



# The State Bar *of California*

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## **OPEN SESSION**

### **AGENDA ITEM**

#### **IV.A. SEPTEMBER 2020**

**DATE:** September 14, 2020

**TO:** Members, California Board of Legal Specialization

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

**SUBJECT:** Report on Financial and Operational Key Indicators

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### **SUMMARY**

A report on financial and operational key indicators is attached for consideration during the September 2020 California Board of Legal Specialization (CBLS) meeting.

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### **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 first quarter through March 31, 2020 indicates that expenditures are in line with projections (Attachment A). The Legal Specialization budget through Q1 2020 demonstrates a 0.1 percent revenue decrease when compared to all of 2019. However, based on actual 2020 expenses, there is an overall \$1,771,909 positive change in current net position.

#### **Total Number of Certified Specialists**

As of September 1, 2020, there are 5,035 current certified specialists, an increase of 63 certified specialists versus the same time last year (Attachment B). Estate Planning, Trust & Probate Law,

and Workers' Compensation Law saw the largest increases in number of specialists with 50 new specialists between the two overall, and the largest decrease in specialists came from Admiralty & Maritime Law and Taxation Law with a decrease of five in each area.

### **Total Number of Resignations by Reason**

There have been 97 resignations of certificates of specialization through September 1, 2020 versus 160 in all of last year, and 158 in 2018 (Attachment C). Based on the current resignation pattern, staff expects additional resignations through the end of the year, but that the total number of resignations for 2020 to be comparable to the previous two years.

### **Legal Specialist Continuing Legal Education (LSCLE) Compliance Reporting**

When 2020 Compliance Group 3 reporting opened, there were a total 1,949 specialists (including dual specialists) with outstanding LSCLE compliance (Attachment D). The reporting period for Compliance Group 3 ended on February 1, 2020, however, at its February meeting the CBLS approved an allowance for the LSCLE deadline to be extended to match any corresponding MCLE reporting deadline, which is currently September 30, 2020. As of September 1, 2020, 544 (27.9 percent) of those specialists remain outstanding on their LSCLE compliance. Compliance statistics by specialty area are noted in the attachment.

Staff provides a recommendation of annual revocations for failure to comply with the LSCLE requirement, to be discussed for approval as a part of Open Session Item IV.F.

### **ATTACHMENT(S) LIST**

- A. Board of Trustees Financial Report: Quarter One through March 31, 2020
- B. Total Number of Certified Specialists as of September 1, 2020
- C. Total Number of Resignations by Reason, 2018 and 2019 Annual v 2020 Year to Date
- D. Total Number of Certified Specialists in Compliance Group 3