an increase of 59 certified specialists versus the same time last year (Attachment B). Workers' Compensation Law and

Immigration & Nationality Law saw the largest increases in number of specialists with 36 new specialists between the two overall, and the only decrease in specialists came from Criminal Law and Taxation Law with a difference of six for both areas together.

Total Number of Resignations by Reason

There have been 130 resignations of certificates of specialization through December 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 due to retirements: 44 in all of 2017, 77 in 2018, and 66 through the first 11 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. We are also expecting to see a number of resignations in December, after the Annual Fee Statements are sent.

Legal Specialist Continuing Legal Education (LSCLE) Compliance Reporting

There are 1,972 specialists (including dual specialists) in Compliance Group 3 (Attachment D). The reporting period for Compliance Group 3 will open next week, and is due February 1, 2020. This will be the first reporting period where specialists will be able to report compliance electronically, through the AIMS portal. Compliance statistics by specialty area are noted on the attachment.

ATTACHMENT(S) LIST

- A.** Q3 Financial Statement Report, Investment Report and Client Security Fund Report
- B.** Total Number of Certified Specialists as of December 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 3