



The State Bar of California

The State Bar of California Board of Legal Specialization

Planning Meeting

Friday, December 8, 2023

CBLS Planning Items

- Engagement & Focus
- 2023 Work Plan Initiatives
- Appointments for 2024
- 2024-2025 CBLS Meeting Schedule
- Training Topics for 2024



Engagement & Focus





Engagement & Focus

- Attendance & Participation
- Policy
- Legal Specialist Exam (LSX)
- Education, Outreach & Program Growth



Attendance & Participation

- Planning out CBLS schedule two-years in advance
- Polling members at beginning of each year
- Additional support and participation at meetings



Policy



Legal
Specialization
Rules



Standards for
Certification and
Recertification



Any others?



Legal Specialist Exam (LSX)

Exam Rules &
Policies

Exam
Administrations

Legal
Specialist
Exam
Development
& Grading
Team

Question
Development



Education, Outreach & Program Growth

- Adding new specialty areas
- Bringing in new specialists to existing areas
- Retaining current specialists
- Reevaluating current specialty areas
- Educating the public



Marketing Opportunities

Specialty Area	2023 YTD # of Specialists
Family Law	1,369
Estate Planning, Trust & Probate Law	1,043
Workers' Compensation Law	980
Appellate Law	305
Criminal Law	286
Taxation Law	275
Immigration & Nationality Law	229
Bankruptcy Law	142
Legal Malpractice Law	95
Franchise & Distribution Law	47
Admiralty & Maritime Law	23
Total	4,802



CBLS 2023 Work Plan Initiatives



2023 Program Accomplishments

- CBLS approved proposed amendments to Legal Specialization rules 3.110 and 3.116
- PLG began work into researching Privacy Law as potential new specialty area
- Launched the LSX online item banking system
- Administered second online LSX
- Transitioned Legal Specialization staff to the Division of Regulation



Goal 2: Protect the public by enhancing access to and inclusion in the legal system.

Re-examine guidelines applied when evaluating proposals for expanding certification areas, outside of the State Bar's current offerings, with a focus on public protection and regulating the legal profession, with consideration to promoting access to justice.



Goal 2: Protect the public by enhancing access to and inclusion in the legal system.

Regarding the Consulting Group on the Establishment of a Legal Specialization in Privacy Law (Privacy Law Group):

1. Review research and recommendation of the Privacy Law Group
2. Present findings to the Board of Trustees, as appropriate



Goal 3: Protect the public by regulating the legal profession.

- Create procedure to ensure that specialists who no longer hold certification have removed the designation from their materials.
- Continue working with Office of Chief Trial Counsel to share information and ensure consistent enforcement and communications.
- Draft updated Standards to include enforcement and consequence for failure to appropriately remove designation/references to specialization.



Goal 2: Protect the public by enhancing access to and inclusion in the legal system.

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Goal 4: Protect the public by engaging partners.

Explore outreach opportunities to:

1. provide information to/educate the public to increase awareness and the importance of the certified specialists
2. prospective licensees (new admittees and current licensees) to become certified specialists



Goal 4: Protect the public by engaging partners.

Evaluate Legal Specialization processes to ensure those processes are supported by Subject Matter Experts (SMEs)

- Procure and retain diverse groups of SMEs to provide expertise and input specific to each legal specialization area (working groups and developers/graders)



State Bar Strategic Plan Goal & CBLS Plan

None – core business operations.

Conduct review of Legal Specialist Exam Rules and Policies, and update, as needed, for the 2023 administration of the exam.



State Bar Strategic Plan Goal & CBLS Plan

None – core business operations.

Begin planning and prioritization of Legal Specialization Rules and Policies to review in 2024.





2024 Goals & Initiatives

- Considering the CBLS engagement & focus, what should we consider as new goals and work plan initiatives for 2024?



Appointments for 2024



A background image of a pair of scales of justice, rendered in a dark teal color, is visible on the left side of the slide.

2024 CBLS Appointments

Members terming off in 2024:

- Jeffrey T. Hammerschmidt
- Jake Yoon



2023-2024 CBLS Meeting Schedule



2023-2024 CBLS Meetings

2024

- Friday, March 8
- Friday, June 7
- Friday, August 30[◇]
- Friday, December 13[△]

2025

- Friday, March 7
- Friday, June 6
- Friday, August 29[◇]
- Friday, December 12[△]

[◇]*Last meeting of State Bar year.* | [△]*First meeting of State Bar year.*



The State Bar of California

Training Topics for 2024



2024 Training Topics

Legal Specialization Rules & Policy

- Presentations from other certifying jurisdictions or organizations

Legal Specialist Exam

- Grading process



Questions?



Thank you.



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