



THE STATE BAR OF CALIFORNIA

180 HOWARD STREET
SAN FRANCISCO, CALIFORNIA 94105-1639
TELEPHONE (415) 538-2000

Title of Report: 2016 Proposed Baseline Budget
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The State Bar of California has submitted a report to the Legislature in accordance with Business and Professions Code section 6140.1. Business and Professions Code section 6140.1 requires the State Bar of California to submit a proposed baseline budget for the following year to the Legislature by November 15 and later a proposed final budget by February 15 so that the budget may be reviewed in conjunction with any bill that authorizes the State Bar's imposition of membership fees on its members.

This summary is provided under Government Code section 9795.

Under its strategic plan, the State Bar budgets on a three-year basis and has submitted its proposed baseline budget for 2016, as required by Business and Professions Code section 6140.1, setting forth the Department Budgets, Statements of Conditions of Funds, and Wage and Salary Supplements for the years 2014, 2015, and 2016.

The 2016 proposed baseline budget can be accessed at:
<http://www.calbar.ca.gov/AboutUs/Reports.aspx>.

A printed copy of the report may be obtained by calling 916-442-8018.

THE STATE BAR OF CALIFORNIA



2016 Proposed Baseline Budget

November 14, 2014

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Admissions

The Office of Admissions is responsible for all activities pertaining to the admission of attorneys to the practice of law in the State of California. Its principal activities include developing, administering and grading the Bar Exam as well as conducting moral character investigations. The Office also carries out the Bar's responsibility to accredit and register law schools. Finally, Admissions administers programs to allow non-members to practice in certain defined, limited areas, as well as programs to certify specialists in areas of legal practice.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---------------------------------|-------------|-------------|-------------|---------------|---------------|---------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Admissions Administration | 9.0 | 9.0 | 9.0 | 1,531 | 1,604 | 1,686 |
| Examination Development | 2.0 | 2.0 | 2.0 | 1,063 | 1,086 | 1,114 |
| Application Processing | 14.0 | 14.0 | 14.0 | 1,321 | 1,411 | 1,538 |
| Admissions Operations | 15.0 | 15.0 | 15.0 | 7,559 | 7,794 | 8,067 |
| Examination Grading | 5.0 | 5.0 | 5.0 | 2,546 | 2,582 | 2,634 |
| Moral Character Determinations | 13.0 | 13.0 | 13.0 | 1,609 | 1,700 | 1,832 |
| Law School Regulation | 2.0 | 2.0 | 2.0 | 317 | 341 | 373 |
| Special Admissions | 2.0 | 2.0 | 2.0 | 174 | 183 | 197 |
| Specialization | 8.0 | 8.0 | 8.0 | 1,450 | 1,765 | 1,604 |
| MCLE Providers | 2.0 | 2.0 | 2.0 | 176 | 189 | 207 |
| Admissions Projects | 0.0 | 0.0 | 0.0 | 139 | 0 | 0 |
| TOTAL (All Programs) | 72.0 | 72.0 | 72.0 | 17,884 | 18,657 | 19,252 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 139 | 0 | 0 |
| Admissions Fund | | | | 16,295 | 16,891 | 17,648 |
| Legal Specializations Fund | | | | 1,450 | 1,765 | 1,604 |
| TOTAL (All Funds) | | | | 17,884 | 18,657 | 19,252 |

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6046, 6063 and 6060-67.

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSAdmissions Administration

Staff in this area provides general oversight and management of the Office of Admissions. The responsibilities of this area include: developing and implementing policies and procedures; supporting the activities of the Committee of Bar Examiners, Board of Governors and its Committee on Regulation, Admissions and Discipline Oversight; compiling and monitoring the departmental budget; interacting with law schools and communicating with applicants and the public; coordinating the production of Admissions certificates for new admittees; monitoring and implementing the IT projects for the office; and processing and determining reasonable testing accommodations for applicants with disabilities taking the examinations.

Examination Development

Staff in this area is responsible for the acquisition, development, editing and production of examination questions. The primary goal of this service area is to ensure that the questions administered on the First-Year Law Students' Examination and the California Bar Examination are valid, reliable, appropriately edited and printed.

Application Processing

Staff in this area is responsible for the receipt and processing of applications for registration, the First-Year Law Students' Examination, the California Bar Examination, moral character determinations, moral character determination extension, multi-jurisdictional practice moral character applications, and eligibility of applicants to take the examinations administered by the Committee of Bar Examiners. The primary goal of this service area is to ensure that applications received are processed correctly and timely.

Admissions Operations

Staff in this area is responsible for oversight of the Los Angeles application processing and examination administration functions. In addition, this area is responsible for the reception and telephone services provided by the Los Angeles office, development of the overall Office of Admissions budget and processing petitions for relief from Committee of Bar Examiners' policies. One of the primary goals of this service area is to ensure that the examinations administered by the Committee of Bar Examiners are done so consistently, efficiently, in conformance with established policies and protocols, and without any major incidents.

Examination Grading

Staff in this area is responsible for ensuring that examinations administered by the Committee of Bar Examiners are graded using the standards and protocols adopted by the Committee, and that the results provided to applicants are error free and on time. In addition to the permanent employees in this area, for each bar examination grading cycle (of which there are 2), approximately 120 Graders are retained as independent contractors. For the First-Year Law Students' Examination, 8 independent contractors are hired to lead the grading groups. Temporary employees are hired to assist in the sorting, processing and entry of data related to handling the examination answers.

Moral Character Determinations

Staff in this area is responsible for completing the moral character investigations of applicants seeking admission to practice law in California and scheduling and coordinating informal conferences for applicants with the Committee of Bar Examiners' Subcommittee on Moral Character. The primary goal of this service area is to ensure that the moral character investigation of applicants is thorough and complies with the standards and protocols required by the Committee of Bar Examiners, within specified time constraints.

Law School Regulation

Staff in this area is responsible for the registration of unaccredited law schools and the accreditation of law schools in California. The workload of the staff includes monitoring applications received, reviewing annual reports, completing law school visitations and reporting findings and recommendations to the Committee of Bar Examiners. The primary goal of this service area is to ensure that law schools meet the requirements for registration or accreditation.

Special Admissions

Staff in this area process applications for the Pro Hac Vice, Out-of-State Attorney Arbitration Counsel, Foreign Legal Consultants, and Multijurisdictional Practice programs, which allow attorneys from other jurisdictions to practice law in California in a limited way. Eligibility requirements are set by the California Rules of Court and the State Bar Rules. Staff also process applications from law students who wish to expand their legal training by participating in the Practice Training of Law Students' Program. Law students eligible for the program must have completed at least one year of law study, taken certain law school courses and have a designated Supervising Attorney, who is responsible for overseeing the work of the law student and ensuring that the student only engages in the activities permitted by the California Rules of Court. The primary goal of this department is to ensure that applications are timely processed and only those persons qualified for the programs are certified.

* Budget, \$ thousands

Specialization

Staff in this area support the work of the Legal Specialization department, which is responsible for administering the requirements for certification in 11 different areas of law. They facilitate meetings of the Board of Legal Specialization, which is responsible for setting policies and rules for the program, and the Legal Specialization Advisory Commissions, which are responsible for the development and grading of questions for the legal specialization examinations. In addition, staff coordinate the administration of the legal specialization examinations that are administered every other year. Legal Specialists must demonstrate proficiency in their specialty area, which includes completion of tasks and standards, engaging in extensive legal education, rigorous peer review and passage of an examination. The primary goal of this department is to ensure that only qualified attorneys are certified as legal specialists.

MCLE Providers

Staff in this area process applications from Mandatory Continuing Legal Education (MCLE) providers seeking certification as single or multiple educational activity providers. Certification is required in order for the legal education to count toward an attorney's MCLE requirements. The department ensures that the appropriate documentation is submitted by the providers that allows the State Bar to exercise its audit and compliance functions. Consistent criteria are applied so only qualified education programs are approved. The primary goal of this department is to ensure only legal education programs that have met the established standards are eligible for MCLE credit.

Admissions Projects

In 2014, this represents the budget for the Task Force on Admissions Regulation Reform (TFARR).

* Budget, \$ thousands

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|---------------|---------------|---------------|
| <u>Admissions Administration</u> | | | |
| Admissions Fund | 1,531 | 1,604 | 1,686 |
| Total Admissions Administration | 1,531 | 1,604 | 1,686 |
| <u>Examination Development</u> | | | |
| Admissions Fund | 1,063 | 1,086 | 1,114 |
| Total Examination Development | 1,063 | 1,086 | 1,114 |
| <u>Application Processing</u> | | | |
| Admissions Fund | 1,321 | 1,411 | 1,538 |
| Total Application Processing | 1,321 | 1,411 | 1,538 |
| <u>Admissions Operations</u> | | | |
| Admissions Fund | 7,559 | 7,794 | 8,067 |
| Total Admissions Operations | 7,559 | 7,794 | 8,067 |
| <u>Examination Grading</u> | | | |
| Admissions Fund | 2,546 | 2,582 | 2,634 |
| Total Examination Grading | 2,546 | 2,582 | 2,634 |
| <u>Moral Character Determinations</u> | | | |
| Admissions Fund | 1,609 | 1,700 | 1,832 |
| Total Moral Character Determinations | 1,609 | 1,700 | 1,832 |
| <u>Law School Regulation</u> | | | |
| Admissions Fund | 317 | 341 | 373 |
| Total Law School Regulation | 317 | 341 | 373 |
| <u>Special Admissions</u> | | | |
| General Fund | 0 | 0 | 0 |
| Admissions Fund | 174 | 183 | 197 |
| Total Special Admissions | 174 | 183 | 197 |
| <u>Specialization</u> | | | |
| Legal Specializations Fund | 1,450 | 1,765 | 1,604 |
| Total Specialization | 1,450 | 1,765 | 1,604 |
| <u>MCLE Providers</u> | | | |
| Admissions Fund | 176 | 189 | 207 |
| Total MCLE Providers | 176 | 189 | 207 |
| <u>Admissions Projects</u> | | | |
| General Fund | 139 | 0 | 0 |
| Admissions Fund | 0 | 0 | 0 |
| Total Admissions Projects | 139 | 0 | 0 |
| TOTAL | 17,884 | 18,657 | 19,252 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|---------------|---------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 72.0 | 72.0 | 72.0 | 7,310 | 7,854 | 8,581 |
| Supplemental Staffing | | | | 567 | 607 | 567 |
| Travel & Training | | | | 794 | 808 | 678 |
| Supplies and Postage | | | | 457 | 455 | 455 |
| Professional Services | | | | 550 | 550 | 550 |
| Exam & Software Licensing | | | | 1,495 | 1,512 | 1,530 |
| Exam Room Rental | | | | 1,685 | 1,727 | 1,769 |
| Exam Proctors | | | | 1,628 | 1,669 | 1,709 |
| Exam Graders | | | | 919 | 919 | 919 |
| Occupancy | | | | 316 | 324 | 331 |
| Telecommunications | | | | 108 | 108 | 108 |
| Other Outside Services | | | | 1,949 | 1,989 | 1,949 |
| Computers & Software | | | | 26 | 56 | 26 |
| Buildings & Equipment | | | | 45 | 45 | 45 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 34 | 34 | 34 |
| TOTAL | 72.0 | 72.0 | 72.0 | 17,884 | 18,657 | 19,252 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Chief Trial Counsel

The Office of the Chief Trial Counsel has primary responsibility for carrying out the disciplinary functions of the State Bar. This includes receiving and investigating complaints from members of the public, and, where necessary, acting as the prosecution in the quasi-judicial proceedings leading to the suspension and/or disbarment of attorneys in California.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|--------------------------------------|--------------|--------------|--------------|---------------|---------------|---------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Management | 7.0 | 7.0 | 7.0 | 73 | 160 | 252 |
| Intake | 38.8 | 38.8 | 38.8 | 4,956 | 5,229 | 5,623 |
| Investigation | 55.0 | 55.0 | 55.0 | 6,898 | 7,253 | 7,778 |
| Trial | 67.6 | 67.6 | 67.6 | 11,231 | 11,616 | 12,390 |
| Audit & Review | 4.0 | 4.0 | 4.0 | 580 | 625 | 684 |
| Central Administration | 62.0 | 62.0 | 62.0 | 5,566 | 5,939 | 6,461 |
| Abandoned and Unauthorized Practices | 5.0 | 5.0 | 5.0 | 479 | 505 | 542 |
| TOTAL (All Programs) | 239.4 | 239.4 | 239.4 | 29,783 | 31,326 | 33,731 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 29,783 | 31,326 | 33,731 |
| TOTAL (All Funds) | | | | 29,783 | 31,326 | 33,731 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6043, 6044, 6044.5, 6049, 6077, 6078, 6092.5, subd (f) et seq

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSManagement

OCTC Management is responsible for the overall leadership of the department including ensuring compliance with statutes, rules and procedures, as well as specific duties including statistics gathering and performance reporting, employee supervision, fiscal oversight and management team development, case involvement and outreach activities.

Intake

Intake functions and responsibilities play a critical role in ensuring that the State Bar fulfills its public protection responsibilities. Intake provides direct customer support services to members of the public. Staff interactions with consumers and other individuals is a significant portion of the State Bar's direct consumer contact. Therefore, the quality of services provided has the potential to significantly affect public opinion about the State Bar and the legal profession. Intake operates as a legal "triage" function by identifying areas in which potential action needs to be taken, while effectively and efficiently pursuing appropriate remedies for those who have been harmed. Intake includes the complaint hotline, complaint processing in all its forms, other information sharing and consumer support services and mediation referral and monitoring.

Investigation

In previous years, the investigative function has been budgeted as an integral component of the Enforcement service area. In practice, drawing a precise line between the investigative and prosecutorial activities is necessarily somewhat artificial. However, in an effort to more clearly present the relative balance of resources committed to the investigation and trial phases of the enforcement process, the State Bar has begun presenting Investigation, Trial and Audit & Review as distinct service areas within the Office of Chief Trial Counsel. The division presented in 2010 is a "first pass" at this task, and modifications are to be expected.

The Investigation service area encompasses staff and other resources dedicated primarily (though not exclusively) to the investigative phase of the enforcement process.

Trial

In previous years, the investigative, prosecutorial (trial) and internal review phases of the enforcement process have been presented as a single service area in the budget, called Enforcement. This reflected the integrated nature of these functions as well as the Office's flexibility in assigning staff as needed to meet shifting workloads. However, in an effort to more clearly present the relative balance of resources committed to the investigation, trial and review phases of the enforcement process, the State Bar has begun presenting Investigation, Trial and Audit & Review as distinct service areas within the Office of Chief Trial Counsel. The division presented in 2010 is a "first pass" at this task, and modifications are to be expected.

The Trial service area encompasses staff and other resources dedicated primarily (though not exclusively) to the prosecutorial phase of the enforcement process.

Audit & Review

When the Office of Chief Trial Counsel decides to close a complaint against a member of the Bar without disciplinary action, the complainant may request a review ("second look") of the decision. These requests are handled by the Audit & Review unit, which was formed in OCTC in 2004. The unit also conducts random audits of OCTC's files twice each year and engages in other specifically designated audit and quality assurance measures.

In previous years, the Audit & Review unit was budgeted within the Enforcement service area. However, in an effort to more clearly present the relative balance of resources committed to the investigation, trial and review phases of the enforcement process, the State Bar has begun presenting Investigation, Trial and Audit & Review as distinct service areas within the Office of Chief Trial Counsel. The division presented in 2010 is a "first pass" at this task, and modifications are to be expected.

Central Administration

OCTC's Central Administration Unit ("Central Admin") provides critical support to the work of OCTC. It is the intention of Central Admin to develop and maintain consistency in administrative support practices between the two offices to the extent possible. Central Admin provides administrative and clerical assistance to all other professionals in OCTC. Like all good administrative operations, Central Admin staff must multi-task and trouble shoot to complete a wide range of duties. Administrative services are categorized as case/litigation support, office and financial services and training and technical support.

In previous years, Central Administration was budgeted separately only in the Los Angeles office, with administrative staff in San Francisco being included in the San Francisco trial unit budget. In an effort to improve comparability between SF and LA presentations, the Central Administration service area now includes administrative support staff from both Los Angeles and San Francisco.

* Budget, \$ thousands

Abandoned and Unauthorized Practices

The State Bar is authorized by law to petition the courts to assume jurisdiction over abandoned law practices, and over the practices of non-attorneys engaged in the unauthorized practice of law. In past years, the costs associated with these duties were not shown separately. Beginning in 2009, these activities will be identified as a separate service area in the Office of Chief Trial Counsel.

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|---------------|---------------|---------------|
| <u>Management</u> | | | |
| General Fund | 73 | 160 | 252 |
| Total Management | 73 | 160 | 252 |
| <u>Intake</u> | | | |
| General Fund | 4,956 | 5,229 | 5,623 |
| Total Intake | 4,956 | 5,229 | 5,623 |
| <u>Investigation</u> | | | |
| General Fund | 6,898 | 7,253 | 7,778 |
| Total Investigation | 6,898 | 7,253 | 7,778 |
| <u>Trial</u> | | | |
| General Fund | 11,231 | 11,616 | 12,390 |
| Total Trial | 11,231 | 11,616 | 12,390 |
| <u>Audit & Review</u> | | | |
| General Fund | 580 | 625 | 684 |
| Total Audit & Review | 580 | 625 | 684 |
| <u>Central Administration</u> | | | |
| General Fund | 5,566 | 5,939 | 6,461 |
| Total Central Administration | 5,566 | 5,939 | 6,461 |
| <u>Abandoned and Unauthorized Practices</u> | | | |
| General Fund | 479 | 505 | 542 |
| Total Abandoned and Unauthorized Practices | 479 | 505 | 542 |
| TOTAL | 29,783 | 31,326 | 33,731 |

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|--------------|--------------|---------------------|---------------|---------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 239.4 | 239.4 | 239.4 | 28,355 | 30,248 | 32,853 |
| Supplemental Staffing | | | | 1,084 | 734 | 534 |
| Travel & Training | | | | 165 | 165 | 165 |
| Supplies and Postage | | | | 403 | 403 | 403 |
| Professional Services | | | | 45 | 45 | 45 |
| Occupancy | | | | 4 | 4 | 4 |
| Telecommunications | | | | 226 | 226 | 226 |
| Other Outside Services | | | | 454 | 454 | 454 |
| Computers & Software | | | | 1 | 1 | 1 |
| Buildings & Equipment | | | | 7 | 7 | 7 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 58 | 58 | 58 |
| Reimbursements | | | | -1,019 | -1,019 | -1,019 |
| TOTAL | 239.4 | 239.4 | 239.4 | 29,783 | 31,326 | 33,731 |

* Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

Probation

The Office of Probation monitors probationer compliance with court orders, providing timely information to Superior Court, State Bar Court and probationers regarding non-compliance, and assisting probationers to successfully return to the practice of law.

| | Positions | | | Expenditures | | |
|--|------------|------------|------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| SUMMARY OF PROGRAM REQUIREMENTS | | | | | | |
| Probation | 8.0 | 8.0 | 8.0 | 897 | 953 | 1,033 |
| TOTAL (All Programs) | 8.0 | 8.0 | 8.0 | 897 | 953 | 1,033 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 897 | 953 | 1,033 |
| TOTAL (All Funds) | | | | 897 | 953 | 1,033 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6043, 6044, 6044.5, 6049, 6077, 6078, 6092.5, subd (f) et seq

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Probation

The Office of Probation (OP) aims to timely and accurately open and maintain files. In order to do so, OP staff must receive the order or stipulation to be monitored, create a physical file, contact the attorney to ensure compliance, and monitor non/compliance. The monitoring may require the OP staff to contact other departments of the State Bar and/or third parties.

OP also aims to timely and accurately obtain and receive information. In order to do so, OP staff must regularly receive updated information and provide information to people both internal and external to the State Bar.

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|----------------------------------|------------|------------|--------------|
| <u>Probation</u> | | | |
| General Fund | 897 | 953 | 1,033 |
| Total Probation | 897 | 953 | 1,033 |
| TOTAL | 897 | 953 | 1,033 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 8.0 | 8.0 | 8.0 | 835 | 891 | 971 |
| Supplemental Staffing | | | | 5 | 5 | 5 |
| Travel & Training | | | | 13 | 13 | 13 |
| Supplies and Postage | | | | 13 | 13 | 13 |
| Professional Services | | | | 1 | 1 | 1 |
| Occupancy | | | | 5 | 5 | 5 |
| Telecommunications | | | | 5 | 5 | 5 |
| Other Outside Services | | | | 9 | 9 | 9 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 9 | 9 | 9 |
| Other Expenditures | | | | 1 | 1 | 1 |
| TOTAL | 8.0 | 8.0 | 8.0 | 897 | 953 | 1,033 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Client Security Fund

The main purpose of CSF is to reimburse victims of attorney theft by processing, investigating, reviewing and making decisions on applications for reimbursement. There are four main areas that encompass the work of CSF: (a) case processing; (b) support for the CSF Commission, the Board of Governors and other State Bar departments; (c) financial management; and (d) basic internal administrative functions.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---------------------------------|-------------|-------------|-------------|---------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Client Security Fund | 11.0 | 11.0 | 11.0 | 10,148 | 7,228 | 7,339 |
| TOTAL (All Programs) | 11.0 | 11.0 | 11.0 | 10,148 | 7,228 | 7,339 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| Client Security Fund | | | | 10,148 | 7,228 | 7,339 |
| TOTAL (All Funds) | | | | 10,148 | 7,228 | 7,339 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6140.5, 6028 and 6029.

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Client Security Fund

The main purpose of CSF is to reimburse victims of attorney theft by processing, investigating, reviewing and making decisions on applications for reimbursement. There are four main areas that encompass the work of CSF: (a) case processing; (b) support for the CSF Commission, the Board of Governors and other State Bar departments; (c) financial management; and (d) basic internal administrative functions.

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|----------------------------------|---------------|--------------|--------------|
| <u>Client Security Fund</u> | | | |
| Client Security Fund | 10,148 | 7,228 | 7,339 |
| Total Client Security Fund | 10,148 | 7,228 | 7,339 |
| TOTAL | 10,148 | 7,228 | 7,339 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 11.0 | 11.0 | 11.0 | 1,405 | 1,485 | 1,596 |
| Supplemental Staffing | | | | 50 | 50 | 50 |
| Travel & Training | | | | 17 | 17 | 17 |
| Supplies and Postage | | | | 25 | 25 | 25 |
| Professional Services | | | | 25 | 25 | 25 |
| Telecommunications | | | | 7 | 7 | 7 |
| Other Outside Services | | | | 16 | 16 | 16 |
| CSF Applications | | | | 9,000 | 6,000 | 6,000 |
| Computers & Software | | | | 3 | 3 | 3 |
| Buildings & Equipment | | | | 0 | 0 | 0 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | -1 | -1 | -1 |
| Reimbursements | | | | -399 | -399 | -399 |
| TOTAL | 11.0 | 11.0 | 11.0 | 10,148 | 7,228 | 7,339 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Mandatory Fee Arbitration

The Mandatory Fee Arbitration program provides arbitration in cases of attorney-client disputes over legal fees, primarily through local bar associations.

| | Positions | | | Expenditures | | |
|--|------------|------------|------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| SUMMARY OF PROGRAM REQUIREMENTS | | | | | | |
| Mandatory Fee Arbitration | 5.0 | 5.0 | 5.0 | 712 | 756 | 818 |
| TOTAL (All Programs) | 5.0 | 5.0 | 5.0 | 712 | 756 | 818 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 712 | 756 | 818 |
| TOTAL (All Funds) | | | | 712 | 756 | 818 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6200, 6203, 6203(d)

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Mandatory Fee Arbitration

The Mandatory Fee Arbitration program provides arbitration in cases of attorney-client disputes over legal fees, primarily through local bar associations.

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>Mandatory Fee Arbitration</u> | | | |
| General Fund | 712 | 756 | 818 |
| Total Mandatory Fee Arbitration | 712 | 756 | 818 |
| TOTAL | 712 | 756 | 818 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 5.0 | 5.0 | 5.0 | 522 | 567 | 629 |
| Supplemental Staffing | | | | 64 | 64 | 64 |
| Travel & Training | | | | 32 | 32 | 32 |
| Supplies and Postage | | | | 11 | 11 | 11 |
| Professional Services | | | | 0 | 0 | 0 |
| Occupancy | | | | 0 | 0 | 0 |
| Telecommunications | | | | 3 | 3 | 3 |
| Other Outside Services | | | | 80 | 80 | 80 |
| Computers & Software | | | | 0 | 0 | 0 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 0 | 0 | 0 |
| TOTAL | 5.0 | 5.0 | 5.0 | 712 | 756 | 818 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

State Bar Court

The California State Bar is the only state bar in the United States with independent professional judges dedicated to ruling on attorney disciplinary and regulatory cases. The independent State Bar Court hears the charges and has the power to recommend that the California Supreme Court suspend or disbar those attorneys found to have committed acts of professional misconduct or convicted of serious crimes. For lesser offenses, public or private reprovls may be issued.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---|-------------|-------------|-------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Administration | 2.8 | 2.8 | 2.8 | 547 | 582 | 615 |
| Hearing Department & Effectuations Unit | 31.0 | 31.0 | 31.0 | 4,971 | 5,188 | 5,509 |
| Review Department | 8.2 | 8.2 | 8.2 | 1,589 | 1,667 | 1,779 |
| TOTAL (All Programs) | 42.0 | 42.0 | 42.0 | 7,108 | 7,437 | 7,903 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 7,108 | 7,437 | 7,903 |
| TOTAL (All Funds) | | | | 7,108 | 7,437 | 7,903 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6007, 6086.5, Cal Rules of Ct, rules 951, 952.6; Rules Proc.Of State Bar, rules 680-687, 700, 711, 4602-4304

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Administration

Administration encompasses the day-to-day administration of the State Bar Court, as well as the State Bar Court Reporter.

Hearing Department & Effectuations Unit

The Hearing Department of the State Bar Court hears disciplinary cases brought by the Office of the Chief Trial Counsel, regulatory matters brought by petitioners, motions for modification and revocation of attorney probation and other matters. The Effectuations Unit of the State Bar Court transmits cases to the California Supreme Court and processes all other cases not requiring Supreme Court action.

Review Department

The Review Department of the State Bar Court decides cases on appeal, exercises suspension and other powers delegated pursuant to Rule 9.10, California Rules of Court, and conducts interlocutory review on issues materially affecting the outcome of Hearing Department cases.

* Budget, \$ thousands

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|--|--------------|--------------|--------------|
| <u>Administration</u> | | | |
| General Fund | 547 | 582 | 615 |
| Total Administration | 547 | 582 | 615 |
| <u>Hearing Department & Effectuations Unit</u> | | | |
| General Fund | 4,971 | 5,188 | 5,509 |
| Total Hearing Department & Effectuations Unit | 4,971 | 5,188 | 5,509 |
| <u>Review Department</u> | | | |
| General Fund | 1,589 | 1,667 | 1,779 |
| Total Review Department | 1,589 | 1,667 | 1,779 |
| TOTAL | 7,108 | 7,437 | 7,903 |

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 42.0 | 42.0 | 42.0 | 6,589 | 6,919 | 7,384 |
| Supplemental Staffing | | | | 66 | 66 | 66 |
| Travel & Training | | | | 123 | 123 | 123 |
| Supplies and Postage | | | | 118 | 118 | 118 |
| Professional Services | | | | 28 | 28 | 28 |
| Occupancy | | | | 34 | 34 | 34 |
| Telecommunications | | | | 49 | 49 | 49 |
| Other Outside Services | | | | 73 | 73 | 73 |
| Computers & Software | | | | 8 | 8 | 8 |
| Buildings & Equipment | | | | 11 | 11 | 11 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 10 | 10 | 10 |
| TOTAL | 42.0 | 42.0 | 42.0 | 7,108 | 7,437 | 7,903 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Member Records & Compliance

The Office of Member Records and Compliance maintains the official roll of attorneys for the State of California, and it manages the registration of law corporations and of LLPs providing legal services. It is also responsible for ensuring the compliance of all bar members with the requirements for mandatory continuing legal education (MCLE).

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---------------------------------|-------------|-------------|-------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Member Service Center | 19.0 | 19.0 | 19.0 | 2,391 | 2,528 | 2,714 |
| TOTAL (All Programs) | 19.0 | 19.0 | 19.0 | 2,391 | 2,528 | 2,714 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 2,391 | 2,528 | 2,714 |
| TOTAL (All Funds) | | | | 2,391 | 2,528 | 2,714 |

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6002.1

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Member Service Center

The Member Service Center (MSC) (which includes Membership Records services) is dedicated solely to improving service to members beyond traditional fee payment processing and discipline proceedings. MSC is dedicated to bringing a positive State Bar experience to all members thus enhancing the State Bar’s relationships with its members.

The State Bar maintains, on behalf of the Supreme Court, the official “Roll of Attorneys,” i.e., the list of all attorneys who are licensed to practice law in the State of California. Upon admission to the practice of law in California, an attorney becomes a “member” of the State Bar. That “membership” or licensing record is a public record accessible to the public.

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|----------------------------------|--------------|--------------|--------------|
| <u>Member Service Center</u> | | | |
| General Fund | 2,391 | 2,528 | 2,714 |
| Total Member Service Center | 2,391 | 2,528 | 2,714 |
| TOTAL | 2,391 | 2,528 | 2,714 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 19.0 | 19.0 | 19.0 | 1,730 | 1,868 | 2,054 |
| Supplemental Staffing | | | | 186 | 186 | 186 |
| Travel & Training | | | | 23 | 23 | 23 |
| Supplies and Postage | | | | 179 | 179 | 179 |
| Professional Services | | | | 0 | 0 | 0 |
| Telecommunications | | | | 26 | 26 | 26 |
| Other Outside Services | | | | 234 | 234 | 234 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 2 | 2 | 2 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 11 | 11 | 11 |
| TOTAL | 19.0 | 19.0 | 19.0 | 2,391 | 2,528 | 2,714 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Professional Competence

The Office of Professional Competence is responsible for developing and publishing standards and guidelines pertaining to ethics in the practice of law in California.

| | Positions | | | Expenditures | | |
|--|-------------|-------------|-------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| SUMMARY OF PROGRAM REQUIREMENTS | | | | | | |
| Ethics Hotline | 0.0 | 0.0 | 0.0 | | | |
| COPRAC & RRC | 0.0 | 0.0 | 0.0 | 228 | 228 | 228 |
| Outreach & Education | 13.0 | 13.0 | 13.0 | 1,535 | 1,627 | 1,756 |
| Publications | 0.0 | 0.0 | 0.0 | 34 | 34 | 34 |
| TOTAL (All Programs) | 13.0 | 13.0 | 13.0 | 1,798 | 1,890 | 2,019 |
| FUNDING | | | | | | |
| General Fund | | | | 1,798 | 1,890 | 2,019 |
| TOTAL (All Funds) | | | | 1,798 | 1,890 | 2,019 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030.

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSEthics Hotline

The Ethics Hotline, a confidential research service for attorneys only, helps lawyers identify and analyze their professional responsibilities. Although staff members cannot provide legal counsel, advice, or opinions, they can discuss issues and authorities with lawyers. By referring callers to statutes, rules, cases, and bar opinions, staff members strive to assist attorneys in reaching informed decisions about their professional responsibility questions.

COPRAC & RRC

Professional Competence staff provides a full range of staffing support for issues related to ethics and professional competence for the Board of Governors, the Committee on Professional Responsibility and Conduct, the State Bar Rules Revision Commission, and other special task forces and committees as directed. These supports services include developing meetings agendas, attending meetings, distributing assignments, making logistical arrangements for meetings, completing legal research and writing, maintaining records of all official materials, assisting in the appointment process for members of COPRAC, implementing approved work product (such as distributing ethics opinions and submitting rules to the Supreme Court for approval, etc.), serving as liaison between groups and others both inside and outside the State Bar, tracking commission/committee expenditures, facilitating the development of work plans, and facilitating development of year to date accomplishment reports.

Outreach & Education

Professional Competence staff regularly participates in outreach and educational activities to enhance the awareness of ethics issues and professional competence resources in an effort to help prevent ethics violations and to protect the public. Professional Competence's outreach and educational activities include: preparing and presenting the State Bar's Annual Ethics Symposium; staffing an exhibit booth and providing educational programs for MCLE credit at the State Bar Annual Meeting; preparing and making presentations to local and specialty bar associations, related legal professional associations, and law schools; hosting and making presentations to out-of-state or out-of-country delegations visiting the State Bar; making presentations and providing information to other State Bar Departments; and writing articles for publication in the California Bar Journal. To complete delivery of these educational and outreach services, Professional Competence staff identifies speakers, compiles written materials, completes legal research, prepares and updates slide presentations, attends programs, arranges for program publicity, produces materials, makes speaker travel and other logistical arrangements, updates mailing lists, updates and sets-up/tears down Professional Competence annual meeting booth, and solicits and reviews feedback about the quality of services.

Publications

Professional Competence staff produces, updates, and distributes publications related to attorney professional responsibility including: The California Compendium on Professional Responsibility; The Handbook on Client Trust Accounting for California Attorneys; and Publication 250 - The California Rules of Professional Conduct, The State Bar Act, and Related Statutes.

DETAILED EXPENDITURES BY PROGRAM

| | 2014* | 2015* | 2016* |
|---------------------------------|--------------|--------------|--------------|
| <u>COPRAC & RRC</u> | | | |
| General Fund | 228 | 228 | 228 |
| Total COPRAC & RRC | 228 | 228 | 228 |
| <u>Outreach & Education</u> | | | |
| General Fund | 1,535 | 1,627 | 1,756 |
| Total Outreach & Education | 1,535 | 1,627 | 1,756 |
| <u>Publications</u> | | | |
| General Fund | 34 | 34 | 34 |
| Total Publications | 34 | 34 | 34 |
| TOTAL | 1,798 | 1,890 | 2,019 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 13.0 | 13.0 | 13.0 | 1,479 | 1,571 | 1,700 |
| Supplemental Staffing | | | | 2 | 2 | 2 |
| Travel & Training | | | | 67 | 67 | 67 |
| Supplies and Postage | | | | 44 | 44 | 44 |
| Professional Services | | | | 143 | 143 | 143 |
| Occupancy | | | | 3 | 3 | 3 |
| Telecommunications | | | | 22 | 22 | 22 |
| Other Outside Services | | | | 33 | 33 | 33 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 1 | 1 | 1 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 3 | 3 | 3 |
| TOTAL | 13.0 | 13.0 | 13.0 | 1,798 | 1,890 | 2,019 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Education

The Office of Education provides opportunities for continuing legal education and professional development. It encompasses the Sections of the State Bar as well as the bar's Annual Meeting.

| | Positions | | | Expenditures | | |
|--|-------------|-------------|-------------|---------------|---------------|---------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| SUMMARY OF PROGRAM REQUIREMENTS | | | | | | |
| Sections | 20.0 | 20.0 | 20.0 | 9,012 | 9,286 | 9,652 |
| Annual Meeting | 0.0 | 0.0 | 0.0 | 922 | 947 | 981 |
| Affinity & Insurance | 1.8 | 1.8 | 1.8 | 484 | 498 | 516 |
| CYLA | 0.0 | 0.0 | 0.0 | 119 | 128 | 139 |
| TOTAL (All Programs) | 21.8 | 21.8 | 21.8 | 10,537 | 10,858 | 11,288 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 119 | 128 | 139 |
| Admin of Justice Fund | | | | 484 | 498 | 516 |
| Annual Meeting Fund | | | | 922 | 947 | 981 |
| Sections Funds | | | | 9,012 | 9,286 | 9,652 |
| TOTAL (All Funds) | | | | 10,537 | 10,858 | 11,288 |

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Sections 6025, 6026 and 6031.5

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSSections

The Sections are voluntary organizations of attorneys and associates who share an area of interest. The Sections help their members maintain expertise in their various fields of law, expand their professional contacts, and serve the profession, the public and the legal system. The State Bar of California has 16 Sections. Each Section is governed by an executive committee of members appointed by the State Bar Board of Governors.

Annual Meeting

In addition to its formal functions, such as the swearing in of newly elected and appointed trustees, the Annual Meeting of the State Bar offers an wide variety of continuing legal education opportunities for attorneys.

Affinity & Insurance

The State Bar of California sponsors several insurance programs specifically designed to serve the needs of State Bar members. These programs are monitored by Standing Committees of the State Bar comprised of volunteer attorney members who work with carriers and underwriters to provide competitive products at reasonable rates. These Standing Committees monitor carrier performance for each line of insurance.

CYLA

CYLA is the nation's largest association of young lawyers. A young lawyer has been in practice for five years or less or is 36 years old or younger.

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|---------------|---------------|---------------|
| <u>Sections</u> | | | |
| Sections Funds | 9,012 | 9,286 | 9,652 |
| Total Sections | 9,012 | 9,286 | 9,652 |
| <u>Annual Meeting</u> | | | |
| Annual Meeting Fund | 922 | 947 | 981 |
| Total Annual Meeting | 922 | 947 | 981 |
| <u>Affinity & Insurance</u> | | | |
| Admin of Justice Fund | 484 | 498 | 516 |
| Total Affinity & Insurance | 484 | 498 | 516 |
| <u>CYLA</u> | | | |
| General Fund | 119 | 128 | 139 |
| Total CYLA | 119 | 128 | 139 |
| TOTAL | 10,537 | 10,858 | 11,288 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|---------------|---------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 21.8 | 21.8 | 21.8 | 2,401 | 2,586 | 2,833 |
| Supplemental Staffing | | | | 71 | 71 | 71 |
| Travel & Training | | | | 3,239 | 3,239 | 3,239 |
| Supplies and Postage | | | | 348 | 348 | 348 |
| Professional Services | | | | 442 | 442 | 442 |
| Occupancy | | | | 237 | 237 | 237 |
| Telecommunications | | | | 77 | 77 | 77 |
| Other Outside Services | | | | 1,366 | 1,366 | 1,366 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 0 | 0 | 0 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 2,355 | 2,492 | 2,675 |
| Indirect Costs | | | | 0 | 0 | 0 |
| TOTAL | 21.8 | 21.8 | 21.8 | 10,537 | 10,858 | 11,288 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Legal Services

The Office of Legal Services operates several programs intended to ensure that all Californians have appropriate access to the legal system, regardless of income.

| | Positions | | | Expenditures | | |
|--|-------------|-------------|-------------|---------------|---------------|---------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| SUMMARY OF PROGRAM REQUIREMENTS | | | | | | |
| Access To Justice | 0.0 | 0.0 | 0.0 | 52 | 52 | 52 |
| Program Development | 9.0 | 9.0 | 9.0 | 1,330 | 1,441 | 1,554 |
| Legal Services Funding | 11.0 | 11.0 | 11.0 | 26,355 | 26,330 | 26,333 |
| TOTAL (All Programs) | 20.0 | 20.0 | 20.0 | 27,738 | 27,823 | 27,939 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 1,382 | 1,493 | 1,606 |
| Grants Fund | | | | 0 | 0 | 0 |
| Justice Gap Fund | | | | 0 | 0 | 0 |
| Legal Services Trust Fund | | | | 26,355 | 26,330 | 26,333 |
| TOTAL (All Funds) | | | | 27,738 | 27,823 | 27,939 |

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Sections 6210 - 6228

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSAccess To Justice

This Service Area addresses the development of policy and initiatives in collaboration with other institutions working to expand access to justice for low income Californians (e.g. Judicial Council; legal services entities; local, state and national organizations such as the American Bar Association and National Legal Aid and Defender Association). Services are provided through the Legal Services Outreach Unit and the California Commission on Access to Justice.

Program Development

This Service Area supports and promotes the direct delivery of legal services to low and middle income Californians with an emphasis on increasing and enhancing pro bono participation by members of the bar. The services are provided through the Program Development Unit, the Standing Committee on the Delivery of Legal Services and a comprehensive, statewide legal services conference ("Pathways to Justice") held every three years. The Program Development Unit provides technical assistance and resources to legal services providers, pro bono programs and certified lawyer referral services, oversees the certification process for lawyer referral services, and administers the Emeritus Attorney Pro Bono Participation program and Wiley Manuel certificate program. The Unit also coordinates a statewide Disaster Legal Services Response network, administers the Standing Committee on the Delivery of Legal Services, and presents the Pathways to Justice conference.

Legal Services Funding

This Service Area focuses on the administration of grants generated through Interest on Lawyer Trust Accounts (IOLTA) and the state Equal Access Fund to fund the provision of free legal services to low income Californians.

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|---------------|---------------|---------------|
| <u>Access To Justice</u> | | | |
| General Fund | 52 | 52 | 52 |
| Grants Fund | 0 | 0 | 0 |
| Total Access To Justice | 52 | 52 | 52 |
| <u>Program Development</u> | | | |
| General Fund | 1,330 | 1,441 | 1,554 |
| Total Program Development | 1,330 | 1,441 | 1,554 |
| <u>Legal Services Funding</u> | | | |
| Justice Gap Fund | 0 | 0 | 0 |
| Legal Services Trust Fund | 26,355 | 26,330 | 26,333 |
| Total Legal Services Funding | 26,355 | 26,330 | 26,333 |
| TOTAL | 27,738 | 27,823 | 27,939 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|---------------|---------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 20.0 | 20.0 | 20.0 | 2,393 | 2,578 | 2,795 |
| Supplemental Staffing | | | | 58 | 58 | 58 |
| Travel & Training | | | | 91 | 91 | 91 |
| Supplies and Postage | | | | 32 | 32 | 32 |
| Professional Services | | | | 234 | 234 | 234 |
| Occupancy | | | | 0 | 0 | 0 |
| Telecommunications | | | | 23 | 23 | 23 |
| Other Outside Services | | | | 11 | 11 | 11 |
| Legal Services Grants | | | | 24,807 | 24,707 | 24,607 |
| Computers & Software | | | | 75 | 75 | 75 |
| Buildings & Equipment | | | | 7 | 7 | 7 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 8 | 8 | 8 |
| Indirect Costs | | | | 0 | 0 | 0 |
| TOTAL | 20.0 | 20.0 | 20.0 | 27,738 | 27,823 | 27,939 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Diversity & Bar Relations

Diversity & Bar Relations encompasses programs aimed at eliminating bias in the legal system as well as the State Bar's relationships with voluntary bar associations and related groups. Programs in this area are financed with non-mandatory dues revenues.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---------------------------------|------------|------------|------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Elimination of Bias | 2.0 | 2.0 | 2.0 | 400 | 414 | 437 |
| Bar Relations | 2.0 | 2.0 | 2.0 | 247 | 263 | 281 |
| TOTAL (All Programs) | 4.0 | 4.0 | 4.0 | 647 | 677 | 718 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| Admin of Justice Fund | | | | 647 | 677 | 718 |
| Grants Fund | | | | 0 | 0 | 0 |
| TOTAL (All Funds) | | | | 647 | 677 | 718 |

LEGAL CITATIONS & AUTHORITY

(n/a)

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Elimination of Bias

This Service Area focuses on local and statewide programs and initiatives to diversify the legal profession and to eliminate bias in the practice of law. The activity in this area is funded solely through voluntary contributions to the State Bar. Services are provided by the Center for Access & Fairness and the Council on Access & Fairness. The Center staff supports and promotes local and statewide programs and projects to increase diversity and eliminate bias in the legal profession. Staff also compiles and disseminates demographic information and other materials to inform and facilitate diversity efforts by the State Bar and other organizations.

Bar Relations

This Service Area focuses on supporting the work of the 240 local, minority and specialty voluntary bar associations in California and providing support to the California Young Lawyers Association Board and members. Activity in conjunction with voluntary bar associations is funded solely through voluntary contributions to the State Bar.

* Budget, \$ thousands

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>Elimination of Bias</u> | | | |
| Admin of Justice Fund | 400 | 414 | 437 |
| Grants Fund | 0 | 0 | 0 |
| Total Elimination of Bias | 400 | 414 | 437 |
| <u>Bar Relations</u> | | | |
| Admin of Justice Fund | 247 | 263 | 281 |
| Grants Fund | 0 | 0 | 0 |
| Total Bar Relations | 247 | 263 | 281 |
| TOTAL | 647 | 677 | 718 |

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 4.0 | 4.0 | 4.0 | 476 | 507 | 551 |
| Supplemental Staffing | | | | 0 | 0 | 0 |
| Travel & Training | | | | 98 | 98 | 100 |
| Supplies and Postage | | | | 15 | 15 | 15 |
| Professional Services | | | | 32 | 32 | 32 |
| Occupancy | | | | 3 | 3 | 2 |
| Telecommunications | | | | 7 | 7 | 6 |
| Other Outside Services | | | | 14 | 14 | 10 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 0 | 0 | 0 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 0 | 0 | 0 |
| TOTAL | 4.0 | 4.0 | 4.0 | 647 | 677 | 718 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Lawyer Assistance Program

The Lawyer Assistance Program (LAP) seeks to rehabilitate attorneys with impairment due to abuse of drugs or alcohol, or due to mental illness, affecting competency so that attorneys so afflicted may be treated and returned to the practice of law in a manner that will not endanger the public health and safety.

| | Positions | | | Expenditures | | |
|--|------------|------------|------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| SUMMARY OF PROGRAM REQUIREMENTS | | | | | | |
| Lawyer Assistance Program | 9.0 | 9.0 | 9.0 | 1,353 | 1,438 | 1,553 |
| TOTAL (All Programs) | 9.0 | 9.0 | 9.0 | 1,353 | 1,438 | 1,553 |
| FUNDING | | | | | | |
| Lawyer Asst Program Fund | | | | 1,353 | 1,438 | 1,553 |
| TOTAL (All Funds) | | | | 1,353 | 1,438 | 1,553 |

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Sections 6230 - 6232

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Lawyer Assistance Program

The Lawyer Assistance Program (LAP) seeks to rehabilitate attorneys with impairment due to abuse of drugs or alcohol, or due to mental illness, affecting competency so that attorneys so afflicted may be treated and returned to the practice of law in a manner that will not endanger the public health and safety.

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>Lawyer Assistance Program</u> | | | |
| Lawyer Asst Program Fund | 1,353 | 1,438 | 1,553 |
| Total Lawyer Assistance Program | 1,353 | 1,438 | 1,553 |
| TOTAL | 1,353 | 1,438 | 1,553 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 9.0 | 9.0 | 9.0 | 1,004 | 1,088 | 1,204 |
| Supplemental Staffing | | | | 21 | 21 | 21 |
| Travel & Training | | | | 85 | 85 | 85 |
| Supplies and Postage | | | | 16 | 16 | 16 |
| Professional Services | | | | 188 | 188 | 188 |
| Occupancy | | | | 1 | 1 | 1 |
| Telecommunications | | | | 26 | 26 | 26 |
| Other Outside Services | | | | 10 | 10 | 10 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 1 | 1 | 1 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 1 | 1 | 1 |
| TOTAL | 9.0 | 9.0 | 9.0 | 1,353 | 1,438 | 1,553 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Executive Director

The Office of the Executive Director is responsible for the overall direction and administration of the day-to-day operations of the State Bar, as well as for legislative activities on behalf of the Bar.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|------------------------------------|-------------|-------------|-------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Management, Oversight and Planning | 7.0 | 7.0 | 7.0 | 1,518 | 1,510 | 1,602 |
| Board Support - Secretariat | 2.0 | 2.0 | 2.0 | 524 | 537 | 556 |
| Judicial Evaluations | 4.0 | 4.0 | 4.0 | 665 | 695 | 736 |
| Governmental Affairs | 3.0 | 3.0 | 3.0 | 496 | 530 | 573 |
| Cost Recovery | 0.0 | 0.0 | 0.0 | 0 | 0 | 0 |
| TOTAL (All Programs) | 16.0 | 16.0 | 16.0 | 3,204 | 3,272 | 3,467 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 2,451 | 2,474 | 2,610 |
| Admin of Justice Fund | | | | 521 | 556 | 601 |
| Admissions Fund | | | | 92 | 96 | 101 |
| Client Security Fund | | | | 6 | 6 | 6 |
| Grants Fund | | | | 0 | 0 | 0 |
| Lawyer Asst Program Fund | | | | 7 | 7 | 8 |
| Legal Services Trust Fund | | | | 18 | 19 | 20 |
| Legal Specializations Fund | | | | 23 | 24 | 25 |
| Annual Meeting Fund | | | | 5 | 5 | 5 |
| Sections Funds | | | | 82 | 85 | 91 |
| TOTAL (All Funds) | | | | 3,204 | 3,272 | 3,467 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSManagement, Oversight and Planning

OED, through the Deputy Executive Director's office (DED) provides support and direction to all management within the State Bar regarding personnel administration, facilities operation and all other management related matters. In its management leadership role, OED staff leads the Senior Management Team in establishing and effectively completing operational/programmatic oversight. OED establishes Bar-wide operating policies and procedures, communicates those policies and procedures to all staff through Administrative Advisories, and follows-up on those advisories to ensure that policies and practices are being followed. OED leads the State Bar's efforts to ensure accountability for the use of resources and compliance with all mandated functions and/or requirements. OED takes the lead in working with the union to reach agreeable memoranda of understanding between the union and management. OED oversees facilities, security, and related functions. OED in collaboration with the Senior Management Team serves as the focus for problem-solving analysis and resolution Bar-wide.

Board Support - Secretariat

OED provides staff support to the Board of Governors to support its effective and efficient operation. In fulfilling the Secretariat responsibilities, OED staff sets the schedule of Board meetings, oversees production of Board agendas, travels to and attends all Board meetings, oversees production of minutes and action summaries, maintains the Board Book and all official permanent records of the State Bar, and timely processes Board member expense reports. OED staff provides expert assistance to Board members and ensures that appropriate State Bar staff timely responds to all Board member inquiries.

In addition to providing support for regular Board meetings and business, OED staff coordinates all Board appointments to commissions, committees, and special task forces, administers annual Board elections, and prepares and conducts orientations for Board candidates, Board members & Committee Chairs. OED staff ensures effective relationships are developed between Board members and State Bar staff and clearly inform board and staff about and enforce policies related to lines of authority. OED staff is responsible for ensuring that all Board directives are carried out.

Judicial Evaluations

The Commission on Judicial Nominees Evaluation (JNE), established pursuant to Government Code Section 12011.5, is the State Bar agency which evaluates all candidates who are under consideration for a judicial appointment by the Governor. The mission of the Commission is to assist the Governor in the judicial selection process and thereby to promote a California judiciary of quality and integrity by providing independent, comprehensive, accurate, and fair evaluations of candidates for judicial appointment and nomination.

Governmental Affairs

The Office of Governmental Affairs serves as the liaison between the State Bar and the Legislative and Executive Branches of Government. Using only non-mandatory, voluntarily-contributed funds, the office identifies and tracks legislative bills affecting or of interest to the State Bar; and advocates the position of the State Bar's Board of Governors on non-ideological issues of significance relating to the Bar, the ethical duties of attorneys, consumer protection relating to the practice of law by lawyers and non-lawyers, increasing access to legal services for the people of California, maintaining and improving the operation of the state's judicial/dispute resolution system, and related issues dealing with the administration of justice. The office also provides technical assistance and information to Legislators and to the Governor on issues of relevance to the practice of law, the legal profession, and consumers of legal services, and responds to inquiries from Legislative and Executive Branch staff. The office also initiates and implements education and assistance programs to increase state policy-makers' understanding of the legal profession, the practice of law and the State Bar's role in the administration of justice.

Cost Recovery

(n/a)

* Budget, \$ thousands

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>Management, Oversight and Planning</u> | | | |
| General Fund | 1,518 | 1,510 | 1,602 |
| Total Management, Oversight and Planning | 1,518 | 1,510 | 1,602 |
| <u>Board Support - Secretariat</u> | | | |
| General Fund | 524 | 537 | 556 |
| Grants Fund | 0 | 0 | 0 |
| Total Board Support - Secretariat | 524 | 537 | 556 |
| <u>Judicial Evaluations</u> | | | |
| General Fund | 665 | 695 | 736 |
| Total Judicial Evaluations | 665 | 695 | 736 |
| <u>Governmental Affairs</u> | | | |
| Admin of Justice Fund | 496 | 530 | 573 |
| Total Governmental Affairs | 496 | 530 | 573 |
| <u>Cost Recovery</u> | | | |
| General Fund | -257 | -268 | -284 |
| Admin of Justice Fund | 25 | 26 | 28 |
| Admissions Fund | 92 | 96 | 101 |
| Client Security Fund | 6 | 6 | 6 |
| Lawyer Asst Program Fund | 7 | 7 | 8 |
| Legal Services Trust Fund | 18 | 19 | 20 |
| Legal Specializations Fund | 23 | 24 | 25 |
| Annual Meeting Fund | 5 | 5 | 5 |
| Sections Funds | 82 | 85 | 91 |
| Total Cost Recovery | 0 | 0 | 0 |
| TOTAL | 3,204 | 3,272 | 3,467 |

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 16.0 | 16.0 | 16.0 | 2,244 | 2,385 | 2,580 |
| Supplemental Staffing | | | | 125 | 125 | 125 |
| Travel & Training | | | | 563 | 501 | 501 |
| Supplies and Postage | | | | 75 | 74 | 74 |
| Professional Services | | | | 313 | 313 | 313 |
| Occupancy | | | | 5 | 5 | 5 |
| Telecommunications | | | | 21 | 21 | 21 |
| Other Outside Services | | | | 45 | 35 | 35 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 5 | 5 | 5 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | -193 | -193 | -193 |
| Indirect Costs | | | | 0 | 0 | 0 |
| TOTAL | 16.0 | 16.0 | 16.0 | 3,204 | 3,272 | 3,467 |

* Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Finance

The Finance department is responsible for accounting, payroll, financial reporting and financial analysis for the State Bar.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---------------------------------|-------------|-------------|-------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Financial Planning and Analysis | 3.0 | 3.0 | 3.0 | 788 | 1,017 | 860 |
| Accounting | 5.6 | 5.6 | 5.6 | 867 | 909 | 967 |
| Procurement & Risk | 3.0 | 3.0 | 3.0 | 1,240 | 1,266 | 1,303 |
| Member Billing | 6.0 | 6.0 | 6.0 | 1,870 | 1,916 | 1,980 |
| Cost Recovery | 0.0 | 0.0 | 0.0 | 0 | 0 | 0 |
| TOTAL (All Programs) | 17.6 | 17.6 | 17.6 | 4,764 | 5,107 | 5,110 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 3,577 | 3,795 | 3,808 |
| Admin of Justice Fund | | | | 90 | 98 | 98 |
| Admissions Fund | | | | 415 | 476 | 463 |
| Client Security Fund | | | | 217 | 225 | 231 |
| Justice Gap Fund | | | | 67 | 69 | 71 |
| Lawyer Asst Program Fund | | | | 80 | 86 | 87 |
| Legal Services Trust Fund | | | | 38 | 44 | 42 |
| Legal Specializations Fund | | | | 24 | 27 | 26 |
| Annual Meeting Fund | | | | 22 | 25 | 25 |
| Sections Funds | | | | 235 | 263 | 259 |
| TOTAL (All Funds) | | | | 4,764 | 5,107 | 5,110 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSFinancial Planning and Analysis

This service area is responsible for the Bar's financial planning and analysis. It also works closely with the Bar's outside auditors and the California Bureau of State Audits to ensure the implementation of sound financial controls and public accountability.

Accounting

This service area is responsible for making accurate and timely payments to the State Bar's employees (payroll) and outside vendors (accounts payable), and for implementing related procedures and internal controls.

Procurement & Risk

A key area of Office of Finance service is organizational support of its contracting for the purchase of goods and service agreements to ensure effective and appropriate use of State Bar resources.

Providing procurement services encompasses a wide range of activities including: developing and implementing general procurement policies and procedures; developing equipment and service standards for acquisition, purchasing specific products and services; documenting deviations from standard procedures; maintaining and developing standardized forms and contract templates; and management of Bar-wide master purchasing agreements with vendors.

Member Billing

Member Billing is responsible for ensuring attorneys are billed appropriately for annual fees and other costs. The primary task for the Member Billing Staff is the collection and recording of the annual membership fees. In addition to the primary task, staff responds to member's billing inquiries, calculates and tracks discipline and CSF cost assessments, assists in the annual suspension process, and reinstates members previously suspended for failure to pay annual fees upon payment of delinquent costs.

Cost Recovery

(n/a)

* Budget, \$ thousands

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>Financial Planning and Analysis</u> | | | |
| General Fund | 788 | 1,017 | 860 |
| Total Financial Planning and Analysis | 788 | 1,017 | 860 |
| <u>Accounting</u> | | | |
| General Fund | 867 | 909 | 967 |
| Total Accounting | 867 | 909 | 967 |
| <u>Procurement & Risk</u> | | | |
| General Fund | 1,240 | 1,266 | 1,303 |
| Total Procurement & Risk | 1,240 | 1,266 | 1,303 |
| <u>Member Billing</u> | | | |
| General Fund | 1,870 | 1,916 | 1,980 |
| Total Member Billing | 1,870 | 1,916 | 1,980 |
| <u>Cost Recovery</u> | | | |
| General Fund | -1,187 | -1,313 | -1,303 |
| Admin of Justice Fund | 90 | 98 | 98 |
| Admissions Fund | 415 | 476 | 463 |
| Client Security Fund | 217 | 225 | 231 |
| Justice Gap Fund | 67 | 69 | 71 |
| Lawyer Asst Program Fund | 80 | 86 | 87 |
| Legal Services Trust Fund | 38 | 44 | 42 |
| Legal Specializations Fund | 24 | 27 | 26 |
| Annual Meeting Fund | 22 | 25 | 25 |
| Sections Funds | 235 | 263 | 259 |
| Total Cost Recovery | 0 | 0 | 0 |
| TOTAL | 4,764 | 5,107 | 5,110 |

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 17.6 | 17.6 | 17.6 | 2,005 | 2,148 | 2,351 |
| Supplemental Staffing | | | | 332 | 332 | 332 |
| Travel & Training | | | | 38 | 38 | 38 |
| Supplies and Postage | | | | 153 | 153 | 153 |
| Professional Services | | | | 262 | 462 | 262 |
| Occupancy | | | | 770 | 770 | 770 |
| Telecommunications | | | | 27 | 27 | 27 |
| Other Outside Services | | | | 1,171 | 1,171 | 1,171 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 4 | 4 | 4 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 2 | 2 | 2 |
| Indirect Costs | | | | 0 | 0 | 0 |
| TOTAL | 17.6 | 17.6 | 17.6 | 4,764 | 5,107 | 5,110 |

* Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

Budget & Performance Analysis

The Office of Budget & Performance Analysis develops and monitors the budget for the State Bar, assists in the development and implementation of the bar's Five-Year Strategic Plan, and develops systems and processes to measure and improve the performance of the organization.

| | Positions | | | Expenditures | | |
|--|------------|------------|------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| SUMMARY OF PROGRAM REQUIREMENTS | | | | | | |
| Budget & Performance | 3.0 | 3.0 | 3.0 | 864 | 909 | 963 |
| Cost Recovery | 0.0 | 0.0 | 0.0 | 0 | 0 | 0 |
| TOTAL (All Programs) | 3.0 | 3.0 | 3.0 | 864 | 909 | 963 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 529 | 556 | 589 |
| Admin of Justice Fund | | | | 20 | 21 | 22 |
| Admissions Fund | | | | 177 | 186 | 197 |
| Client Security Fund | | | | 10 | 10 | 11 |
| Lawyer Asst Program Fund | | | | 12 | 13 | 14 |
| Legal Services Trust Fund | | | | 16 | 17 | 18 |
| Legal Specializations Fund | | | | 10 | 11 | 11 |
| Annual Meeting Fund | | | | 9 | 10 | 11 |
| Sections Funds | | | | 81 | 85 | 90 |
| TOTAL (All Funds) | | | | 864 | 909 | 963 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Budget & Performance

The Office of Budget & Performance Analysis develops and monitors the budget for the State Bar, assists in the development and implementation of the bar's Five-Year Strategic Plan, and develops systems and processes to measure and improve the performance of the organization.

Cost Recovery

(n/a)

* Budget, \$ thousands

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>Budget & Performance</u> | | | |
| General Fund | 864 | 909 | 963 |
| Total Budget & Performance | 864 | 909 | 963 |
| <u>Cost Recovery</u> | | | |
| General Fund | -335 | -353 | -374 |
| Admin of Justice Fund | 20 | 21 | 22 |
| Admissions Fund | 177 | 186 | 197 |
| Client Security Fund | 10 | 10 | 11 |
| Lawyer Asst Program Fund | 12 | 13 | 14 |
| Legal Services Trust Fund | 16 | 17 | 18 |
| Legal Specializations Fund | 10 | 11 | 11 |
| Annual Meeting Fund | 9 | 10 | 11 |
| Sections Funds | 81 | 85 | 90 |
| Total Cost Recovery | 0 | 0 | 0 |
| TOTAL | 864 | 909 | 963 |

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 3.0 | 3.0 | 3.0 | 518 | 563 | 617 |
| Travel & Training | | | | 26 | 26 | 26 |
| Supplies and Postage | | | | 3 | 3 | 3 |
| Professional Services | | | | 315 | 315 | 315 |
| Telecommunications | | | | 0 | 0 | 0 |
| Other Outside Services | | | | 2 | 2 | 2 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 0 | 0 | 0 |
| Indirect Costs | | | | 0 | 0 | 0 |
| TOTAL | 3.0 | 3.0 | 3.0 | 864 | 909 | 963 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

General Counsel

The General Counsel functions as the State Bar's lawyer, and the OGC is responsible for providing legal advice and counsel to all departments of the Bar. In addition to its general legal duties, OGC also provides such services in specialty areas such as insurance/group insurance, real property, Lawyer Assistance Program, Admissions, Lawyer Referral Services, membership, and discipline.

| | Positions | | | Expenditures | | |
|--|-------------|-------------|-------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| SUMMARY OF PROGRAM REQUIREMENTS | | | | | | |
| General Counsel | 23.0 | 24.0 | 24.0 | 4,278 | 4,612 | 4,936 |
| Law Library & Archives | 2.0 | 2.0 | 2.0 | 494 | 511 | 533 |
| Cost Recovery | 0.0 | 0.0 | 0.0 | 0 | 0 | 0 |
| TOTAL (All Programs) | 25.0 | 26.0 | 26.0 | 4,773 | 5,123 | 5,469 |
| FUNDING | | | | | | |
| General Fund | | | | 3,749 | 4,041 | 4,313 |
| Admin of Justice Fund | | | | 59 | 62 | 67 |
| Admissions Fund | | | | 507 | 536 | 574 |
| Client Security Fund | | | | 84 | 89 | 95 |
| Lawyer Asst Program Fund | | | | 71 | 75 | 81 |
| Legal Services Trust Fund | | | | 87 | 92 | 99 |
| Legal Specializations Fund | | | | 63 | 67 | 72 |
| Annual Meeting Fund | | | | 23 | 24 | 26 |
| Sections Funds | | | | 128 | 135 | 145 |
| TOTAL (All Funds) | | | | 4,773 | 5,123 | 5,469 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSGeneral Counsel

OGC provides contract, litigation and legal opinion services for a wide range of matters for the State Bar. In addition to its general legal duties, OGC also provides such services in specialty areas such as insurance/group insurance, real property, Lawyer Assistance Program, Admissions, Lawyer Referral Services, membership, and discipline.

Law Library & Archives

This unit maintains the State Bar's law library, including hardcopy and electronic materials; provides legal research assistance to the Bar's attorney staff; and provides institutional archive services to maintain the Bar's historical records.

Cost Recovery

(n/a)

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>General Counsel</u> | | | |
| General Fund | 4,278 | 4,612 | 4,936 |
| Total General Counsel | 4,278 | 4,612 | 4,936 |
| <u>Law Library & Archives</u> | | | |
| General Fund | 494 | 511 | 533 |
| Total Law Library & Archives | 494 | 511 | 533 |
| <u>Cost Recovery</u> | | | |
| General Fund | -1,023 | -1,081 | -1,156 |
| Admin of Justice Fund | 59 | 62 | 67 |
| Admissions Fund | 507 | 536 | 574 |
| Client Security Fund | 84 | 89 | 95 |
| Lawyer Asst Program Fund | 71 | 75 | 81 |
| Legal Services Trust Fund | 87 | 92 | 99 |
| Legal Specializations Fund | 63 | 67 | 72 |
| Annual Meeting Fund | 23 | 24 | 26 |
| Sections Funds | 128 | 135 | 145 |
| Total Cost Recovery | 0 | 0 | 0 |
| TOTAL | 4,773 | 5,123 | 5,469 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 25.0 | 26.0 | 26.0 | 3,304 | 3,654 | 4,000 |
| Supplemental Staffing | | | | 205 | 205 | 205 |
| Travel & Training | | | | 61 | 61 | 61 |
| Supplies and Postage | | | | 339 | 339 | 339 |
| Professional Services | | | | 776 | 776 | 776 |
| Telecommunications | | | | 27 | 27 | 27 |
| Other Outside Services | | | | 51 | 51 | 51 |
| Computers & Software | | | | 3 | 3 | 3 |
| Buildings & Equipment | | | | 1 | 1 | 1 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 5 | 5 | 5 |
| Indirect Costs | | | | 0 | 0 | 0 |
| TOTAL | 25.0 | 26.0 | 26.0 | 4,773 | 5,123 | 5,469 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Human Resources

The Human Resources department is responsible for policies governing the compensation of Bar employees, for negotiation with the Bar's collective bargaining units, and for advising Bar staff with regard to personnel matters.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---------------------------------|-------------|-------------|-------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| HR Administration | 0.0 | 0.0 | 0.0 | 3 | 3 | 3 |
| Compensation Administration | 1.0 | 1.0 | 1.0 | 173 | 180 | 191 |
| Recruiting and Development | 2.0 | 2.0 | 2.0 | 466 | 488 | 518 |
| Employee Relations | 1.0 | 1.0 | 1.0 | 574 | 589 | 610 |
| Records and Information Systems | 6.0 | 6.0 | 6.0 | 442 | 482 | 537 |
| Cost Recovery | 0.0 | 0.0 | 0.0 | 0 | 0 | 0 |
| TOTAL (All Programs) | 10.0 | 10.0 | 10.0 | 1,657 | 1,743 | 1,860 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 1,211 | 1,274 | 1,359 |
| Admin of Justice Fund | | | | 23 | 25 | 26 |
| Admissions Fund | | | | 226 | 237 | 253 |
| Client Security Fund | | | | 32 | 33 | 36 |
| Lawyer Asst Program Fund | | | | 32 | 33 | 36 |
| Legal Services Trust Fund | | | | 39 | 41 | 44 |
| Legal Specializations Fund | | | | 28 | 30 | 32 |
| Annual Meeting Fund | | | | 10 | 11 | 11 |
| Sections Funds | | | | 57 | 60 | 64 |
| TOTAL (All Funds) | | | | 1,657 | 1,743 | 1,860 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

HR Administration

This service area provides overall management and administrative support for the Office of Human Resources.

Compensation Administration

The Office of Human Resources plays the leading role in developing, benchmarking and administering the Bar's employee compensation structure, including its salary schedules, benefit offerings and retirement alternatives. This service area also includes day-to-day operations of the Bar's payroll and benefit programs.

Recruiting and Development

This service area encompasses recruiting new staff, institutional training, and administering the Bar's system of performance reviews for current employees. This service area also handles employee separations.

Employee Relations

Employee relations encompasses activities ranging from health and wellness promotion to collective bargaining. It includes workplace safety efforts, contract negotiations, and management of the employee grievance process.

Records and Information Systems

This service area is responsible for maintaining required employment records, processing security clearances, and operating the Bar's Human Resources Information System (HRIS).

Cost Recovery

(n/a)

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>HR Administration</u> | | | |
| General Fund | 3 | 3 | 3 |
| Total HR Administration | 3 | 3 | 3 |
| <u>Compensation Administration</u> | | | |
| General Fund | 173 | 180 | 191 |
| Total Compensation Administration | 173 | 180 | 191 |
| <u>Recruiting and Development</u> | | | |
| General Fund | 466 | 488 | 518 |
| Total Recruiting and Development | 466 | 488 | 518 |
| <u>Employee Relations</u> | | | |
| General Fund | 574 | 589 | 610 |
| Total Employee Relations | 574 | 589 | 610 |
| <u>Records and Information Systems</u> | | | |
| General Fund | 442 | 482 | 537 |
| Total Records and Information Systems | 442 | 482 | 537 |
| <u>Cost Recovery</u> | | | |
| General Fund | -446 | -470 | -501 |
| Admin of Justice Fund | 23 | 25 | 26 |
| Admissions Fund | 226 | 237 | 253 |
| Client Security Fund | 32 | 33 | 36 |
| Lawyer Asst Program Fund | 32 | 33 | 36 |
| Legal Services Trust Fund | 39 | 41 | 44 |
| Legal Specializations Fund | 28 | 30 | 32 |
| Annual Meeting Fund | 10 | 11 | 11 |
| Sections Funds | 57 | 60 | 64 |
| Total Cost Recovery | 0 | 0 | 0 |
| TOTAL | 1,657 | 1,743 | 1,860 |

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 10.0 | 10.0 | 10.0 | 985 | 1,072 | 1,188 |
| Supplemental Staffing | | | | 33 | 33 | 33 |
| Travel & Training | | | | 31 | 31 | 31 |
| Supplies and Postage | | | | 14 | 14 | 14 |
| Professional Services | | | | 154 | 154 | 154 |
| Telecommunications | | | | 14 | 14 | 14 |
| Other Outside Services | | | | 37 | 37 | 37 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 1 | 1 | 1 |
| Retiree Medical Funding | | | | 387 | 387 | 387 |
| Other Expenditures | | | | 0 | 0 | 0 |
| Indirect Costs | | | | 0 | 0 | 0 |
| TOTAL | 10.0 | 10.0 | 10.0 | 1,657 | 1,743 | 1,860 |

* Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

Information Technology

The Information Technology department is responsible for the Bar's IT infrastructure (including PC's, networks, servers, and mini-computers), for custom software development, for maintenance and administration of the Bar's existing software, and for the Bar's public-facing internet presence.

| | Positions | | | Expenditures | | |
|--|-------------|-------------|-------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| SUMMARY OF PROGRAM REQUIREMENTS | | | | | | |
| IT Admin | 29.0 | 29.0 | 29.0 | 372 | 400 | 438 |
| IT Operations | 0.0 | 0.0 | 0.0 | 2,873 | 2,998 | 3,159 |
| IT Applications | 0.0 | 0.0 | 0.0 | 2,318 | 2,568 | 2,775 |
| IT Project Mgt | 0.0 | 0.0 | 0.0 | 214 | 229 | 250 |
| Cost Recovery | 0.0 | 0.0 | 0.0 | 0 | 0 | 0 |
| TOTAL (All Programs) | 29.0 | 29.0 | 29.0 | 5,777 | 6,195 | 6,622 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 4,220 | 4,526 | 4,838 |
| Admin of Justice Fund | | | | 82 | 88 | 94 |
| Admissions Fund | | | | 786 | 843 | 901 |
| Client Security Fund | | | | 111 | 119 | 127 |
| Lawyer Asst Program Fund | | | | 111 | 119 | 127 |
| Legal Services Trust Fund | | | | 135 | 145 | 155 |
| Legal Specializations Fund | | | | 98 | 105 | 113 |
| Annual Meeting Fund | | | | 35 | 38 | 40 |
| Sections Funds | | | | 198 | 213 | 227 |
| TOTAL (All Funds) | | | | 5,777 | 6,195 | 6,622 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSIT Admin

Overall direction and long-term planning for the State Bar's information technology.

IT Operations

Personnel, licensing, and other operating costs pertaining to the operations and maintenance of the State Bar's IT infrastructure, including servers, networking equipment, desktop equipment, and systems software.

IT Applications

Personnel and other costs relating to the ongoing administration maintenance of the State Bar's IT applications, including the financial system, the admissions system, and case management systems in the State Bar Court and the Office of Chief Trial Counsel. Also includes numerous smaller system supporting a variety of State Bar activities.

IT Project Mgt

Personnel and other cost related to the management of major and medium-scale IT projects.

Cost Recovery

(n/a)

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>IT Admin</u> | | | |
| General Fund | 372 | 400 | 438 |
| Total IT Admin | 372 | 400 | 438 |
| <u>IT Operations</u> | | | |
| General Fund | 2,873 | 2,998 | 3,159 |
| Total IT Operations | 2,873 | 2,998 | 3,159 |
| <u>IT Applications</u> | | | |
| General Fund | 2,318 | 2,568 | 2,775 |
| Total IT Applications | 2,318 | 2,568 | 2,775 |
| <u>IT Project Mgt</u> | | | |
| General Fund | 214 | 229 | 250 |
| Total IT Project Mgt | 214 | 229 | 250 |
| <u>Cost Recovery</u> | | | |
| General Fund | -1,556 | -1,669 | -1,784 |
| Admin of Justice Fund | 82 | 88 | 94 |
| Admissions Fund | 786 | 843 | 901 |
| Client Security Fund | 111 | 119 | 127 |
| Lawyer Asst Program Fund | 111 | 119 | 127 |
| Legal Services Trust Fund | 135 | 145 | 155 |
| Legal Specializations Fund | 98 | 105 | 113 |
| Annual Meeting Fund | 35 | 38 | 40 |
| Sections Funds | 198 | 213 | 227 |
| Total Cost Recovery | 0 | 0 | 0 |
| TOTAL | 5,777 | 6,195 | 6,622 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 29.0 | 29.0 | 29.0 | 3,985 | 4,284 | 4,681 |
| Supplemental Staffing | | | | 50 | 50 | 50 |
| Travel & Training | | | | 91 | 91 | 91 |
| Supplies and Postage | | | | 10 | 10 | 10 |
| Professional Services | | | | 260 | 260 | 260 |
| Occupancy | | | | 148 | 148 | 148 |
| Telecommunications | | | | 180 | 180 | 180 |
| Other Outside Services | | | | 0 | 0 | 0 |
| Computers & Software | | | | 1,054 | 1,174 | 1,204 |
| Buildings & Equipment | | | | 0 | 0 | 0 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | 0 | 0 | 0 |
| Indirect Costs | | | | 0 | 0 | 0 |
| TOTAL | 29.0 | 29.0 | 29.0 | 5,777 | 6,195 | 6,622 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Communications

Media & Information Services is primarily responsible for communications between the Bar and both its members and the general public. MIS produces the California Bar Journal, a major channel of communication with the membership. In addition, MIS is responsible for public outreach, press relations, and the content of the Bar's website.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---------------------------------|------------|------------|------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Media Relations | 7.6 | 7.6 | 7.6 | 1,358 | 1,344 | 1,433 |
| California Bar Journal | 1.0 | 1.0 | 1.0 | 286 | 301 | 319 |
| Public Education | 0.0 | 0.0 | 0.0 | 0 | 0 | 0 |
| Cost Recovery | 0.0 | 0.0 | 0.0 | 0 | 0 | 0 |
| TOTAL (All Programs) | 8.6 | 8.6 | 8.6 | 1,644 | 1,644 | 1,752 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 1,512 | 1,514 | 1,613 |
| Admin of Justice Fund | | | | 8 | 8 | 8 |
| Admissions Fund | | | | 70 | 69 | 73 |
| Client Security Fund | | | | 4 | 4 | 4 |
| Grants Fund | | | | 0 | 0 | 0 |
| Lawyer Asst Program Fund | | | | 5 | 5 | 5 |
| Legal Services Trust Fund | | | | 6 | 6 | 7 |
| Legal Specializations Fund | | | | 4 | 4 | 4 |
| Annual Meeting Fund | | | | 4 | 4 | 4 |
| Sections Funds | | | | 32 | 31 | 33 |
| TOTAL (All Funds) | | | | 1,644 | 1,644 | 1,752 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6092.5 subd. (h)

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSMedia Relations

Media Relations is the State Bar's principal day-to-day liaison with the news media. Media Relations staff are responsible for fielding inbound inquiries from the press and electronic media and for actively communicating the Bar's message via press releases and other means. Media Relations also provides support and training for other Bar staff who may have contact with the press.

California Bar Journal

Prepared and distributed monthly, the California Bar Journal is a primary communication tool between the State Bar and its members. Staff researches and writes stories, compiles monthly discipline summaries, solicits articles from outside authors, hires and oversees freelance writers, edits/rewrites submissions, identifies opportunities for and takes or obtains photographs relevant to stories, completes design and layout of stories and advertising, and solicits MCLE self-study tests. Staff in this area also obtains advertisers, oversees advertising and other contracts, and collects advertising and other revenue.

Public Education

Staff in this service area participates in the development of consumer education pamphlets, brochures and guides. These public education materials are initially researched and written by staff whose work is then reviewed by volunteer attorneys for completeness and accuracy. Staff designs, lays out, edits, and oversees the translation of the final materials in multiple languages. In addition, staff also organizes and attends public education forums throughout the state and helps to market those forums to encourage attorney participation and public attendance.

Cost Recovery

(n/a)

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>Media Relations</u> | | | |
| General Fund | 1,358 | 1,344 | 1,433 |
| Total Media Relations | 1,358 | 1,344 | 1,433 |
| <u>California Bar Journal</u> | | | |
| General Fund | 286 | 301 | 319 |
| Total California Bar Journal | 286 | 301 | 319 |
| <u>Public Education</u> | | | |
| Grants Fund | 0 | 0 | 0 |
| Total Public Education | 0 | 0 | 0 |
| <u>Cost Recovery</u> | | | |
| General Fund | -132 | -130 | -139 |
| Admin of Justice Fund | 8 | 8 | 8 |
| Admissions Fund | 70 | 69 | 73 |
| Client Security Fund | 4 | 4 | 4 |
| Lawyer Asst Program Fund | 5 | 5 | 5 |
| Legal Services Trust Fund | 6 | 6 | 7 |
| Legal Specializations Fund | 4 | 4 | 4 |
| Annual Meeting Fund | 4 | 4 | 4 |
| Sections Funds | 32 | 31 | 33 |
| Total Cost Recovery | 0 | 0 | 0 |
| TOTAL | 1,644 | 1,644 | 1,752 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 8.6 | 8.6 | 8.6 | 1,218 | 1,293 | 1,401 |
| Supplemental Staffing | | | | 4 | 4 | 4 |
| Travel & Training | | | | 12 | 12 | 12 |
| Supplies and Postage | | | | 23 | 23 | 23 |
| Professional Services | | | | 219 | 219 | 219 |
| Telecommunications | | | | 6 | 6 | 6 |
| Other Outside Services | | | | 175 | 101 | 101 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 0 | 0 | 0 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | -13 | -13 | -13 |
| Indirect Costs | | | | 0 | 0 | 0 |
| TOTAL | 8.6 | 8.6 | 8.6 | 1,644 | 1,644 | 1,752 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

General Services

The Office of Operations provides a comprehensive range of administrative and facilities services that support the work of all State Bar departments.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---------------------------------|-------------|-------------|-------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Administrative Services | 22.0 | 22.0 | 22.0 | 2,160 | 2,283 | 2,458 |
| Facilities Management | 0.0 | 0.0 | 0.0 | 2,932 | 2,921 | 3,032 |
| Cost Recovery | 0.0 | 0.0 | 0.0 | 0 | 0 | 0 |
| TOTAL (All Programs) | 22.0 | 22.0 | 22.0 | 5,091 | 5,204 | 5,490 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 2,408 | 2,489 | 2,697 |
| Admin of Justice Fund | | | | 90 | 91 | 94 |
| Admissions Fund | | | | 1,964 | 1,987 | 2,044 |
| Building Assessment Fund | | | | 0 | 0 | 0 |
| Lawyer Asst Program Fund | | | | 217 | 220 | 226 |
| 180 Howard Street Fund | | | | 0 | 0 | 0 |
| Sections Funds | | | | 411 | 416 | 428 |
| TOTAL (All Funds) | | | | 5,091 | 5,204 | 5,490 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Administrative Services

As the organization's administrative support arm, the Office of Operations manages mail and courier services; reception and public inquiry; document imaging and printing; fax and copier support; meeting and conference support; and travel services.

Facilities Management

The Office of Operations manages over 300,000 square feet of owned and leased office space for Bar staff and tenants. Operations maintains the Bar's facilities and safeguards its physical assets by managing engineering and janitorial services; landlord/tenant relations; space planning and use; safety and security programs; parking; and recycling programs.

Cost Recovery

(n/a)

* Budget, \$ thousands

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>Administrative Services</u> | | | |
| General Fund | 2,160 | 2,283 | 2,458 |
| Total Administrative Services | 2,160 | 2,283 | 2,458 |
| <u>Facilities Management</u> | | | |
| General Fund | 2,932 | 2,921 | 3,032 |
| Building Assessment Fund | 0 | 0 | 0 |
| 180 Howard Street Fund | 0 | 0 | 0 |
| Total Facilities Management | 2,932 | 2,921 | 3,032 |
| <u>Cost Recovery</u> | | | |
| General Fund | -2,683 | -2,716 | -2,793 |
| Admin of Justice Fund | 90 | 91 | 94 |
| Admissions Fund | 1,964 | 1,987 | 2,044 |
| Lawyer Asst Program Fund | 217 | 220 | 226 |
| Sections Funds | 411 | 416 | 428 |
| Total Cost Recovery | 0 | 0 | 0 |
| TOTAL | 5,091 | 5,204 | 5,490 |

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------------|------------------|-------------|-------------|---------------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | 22.0 | 22.0 | 22.0 | 1,943 | 2,067 | 2,241 |
| Supplemental Staffing | | | | 59 | 59 | 59 |
| Travel & Training | | | | 24 | 24 | 24 |
| Supplies and Postage | | | | 259 | 264 | 269 |
| Professional Services | | | | 271 | 282 | 293 |
| Occupancy | | | | 2,720 | 2,811 | 2,906 |
| Telecommunications | | | | 27 | 27 | 27 |
| Other Outside Services | | | | 287 | 37 | 37 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 15 | 15 | 15 |
| Retiree Medical Funding | | | | 0 | 0 | 0 |
| Other Expenditures | | | | -76 | -76 | -76 |
| Indirect Costs | | | | 0 | 0 | 0 |
| Reimbursements | | | | -437 | -305 | -305 |
| TOTAL | 22.0 | 22.0 | 22.0 | 5,091 | 5,204 | 5,490 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Technology Projects

This category includes telecommunications and IT infrastructure upgrades as well as upgrades to and replacement of software applications.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---------------------------------|------------|------------|------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Technology Projects | 0.0 | 0.0 | 0.0 | 1,509 | 2,850 | 250 |
| TOTAL (All Programs) | 0.0 | 0.0 | 0.0 | 1,509 | 2,850 | 250 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| IT Assessment Fund | | | | 0 | 0 | 0 |
| Technology Projects Fund | | | | 1,509 | 2,850 | 250 |
| TOTAL (All Funds) | | | | 1,509 | 2,850 | 250 |

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Section 6001

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Technology Projects

This category includes telecommunications and IT infrastructure upgrades as well as upgrades to and replacement of software applications.

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|----------------------------------|--------------|--------------|------------|
| <u>Technology Projects</u> | | | |
| IT Assessment Fund | 0 | 0 | 0 |
| Technology Projects Fund | 1,509 | 2,850 | 250 |
| Total Technology Projects | 1,509 | 2,850 | 250 |
| TOTAL | 1,509 | 2,850 | 250 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|--------------------------|-----------|------|------|--------------|--------------|------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Supplemental Staffing | | | | 0 | 0 | 0 |
| Travel & Training | | | | 0 | 0 | 0 |
| Supplies and Postage | | | | 0 | 0 | 0 |
| Professional Services | | | | 500 | 200 | 100 |
| Telecommunications | | | | 0 | 0 | 0 |
| Other Outside Services | | | | 0 | 0 | 0 |
| Computers & Software | | | | 1,009 | 2,650 | 150 |
| Buildings & Equipment | | | | 0 | 0 | 0 |
| TOTAL | | | | 1,509 | 2,850 | 250 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Facilities Projects

This category includes capital improvement projects at the State Bar's headquarters at 180 Howard Street in San Francisco and its offices at 845 South Figueroa in Los Angeles.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---------------------------------|------------|------------|------------|---------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Facilities Projects | 0.0 | 0.0 | 0.0 | 11,377 | 4,202 | 4,202 |
| TOTAL (All Programs) | 0.0 | 0.0 | 0.0 | 11,377 | 4,202 | 4,202 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | 4,202 | 4,202 | 4,202 |
| 180 Howard Street Fund | | | | 7,175 | 0 | 0 |
| LA Facilities Fund | | | | 0 | 0 | 0 |
| TOTAL (All Funds) | | | | 11,377 | 4,202 | 4,202 |

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Section 6001

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Facilities Projects

This category includes capital improvement projects at the State Bar's headquarters at 180 Howard Street in San Francisco and its offices at 845 South Figueroa in Los Angeles.

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|----------------------------------|---------------|--------------|--------------|
| <u>Facilities Projects</u> | | | |
| General Fund | 4,202 | 4,202 | 4,202 |
| 180 Howard Street Fund | 7,175 | 0 | 0 |
| LA Facilities Fund | 0 | 0 | 0 |
| Total Facilities Projects | 11,377 | 4,202 | 4,202 |
| TOTAL | 11,377 | 4,202 | 4,202 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------|-----------|------|------|---------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | | | | 0 | 0 | 0 |
| Travel & Training | | | | 0 | 0 | 0 |
| Supplies and Postage | | | | 0 | 0 | 0 |
| Professional Services | | | | 0 | 0 | 0 |
| Occupancy | | | | 1,900 | 1,900 | 1,900 |
| Telecommunications | | | | 0 | 0 | 0 |
| Other Outside Services | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 7,175 | 0 | 0 |
| Debt Service | | | | 2,302 | 2,302 | 2,302 |
| TOTAL | | | | 11,377 | 4,202 | 4,202 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Non-Departmental

The Non-Departmental budget accounts for a variety of line items which are not associated with specific departments, programs or Bar operations.

| SUMMARY OF PROGRAM REQUIREMENTS | Positions | | | Expenditures | | |
|---------------------------------|------------|------------|------------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Bar-Wide Accounts | 0.0 | 0.0 | 0.0 | 51 | 51 | 51 |
| Fund Level Accounts | 0.0 | 0.0 | 0.0 | 3,304 | 1,392 | 2,264 |
| TOTAL (All Programs) | 0.0 | 0.0 | 0.0 | 3,355 | 1,443 | 2,315 |
| FUNDING | | | | 2014* | 2015* | 2016* |
| General Fund | | | | -827 | -852 | -877 |
| Admin of Justice Fund | | | | 1,340 | 3,090 | 1,690 |
| Admissions Fund | | | | 135 | 135 | 135 |
| Building Assessment Fund | | | | 0 | 0 | 0 |
| Client Security Fund | | | | 19 | 19 | 19 |
| Discipline Fund | | | | 0 | 0 | 0 |
| IT Assessment Fund | | | | 3,500 | 0 | 0 |
| Justice Gap Fund | | | | 680 | 680 | 680 |
| Lawyer Asst Program Fund | | | | 19 | 19 | 19 |
| Legal Services Trust Fund | | | | 19 | 19 | 19 |
| Legal Specializations Fund | | | | 19 | 19 | 19 |
| 180 Howard Street Fund | | | | 106 | 106 | 2,586 |
| LA Facilities Fund | | | | 400 | 400 | 400 |
| Technology Projects Fund | | | | 0 | 0 | 0 |
| Annual Meeting Fund | | | | 6 | 6 | 6 |
| Sections Funds | | | | -2,063 | -2,200 | -2,383 |
| Public Protection Fund | | | | 0 | 0 | 0 |
| TOTAL (All Funds) | | | | 3,355 | 1,443 | 2,315 |

LEGAL CITATIONS & AUTHORITY

Business & Professional Code Sections 6028, 6029, 6030

* Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSBar-Wide Accounts

Bar-Wide Accounts includes a number of revenue and expenditure lines which are meaningful for the Bar as a whole, but which are not connected with specific departments, programs or operations.

Fund Level Accounts

Fund level accounts reflect charges attributed to particular State Bar funds, but not to the operations of specific departments. Major examples include indirect costs and inter-fund transfers.

| DETAILED EXPENDITURES BY PROGRAM | 2014* | 2015* | 2016* |
|---|--------------|--------------|--------------|
| <u>Bar-Wide Accounts</u> | | | |
| Admin of Justice Fund | 51 | 51 | 51 |
| Total Bar-Wide Accounts | 51 | 51 | 51 |
| <u>Fund Level Accounts</u> | | | |
| General Fund | -827 | -852 | -877 |
| Admin of Justice Fund | 1,289 | 3,039 | 1,639 |
| Admissions Fund | 135 | 135 | 135 |
| Building Assessment Fund | 0 | 0 | 0 |
| Client Security Fund | 19 | 19 | 19 |
| Discipline Fund | 0 | 0 | 0 |
| IT Assessment Fund | 3,500 | 0 | 0 |
| Justice Gap Fund | 680 | 680 | 680 |
| Lawyer Asst Program Fund | 19 | 19 | 19 |
| Legal Services Trust Fund | 19 | 19 | 19 |
| Legal Specializations Fund | 19 | 19 | 19 |
| 180 Howard Street Fund | 106 | 106 | 2,586 |
| LA Facilities Fund | 400 | 400 | 400 |
| Technology Projects Fund | 0 | 0 | 0 |
| Annual Meeting Fund | 6 | 6 | 6 |
| Sections Funds | -2,063 | -2,200 | -2,383 |
| Public Protection Fund | 0 | 0 | 0 |
| Total Fund Level Accounts | 3,304 | 1,392 | 2,264 |
| TOTAL | 3,355 | 1,443 | 2,315 |

* Budget, \$ thousands

| EXPENDITURES BY CATEGORY | Positions | | | Expenditures | | |
|---------------------------|-----------|------|------|--------------|--------------|--------------|
| | 2014 | 2015 | 2016 | 2014* | 2015* | 2016* |
| Regular Salary & Benefits | | | | -1,129 | -1,154 | -1,179 |
| Travel & Training | | | | 31 | 31 | 31 |
| Supplies and Postage | | | | 0 | 0 | 0 |
| Professional Services | | | | 0 | 0 | 0 |
| Occupancy | | | | 0 | 0 | 0 |
| Telecommunications | | | | -200 | -200 | -200 |
| Other Outside Services | | | | 100 | 100 | 100 |
| CSF Applications | | | | 0 | 0 | 0 |
| Legal Services Grants | | | | 0 | 0 | 0 |
| Computers & Software | | | | 0 | 0 | 0 |
| Buildings & Equipment | | | | 0 | 0 | 0 |
| Retiree Medical Funding | | | | 813 | 813 | 813 |
| Debt Service | | | | 0 | 0 | 0 |
| Other Expenditures | | | | -2,096 | -2,232 | -2,416 |
| Indirect Costs | | | | 0 | 0 | 0 |
| Reimbursements | | | | 0 | 0 | 0 |
| Interfund Transfers | | | | 5,836 | 4,086 | 5,166 |
| TOTAL | | | | 3,355 | 1,443 | 2,315 |

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

Not applicable: no changes in authorized positions have been made to date.

* Budget, \$ thousands

Statements of Fund Condition

| General Fund | 2014* | 2015* | 2016* |
|-------------------------------|--------|--------|--------|
| Beginning Balance | 2,600 | 2,562 | 2,504 |
| <u>Revenues</u> | | | |
| Mandatory Dues | 61,750 | 63,000 | 68,250 |
| Administrative Fees | 2,010 | 2,010 | 2,010 |
| Penalties and Late Fees | 2,530 | 2,530 | 2,530 |
| Lease Revenues | 0 | 0 | 0 |
| Other Fees and Charges | 160 | 160 | 160 |
| Grants | 0 | 0 | 0 |
| Interest Income | 40 | 40 | 40 |
| Other Revenues | 331 | 331 | 331 |
| Interfund Transfers | 500 | 2,400 | 1,100 |
| Total Revenues | 67,321 | 70,471 | 74,421 |
| <u>Expenditures</u> | | | |
| Admissions | 139 | 0 | 0 |
| Chief Trial Counsel | 29,783 | 31,326 | 33,731 |
| Probation | 897 | 953 | 1,033 |
| Mandatory Fee Arbitration | 712 | 756 | 818 |
| State Bar Court | 7,108 | 7,437 | 7,903 |
| Member Records & Compliance | 2,391 | 2,528 | 2,714 |
| Professional Competence | 1,798 | 1,890 | 2,019 |
| Education | 119 | 128 | 139 |
| Legal Services | 1,382 | 1,493 | 1,606 |
| Executive Director | 2,451 | 2,474 | 2,610 |
| Finance | 3,577 | 3,795 | 3,808 |
| Budget & Performance Analysis | 529 | 556 | 589 |
| General Counsel | 3,749 | 4,041 | 4,313 |
| Human Resources | 1,211 | 1,274 | 1,359 |
| Information Technology | 4,220 | 4,526 | 4,838 |
| Communications | 1,512 | 1,514 | 1,613 |
| General Services | 2,408 | 2,489 | 2,697 |
| Facilities Projects | 4,202 | 4,202 | 4,202 |
| Non-Departmental | -827 | -852 | -877 |
| Total Expenditures | 67,359 | 70,529 | 75,113 |
| Ending Balance | 2,562 | 2,504 | 1,811 |

* Budget, \$ thousands

| Admin of Justice Fund | 2014* | 2015* | 2016* |
|-------------------------------|--------------|--------------|--------------|
| Beginning Balance | 1,000 | 1,477 | 104 |
| <u>Revenues</u> | | | |
| Voluntary Dues & Donations | 1,540 | 1,540 | 1,540 |
| Lease Revenues | 0 | 0 | 0 |
| Insurance Commissions | 1,775 | 1,775 | 1,775 |
| Other Fees and Charges | 0 | 0 | 0 |
| Interest Income | 6 | 6 | 6 |
| Other Revenues | 120 | 120 | 120 |
| Interfund Transfers | 400 | 400 | 400 |
| Total Revenues | 3,841 | 3,841 | 3,841 |
| <u>Expenditures</u> | | | |
| Education | 484 | 498 | 516 |
| Diversity & Bar Relations | 647 | 677 | 718 |
| Executive Director | 521 | 556 | 601 |
| Finance | 90 | 98 | 98 |
| Budget & Performance Analysis | 20 | 21 | 22 |
| General Counsel | 59 | 62 | 67 |
| Human Resources | 23 | 25 | 26 |
| Information Technology | 82 | 88 | 94 |
| Communications | 8 | 8 | 8 |
| General Services | 90 | 91 | 94 |
| Non-Departmental | 1,340 | 3,090 | 1,690 |
| Total Expenditures | 3,364 | 5,214 | 3,933 |
| Ending Balance | 1,477 | 104 | 12 |

* Budget, \$ thousands

| Admissions Fund | 2014* | 2015* | 2016* |
|---------------------------------|--------------|--------------|--------------|
| Beginning Balance | 3,800 | 2,642 | 1,624 |
| <u>Revenues</u> | | | |
| Administrative Fees | 610 | 610 | 610 |
| Penalties and Late Fees | 510 | 535 | 561 |
| Student Registration Fees | 1,080 | 1,134 | 1,188 |
| Exam Fees | 13,131 | 13,787 | 14,443 |
| Moral Character Fees | 3,888 | 4,082 | 4,276 |
| Other Fees and Charges | 260 | 260 | 260 |
| Interest Income | 32 | 32 | 32 |
| Other Revenues | 0 | 0 | 0 |
| Interfund Transfers | 0 | 0 | 0 |
| Total Revenues | 19,510 | 20,440 | 21,370 |
| <u>Expenditures</u> | | | |
| Admissions | 16,295 | 16,891 | 17,648 |
| Executive Director | 92 | 96 | 101 |
| Finance | 415 | 476 | 463 |
| Budget & Performance Analysis | 177 | 186 | 197 |
| General Counsel | 507 | 536 | 574 |
| Human Resources | 226 | 237 | 253 |
| Information Technology | 786 | 843 | 901 |
| Communications | 70 | 69 | 73 |
| General Services | 1,964 | 1,987 | 2,044 |
| Non-Departmental | 135 | 135 | 135 |
| Total Expenditures | 20,668 | 21,458 | 22,391 |
| Ending Balance | 2,642 | 1,624 | 603 |
| Building Assessment Fund | | | |
| Beginning Balance | 0 | 0 | 0 |
| <u>Revenues</u> | | | |
| Mandatory Dues | 0 | 0 | 0 |
| Interest Income | 0 | 0 | 0 |
| Other Revenues | 0 | 0 | 0 |
| Total Revenues | 0 | 0 | 0 |
| <u>Expenditures</u> | | | |
| General Services | 0 | 0 | 0 |
| Non-Departmental | 0 | 0 | 0 |
| Total Expenditures | 0 | 0 | 0 |
| Ending Balance | 0 | 0 | 0 |

* Budget, \$ thousands

| Client Security Fund | 2014* | 2015* | 2016* |
|-------------------------------|--------------|--------------|--------------|
| Beginning Balance | 5,100 | 2,050 | 2,048 |
| <u>Revenues</u> | | | |
| Mandatory Dues | 7,580 | 7,730 | 7,880 |
| Interest Income | 0 | 0 | 0 |
| Other Revenues | 0 | 0 | 0 |
| Total Revenues | 7,580 | 7,730 | 7,880 |
| <u>Expenditures</u> | | | |
| Client Security Fund | 10,148 | 7,228 | 7,339 |
| Executive Director | 6 | 6 | 6 |
| Finance | 217 | 225 | 231 |
| Budget & Performance Analysis | 10 | 10 | 11 |
| General Counsel | 84 | 89 | 95 |
| Human Resources | 32 | 33 | 36 |
| Information Technology | 111 | 119 | 127 |
| Communications | 4 | 4 | 4 |
| Non-Departmental | 19 | 19 | 19 |
| Total Expenditures | 10,630 | 7,733 | 7,867 |
| Ending Balance | 2,050 | 2,048 | 2,061 |
| <hr/> | | | |
| Discipline Fund | 2014* | 2015* | 2016* |
| Beginning Balance | | | |
| <u>Revenues</u> | | | |
| Interest Income | 0 | 0 | 0 |
| Total Revenues | 0 | 0 | 0 |
| <u>Expenditures</u> | | | |
| Non-Departmental | 0 | 0 | 0 |
| Total Expenditures | 0 | 0 | 0 |
| Ending Balance | | | |

* Budget, \$ thousands

| Grants Fund | 2014* | 2015* | 2016* |
|----------------------------|--------------|--------------|--------------|
| Beginning Balance | 0 | 0 | 0 |
| <u>Revenues</u> | | | |
| Grants | 0 | 0 | 0 |
| Other Revenues | 0 | 0 | 0 |
| Total Revenues | 0 | 0 | 0 |
| <u>Expenditures</u> | | | |
| Legal Services | 0 | 0 | 0 |
| Diversity & Bar Relations | 0 | 0 | 0 |
| Executive Director | 0 | 0 | 0 |
| Communications | 0 | 0 | 0 |
| Total Expenditures | 0 | 0 | 0 |
| Ending Balance | 0 | 0 | 0 |
| IT Assessment Fund | 2014* | 2015* | 2016* |
| Beginning Balance | 3,500 | 0 | 0 |
| <u>Revenues</u> | | | |
| Mandatory Dues | 0 | 0 | 0 |
| Interest Income | 0 | 0 | 0 |
| Other Revenues | 0 | 0 | 0 |
| Interfund Transfers | 0 | 0 | 0 |
| Total Revenues | 0 | 0 | 0 |
| <u>Expenditures</u> | | | |
| Technology Projects | 0 | 0 | 0 |
| Non-Departmental | 3,500 | 0 | 0 |
| Total Expenditures | 3,500 | 0 | 0 |
| Ending Balance | 0 | 0 | 0 |
| Justice Gap Fund | 2014* | 2015* | 2016* |
| Beginning Balance | 0 | 3 | 4 |
| <u>Revenues</u> | | | |
| Voluntary Dues & Donations | 750 | 750 | 750 |
| Interest Income | 0 | 0 | 0 |
| Other Revenues | 0 | 0 | 0 |
| Total Revenues | 750 | 750 | 750 |
| <u>Expenditures</u> | | | |
| Legal Services | 0 | 0 | 0 |
| Finance | 67 | 69 | 71 |
| Non-Departmental | 680 | 680 | 680 |
| Total Expenditures | 747 | 749 | 751 |
| Ending Balance | 3 | 4 | 2 |

* Budget, \$ thousands

| Lawyer Asst Program Fund | 2014* | 2015* | 2016* |
|----------------------------------|--------------|--------------|--------------|
| Beginning Balance | 1,400 | 1,475 | 1,492 |
| <u>Revenues</u> | | | |
| Mandatory Dues | 1,983 | 2,033 | 2,058 |
| Interest Income | 0 | 0 | 0 |
| Other Revenues | 0 | 0 | 0 |
| Interfund Transfers | 0 | 0 | 0 |
| Total Revenues | 1,983 | 2,033 | 2,058 |
| <u>Expenditures</u> | | | |
| Lawyer Assistance Program | 1,353 | 1,438 | 1,553 |
| Executive Director | 7 | 7 | 8 |
| Finance | 80 | 86 | 87 |
| Budget & Performance Analysis | 12 | 13 | 14 |
| General Counsel | 71 | 75 | 81 |
| Human Resources | 32 | 33 | 36 |
| Information Technology | 111 | 119 | 127 |
| Communications | 5 | 5 | 5 |
| General Services | 217 | 220 | 226 |
| Non-Departmental | 19 | 19 | 19 |
| Total Expenditures | 1,908 | 2,016 | 2,155 |
| Ending Balance | 1,475 | 1,492 | 1,394 |
| Legal Services Trust Fund | | | |
| | 2014* | 2015* | 2016* |
| Beginning Balance | 0 | 81 | 163 |
| <u>Revenues</u> | | | |
| Voluntary Dues & Donations | 4,800 | 4,800 | 4,800 |
| Administrative Fees | 500 | 500 | 500 |
| Grants | 15,600 | 15,600 | 15,600 |
| IOLTA | 4,800 | 4,800 | 4,800 |
| Interest Income | 15 | 15 | 15 |
| Other Revenues | 0 | 0 | 0 |
| Interfund Transfers | 1,080 | 1,080 | 1,080 |
| Total Revenues | 26,795 | 26,795 | 26,795 |
| <u>Expenditures</u> | | | |
| Legal Services | 26,355 | 26,330 | 26,333 |
| Executive Director | 18 | 19 | 20 |
| Finance | 38 | 44 | 42 |
| Budget & Performance Analysis | 16 | 17 | 18 |
| General Counsel | 87 | 92 | 99 |
| Human Resources | 39 | 41 | 44 |
| Information Technology | 135 | 145 | 155 |
| Communications | 6 | 6 | 7 |
| Non-Departmental | 19 | 19 | 19 |
| Total Expenditures | 26,714 | 26,713 | 26,737 |
| Ending Balance | 81 | 163 | 221 |

* Budget, \$ thousands

| Legal Specializations Fund | 2014* | 2015* | 2016* |
|-----------------------------------|--------------|--------------|--------------|
| Beginning Balance | 1,100 | 1,520 | 1,983 |
| <u>Revenues</u> | | | |
| Administrative Fees | 1,935 | 1,935 | 1,935 |
| Penalties and Late Fees | 0 | 0 | 0 |
| Exam Fees | 77 | 452 | 77 |
| Other Fees and Charges | 11 | 11 | 11 |
| Interest Income | 7 | 7 | 7 |
| Other Revenues | 3 | 3 | 3 |
| Interfund Transfers | 106 | 106 | 2,586 |
| Total Revenues | 2,140 | 2,515 | 4,620 |
| <u>Expenditures</u> | | | |
| Admissions | 1,450 | 1,765 | 1,604 |
| Executive Director | 23 | 24 | 25 |
| Finance | 24 | 27 | 26 |
| Budget & Performance Analysis | 10 | 11 | 11 |
| General Counsel | 63 | 67 | 72 |
| Human Resources | 28 | 30 | 32 |
| Information Technology | 98 | 105 | 113 |
| Communications | 4 | 4 | 4 |
| Non-Departmental | 19 | 19 | 19 |
| Total Expenditures | 1,719 | 2,052 | 1,907 |
| Ending Balance | 1,520 | 1,983 | 4,696 |
| 180 Howard Street Fund | | | |
| Beginning Balance | 7,700 | 1,255 | 1,870 |
| <u>Revenues</u> | | | |
| Mandatory Dues | 0 | 0 | 0 |
| Penalties and Late Fees | 0 | 0 | 0 |
| Lease Revenues | 836 | 721 | 745 |
| Interest Income | 0 | 0 | 0 |
| Other Revenues | 0 | 0 | 0 |
| Interfund Transfers | 0 | 0 | 0 |
| Total Revenues | 836 | 721 | 745 |
| <u>Expenditures</u> | | | |
| General Services | 0 | 0 | 0 |
| Facilities Projects | 7,175 | 0 | 0 |
| Non-Departmental | 106 | 106 | 2,586 |
| Total Expenditures | 7,281 | 106 | 2,586 |
| Ending Balance | 1,255 | 1,870 | 29 |

* Budget, \$ thousands

| LA Facilities Fund | 2014* | 2015* | 2016* |
|---------------------------------|--------------|--------------|--------------|
| Beginning Balance | 0 | 0 | 0 |
| <u>Revenues</u> | | | |
| Lease Revenues | 400 | 400 | 400 |
| Interest Income | 0 | 0 | 0 |
| Other Revenues | 0 | 0 | 0 |
| Interfund Transfers | 0 | 0 | 0 |
| Total Revenues | 400 | 400 | 400 |
| <u>Expenditures</u> | | | |
| Facilities Projects | 0 | 0 | 0 |
| Non-Departmental | 400 | 400 | 400 |
| Total Expenditures | 400 | 400 | 400 |
| Ending Balance | 0 | 0 | 0 |
| <hr/> | | | |
| Technology Projects Fund | 2014* | 2015* | 2016* |
| Beginning Balance | 1,200 | 3,191 | 341 |
| <u>Revenues</u> | | | |
| Interest Income | 0 | 0 | 0 |
| Other Revenues | 0 | 0 | 0 |
| Interfund Transfers | 3,500 | 0 | 0 |
| Total Revenues | 3,500 | 0 | 0 |
| <u>Expenditures</u> | | | |
| Technology Projects | 1,509 | 2,850 | 250 |
| Non-Departmental | 0 | 0 | 0 |
| Total Expenditures | 1,509 | 2,850 | 250 |
| Ending Balance | 3,191 | 341 | 91 |

* Budget, \$ thousands

| Annual Meeting Fund | 2014* | 2015* | 2016* |
|-------------------------------|--------------|--------------|--------------|
| Beginning Balance | 0 | 1 | -182 |
| <u>Revenues</u> | | | |
| Other Fees and Charges | 482 | 482 | 482 |
| Interest Income | 1 | 1 | 1 |
| Other Revenues | 303 | 303 | 303 |
| Interfund Transfers | 250 | 100 | 0 |
| Total Revenues | 1,036 | 886 | 786 |
| <u>Expenditures</u> | | | |
| Education | 922 | 947 | 981 |
| Executive Director | 5 | 5 | 5 |
| Finance | 22 | 25 | 25 |
| Budget & Performance Analysis | 9 | 10 | 11 |
| General Counsel | 23 | 24 | 26 |
| Human Resources | 10 | 11 | 11 |
| Information Technology | 35 | 38 | 40 |
| Communications | 4 | 4 | 4 |
| Non-Departmental | 6 | 6 | 6 |
| Total Expenditures | 1,035 | 1,069 | 1,109 |
| Ending Balance | 1 | -182 | -505 |
| <hr/> | | | |
| Sections Funds | 2014* | 2015* | 2016* |
| Beginning Balance | 6,800 | 6,098 | 5,193 |
| <u>Revenues</u> | | | |
| Sections Member Dues | 4,876 | 4,876 | 4,876 |
| Grants | 5 | 5 | 5 |
| Interest Income | 24 | 24 | 24 |
| Other Revenues | 2,566 | 2,566 | 2,566 |
| Total Revenues | 7,471 | 7,471 | 7,471 |
| <u>Expenditures</u> | | | |
| Education | 9,012 | 9,286 | 9,652 |
| Executive Director | 82 | 85 | 91 |
| Finance | 235 | 263 | 259 |
| Budget & Performance Analysis | 81 | 85 | 90 |
| General Counsel | 128 | 135 | 145 |
| Human Resources | 57 | 60 | 64 |
| Information Technology | 198 | 213 | 227 |
| Communications | 32 | 31 | 33 |
| General Services | 411 | 416 | 428 |
| Non-Departmental | -2,063 | -2,200 | -2,383 |
| Total Expenditures | 8,172 | 8,375 | 8,607 |
| Ending Balance | 6,098 | 5,193 | 4,057 |

* Budget, \$ thousands

| Public Protection Fund | 2014* | 2015* | 2016* |
|-------------------------------|--------------|--------------|--------------|
| Beginning Balance | 1,900 | 1,900 | 1,900 |
| <u>Revenues</u> | | | |
| Interest Income | 0 | 0 | 0 |
| Total Revenues | 0 | 0 | 0 |
| <u>Expenditures</u> | | | |
| Non-Departmental | 0 | 0 | 0 |
| Total Expenditures | 0 | 0 | 0 |
| Ending Balance | 1,900 | 1,900 | 1,900 |

* Budget, \$ thousands

Wages & Salary Supplement

| | Budgeted FTE | | | Expenditures | | |
|----------------------------------|--------------|-------|-------|-----------------|-------------|-------------|
| | 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |
| Admissions | | | | | | |
| <u>Admissions Administration</u> | | | | | | |
| Senior Director Admissions | 1.00 | 1.00 | 1.00 | 11,360 - 16,585 | 198,684 | 206,658 |
| Section Chief | 1.00 | 1.00 | 1.00 | 6,418 - 8,450 | 87,504 | 98,482 |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 68,744 | 77,552 |
| Administrative Specialist Conf | 1.00 | 1.00 | 1.00 | 5,000 - 6,761 | 66,120 | 75,062 |
| Administrative Assistant II | 2.00 | 2.00 | 2.00 | 4,346 - 5,790 | 115,860 | 131,048 |
| Admissions Analyst III | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 71,370 | 76,707 |
| Accounting Technician | 0.00 | 0.00 | 0.00 | 3,933 - 5,243 | | |
| Administrative Assistant I | 2.00 | 2.00 | 2.00 | 3,933 - 5,243 | 105,581 | 119,446 |
| Admissions Administration Total | 9.00 | 9.00 | 9.00 | 665,904 | 713,863 | 784,955 |
| <u>Examination Development</u> | | | | | | |
| Director, Examinations | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 144,306 | 161,778 |
| Examinations Technician | 1.00 | 1.00 | 1.00 | 5,840 - 7,699 | 94,851 | 102,033 |
| Examination Development Total | 2.00 | 2.00 | 2.00 | 224,073 | 239,157 | 263,811 |
| <u>Application Processing</u> | | | | | | |
| Section Chief | 3.00 | 3.00 | 3.00 | 6,418 - 8,450 | 282,534 | 312,717 |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 76,712 | 86,427 |
| Admis Eligibility Analyst III | 1.00 | 1.00 | 1.00 | 4,781 - 6,371 | 78,546 | 84,429 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 63,302 | 71,333 |
| Admis Eligibility Analyst II | 2.00 | 2.00 | 2.00 | 4,346 - 5,790 | 141,396 | 153,414 |
| Coordinator Of Records | 6.00 | 6.00 | 6.00 | 3,933 - 5,243 | 335,829 | 378,827 |
| Application Processing Total | 14.00 | 14.00 | 14.00 | 919,671 | 978,319 | 1,087,147 |
| <u>Admissions Operations</u> | | | | | | |
| Director, Operations & Mgmt | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 137,416 | 155,294 |
| Deputy Dir, Operations & Mgmt | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 126,636 | 143,125 |
| Section Chief | 2.00 | 2.00 | 2.00 | 6,418 - 8,450 | 172,246 | 194,086 |
| Technology Svce Analyst Techn | 1.00 | 1.00 | 1.00 | 5,840 - 7,699 | 94,101 | 102,033 |
| Sr Administrative Assistant | 2.00 | 2.00 | 2.00 | 5,311 - 7,008 | 160,902 | 177,582 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 66,380 | 74,551 |
| Admissions Analyst III | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 71,370 | 76,707 |
| Accounting Technician | 1.00 | 1.00 | 1.00 | 3,933 - 5,243 | 56,138 | 63,261 |
| Administrative Assistant I | 2.00 | 2.00 | 2.00 | 3,933 - 5,243 | 118,495 | 132,420 |
| Admissions Analyst II | 1.00 | 1.00 | 1.00 | 3,933 - 5,243 | 55,829 | 62,937 |
| Admissions Analyst I | 2.00 | 2.00 | 2.00 | 3,228 - 4,306 | 98,933 | 108,727 |
| Admissions Operations Total | 15.00 | 15.00 | 15.00 | 1,081,182 | 1,158,446 | 1,290,723 |

NOTE: FTEs show are as of January 1 of each year.

| | Positions (FTE) | | | Expenditures | | |
|---------------------------------------|-----------------|--------------|--------------|------------------|------------------|------------------|
| | 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |
| <u>Examination Grading</u> | | | | | | |
| Director, Admissions Admin | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 131,058 | 148,122 |
| Section Chief | 1.00 | 1.00 | 1.00 | 6,418 - 8,450 | 83,070 | 93,712 |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 68,744 | 77,552 |
| Admissions Coordinator | 1.00 | 1.00 | 1.00 | 3,550 - 4,731 | 58,318 | 62,694 |
| Admissions Processing Clerk II | 1.00 | 1.00 | 1.00 | 2,919 - 3,892 | 47,996 | 51,570 |
| Examination Grading Total | 5.00 | 5.00 | 5.00 | 365,447 | 389,186 | 433,650 |
| <u>Moral Character Determinations</u> | | | | | | |
| Dir, Moral Char Determinations | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 131,838 | 149,000 |
| Section Chief | 2.00 | 2.00 | 2.00 | 6,418 - 8,450 | 208,364 | 223,938 |
| Moral Character Analyst | 9.00 | 9.00 | 9.00 | 5,311 - 7,008 | 711,640 | 787,991 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 71,202 | 76,707 |
| Moral Character Determinations Total | 13.00 | 13.00 | 13.00 | 1,065,216 | 1,123,044 | 1,237,636 |
| <u>Law School Regulation</u> | | | | | | |
| Director, Educational Standards | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 142,916 | 160,638 |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 73,952 | 83,415 |
| Law School Regulation Total | 2.00 | 2.00 | 2.00 | 201,094 | 216,868 | 244,053 |
| <u>Special Admissions</u> | | | | | | |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 71,370 | 76,707 |
| Administrative Assistant I | 1.00 | 1.00 | 1.00 | 3,933 - 5,243 | 55,520 | 62,613 |
| Special Admissions Total | 2.00 | 2.00 | 2.00 | 120,904 | 126,890 | 139,320 |
| <u>Specialization</u> | | | | | | |
| Director, Legal Specialization | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 144,306 | 161,778 |
| Section Chief | 1.00 | 1.00 | 1.00 | 6,418 - 8,450 | 86,895 | 97,637 |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 70,886 | 79,983 |
| Administrative Assistant II | 3.00 | 3.00 | 3.00 | 4,346 - 5,790 | 183,636 | 207,060 |
| Administrative Assistant I | 2.00 | 2.00 | 2.00 | 3,933 - 5,243 | 111,555 | 125,766 |
| Specialization Total | 8.00 | 8.00 | 8.00 | 553,687 | 597,278 | 672,224 |
| <u>MCLE Providers</u> | | | | | | |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 62,048 | 69,949 |
| Administrative Assistant I | 1.00 | 1.00 | 1.00 | 3,933 - 5,243 | 61,750 | 69,257 |
| MCLE Providers Total | 2.00 | 2.00 | 2.00 | 114,963 | 123,798 | 139,206 |
| Admissions Total | 72.00 | 72.00 | 72.00 | 5,312,141 | 5,666,849 | 6,292,725 |

NOTE: FTEs show are as of January 1 of each year.

| | Positions (FTE) | | | Expenditures | | |
|--------------------------------|-----------------|-------|-------|-----------------|-------------|-------------|
| | 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |
| Chief Trial Counsel | | | | | | |
| <u>Management</u> | | | | | | |
| Chief Trial Counsel | 1.00 | 1.00 | 1.00 | 12,496 - 16,585 | 199,004 | 206,658 |
| Deputy Chief Trial Counsel | 1.00 | 1.00 | 1.00 | 10,328 - 15,113 | 185,316 | 200,259 |
| Special Asst. Chief Trial Cnsl | 1.00 | 1.00 | 1.00 | 9,388 - 13,810 | 154,284 | 180,301 |
| Program/Court Sys Anlst (Conf) | 1.00 | 1.00 | 1.00 | 5,588 - 7,435 | 72,488 | 81,954 |
| Executive Secretary | 2.00 | 2.00 | 2.00 | 5,000 - 6,761 | 132,240 | 150,124 |
| Administrative Secretary | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 71,370 | 76,707 |
| Management Total | 7.00 | 7.00 | 7.00 | 757,730 | 814,702 | 896,003 |
| <u>Intake</u> | | | | | | |
| Assistant Chief Trial Counsel | 1.00 | 1.00 | 1.00 | 9,388 - 13,810 | 170,248 | 182,979 |
| Senior Attorney | 2.00 | 2.00 | 2.00 | 8,450 - 12,729 | 313,872 | 337,338 |
| Attorney | 7.75 | 7.75 | 7.75 | 6,853 - 10,682 | 983,506 | 1,070,359 |
| Complaint Analyst | 17.00 | 17.00 | 17.00 | 5,311 - 7,008 | 1,355,683 | 1,494,097 |
| Paralegal | 4.00 | 4.00 | 4.00 | 5,311 - 7,008 | 345,592 | 371,520 |
| Complaint Analyst I | 6.00 | 6.00 | 6.00 | 4,781 - 6,371 | 401,880 | 453,534 |
| Administrative Secretary | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 60,908 | 68,723 |
| Intake Total | 38.75 | 38.75 | 38.75 | 3,459,667 | 3,631,689 | 3,978,550 |
| <u>Investigation</u> | | | | | | |
| Managing Dir Investigation | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 117,116 | 132,347 |
| Investigator Supervisor | 5.00 | 5.00 | 5.00 | 6,418 - 8,450 | 440,896 | 491,587 |
| Investigator II | 48.00 | 48.00 | 48.00 | 5,840 - 7,699 | 4,342,818 | 4,733,760 |
| Administrative Secretary | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 61,934 | 69,794 |
| Investigation Total | 55.00 | 55.00 | 55.00 | 4,741,331 | 4,962,764 | 5,427,488 |
| <u>Trial</u> | | | | | | |
| Assistant Chief Trial Counsel | 4.00 | 4.00 | 4.00 | 9,388 - 13,810 | 674,232 | 731,916 |
| Senior Attorney | 24.00 | 24.00 | 24.00 | 8,450 - 12,729 | 3,393,854 | 3,748,466 |
| Attorney | 25.60 | 25.60 | 25.60 | 6,853 - 10,682 | 2,585,565 | 2,897,332 |
| Paralegal | 11.00 | 11.00 | 11.00 | 5,311 - 7,008 | 853,046 | 949,602 |
| Administrative Secretary | 3.00 | 3.00 | 3.00 | 4,346 - 5,790 | 203,718 | 222,970 |
| Trial Total | 67.60 | 67.60 | 67.60 | 7,230,934 | 7,710,415 | 8,550,286 |
| <u>Audit & Review</u> | | | | | | |
| Senior Attorney | 0.00 | 0.00 | 0.00 | 8,450 - 12,729 | | |
| Attorney | 4.00 | 4.00 | 4.00 | 6,853 - 10,682 | 446,488 | 497,096 |
| Legal Secretary | 0.00 | 0.00 | 0.00 | 4,346 - 5,790 | | |
| Audit & Review Total | 4.00 | 4.00 | 4.00 | 417,260 | 446,488 | 497,096 |

NOTE: FTEs show are as of January 1 of each year.

| | Positions (FTE) | | | Expenditures | | |
|---|-----------------|---------------|---------------|-------------------|-------------------|-------------------|
| | 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |
| <u>Central Administration</u> | | | | | | |
| Director, Central Admin, Ctc | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 137,416 | 155,294 |
| Managing Director Admin | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 106,674 | 120,563 |
| Sr Administrative Supervisor | 1.00 | 1.00 | 1.00 | 6,418 - 8,450 | 89,024 | 100,202 |
| Complaint Analyst | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 74,918 | 84,416 |
| Program Court Sys Analyst | 3.00 | 3.00 | 3.00 | 5,311 - 7,008 | 222,792 | 251,119 |
| Sr Administrative Assistant | 3.00 | 3.00 | 3.00 | 5,311 - 7,008 | 244,540 | 270,686 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 71,370 | 76,707 |
| Administrative Secretary | 2.00 | 2.00 | 2.00 | 4,346 - 5,790 | 122,728 | 138,329 |
| Legal Secretary | 16.00 | 16.00 | 16.00 | 4,346 - 5,790 | 1,033,077 | 1,149,989 |
| Administrative Assistant I | 2.00 | 2.00 | 2.00 | 3,933 - 5,243 | 129,272 | 138,942 |
| Coordinator Of Records | 14.00 | 14.00 | 14.00 | 3,933 - 5,243 | 825,477 | 913,638 |
| Secretary II | 11.00 | 11.00 | 11.00 | 3,933 - 5,243 | 646,091 | 717,047 |
| General Clerk II | 4.00 | 4.00 | 4.00 | 3,228 - 4,306 | 178,264 | 201,301 |
| General Clerk III | 2.00 | 2.00 | 2.00 | 3,228 - 4,306 | 96,893 | 106,507 |
| Central Administration Total | 62.00 | 62.00 | 62.00 | 3,735,637 | 3,978,536 | 4,424,740 |
| <u>Abandoned and Unauthorized Practices</u> | | | | | | |
| Paralegal | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 86,398 | 92,880 |
| Sr Administrative Assistant | 0.00 | 0.00 | 0.00 | 5,311 - 7,008 | | |
| Coordinator Of Records | 4.00 | 4.00 | 4.00 | 3,933 - 5,243 | 234,611 | 260,965 |
| Abandoned and Unauthorized Practices Total | 5.00 | 5.00 | 5.00 | 304,617 | 321,009 | 353,845 |
| Chief Trial Counsel Total | 239.35 | 239.35 | 239.35 | 20,647,176 | 21,865,603 | 24,128,008 |
| Probation | | | | | | |
| <u>Probation</u> | | | | | | |
| Senior Attorney | 1.00 | 1.00 | 1.00 | 8,450 - 12,729 | 156,936 | 168,669 |
| Probation Deputy | 6.00 | 6.00 | 6.00 | 4,781 - 6,371 | 422,905 | 472,189 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 63,188 | 71,215 |
| Probation Total | 8.00 | 8.00 | 8.00 | 607,050 | 643,029 | 712,073 |
| Probation Total | 8.00 | 8.00 | 8.00 | 607,050 | 643,029 | 712,073 |
| Client Security Fund | | | | | | |
| <u>Client Security Fund</u> | | | | | | |
| Director, Client Security Fund | 1.00 | 1.00 | 1.00 | 9,388 - 13,810 | 163,716 | 182,739 |
| Senior Attorney | 2.00 | 2.00 | 2.00 | 8,450 - 12,729 | 312,696 | 337,338 |
| Sr Administrative Supervisor | 1.00 | 1.00 | 1.00 | 6,418 - 8,450 | 104,182 | 111,969 |
| Paralegal | 2.00 | 2.00 | 2.00 | 5,311 - 7,008 | 161,040 | 177,010 |
| Administrative Assistant II | 2.00 | 2.00 | 2.00 | 4,346 - 5,790 | 135,242 | 148,544 |
| Administrative Secretary | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 71,370 | 76,707 |
| Legal Secretary | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 61,934 | 69,794 |
| Coordinator Of Records | 1.00 | 1.00 | 1.00 | 3,933 - 5,243 | 64,636 | 69,471 |
| Client Security Fund Total | 11.00 | 11.00 | 11.00 | 1,024,612 | 1,074,816 | 1,173,572 |
| Client Security Fund Total | 11.00 | 11.00 | 11.00 | 1,024,612 | 1,074,816 | 1,173,572 |

NOTE: FTEs show are as of January 1 of each year.

| | Positions (FTE) | | | Expenditures | | |
|--|-----------------|--------------|--------------|------------------|------------------|------------------|
| | 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |
| Mandatory Fee Arbitration | | | | | | |
| <u>Mandatory Fee Arbitration</u> | | | | | | |
| Director, Fee Arbitration | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 117,980 | 133,333 |
| Sr Administrative Assistant | 3.00 | 3.00 | 3.00 | 5,311 - 7,008 | 224,754 | 253,248 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 66,618 | 74,851 |
| Mandatory Fee Arbitration Total | 5.00 | 5.00 | 5.00 | 379,749 | 409,352 | 461,432 |
| Mandatory Fee Arbitration Total | 5.00 | 5.00 | 5.00 | 379,749 | 409,352 | 461,432 |
| State Bar Court | | | | | | |
| <u>Administration</u> | | | | | | |
| Sr Director State Bar Court | 1.00 | 1.00 | 1.00 | 11,360 - 16,585 | 192,624 | 206,658 |
| Admin Specialist II (Conf) | 1.00 | 1.00 | 1.00 | 6,143 - 8,172 | 80,634 | 91,077 |
| Sr Admin Secretary | 0.75 | 0.75 | 0.75 | 4,781 - 6,371 | 58,211 | 63,315 |
| Administration Total | 2.75 | 2.75 | 2.75 | 308,167 | 331,469 | 361,050 |
| <u>Hearing Department & Effectuations Unit</u> | | | | | | |
| Hearing Judge | 5.00 | 5.00 | 5.00 | 13,769 - 15,108 | 826,020 | 857,790 |
| Chief Assistant Court Counsel | 1.00 | 1.00 | 1.00 | 9,388 - 13,810 | 161,852 | 181,199 |
| Court Administrator | 2.00 | 2.00 | 2.00 | 8,535 - 12,376 | 296,856 | 327,996 |
| Senior Attorney | 5.00 | 5.00 | 5.00 | 8,450 - 12,729 | 731,359 | 798,644 |
| Case Administrator | 10.00 | 10.00 | 10.00 | 5,840 - 7,699 | 916,364 | 994,630 |
| Court Services Analyst/Tech | 1.00 | 1.00 | 1.00 | 5,840 - 7,699 | 94,926 | 102,033 |
| Lead Data Analyst | 1.00 | 1.00 | 1.00 | 5,840 - 7,699 | 87,048 | 97,951 |
| Program Court Sys Analyst | 2.00 | 2.00 | 2.00 | 5,311 - 7,008 | 141,454 | 159,680 |
| Deputy Court Clerk IV | 2.00 | 2.00 | 2.00 | 4,781 - 6,371 | 146,534 | 161,058 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 59,425 | 67,058 |
| Legal Secretary | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 71,370 | 76,707 |
| Hearing Department & Effectuations Unit Total | 31.00 | 31.00 | 31.00 | 3,402,395 | 3,533,208 | 3,824,746 |
| <u>Review Department</u> | | | | | | |
| Presiding Judge | 1.00 | 1.00 | 1.00 | 13,769 - 15,108 | 181,272 | 188,244 |
| Review Judge | 1.20 | 1.20 | 1.20 | 13,769 - 15,108 | 217,516 | 225,882 |
| Chief Court Counsel | 1.00 | 1.00 | 1.00 | 10,328 - 15,113 | 181,256 | 200,259 |
| Senior Attorney | 3.00 | 3.00 | 3.00 | 8,450 - 12,729 | 388,910 | 437,502 |
| Case Administrator | 2.00 | 2.00 | 2.00 | 5,840 - 7,699 | 173,156 | 190,244 |
| Review Department Total | 8.20 | 8.20 | 8.20 | 1,094,098 | 1,142,110 | 1,242,131 |
| State Bar Court Total | 41.95 | 41.95 | 41.95 | 4,804,660 | 5,006,787 | 5,427,927 |

NOTE: FTEs show are as of January 1 of each year.

| | Positions (FTE) | | | Expenditures | | |
|--|-----------------|--------------|--------------|------------------|------------------|------------------|
| | 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |
| Member Records & Compliance | | | | | | |
| <u>Member Service Center</u> | | | | | | |
| Managing Dir Member Rec & Comp | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 117,376 | 132,644 |
| Sr Administrative Supervisor | 2.00 | 2.00 | 2.00 | 6,418 - 8,450 | 190,738 | 214,809 |
| Lead Data Analyst | 1.00 | 1.00 | 1.00 | 5,840 - 7,699 | 79,058 | 89,135 |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 72,572 | 81,985 |
| Administrative Specialist Conf | 0.00 | 0.00 | 0.00 | 5,000 - 6,761 | | |
| Membership Services Rep | 3.00 | 3.00 | 3.00 | 4,781 - 6,371 | 209,834 | 232,812 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 71,370 | 76,707 |
| Member Services Associate | 6.00 | 6.00 | 6.00 | 4,346 - 5,790 | 392,787 | 436,273 |
| Administrative Assistant I | 4.00 | 4.00 | 4.00 | 3,933 - 5,243 | 212,398 | 239,928 |
| Member Service Center Total | 19.00 | 19.00 | 19.00 | 1,255,641 | 1,346,133 | 1,504,293 |
| Member Records & Compliance Total | 19.00 | 19.00 | 19.00 | 1,255,641 | 1,346,133 | 1,504,293 |
| Professional Competence | | | | | | |
| <u>Outreach & Education</u> | | | | | | |
| Director, Professnl Competnce | 1.00 | 1.00 | 1.00 | 9,388 - 13,810 | 170,248 | 182,979 |
| Attorney | 1.00 | 1.00 | 1.00 | 6,853 - 10,682 | 97,558 | 110,685 |
| Sr Administrative Specialist | 1.00 | 1.00 | 1.00 | 6,750 - 8,925 | 88,602 | 100,072 |
| Paralegal | 7.00 | 7.00 | 7.00 | 5,311 - 7,008 | 570,082 | 624,507 |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 84,673 | 92,880 |
| Administrative Secretary | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 66,503 | 74,735 |
| Data Analyst II | 1.00 | 1.00 | 1.00 | 3,550 - 4,731 | 58,318 | 62,694 |
| Outreach & Education Total | 13.00 | 13.00 | 13.00 | 1,077,211 | 1,135,984 | 1,248,552 |
| Professional Competence Total | 13.00 | 13.00 | 13.00 | 1,077,211 | 1,135,984 | 1,248,552 |
| Education | | | | | | |
| <u>Sections</u> | | | | | | |
| Senior Director Education | 1.00 | 1.00 | 1.00 | 11,360 - 16,585 | 179,236 | 201,698 |
| Dir, Section Educ & Mtg Svcs | 0.00 | 0.00 | 0.00 | 8,535 - 12,376 | 0 | 0 |
| Managing Dir Sec Ed & Mtg Svcs | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 116,246 | 131,361 |
| Meeting & Event Administrator | 2.00 | 2.00 | 2.00 | 6,418 - 8,450 | 199,307 | 218,983 |
| Section Coordinator | 6.00 | 6.00 | 6.00 | 6,418 - 8,450 | 589,700 | 650,000 |
| Web Administrator | 1.00 | 1.00 | 1.00 | 5,840 - 7,699 | 84,906 | 95,596 |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 70,256 | 79,268 |
| Administrative Assistant II | 7.00 | 7.00 | 7.00 | 4,346 - 5,790 | 431,678 | 483,944 |
| Data Analyst II | 1.00 | 1.00 | 1.00 | 3,550 - 4,731 | 48,713 | 55,056 |
| Sections Total | 20.00 | 20.00 | 20.00 | 1,608,333 | 1,720,042 | 1,915,906 |
| <u>Affinity & Insurance</u> | | | | | | |
| Sr Administrative Assistant | 1.80 | 1.80 | 1.80 | 5,311 - 7,008 | 149,418 | 164,790 |
| Affinity & Insurance Total | 1.80 | 1.80 | 1.80 | 140,004 | 149,418 | 164,790 |
| Education Total | 21.80 | 21.80 | 21.80 | 1,748,337 | 1,869,460 | 2,080,696 |

NOTE: FTEs show are as of January 1 of each year.

| | Positions (FTE) | | | Expenditures | | |
|--|-----------------|--------------|--------------|------------------|------------------|------------------|
| | 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |
| Legal Services | | | | | | |
| <u>Program Development</u> | | | | | | |
| Sr Director Admin Justice | 1.00 | 1.00 | 1.00 | 11,360 - 16,585 | 186,758 | 206,658 |
| Director Legal Services | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 140,130 | 158,338 |
| Program Developer | 3.00 | 3.00 | 3.00 | 6,418 - 8,450 | 312,460 | 335,907 |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 81,420 | 91,307 |
| Program Coordinator | 1.00 | 1.00 | 1.00 | 4,781 - 6,371 | 66,224 | 74,809 |
| Administrative Assistant II | 2.00 | 2.00 | 2.00 | 4,346 - 5,790 | 139,368 | 152,950 |
| Program Development Total | 9.00 | 9.00 | 9.00 | 854,890 | 926,360 | 1,019,969 |
| <u>Legal Services Funding</u> | | | | | | |
| Mngng Dir, Lgl Svcs Trust Fnd | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 137,222 | 149,148 |
| Senior Accountant/Auditor | 2.00 | 2.00 | 2.00 | 6,418 - 8,450 | 188,874 | 212,465 |
| Senior Grants Administrator | 1.00 | 1.00 | 1.00 | 6,418 - 8,450 | 104,182 | 111,969 |
| Sr Administrative Assistant | 3.00 | 3.00 | 3.00 | 5,311 - 7,008 | 246,472 | 268,889 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 67,078 | 75,315 |
| Compliance Auditor I | 3.00 | 3.00 | 3.00 | 4,346 - 5,790 | 193,046 | 214,036 |
| General Clerk II | 0.00 | 0.00 | 0.00 | 3,228 - 4,306 | | |
| Legal Services Funding Total | 11.00 | 11.00 | 11.00 | 886,402 | 936,874 | 1,031,822 |
| Legal Services Total | 20.00 | 20.00 | 20.00 | 1,741,292 | 1,863,234 | 2,051,791 |
| Diversity & Bar Relations | | | | | | |
| <u>Elimination of Bias</u> | | | | | | |
| Managing Dir Diversity Outreac | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 138,762 | 149,148 |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 72,710 | 82,128 |
| Elimination of Bias Total | 2.00 | 2.00 | 2.00 | 202,483 | 211,472 | 231,276 |
| <u>Bar Relations</u> | | | | | | |
| Managing Director Bar Relation | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 128,110 | 144,548 |
| Program Court Sys Analyst | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 84,742 | 92,880 |
| Bar Relations Total | 2.00 | 2.00 | 2.00 | 197,872 | 212,852 | 237,428 |
| Diversity & Bar Relations Total | 4.00 | 4.00 | 4.00 | 400,355 | 424,324 | 468,704 |
| Lawyer Assistance Program | | | | | | |
| <u>Lawyer Assistance Program</u> | | | | | | |
| Director, Lawyers Assist Prgm | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 122,954 | 138,965 |
| Case Specialist | 1.00 | 1.00 | 1.00 | 6,418 - 8,450 | 99,723 | 110,812 |
| Case Manager | 5.00 | 5.00 | 5.00 | 5,840 - 7,699 | 427,291 | 480,386 |
| Program Court Sys Analyst | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 74,228 | 83,701 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 61,478 | 69,318 |
| Lawyer Assistance Program Total | 9.00 | 9.00 | 9.00 | 729,625 | 785,674 | 883,182 |
| Lawyer Assistance Program Total | 9.00 | 9.00 | 9.00 | 729,625 | 785,674 | 883,182 |

NOTE: FTEs show are as of January 1 of each year.

| | Positions (FTE) | | | Expenditures | | |
|---|-----------------|--------------|--------------|------------------|------------------|------------------|
| | 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |
| Executive Director | | | | | | |
| <u>Management, Oversight and Planning</u> | | | | | | |
| Executive Director/Ceo | 1.00 | 1.00 | 1.00 | 19,750 - 19,750 | 236,990 | 246,105 |
| Deputy Ceo/Chief Ops Officer | 1.00 | 1.00 | 1.00 | 12,496 - 16,585 | 199,004 | 206,658 |
| Assistant Secretary | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 148,748 | 163,998 |
| Managing Dir Planning Admin | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 123,162 | 139,188 |
| Special Asst To Exec Director | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 102,648 | 115,991 |
| Sr Administrative Specialist | 1.00 | 1.00 | 1.00 | 6,750 - 8,925 | 88,602 | 100,072 |
| Admin Specialist II (Conf) | 1.00 | 1.00 | 1.00 | 6,143 - 8,172 | 79,716 | 90,123 |
| Management, Oversight and Planning Total | 7.00 | 7.00 | 7.00 | 939,344 | 978,870 | 1,062,135 |
| <u>Board Support - Secretariat</u> | | | | | | |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 69,500 | 78,410 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 71,370 | 76,707 |
| Board Support - Secretariat Total | 2.00 | 2.00 | 2.00 | 133,765 | 140,870 | 155,117 |
| <u>Judicial Evaluations</u> | | | | | | |
| Sr Administrative Specialist | 1.00 | 1.00 | 1.00 | 6,750 - 8,925 | 88,602 | 100,072 |
| Executive Secretary | 1.00 | 1.00 | 1.00 | 5,000 - 6,761 | 66,120 | 75,062 |
| Administrative Assistant II | 2.00 | 2.00 | 2.00 | 4,346 - 5,790 | 125,123 | 140,959 |
| Judicial Evaluations Total | 4.00 | 4.00 | 4.00 | 258,785 | 279,845 | 316,093 |
| <u>Governmental Affairs</u> | | | | | | |
| Attorney III Conf | 2.00 | 2.00 | 2.00 | 8,971 - 13,025 | 232,930 | 262,132 |
| Sr Administrative Assistant | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 85,294 | 92,880 |
| Governmental Affairs Total | 3.00 | 3.00 | 3.00 | 295,982 | 318,224 | 355,012 |
| Executive Director Total | 16.00 | 16.00 | 16.00 | 1,627,876 | 1,717,809 | 1,888,357 |
| Finance | | | | | | |
| <u>Financial Planning and Analysis</u> | | | | | | |
| Chief Financial Officer | 1.00 | 1.00 | 1.00 | 12,496 - 16,585 | 199,004 | 206,658 |
| Director, Finance | 1.00 | 1.00 | 1.00 | 9,388 - 13,810 | 151,988 | 171,785 |
| Senior Financial Analyst | 1.00 | 1.00 | 1.00 | 6,750 - 8,925 | 88,602 | 100,072 |
| Administrative Specialist Conf | 0.00 | 0.00 | 0.00 | 5,000 - 6,761 | 0 | 0 |
| Financial Planning and Analysis Total | 3.00 | 3.00 | 3.00 | 421,868 | 439,594 | 478,515 |
| <u>Accounting</u> | | | | | | |
| Senior Financial Analyst | 1.00 | 1.00 | 1.00 | 6,750 - 8,925 | 88,602 | 100,072 |
| Payroll Specialist | 1.00 | 1.00 | 1.00 | 5,588 - 7,435 | 73,328 | 82,818 |
| Auditor/Accountant | 1.00 | 1.00 | 1.00 | 4,781 - 6,371 | 68,996 | 77,799 |
| Payroll Technician I | 1.00 | 1.00 | 1.00 | 4,111 - 5,564 | 54,380 | 61,745 |
| Accounting Technician | 1.55 | 1.55 | 1.55 | 3,933 - 5,243 | 89,022 | 100,214 |
| Accounting Clerk | 0.00 | 0.00 | 0.00 | 3,228 - 4,306 | 0 | 0 |
| Accounting Total | 5.55 | 5.55 | 5.55 | 346,384 | 374,328 | 422,648 |

NOTE: FTEs show are as of January 1 of each year.

| | Positions (FTE) | | | Expenditures | | |
|--|-----------------|--------------|--------------|------------------|------------------|------------------|
| | 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |
| Procurement & Risk | | | | | | |
| Dir Procurement & Risk Mgmt | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 137,416 | 155,294 |
| Finance Manager | 0.00 | 0.00 | 0.00 | 7,759 - 11,256 | 0 | 0 |
| Purchasing Assistant | 2.00 | 2.00 | 2.00 | 4,781 - 6,371 | 140,764 | 154,948 |
| Procurement & Risk Total | 3.00 | 3.00 | 3.00 | 261,166 | 278,180 | 310,242 |
| Member Billing | | | | | | |
| Finance Manager | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 113,298 | 128,032 |
| Sr Administrative Supervisor | 1.00 | 1.00 | 1.00 | 6,418 - 8,450 | 87,200 | 98,138 |
| Membership Billing Technician | 4.00 | 4.00 | 4.00 | 4,346 - 5,790 | 259,225 | 288,436 |
| Member Billing Total | 6.00 | 6.00 | 6.00 | 429,670 | 459,723 | 514,606 |
| Finance Total | 17.55 | 17.55 | 17.55 | 1,459,088 | 1,551,825 | 1,726,011 |
| Budget & Performance Analysis | | | | | | |
| <u>Budget & Performance</u> | | | | | | |
| Director, Budget & Perf. Anls | 1.00 | 1.00 | 1.00 | 10,328 - 15,113 | 178,996 | 199,839 |
| Director Is & Bus Solutions | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 148,768 | 163,998 |
| Budget & Performance Analyst | 1.00 | 1.00 | 1.00 | 6,143 - 8,172 | 80,634 | 91,077 |
| Budget & Performance Total | 3.00 | 3.00 | 3.00 | 378,924 | 408,398 | 454,914 |
| Budget & Performance Analysis Total | 3.00 | 3.00 | 3.00 | 378,924 | 408,398 | 454,914 |
| General Counsel | | | | | | |
| <u>General Counsel</u> | | | | | | |
| Chief Legal Officer | 1.00 | 1.00 | 1.00 | 12,496 - 16,585 | 199,004 | 206,658 |
| Chief Legal Officer Emeritus | 1.00 | 0.00 | 0.00 | 12,496 - 16,585 | 0 | 0 |
| Chief Assist. General Counsel | 2.00 | 2.00 | 2.00 | 10,328 - 15,113 | 372,272 | 400,518 |
| Attorney III Conf | 8.00 | 8.00 | 8.00 | 8,971 - 13,025 | 936,592 | 1,053,760 |
| Senior Attorney | 1.00 | 1.00 | 1.00 | 8,450 - 12,729 | 109,512 | 123,656 |
| Director, Administration | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 135,302 | 149,148 |
| Investigator Supervisor | 1.00 | 1.00 | 1.00 | 6,418 - 8,450 | 83,070 | 93,712 |
| Admin Specialist II (Conf) | 1.00 | 1.00 | 1.00 | 6,143 - 8,172 | 80,634 | 91,077 |
| Investigator II | 0.00 | 1.00 | 1.00 | 5,840 - 7,699 | 75,608 | 85,285 |
| Legal Assistant (Confidential) | 1.00 | 1.00 | 1.00 | 5,588 - 7,435 | 73,328 | 82,818 |
| Program/Court Sys Anlst (Conf) | 1.00 | 1.00 | 1.00 | 5,588 - 7,435 | 73,328 | 82,818 |
| Admin Assistant II (Conf) | 1.00 | 1.00 | 1.00 | 4,544 - 6,146 | 60,094 | 68,228 |
| Administrative Secretary (Conf) | 1.00 | 1.00 | 1.00 | 4,544 - 6,146 | 60,094 | 68,228 |
| Legal Secretary (Confidential) | 2.00 | 2.00 | 2.00 | 4,544 - 6,146 | 120,188 | 136,456 |
| Administrative Assistant II | 0.00 | 1.00 | 1.00 | 4,346 - 5,790 | 56,550 | 64,108 |
| Coordinator Rec Conf | 1.00 | 1.00 | 1.00 | 4,111 - 5,564 | 54,380 | 61,745 |
| General Counsel Total | 23.00 | 24.00 | 24.00 | 2,265,187 | 2,489,956 | 2,768,215 |
| <u>Law Library & Archives</u> | | | | | | |
| Senior Librarian/Archivist | 1.00 | 1.00 | 1.00 | 5,840 - 7,699 | 86,755 | 97,587 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 67,308 | 75,431 |
| Law Library & Archives Total | 2.00 | 2.00 | 2.00 | 143,180 | 154,063 | 173,018 |

NOTE: FTEs show are as of January 1 of each year.

| | Positions (FTE) | | | Expenditures | | |
|--|-----------------|--------------|--------------|------------------|------------------|------------------|
| | 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |
| General Counsel Total | 25.00 | 26.00 | 26.00 | 2,408,367 | 2,644,019 | 2,941,233 |
| Human Resources | | | | | | |
| <u>Compensation Administration</u> | | | | | | |
| Hr Specialist | 1.00 | 1.00 | 1.00 | 5,588 - 7,435 | 73,328 | 82,818 |
| Compensation Administration Total | 1.00 | 1.00 | 1.00 | 67,864 | 73,328 | 82,818 |
| <u>Recruiting and Development</u> | | | | | | |
| Hr Specialist | 1.00 | 1.00 | 1.00 | 5,588 - 7,435 | 73,328 | 82,818 |
| Human Resources Coordinator | 1.00 | 1.00 | 1.00 | 4,544 - 6,146 | 60,094 | 68,228 |
| Recruiting and Development Total | 2.00 | 2.00 | 2.00 | 123,130 | 133,422 | 151,046 |
| <u>Employee Relations</u> | | | | | | |
| Director Hr & Labor Relations | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 142,202 | 160,038 |
| Mgr Hr & Emp/Labor Relations | 0.00 | 0.00 | 0.00 | 7,759 - 11,256 | 0 | 0 |
| Employee Relations Total | 1.00 | 1.00 | 1.00 | 131,792 | 142,202 | 160,038 |
| <u>Records and Information Systems</u> | | | | | | |
| Senior Hr Specialist | 1.00 | 1.00 | 1.00 | 6,750 - 8,925 | 88,602 | 100,072 |
| Human Resources Administrator | 1.00 | 1.00 | 1.00 | 5,000 - 6,761 | 66,120 | 75,062 |
| Admin Assistant II (Conf) | 1.00 | 1.00 | 1.00 | 4,544 - 6,146 | 60,094 | 68,228 |
| Human Resources Coordinator | 3.00 | 3.00 | 3.00 | 4,544 - 6,146 | 180,282 | 204,684 |
| Human Resources Assistant | 0.00 | 0.00 | 0.00 | 4,111 - 5,564 | | |
| Records and Information Systems Total | 6.00 | 6.00 | 6.00 | 363,856 | 395,098 | 448,046 |
| Human Resources Total | 10.00 | 10.00 | 10.00 | 686,642 | 744,050 | 841,948 |
| Information Technology | | | | | | |
| <u>IT Admin</u> | | | | | | |
| Senior Director It | 1.00 | 1.00 | 1.00 | 11,360 - 16,585 | 179,236 | 201,698 |
| Director Of Applications | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 137,416 | 155,294 |
| Director, Project Management | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 137,416 | 155,294 |
| Director, Technology Systems | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 142,916 | 160,638 |
| Managing Dir Info Tec/Sys Proj | 0.00 | 0.00 | 0.00 | 7,759 - 11,256 | | |
| Managing Director Telecom | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 126,954 | 143,476 |
| Computer Analyst/Programmer | 10.00 | 10.00 | 10.00 | 7,186 - 9,379 | 1,052,394 | 1,166,276 |
| Webmaster | 2.00 | 2.00 | 2.00 | 7,186 - 9,379 | 221,180 | 242,415 |
| Technical Support Administratr | 8.00 | 8.00 | 8.00 | 6,418 - 8,450 | 759,304 | 837,080 |
| Technology Svce Analyst Techn | 3.00 | 3.00 | 3.00 | 5,840 - 7,699 | 272,678 | 299,937 |
| Program/Court Sys Anlst (Conf) | 1.00 | 1.00 | 1.00 | 5,588 - 7,435 | 73,328 | 82,818 |
| Administrative Specialist Conf | 0.00 | 0.00 | 0.00 | 5,000 - 6,761 | 0 | 0 |
| IT Admin Total | 29.00 | 29.00 | 29.00 | 2,908,217 | 3,102,822 | 3,444,926 |
| Information Technology Total | 29.00 | 29.00 | 29.00 | 2,908,217 | 3,102,822 | 3,444,926 |

NOTE: FTEs show are as of January 1 of each year.

| | Positions (FTE) | | | Expenditures | | |
|--------------------------------|-----------------|--------------|--------------|------------------|------------------|------------------|
| | 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |
| Communications | | | | | | |
| <u>Media Relations</u> | | | | | | |
| Chief Executive Communications | 1.00 | 1.00 | 1.00 | 12,496 - 16,585 | 199,004 | 206,658 |
| Director Communications | 1.00 | 1.00 | 1.00 | 8,535 - 12,376 | 131,740 | 148,892 |
| Web Editor | 1.00 | 1.00 | 1.00 | 6,418 - 8,450 | 88,416 | 99,514 |
| Public Information Officer | 4.60 | 4.60 | 4.60 | 5,840 - 7,699 | 369,229 | 411,400 |
| Media Relations Total | 7.60 | 7.60 | 7.60 | 750,933 | 788,389 | 866,464 |
| <u>California Bar Journal</u> | | | | | | |
| Managing Dir Comm & Info Svcs | 0.00 | 0.00 | 0.00 | 7,759 - 11,256 | | |
| Program Court Sys Analyst | 1.00 | 1.00 | 1.00 | 5,311 - 7,008 | 82,948 | 92,880 |
| California Bar Journal Total | 1.00 | 1.00 | 1.00 | 77,225 | 82,948 | 92,880 |
| Communications Total | 8.60 | 8.60 | 8.60 | 828,158 | 871,337 | 959,344 |
| General Services | | | | | | |
| <u>Administrative Services</u> | | | | | | |
| Director, Operations | 1.00 | 1.00 | 1.00 | 10,328 - 15,113 | 178,996 | 199,839 |
| Deputy Director, Operations | 1.00 | 1.00 | 1.00 | 7,759 - 11,256 | 106,674 | 120,563 |
| Admin Specialist II (Conf) | 1.00 | 1.00 | 1.00 | 6,143 - 8,172 | 80,634 | 91,077 |
| Supervisor, Off. & Recep. Svcs | 2.00 | 2.00 | 2.00 | 5,840 - 7,699 | 189,027 | 204,066 |
| Administrative Assistant II | 1.00 | 1.00 | 1.00 | 4,346 - 5,790 | 71,370 | 76,707 |
| Printing Technician II | 2.00 | 2.00 | 2.00 | 4,346 - 5,790 | 142,740 | 153,414 |
| Travel & Info Svcs Coordinator | 2.00 | 2.00 | 2.00 | 3,933 - 5,243 | 120,774 | 132,732 |
| Maintenance Technician | 1.00 | 1.00 | 1.00 | 3,550 - 4,731 | 55,071 | 61,830 |
| Printing Technician I | 2.00 | 2.00 | 2.00 | 3,550 - 4,731 | 111,495 | 122,502 |
| Sr Office Services Coordinator | 1.00 | 1.00 | 1.00 | 3,550 - 4,731 | 58,318 | 62,694 |
| Sr Office Services Clerk | 5.00 | 5.00 | 5.00 | 3,228 - 4,306 | 236,031 | 263,394 |
| Receptionist/Reservation Coord | 3.00 | 3.00 | 3.00 | 2,919 - 3,892 | 129,870 | 143,964 |
| Administrative Services Total | 22.00 | 22.00 | 22.00 | 1,401,711 | 1,481,000 | 1,632,782 |
| General Services Total | 22.00 | 22.00 | 22.00 | 1,401,711 | 1,481,000 | 1,632,782 |

NOTE: FTEs show are as of January 1 of each year.

| Positions (FTE) | | | Expenditures | | |
|-----------------|------|------|--------------|-------------|-------------|
| 2014 | 2015 | 2016 | 2014 Range | 2015 Budget | 2016 Budget |

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NOTE: FTEs show are as of January 1 of each year.