



THE STATE BAR OF CALIFORNIA

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Title of Report: 2017 Proposed Baseline Budget
Statutory Citation: Business and Professions Code section 6140.1
Date of Report: November 12, 2015

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 2017, 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 2015, 2016, and 2017.

The 2017 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



2017 Proposed Baseline Budget

November 13, 2015

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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		
	2015	2016	2017	2015*	2016*	2017*
Admissions Administration	10.0	10.0	10.0	1,825	1,863	1,938
Examination Development	2.0	2.0	2.0	1,036	1,077	1,114
Application Processing	14.0	14.0	14.0	1,414	1,449	1,509
Admissions Operations	14.0	14.0	14.0	7,878	7,928	8,208
Examination Grading	6.0	6.0	6.0	2,957	2,840	2,946
Moral Character Determinations	13.0	13.0	13.0	1,667	1,706	1,764
Law School Regulation	2.0	2.0	2.0	336	341	358
Special Admissions	2.0	2.0	2.0	186	187	193
Specialization	8.0	8.0	8.0	1,567	1,482	1,640
MCLE Providers	2.0	2.0	2.0	174	181	190
Admissions Projects	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	73.0	73.0	73.0	19,041	19,054	19,860
FUNDING				2015*	2016*	2017*
General Fund				0	0	0
Admissions Fund				17,474	17,572	18,220
Legal Specializations Fund				1,567	1,482	1,640
TOTAL (All Funds)				19,041	19,054	19,860

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

(n/a)

* Budget, \$ thousands

DETAILED EXPENDITURES BY PROGRAM	2015*	2016*	2017*
<u>Admissions Administration</u>			
Admissions Fund	1,825	1,863	1,938
Total Admissions Administration	1,825	1,863	1,938
<u>Examination Development</u>			
Admissions Fund	1,036	1,077	1,114
Total Examination Development	1,036	1,077	1,114
<u>Application Processing</u>			
Admissions Fund	1,414	1,449	1,509
Total Application Processing	1,414	1,449	1,509
<u>Admissions Operations</u>			
Admissions Fund	7,878	7,928	8,208
Total Admissions Operations	7,878	7,928	8,208
<u>Examination Grading</u>			
Admissions Fund	2,957	2,840	2,946
Total Examination Grading	2,957	2,840	2,946
<u>Moral Character Determinations</u>			
Admissions Fund	1,667	1,706	1,764
Total Moral Character Determinations	1,667	1,706	1,764
<u>Law School Regulation</u>			
Admissions Fund	336	341	358
Total Law School Regulation	336	341	358
<u>Special Admissions</u>			
General Fund	0	0	0
Admissions Fund	186	187	193
Total Special Admissions	186	187	193
<u>Specialization</u>			
Legal Specializations Fund	1,567	1,482	1,640
Total Specialization	1,567	1,482	1,640
<u>MCLE Providers</u>			
Admissions Fund	174	181	190
Total MCLE Providers	174	181	190
<u>Admissions Projects</u>			
Admissions Fund	0	0	0
Total Admissions Projects	0	0	0
TOTAL	19,041	19,054	19,860

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	73.0	73.0	73.0	7,832	8,062	8,392
Supplemental Staffing				837	714	737
Travel & Training				684	678	692
Supplies and Postage				443	463	478
Professional Services				620	639	658
Exam & Software Licensing				1,643	1,607	1,698
Exam Room Rental				1,736	1,743	1,854
Exam Proctors				1,677	1,735	1,794
Exam Graders				912	949	982
Occupancy				202	194	211
Telecommunications				108	111	115
Other Outside Services				2,148	1,955	2,038
Computers & Software				30	30	30
Buildings & Equipment				135	140	145
Retiree Medical Funding				0	0	0
Other Expenditures				35	34	35
Indirect Costs				0	0	0
TOTAL	73.0	73.0	73.0	19,041	19,054	19,860

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Admissions by 185* in order to account for salary and benefit adjustments and 452* due to the increased costs of conducting the licensing exam.

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		
	2015	2016	2017	2015*	2016*	2017*
Management	6.0	6.0	6.0	136	168	190
Intake	37.8	37.8	37.8	4,967	5,070	5,217
Investigation	52.0	52.0	52.0	6,894	6,995	7,159
Trial	69.0	69.0	69.0	12,042	12,544	12,965
Audit & Review	3.6	3.6	3.6	610	629	648
Central Administration	64.0	64.0	64.0	6,218	6,390	6,624
Abandoned and Unauthorized Practices	3.0	3.0	3.0	275	285	298
TOTAL (All Programs)	235.4	235.4	235.4	31,141	32,081	33,101
FUNDING				2015*	2016*	2017*
General Fund				31,141	32,081	33,101
TOTAL (All Funds)				31,141	32,081	33,101

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	2015*	2016*	2017*
<u>Management</u>			
General Fund	136	168	190
Total Management	136	168	190
<u>Intake</u>			
General Fund	4,967	5,070	5,217
Total Intake	4,967	5,070	5,217
<u>Investigation</u>			
General Fund	6,894	6,995	7,159
Total Investigation	6,894	6,995	7,159
<u>Trial</u>			
General Fund	12,042	12,544	12,965
Total Trial	12,042	12,544	12,965
<u>Audit & Review</u>			
General Fund	610	629	648
Total Audit & Review	610	629	648
<u>Central Administration</u>			
General Fund	6,218	6,390	6,624
Total Central Administration	6,218	6,390	6,624
<u>Abandoned and Unauthorized Practices</u>			
General Fund	275	285	298
Total Abandoned and Unauthorized Practices	275	285	298
TOTAL	31,141	32,081	33,101

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	235.4	235.4	235.4	29,698	30,637	31,657
Supplemental Staffing				1,096	1,096	1,096
Travel & Training				187	187	187
Supplies and Postage				397	397	397
Professional Services				57	57	57
Occupancy				4	4	4
Telecommunications				225	225	225
Other Outside Services				427	427	427
Computers & Software				1	1	1
Buildings & Equipment				5	5	5
Retiree Medical Funding				0	0	0
Other Expenditures				64	64	64
Indirect Costs				0	0	0
Reimbursements				-1,019	-1,019	-1,019
TOTAL	235.4	235.4	235.4	31,141	32,081	33,101

* Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Chief Trial Counsel by 397* in order to account for salary and benefit adjustments.

CHANGES IN AUTHORIZED POSITIONS

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

* Budget, \$ thousands

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.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Probation	8.0	8.0	8.0	957	985	1,017
TOTAL (All Programs)	8.0	8.0	8.0	957	985	1,017
FUNDING				2015*	2016*	2017*
General Fund				957	985	1,017
TOTAL (All Funds)				957	985	1,017

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	2015*	2016*	2017*
<u>Probation</u>			
General Fund	957	985	1,017
Total Probation	957	985	1,017
TOTAL	957	985	1,017

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	8.0	8.0	8.0	896	923	956
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
Indirect Costs				0	0	0
TOTAL	8.0	8.0	8.0	957	985	1,017

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Probation by 14* in order to account for salary and benefit adjustments.

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		
	2015	2016	2017	2015*	2016*	2017*
Client Security Fund	11.0	11.0	11.0	7,240	7,262	7,291
TOTAL (All Programs)	11.0	11.0	11.0	7,240	7,262	7,291
FUNDING				2015*	2016*	2017*
Client Security Fund				7,240	7,262	7,291
TOTAL (All Funds)				7,240	7,262	7,291

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	2015*	2016*	2017*
<u>Client Security Fund</u>			
Client Security Fund	7,240	7,262	7,291
Total Client Security Fund	7,240	7,262	7,291
TOTAL	7,240	7,262	7,291

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	11.0	11.0	11.0	1,497	1,519	1,549
Supplemental Staffing				50	50	50
Travel & Training				17	17	17
Supplies and Postage				24	24	24
Professional Services				24	24	24
Telecommunications				9	9	9
Other Outside Services				18	18	18
CSF Applications				6,000	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
Indirect Costs				0	0	0
Reimbursements				-399	-399	-399
TOTAL	11.0	11.0	11.0	7,240	7,262	7,291

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Client Security Fund by 27* in order to account for salary and benefit adjustments.

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.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Mandatory Fee Arbitration	5.0	5.0	5.0	766	782	811
TOTAL (All Programs)	5.0	5.0	5.0	766	782	811
FUNDING				2015*	2016*	2017*
General Fund				766	782	811
TOTAL (All Funds)				766	782	811

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	2015*	2016*	2017*
<u>Mandatory Fee Arbitration</u>			
General Fund	766	782	811
Total Mandatory Fee Arbitration	766	782	811
TOTAL	766	782	811

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	5.0	5.0	5.0	570	586	615
Supplemental Staffing				64	64	64
Travel & Training				37	37	37
Supplies and Postage				11	11	11
Professional Services				0	0	0
Telecommunications				4	4	4
Other Outside Services				80	80	80
Computers & Software				0	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				0	0	0
Indirect Costs				0	0	0
TOTAL	5.0	5.0	5.0	766	782	811

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Mandatory Fee Arbitration by 19* in order to account for salary and benefit adjustments.

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		
	2015	2016	2017	2015*	2016*	2017*
Administration	2.8	2.8	2.8	634	602	623
Hearing Department & Effectuations Unit	31.0	31.0	31.0	5,268	5,351	5,462
Review Department	8.6	8.6	8.6	1,886	1,904	1,949
TOTAL (All Programs)	42.4	42.4	42.4	7,789	7,858	8,034
FUNDING				2015*	2016*	2017*
General Fund				7,789	7,858	8,034
TOTAL (All Funds)				7,789	7,858	8,034

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	2015*	2016*	2017*
<u>Administration</u>			
General Fund	634	602	623
Total Administration	634	602	623
<u>Hearing Department & Effectuations Unit</u>			
General Fund	5,268	5,351	5,462
Total Hearing Department & Effectuations Unit	5,268	5,351	5,462
<u>Review Department</u>			
General Fund	1,886	1,904	1,949
Total Review Department	1,886	1,904	1,949
TOTAL	7,789	7,858	8,034

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	42.4	42.4	42.4	7,092	7,161	7,337
Supplemental Staffing				185	185	185
Travel & Training				164	164	164
Supplies and Postage				126	126	126
Professional Services				35	35	35
Occupancy				31	31	31
Telecommunications				63	63	63
Other Outside Services				65	65	65
Computers & Software				8	8	8
Buildings & Equipment				11	11	11
Retiree Medical Funding				0	0	0
Other Expenditures				10	10	10
Indirect Costs				0	0	0
TOTAL	42.4	42.4	42.4	7,789	7,858	8,034

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in State Bar Court by 208* in order to account for salary and benefit adjustments.

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		
	2015	2016	2017	2015*	2016*	2017*
Member Service Center	19.0	19.0	19.0	2,586	2,642	2,720
TOTAL (All Programs)	19.0	19.0	19.0	2,586	2,642	2,720
FUNDING				2015*	2016*	2017*
General Fund				2,586	2,642	2,720
TOTAL (All Funds)				2,586	2,642	2,720

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	2015*	2016*	2017*
<u>Member Service Center</u>			
General Fund	2,586	2,642	2,720
Total Member Service Center	2,586	2,642	2,720
TOTAL	2,586	2,642	2,720

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	19.0	19.0	19.0	1,888	1,944	2,023
Supplemental Staffing				227	227	227
Travel & Training				23	23	23
Supplies and Postage				185	185	185
Professional Services				0	0	0
Telecommunications				26	26	26
Other Outside Services				221	221	221
Computers & Software				0	0	0
Buildings & Equipment				2	2	2
Retiree Medical Funding				0	0	0
Other Expenditures				13	13	13
Indirect Costs				0	0	0
TOTAL	19.0	19.0	19.0	2,586	2,642	2,720

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Member Records & Compliance by 46* in order to account for salary and benefit adjustments.

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		
	2015	2016	2017	2015*	2016*	2017*
SUMMARY OF PROGRAM REQUIREMENTS						
Ethics Hotline	0.0	0.0	0.0			
COPRAC & RRC	0.0	0.0	0.0	242	242	242
Outreach & Education	13.0	13.0	13.0	1,630	1,666	1,711
Publications	0.0	0.0	0.0	28	28	28
TOTAL (All Programs)	13.0	13.0	13.0	1,900	1,936	1,980
FUNDING				2015*	2016*	2017*
General Fund				1,900	1,936	1,980
TOTAL (All Funds)				1,900	1,936	1,980

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

	2015*	2016*	2017*
<u>COPRAC & RRC</u>			
General Fund	242	242	242
Total COPRAC & RRC	242	242	242
<u>Outreach & Education</u>			
General Fund	1,630	1,666	1,711
Total Outreach & Education	1,630	1,666	1,711
<u>Publications</u>			
General Fund	28	28	28
Total Publications	28	28	28
TOTAL	1,900	1,936	1,980

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	13.0	13.0	13.0	1,568	1,604	1,648
Supplemental Staffing				2	2	2
Travel & Training				153	153	153
Supplies and Postage				23	23	23
Professional Services				88	88	88
Occupancy				3	3	3
Telecommunications				22	22	22
Other Outside Services				29	29	29
Computers & Software				0	0	0
Buildings & Equipment				1	1	1
Retiree Medical Funding				0	0	0
Other Expenditures				12	12	12
Indirect Costs				0	0	0
TOTAL	13.0	13.0	13.0	1,900	1,936	1,980

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Professional Competence by 27* in order to account for salary and benefit adjustments.

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		
	2015	2016	2017	2015*	2016*	2017*
SUMMARY OF PROGRAM REQUIREMENTS						
Sections	21.0	21.0	21.0	8,161	8,254	8,387
Annual Meeting	0.0	0.0	0.0	886	781	789
Affinity & Insurance	1.8	1.8	1.8	562	573	585
CYLA	0.0	0.0	0.0	192	157	161
TOTAL (All Programs)	22.8	22.8	22.8	9,801	9,766	9,923
FUNDING				2015*	2016*	2017*
General Fund				192	157	161
Admin of Justice Fund				562	573	585
Annual Meeting Fund				886	781	789
Sections Funds				8,161	8,254	8,387
TOTAL (All Funds)				9,801	9,766	9,923

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	2015*	2016*	2017*
<u>Sections</u>			
Sections Funds	8,161	8,254	8,387
Total Sections	8,161	8,254	8,387
<u>Annual Meeting</u>			
Annual Meeting Fund	886	781	789
Total Annual Meeting	886	781	789
<u>Affinity & Insurance</u>			
Admin of Justice Fund	562	573	585
Total Affinity & Insurance	562	573	585
<u>CYLA</u>			
General Fund	192	157	161
Total CYLA	192	157	161
TOTAL	9,801	9,766	9,923

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	22.8	22.8	22.8	2,671	2,787	2,895
Supplemental Staffing				145	145	145
Travel & Training				3,285	3,100	3,100
Supplies and Postage				324	307	307
Professional Services				693	689	689
Occupancy				0	0	0
Telecommunications				59	47	47
Other Outside Services				1,170	1,104	1,104
Computers & Software				1	1	1
Buildings & Equipment				0	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				1,353	1,486	1,535
Indirect Costs				100	100	100
TOTAL	22.8	22.8	22.8	9,801	9,766	9,923

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Education by 87* in order to account for salary and benefit adjustments and 90* due to a technical error in the original budget.

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		
	2015	2016	2017	2015*	2016*	2017*
SUMMARY OF PROGRAM REQUIREMENTS						
Access To Justice	0.0	0.0	0.0	360	52	52
Program Development	9.0	9.0	9.0	1,362	1,386	1,423
Legal Services Funding	11.0	11.0	11.0	26,705	26,646	26,682
TOTAL (All Programs)	20.0	20.0	20.0	28,427	28,084	28,157
FUNDING				2015*	2016*	2017*
General Fund				1,414	1,438	1,475
Grants Fund				308	0	0
Justice Gap Fund				0	0	0
Legal Services Trust Fund				26,705	26,646	26,682
TOTAL (All Funds)				28,427	28,084	28,157

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	2015*	2016*	2017*
<u>Access To Justice</u>			
General Fund	52	52	52
Grants Fund	308	0	0
Total Access To Justice	360	52	52
<u>Program Development</u>			
General Fund	1,362	1,386	1,423
Total Program Development	1,362	1,386	1,423
<u>Legal Services Funding</u>			
Justice Gap Fund	0	0	0
Legal Services Trust Fund	26,705	26,646	26,682
Total Legal Services Funding	26,705	26,646	26,682
TOTAL	28,427	28,084	28,157

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	20.0	20.0	20.0	2,446	2,486	2,559
Supplemental Staffing				133	133	133
Travel & Training				119	111	111
Supplies and Postage				35	34	34
Professional Services				281	266	266
Occupancy				0	0	0
Telecommunications				23	23	23
Other Outside Services				13	13	13
Legal Services Grants				25,189	25,004	25,004
Computers & Software				75	0	0
Buildings & Equipment				4	4	4
Retiree Medical Funding				0	0	0
Other Expenditures				10	10	10
Indirect Costs				0	0	0
Interfund Transfers				100	0	0
TOTAL	20.0	20.0	20.0	28,427	28,084	28,157

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Legal Services by 66* in order to account for salary and benefit adjustments.

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, with the exception of support for the California Young Lawyers Association (CYLA).

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Elimination of Bias	2.0	2.0	2.0	461	466	474
Bar Relations	2.0	2.0	2.0	327	278	285
TOTAL (All Programs)	4.0	4.0	4.0	788	744	760
FUNDING				2015*	2016*	2017*
Admin of Justice Fund				788	744	760
Grants Fund				0	0	0
TOTAL (All Funds)				788	744	760

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	2015*	2016*	2017*
<u>Elimination of Bias</u>			
Admin of Justice Fund	461	466	474
Grants Fund	0	0	0
Total Elimination of Bias	<u>461</u>	<u>466</u>	<u>474</u>
<u>Bar Relations</u>			
Admin of Justice Fund	327	278	285
Grants Fund	0	0	0
Total Bar Relations	<u>327</u>	<u>278</u>	<u>285</u>
TOTAL	<u>788</u>	<u>744</u>	<u>760</u>

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	4.0	4.0	4.0	568	524	539
Supplemental Staffing				0	0	0
Travel & Training				131	131	131
Supplies and Postage				15	15	15
Professional Services				41	41	41
Occupancy				1	1	1
Telecommunications				8	8	8
Other Outside Services				24	24	24
Computers & Software				0	0	0
Buildings & Equipment				0	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				0	0	0
Indirect Costs				0	0	0
TOTAL	<u>4.0</u>	<u>4.0</u>	<u>4.0</u>	<u>788</u>	<u>744</u>	<u>760</u>

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Diversity & Bar Relations by 66* in order to account for salary and benefit adjustments.

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.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Lawyer Assistance Program	8.0	8.0	8.0	1,383	1,410	1,455
TOTAL (All Programs)	8.0	8.0	8.0	1,383	1,410	1,455
FUNDING				2015*	2016*	2017*
Lawyer Asst Program Fund				1,383	1,410	1,455
TOTAL (All Funds)				1,383	1,410	1,455

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
(n/a)

DETAILED EXPENDITURES BY PROGRAM	2015*	2016*	2017*
<u>Lawyer Assistance Program</u>			
Lawyer Asst Program Fund	1,383	1,410	1,455
Total Lawyer Assistance Program	1,383	1,410	1,455
TOTAL	1,383	1,410	1,455

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	8.0	8.0	8.0	1,034	1,061	1,106
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
Indirect Costs				0	0	0
TOTAL	8.0	8.0	8.0	1,383	1,410	1,455

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Probation by 14* in order to account for salary and benefit adjustments.

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		
	2015	2016	2017	2015*	2016*	2017*
Management, Oversight and Planning	7.0	7.0	7.0	1,589	1,577	1,615
Board Support - Secretariat	2.0	2.0	2.0	532	562	565
Judicial Evaluations	4.0	4.0	4.0	747	754	765
Governmental Affairs	2.0	2.0	2.0	521	525	534
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	15.0	15.0	15.0	3,389	3,419	3,480
FUNDING				2015*	2016*	2017*
General Fund				2,409	2,425	2,469
Admin of Justice Fund				557	563	573
Admissions Fund				196	195	200
Client Security Fund				23	23	24
Grants Fund				0	0	0
Lawyer Asst Program Fund				14	14	14
Legal Services Trust Fund				21	22	22
Legal Specializations Fund				33	36	36
Annual Meeting Fund				11	11	11
Sections Funds				124	129	132
TOTAL (All Funds)				3,389	3,419	3,480

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	2015*	2016*	2017*
<u>Management, Oversight and Planning</u>			
General Fund	1,589	1,577	1,615
Total Management, Oversight and Planning	1,589	1,577	1,615
<u>Board Support - Secretariat</u>			
General Fund	532	562	565
Grants Fund	0	0	0
Total Board Support - Secretariat	532	562	565
<u>Judicial Evaluations</u>			
General Fund	747	754	765
Total Judicial Evaluations	747	754	765
<u>Governmental Affairs</u>			
Admin of Justice Fund	521	525	534
Total Governmental Affairs	521	525	534
<u>Cost Recovery</u>			
General Fund	-459	-468	-477
Admin of Justice Fund	36	38	39
Admissions Fund	196	195	200
Client Security Fund	23	23	24
Lawyer Asst Program Fund	14	14	14
Legal Services Trust Fund	21	22	22
Legal Specializations Fund	33	36	36
Annual Meeting Fund	11	11	11
Sections Funds	124	129	132
Total Cost Recovery	0	0	0
TOTAL	3,389	3,419	3,480

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	15.0	15.0	15.0	2,401	2,432	2,493
Supplemental Staffing				125	125	125
Travel & Training				503	501	501
Supplies and Postage				74	74	74
Professional Services				313	313	313
Occupancy				5	5	5
Telecommunications				21	21	21
Other Outside Services				36	36	36
Computers & Software				0	0	0
Buildings & Equipment				5	5	5
Retiree Medical Funding				0	0	0
Other Expenditures				7	7	7
Indirect Costs				-100	-100	-100
TOTAL	15.0	15.0	15.0	3,389	3,419	3,480

* Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Executive Director by 66* in order to account for salary and benefit adjustments.

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		
	2015	2016	2017	2015*	2016*	2017*
Financial Planning and Analysis	4.0	4.0	4.0	1,876	967	1,243
Accounting	7.0	7.0	7.0	1,006	1,048	1,078
Procurement & Risk	4.0	4.0	4.0	1,338	1,348	1,369
Member Billing	6.0	6.0	6.0	1,836	1,851	1,881
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	21.0	21.0	21.0	6,056	5,213	5,572
FUNDING				2015*	2016*	2017*
General Fund				3,939	3,429	3,651
Admin of Justice Fund				125	107	114
Admissions Fund				863	688	755
Client Security Fund				267	248	259
Lawyer Asst Program Fund				105	93	98
Legal Services Trust Fund				179	163	171
Legal Specializations Fund				62	50	54
Annual Meeting Fund				48	38	42
Sections Funds				468	397	427
TOTAL (All Funds)				6,056	5,213	5,572

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 budgeting, financial planning, financial analysis and accounting. 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	2015*	2016*	2017*
<u>Financial Planning and Analysis</u>			
General Fund	1,876	967	1,243
Total Financial Planning and Analysis	1,876	967	1,243
<u>Accounting</u>			
General Fund	1,006	1,048	1,078
Total Accounting	1,006	1,048	1,078
<u>Procurement & Risk</u>			
General Fund	1,338	1,348	1,369
Total Procurement & Risk	1,338	1,348	1,369
<u>Member Billing</u>			
General Fund	1,836	1,851	1,881
Total Member Billing	1,836	1,851	1,881
<u>Cost Recovery</u>			
General Fund	-2,117	-1,784	-1,920
Admin of Justice Fund	125	107	114
Admissions Fund	863	688	755
Client Security Fund	267	248	259
Lawyer Asst Program Fund	105	93	98
Legal Services Trust Fund	179	163	171
Legal Specializations Fund	62	50	54
Annual Meeting Fund	48	38	42
Sections Funds	468	397	427
Total Cost Recovery	0	0	0
TOTAL	6,056	5,213	5,572

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	21.0	21.0	21.0	2,668	2,550	2,659
Supplemental Staffing				308	308	308
Travel & Training				33	33	33
Supplies and Postage				151	151	151
Professional Services				987	262	512
Occupancy				770	770	770
Telecommunications				27	27	27
Other Outside Services				1,109	1,109	1,109
Computers & Software				0	0	0
Buildings & Equipment				1	1	1
Retiree Medical Funding				0	0	0
Other Expenditures				2	2	2
Indirect Costs				0	0	0
TOTAL	21.0	21.0	21.0	6,056	5,213	5,572

* Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Finance by 130* in order to account for salary and benefit adjustments, 450* for increased audit and professional fees and 125* for a severance package.

CHANGES IN AUTHORIZED POSITIONS

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

* Budget, \$ thousands

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.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Budget & Performance	3.0	3.0	3.0	848	856	881
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	3.0	3.0	3.0	848	856	881
FUNDING				2015*	2016*	2017*
General Fund				515	520	535
Admin of Justice Fund				18	18	19
Admissions Fund				173	175	180
Client Security Fund				20	20	20
Lawyer Asst Program Fund				12	12	12
Legal Services Trust Fund				16	16	17
Legal Specializations Fund				13	13	13
Annual Meeting Fund				10	10	10
Sections Funds				71	72	74
TOTAL (All Funds)				848	856	881

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

(n/a)

Cost Recovery

(n/a)

* Budget, \$ thousands

DETAILED EXPENDITURES BY PROGRAM	2015*	2016*	2017*
<u>Budget & Performance</u>			
General Fund	848	856	881
Total Budget & Performance	848	856	881
<u>Cost Recovery</u>			
General Fund	-332	-336	-345
Admin of Justice Fund	18	18	19
Admissions Fund	173	175	180
Client Security Fund	20	20	20
Lawyer Asst Program Fund	12	12	12
Legal Services Trust Fund	16	16	17
Legal Specializations Fund	13	13	13
Annual Meeting Fund	10	10	10
Sections Funds	71	72	74
Total Cost Recovery	0	0	0
TOTAL	848	856	881

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	3.0	3.0	3.0	567	575	600
Travel & Training				26	26	26
Supplies and Postage				3	3	3
Professional Services				250	250	250
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	848	856	881

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Budget & Performance Analysis by 27* in order to account for salary and benefit adjustments.

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.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
General Counsel	22.0	22.0	22.0	4,634	4,560	4,674
Law Library & Archives	2.0	2.0	2.0	538	547	554
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	24.0	24.0	24.0	5,172	5,107	5,228
FUNDING				2015*	2016*	2017*
General Fund				3,898	3,853	3,943
Admin of Justice Fund				79	78	80
Admissions Fund				607	597	612
Client Security Fund				124	123	126
Lawyer Asst Program Fund				85	84	86
Legal Services Trust Fund				104	103	105
Legal Specializations Fund				76	75	76
Sections Funds				199	196	201
TOTAL (All Funds)				5,172	5,107	5,228

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

	2015*	2016*	2017*
<u>General Counsel</u>			
General Fund	4,634	4,560	4,674
Total General Counsel	4,634	4,560	4,674
<u>Law Library & Archives</u>			
General Fund	538	547	554
Total Law Library & Archives	538	547	554
<u>Cost Recovery</u>			
General Fund	-1,274	-1,254	-1,285
Admin of Justice Fund	79	78	80
Admissions Fund	607	597	612
Client Security Fund	124	123	126
Lawyer Asst Program Fund	85	84	86
Legal Services Trust Fund	104	103	105
Legal Specializations Fund	76	75	76
Sections Funds	199	196	201
Total Cost Recovery	0	0	0
TOTAL	5,172	5,107	5,228

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	24.0	24.0	24.0	3,644	3,829	3,950
Supplemental Staffing				206	206	206
Travel & Training				66	66	66
Supplies and Postage				354	354	354
Professional Services				826	576	576
Telecommunications				27	27	27
Other Outside Services				39	39	39
Computers & Software				3	3	3
Buildings & Equipment				2	2	2
Retiree Medical Funding				0	0	0
Other Expenditures				5	5	5
Indirect Costs				0	0	0
TOTAL	24.0	24.0	24.0	5,172	5,107	5,228

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in General Counsel by 7* in order to account for salary and benefit adjustments.

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		
	2015	2016	2017	2015*	2016*	2017*
HR Administration	0.0	0.0	0.0	43	43	43
Compensation Administration	1.0	1.0	1.0	199	201	204
Recruiting and Development	2.0	2.0	2.0	526	530	539
Employee Relations	1.0	1.0	1.0	779	780	785
Records and Information Systems	6.0	6.0	6.0	634	683	703
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	10.0	10.0	10.0	2,180	2,237	2,275
FUNDING				2015*	2016*	2017*
General Fund				1,591	1,632	1,660
Admin of Justice Fund				35	36	36
Admissions Fund				286	294	299
Client Security Fund				49	50	51
Lawyer Asst Program Fund				40	41	42
Legal Services Trust Fund				49	50	51
Legal Specializations Fund				36	37	37
Sections Funds				94	96	98
TOTAL (All Funds)				2,180	2,237	2,275

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)

* Budget, \$ thousands

DETAILED EXPENDITURES BY PROGRAM	2015*	2016*	2017*
<u>HR Administration</u>			
General Fund	43	43	43
Total HR Administration	43	43	43
<u>Compensation Administration</u>			
General Fund	199	201	204
Total Compensation Administration	199	201	204
<u>Recruiting and Development</u>			
General Fund	526	530	539
Total Recruiting and Development	526	530	539
<u>Employee Relations</u>			
General Fund	779	780	785
Total Employee Relations	779	780	785
<u>Records and Information Systems</u>			
General Fund	634	683	703
Total Records and Information Systems	634	683	703
<u>Cost Recovery</u>			
General Fund	-590	-605	-615
Admin of Justice Fund	35	36	36
Admissions Fund	286	294	299
Client Security Fund	49	50	51
Lawyer Asst Program Fund	40	41	42
Legal Services Trust Fund	49	50	51
Legal Specializations Fund	36	37	37
Sections Funds	94	96	98
Total Cost Recovery	0	0	0
TOTAL	2,180	2,237	2,275

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	10.0	10.0	10.0	1,169	1,226	1,264
Supplemental Staffing				153	153	153
Travel & Training				51	51	51
Supplies and Postage				14	14	14
Professional Services				154	154	154
Telecommunications				14	14	14
Other Outside Services				57	57	57
Computers & Software				0	0	0
Buildings & Equipment				1	1	1
Retiree Medical Funding				567	567	567
Other Expenditures				0	0	0
Indirect Costs				0	0	0
TOTAL	10.0	10.0	10.0	2,180	2,237	2,275

* Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Human Resources by 2* in order to account for salary and benefit adjustments.

CHANGES IN AUTHORIZED POSITIONS

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

* Budget, \$ thousands

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.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
IT Admin	2.0	2.0	2.0	415	418	438
IT Operations	11.0	11.0	11.0	2,937	2,924	2,986
IT Applications	15.0	15.0	15.0	2,896	2,954	3,014
IT Project Mgt	1.0	1.0	1.0	222	222	232
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	29.0	29.0	29.0	6,470	6,518	6,671
FUNDING				2015*	2016*	2017*
General Fund				4,721	4,755	4,867
Admin of Justice Fund				104	104	107
Admissions Fund				850	856	876
Client Security Fund				146	147	151
Lawyer Asst Program Fund				119	120	123
Legal Services Trust Fund				146	147	151
Legal Specializations Fund				106	107	109
Sections Funds				279	281	287
TOTAL (All Funds)				6,470	6,518	6,671

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

(n/a)

IT Operations

(n/a)

IT Applications

(n/a)

IT Project Mgt

(n/a)

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM

	2015*	2016*	2017*
<u>IT Admin</u>			
General Fund	415	418	438
Total IT Admin	415	418	438
<u>IT Operations</u>			
General Fund	2,937	2,924	2,986
Total IT Operations	2,937	2,924	2,986
<u>IT Applications</u>			
General Fund	2,896	2,954	3,014
Total IT Applications	2,896	2,954	3,014
<u>IT Project Mgt</u>			
General Fund	222	222	232
Total IT Project Mgt	222	222	232
<u>Cost Recovery</u>			
General Fund	-1,750	-1,762	-1,804
Admin of Justice Fund	104	104	107
Admissions Fund	850	856	876
Client Security Fund	146	147	151
Lawyer Asst Program Fund	119	120	123
Legal Services Trust Fund	146	147	151
Legal Specializations Fund	106	107	109
Sections Funds	279	281	287
Total Cost Recovery	0	0	0
TOTAL	6,470	6,518	6,671

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	29.0	29.0	29.0	4,238	4,381	4,534
Supplemental Staffing				50	50	50
Travel & Training				136	136	136
Supplies and Postage				5	5	5
Professional Services				335	335	335
Occupancy				183	183	183
Telecommunications				150	150	150
Other Outside Services				0	0	0
Computers & Software				1,260	1,165	1,165
Buildings & Equipment				115	115	115
Retiree Medical Funding				0	0	0
Other Expenditures				0	0	0
Indirect Costs				0	0	0
TOTAL	29.0	29.0	29.0	6,470	6,518	6,671

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Information Technology by 60* in order to account for salary and benefit adjustments.

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		
	2015	2016	2017	2015*	2016*	2017*
Media Relations	7.6	7.6	7.6	1,377	1,457	1,510
California Bar Journal	1.0	1.0	1.0	284	289	291
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	1,661	1,746	1,801
FUNDING				2015*	2016*	2017*
General Fund				1,526	1,603	1,653
Admin of Justice Fund				7	8	8
Admissions Fund				70	74	77
Client Security Fund				8	8	9
Grants Fund				0	0	0
Lawyer Asst Program Fund				5	5	5
Legal Services Trust Fund				7	7	7
Legal Specializations Fund				5	5	6
Annual Meeting Fund				4	4	4
Sections Funds				29	31	32
TOTAL (All Funds)				1,661	1,746	1,801

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	2015*	2016*	2017*
<u>Media Relations</u>			
General Fund	1,377	1,457	1,510
Total Media Relations	1,377	1,457	1,510
<u>California Bar Journal</u>			
General Fund	284	289	291
Total California Bar Journal	284	289	291
<u>Public Education</u>			
Grants Fund	0	0	0
Total Public Education	0	0	0
<u>Cost Recovery</u>			
General Fund	-135	-143	-148
Admin of Justice Fund	7	8	8
Admissions Fund	70	74	77
Client Security Fund	8	8	9
Lawyer Asst Program Fund	5	5	5
Legal Services Trust Fund	7	7	7
Legal Specializations Fund	5	5	6
Annual Meeting Fund	4	4	4
Sections Funds	29	31	32
Total Cost Recovery	0	0	0
TOTAL	1,661	1,746	1,801

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	8.6	8.6	8.6	1,259	1,344	1,399
Supplemental Staffing				4	4	4
Travel & Training				37	37	37
Supplies and Postage				24	24	24
Professional Services				147	147	147
Telecommunications				6	6	6
Other Outside Services				197	197	197
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	1,661	1,746	1,801

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment decreased the expenditures budget in Communications by 12* in order to account for salary and benefit adjustments.

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		
	2015	2016	2017	2015*	2016*	2017*
Administrative Services	22.0	22.0	22.0	2,320	2,336	2,403
Facilities Management	0.0	0.0	0.0	6,659	6,659	6,659
Library & Research Services	0.0	0.0	0.0			
Cost Recovery	0.0	0.0	0.0	-30	-30	-30
TOTAL (All Programs)	22.0	22.0	22.0	8,948	8,965	9,032
FUNDING				2015*	2016*	2017*
General Fund				5,239	5,252	5,303
Admin of Justice Fund				13	13	13
Admissions Fund				1,013	1,015	1,026
Building Assessment Fund				0	0	0
Client Security Fund				62	62	63
Lawyer Asst Program Fund				56	56	57
Legal Services Trust Fund				18	18	19
Legal Specializations Fund				123	123	124
180 Howard Street Fund				0	0	0
LA Facilities Fund				2,302	2,302	2,302
Annual Meeting Fund				19	19	19
Sections Funds				105	105	107
TOTAL (All Funds)				8,948	8,965	9,032

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 DESCRIPTIONSAdministrative 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.

Library & Research Services

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

	2015*	2016*	2017*
<u>Administrative Services</u>			
General Fund	2,320	2,336	2,403
Total Administrative Services	2,320	2,336	2,403
<u>Facilities Management</u>			
General Fund	4,357	4,357	4,357
Building Assessment Fund	0	0	0
180 Howard Street Fund	0	0	0
LA Facilities Fund	2,302	2,302	2,302
Total Facilities Management	6,659	6,659	6,659
<u>Cost Recovery</u>			
General Fund	-1,438	-1,442	-1,457
Admin of Justice Fund	13	13	13
Admissions Fund	1,013	1,015	1,026
Client Security Fund	62	62	63
Lawyer Asst Program Fund	56	56	57
Legal Services Trust Fund	18	18	19
Legal Specializations Fund	123	123	124
Annual Meeting Fund	19	19	19
Sections Funds	105	105	107
Total Cost Recovery	-30	-30	-30
TOTAL	8,948	8,965	9,032

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits	22.0	22.0	22.0	2,081	2,098	2,164
Supplemental Staffing				59	59	59
Travel & Training				53	53	53
Supplies and Postage				202	202	202
Professional Services				321	321	321
Occupancy				3,894	3,894	3,894
Telecommunications				36	36	36
Other Outside Services				95	95	95
Computers & Software				0	0	0
Buildings & Equipment				13	13	13
Retiree Medical Funding				0	0	0
Debt Service				2,302	2,302	2,302
Other Expenditures				-76	-76	-76
Indirect Costs				-30	-30	-30
Reimbursements				0	0	0
TOTAL	22.0	22.0	22.0	8,948	8,965	9,032

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in General Services by 74* in order to account for salary and benefit adjustments.

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		
	2015	2016	2017	2015*	2016*	2017*
Technology Projects	0.0	0.0	0.0	1,402	1,030	325
TOTAL (All Programs)	0.0	0.0	0.0	1,402	1,030	325
FUNDING				2015*	2016*	2017*
IT Assessment Fund				0	0	0
Technology Projects Fund				1,402	1,030	325
TOTAL (All Funds)				1,402	1,030	325

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
(n/a)

DETAILED EXPENDITURES BY PROGRAM	2015*	2016*	2017*
<u>Technology Projects</u>			
IT Assessment Fund	0	0	0
Technology Projects Fund	1,402	1,030	325
Total Technology Projects	1,402	1,030	325
TOTAL	1,402	1,030	325

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Supplemental Staffing				211	0	0
Travel & Training				61	0	25
Supplies and Postage				0	0	0
Professional Services				750	450	300
Telecommunications				0	0	0
Other Outside Services				50	0	0
Computers & Software				330	580	0
Buildings & Equipment				0	0	0
TOTAL				1,402	1,030	325

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 as well as at its recently acquired offices at 845 South Figueroa in Los Angeles.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Facilities Projects	0.0	0.0	0.0	5,825	1,500	1,000
TOTAL (All Programs)	0.0	0.0	0.0	5,825	1,500	1,000
FUNDING				2015*	2016*	2017*
180 Howard Street Fund				5,025	1,500	1,000
LA Facilities Fund				800	0	0
TOTAL (All Funds)				5,825	1,500	1,000

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

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2015*	2016*	2017*
<u>Facilities Projects</u>			
180 Howard Street Fund	5,025	1,500	1,000
LA Facilities Fund	800	0	0
Total Facilities Projects	5,825	1,500	1,000
TOTAL	5,825	1,500	1,000

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Travel & Training				0	0	0
Professional Services				0	0	0
Occupancy				0	0	0
Buildings & Equipment				5,825	1,500	1,000
TOTAL				5,825	1,500	1,000

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment increased the expenditures budget in Facilities Projects by 2,525* for capital improvement projects in the Bar's San Francisco and Los Angeles buildings.

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		
	2015	2016	2017	2015*	2016*	2017*
Bar-Wide Accounts	0.0	0.0	0.0	137	137	137
Fund Level Accounts	0.0	0.0	0.0	3,901	5,793	3,158
Fixed Assets	0.0	0.0	0.0			
Obsolete Accounts	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	0.0	0.0	0.0	4,038	5,930	3,295
FUNDING				2015*	2016*	2017*
General Fund				1,586	1,836	1,836
Admin of Justice Fund				709	609	609
Admissions Fund				642	642	642
Building Assessment Fund				0	0	0
Client Security Fund				73	73	73
Discipline Fund				0	0	0
Grants Fund				0	0	0
IT Assessment Fund				0	0	0
Justice Gap Fund				800	800	800
Lawyer Asst Program Fund				72	72	72
Legal Services Trust Fund				87	87	87
Legal Specializations Fund				58	58	58
180 Howard Street Fund				906	2,586	0
LA Facilities Fund				400	400	400
Technology Projects Fund				0	0	0
Annual Meeting Fund				9	9	9
Sections Funds				-1,304	-1,242	-1,291
Public Protection Fund				0	0	0
TOTAL (All Funds)				4,038	5,930	3,295

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.

Fixed Assets

In previous years, the Fixed Assets fund included a budget for depreciation expense. However, most government agencies do not budget for non-cash expenses such as depreciation. In keeping with prevailing government accounting practice, depreciation is not shown as a budgeted item in 2008.

Obsolete Accounts

The Obsolete Accounts budget is a "holding area" for certain accounts which are no longer in use, but which may have small historical amounts associated with them (so that they do not drop out of the presentation altogether).

DETAILED EXPENDITURES BY PROGRAM	2015*	2016*	2017*
<u>Bar-Wide Accounts</u>			
Admin of Justice Fund	137	137	137
Total Bar-Wide Accounts	137	137	137
<u>Fund Level Accounts</u>			
General Fund	1,586	1,836	1,836
Admin of Justice Fund	573	473	473
Admissions Fund	642	642	642
Building Assessment Fund	0	0	0
Client Security Fund	73	73	73
Discipline Fund	0	0	0
IT Assessment Fund	0	0	0
Justice Gap Fund	800	800	800
Lawyer Asst Program Fund	72	72	72
Legal Services Trust Fund	87	87	87
Legal Specializations Fund	58	58	58
180 Howard Street Fund	906	2,586	0
LA Facilities Fund	400	400	400
Technology Projects Fund	0	0	0
Annual Meeting Fund	9	9	9
Sections Funds	-1,304	-1,242	-1,291
Public Protection Fund	0	0	0
Total Fund Level Accounts	3,901	5,793	3,158
<u>Obsolete Accounts</u>			
General Fund	0	0	0
Grants Fund	0	0	0
Total Obsolete Accounts	0	0	0
TOTAL	4,038	5,930	3,295

* Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
Regular Salary & Benefits				-729	-479	-479
Travel & Training				61	61	61
Supplies and Postage				0	0	0
Professional Services				0	0	0
Occupancy				0	0	0
Telecommunications				-200	-200	-200
Other Outside Services				55	55	55
CSF Applications				0	0	0
Legal Services Grants				0	0	0
Computers & Software				0	0	0
Buildings & Equipment				0	0	0
Retiree Medical Funding				1,333	1,333	1,333
Debt Service				0	0	0
Other Expenditures				-914	1,628	-1,007
Indirect Costs				2,332	2,332	2,332
Reimbursements				0	0	0
Interfund Transfers				2,100	1,200	1,200
TOTAL				4,038	5,930	3,295

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

The State Bar Board of Trustees amended the 2015 Budget on October 11, 2015. The amendment decreased the expenditures budget in Non-Departmental by 63* in order to account for allocation changes due to the other adjustments.

CHANGES IN AUTHORIZED POSITIONS

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

* Budget, \$ thousands

Non-Bar Programs

(n/a)

	Positions			Expenditures		
	2015	2016	2017	2015*	2016*	2017*
SUMMARY OF PROGRAM REQUIREMENTS						
Access & Education Foundation	0.0	0.0	0.0			
TOTAL (All Programs)	0.0	0.0	0.0			

LEGAL CITATIONS & AUTHORITY

(n/a)

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Access & Education Foundation

(n/a)

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	2015*	2016*	2017*
Beginning Balance	4,030	1,181	-1,655
<u>Revenues</u>			
Mandatory Dues	63,875	64,925	66,025
Voluntary Dues & Donations	0	0	0
Administrative Fees	2,083	2,083	2,083
Penalties and Late Fees	2,235	2,311	2,333
Lease Revenues	408	408	408
Other Fees and Charges	190	190	190
Grants	0	0	0
Interest Income	60	60	60
Other Revenues	371	371	371
Interfund Transfers	100	0	0
Total Revenues	69,321	70,347	71,469
<u>Expenditures</u>			
Admissions	0	0	0
Chief Trial Counsel	31,141	32,081	33,101
Probation	957	985	1,017
Mandatory Fee Arbitration	766	782	811
State Bar Court	7,789	7,858	8,034
Member Records & Compliance	2,586	2,642	2,720
Professional Competence	1,900	1,936	1,980
Education	192	157	161
Legal Services	1,414	1,438	1,475
Executive Director	2,409	2,425	2,469
Finance	3,939	3,429	3,651
Budget & Performance Analysis	515	520	535
General Counsel	3,898	3,853	3,943
Human Resources	1,591	1,632	1,660
Information Technology	4,721	4,755	4,867
Communications	1,526	1,603	1,653
General Services	5,239	5,252	5,303
Non-Departmental	1,586	1,836	1,836
Total Expenditures	72,170	73,183	75,218
Ending Balance	1,181	-1,655	-5,404

* Budget, \$ thousands

Admin of Justice Fund	2015*	2016*	2017*
Beginning Balance	1,558	2,592	3,770
<u>Revenues</u>			
Voluntary Dues & Donations	1,540	1,540	1,540
Insurance Commissions	1,995	1,995	1,995
Other Fees and Charges	0	0	0
Interest Income	6	6	6
Other Revenues	490	490	490
Interfund Transfers	0	0	0
Total Revenues	4,031	4,031	4,031
<u>Expenditures</u>			
Education	562	573	585
Diversity & Bar Relations	788	744	760
Executive Director	557	563	573
Finance	125	107	114
Budget & Performance Analysis	18	18	19
General Counsel	79	78	80
Human Resources	35	36	36
Information Technology	104	104	107
Communications	7	8	8
General Services	13	13	13
Non-Departmental	709	609	609
Total Expenditures	2,997	2,853	2,903
Ending Balance	2,592	3,770	4,898

* Budget, \$ thousands

Admissions Fund	2015*	2016*	2017*
Beginning Balance	3,417	1,499	622
<u>Revenues</u>			
Administrative Fees	627	636	636
Penalties and Late Fees	476	489	489
Student Registration Fees	1,131	1,185	1,185
Exam Fees	13,574	14,251	14,251
Moral Character Fees	4,192	4,401	4,401
Other Fees and Charges	237	249	249
Interest Income	20	20	20
Other Revenues	0	0	0
Total Revenues	20,256	21,231	21,231
<u>Expenditures</u>			
Admissions	17,474	17,572	18,220
Executive Director	196	195	200
Finance	863	688	755
Budget & Performance Analysis	173	175	180
General Counsel	607	597	612
Human Resources	286	294	299
Information Technology	850	856	876
Communications	70	74	77
General Services	1,013	1,015	1,026
Non-Departmental	642	642	642
Total Expenditures	22,174	22,108	22,886
Ending Balance	1,499	622	-1,033
<hr/>			
Building Assessment Fund	2015*	2016*	2017*
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	2015*	2016*	2017*
Beginning Balance	2,295	1,998	1,825
<u>Revenues</u>			
Mandatory Dues	7,708	7,839	7,972
Interest Income	5	5	5
Other Revenues	0	0	0
Total Revenues	7,713	7,844	7,977
<u>Expenditures</u>			
Client Security Fund	7,240	7,262	7,291
Executive Director	23	23	24
Finance	267	248	259
Budget & Performance Analysis	20	20	20
General Counsel	124	123	126
Human Resources	49	50	51
Information Technology	146	147	151
Communications	8	8	9
General Services	62	62	63
Non-Departmental	73	73	73
Total Expenditures	8,011	8,017	8,066
Ending Balance	1,998	1,825	1,736
<hr/>			
Discipline Fund	2015*	2016*	2017*
Beginning Balance	0	0	0
<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	0	0	0

* Budget, \$ thousands

Grants Fund	2015*	2016*	2017*
Beginning Balance	380	72	72
<u>Revenues</u>			
Grants	0	0	0
Other Revenues	0	0	0
Total Revenues	0	0	0
<u>Expenditures</u>			
Legal Services	308	0	0
Diversity & Bar Relations	0	0	0
Executive Director	0	0	0
Communications	0	0	0
Non-Departmental	0	0	0
Total Expenditures	308	0	0
Ending Balance	72	72	72
<hr/>			
IT Assessment Fund	2015*	2016*	2017*
Beginning Balance	0	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	0	0	0
Total Expenditures	0	0	0
Ending Balance	0	0	0
<hr/>			
Justice Gap Fund	2015*	2016*	2017*
Beginning Balance	250	200	150
<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
Non-Departmental	800	800	800
Total Expenditures	800	800	800
Ending Balance	200	150	100

* Budget, \$ thousands

Lawyer Asst Program Fund	2015*	2016*	2017*
Beginning Balance	1,580	1,709	1,856
<u>Revenues</u>			
Mandatory Dues	2,017	2,051	2,086
Interest Income	4	4	4
Other Revenues	0	0	0
Total Revenues	2,021	2,055	2,090
<u>Expenditures</u>			
Lawyer Assistance Program	1,383	1,410	1,455
Executive Director	14	14	14
Finance	105	93	98
Budget & Performance Analysis	12	12	12
General Counsel	85	84	86
Human Resources	40	41	42
Information Technology	119	120	123
Communications	5	5	5
General Services	56	56	57
Non-Departmental	72	72	72
Total Expenditures	1,891	1,908	1,965
Ending Balance	1,709	1,856	1,981
Legal Services Trust Fund			
Beginning Balance	955	763	644
<u>Revenues</u>			
Mandatory Dues	50	50	50
Voluntary Dues & Donations	5,800	5,800	5,800
Administrative Fees	475	475	475
Grants	14,600	14,600	14,600
IOLTA	5,000	5,000	5,000
Interest Income	15	15	15
Other Revenues	0	0	0
Interfund Transfers	1,200	1,200	1,200
Total Revenues	27,140	27,140	27,140
<u>Expenditures</u>			
Legal Services	26,705	26,646	26,682
Executive Director	21	22	22
Finance	179	163	171
Budget & Performance Analysis	16	16	17
General Counsel	104	103	105
Human Resources	49	50	51
Information Technology	146	147	151
Communications	7	7	7
General Services	18	18	19
Non-Departmental	87	87	87
Total Expenditures	27,332	27,259	27,312
Ending Balance	763	644	472

* Budget, \$ thousands

Legal Specializations Fund	2015*	2016*	2017*
Beginning Balance	1,552	1,931	4,549
<u>Revenues</u>			
Administrative Fees	1,935	1,935	1,935
Penalties and Late Fees	0	0	0
Exam Fees	395	60	395
Other Fees and Charges	11	11	11
Interest Income	7	7	7
Other Revenues	109	2,589	3
Interfund Transfers	0	0	0
Total Revenues	2,458	4,603	2,352
<u>Expenditures</u>			
Admissions	1,567	1,482	1,640
Executive Director	33	36	36
Finance	62	50	54
Budget & Performance Analysis	13	13	13
General Counsel	76	75	76
Human Resources	36	37	37
Information Technology	106	107	109
Communications	5	5	6
General Services	123	123	124
Non-Departmental	58	58	58
Total Expenditures	2,079	1,984	2,155
Ending Balance	1,931	4,549	4,746
<hr/>			
180 Howard Street Fund	2015*	2016*	2017*
Beginning Balance	6,200	1,096	-2,162
<u>Revenues</u>			
Mandatory Dues	0	0	0
Penalties and Late Fees	0	0	0
Lease Revenues	827	827	827
Interest Income	0	0	0
Other Revenues	0	0	0
Interfund Transfers	0	0	0
Total Revenues	827	827	827
<u>Expenditures</u>			
General Services	0	0	0
Facilities Projects	5,025	1,500	1,000
Non-Departmental	906	2,586	0
Total Expenditures	5,931	4,086	1,000
Ending Balance	1,096	-2,162	-2,335

* Budget, \$ thousands

LA Facilities Fund	2015*	2016*	2017*
Beginning Balance	0	0	0
<u>Revenues</u>			
Lease Revenues	400	400	400
Interest Income	0	0	0
Other Revenues	2,302	2,302	2,302
Interfund Transfers	800	0	0
Total Revenues	3,502	2,702	2,702
<u>Expenditures</u>			
General Services	2,302	2,302	2,302
Facilities Projects	800	0	0
Non-Departmental	400	400	400
Total Expenditures	3,502	2,702	2,702
Ending Balance	0	0	0
<hr/>			
Technology Projects Fund	2015*	2016*	2017*
Beginning Balance	4,750	3,348	2,318
<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	1,402	1,030	325
Non-Departmental	0	0	0
Total Expenditures	1,402	1,030	325
Ending Balance	3,348	2,318	1,993

* Budget, \$ thousands

Annual Meeting Fund	2015*	2016*	2017*
Beginning Balance	60	23	15
<u>Revenues</u>			
Other Fees and Charges	482	482	482
Interest Income	8	8	8
Other Revenues	360	375	385
Interfund Transfers	100	0	0
Total Revenues	949	864	874
<u>Expenditures</u>			
Education	886	781	789
Executive Director	11	11	11
Finance	48	38	42
Budget & Performance Analysis	10	10	10
Communications	4	4	4
General Services	19	19	19
Non-Departmental	9	9	9
Total Expenditures	986	872	884
Ending Balance	23	15	5
<hr/>			
Sections Funds	2015*	2016*	2017*
Beginning Balance	6,469	6,188	5,799
<u>Revenues</u>			
Sections Member Dues	5,394	5,394	5,394
Grants	0	0	0
Interest Income	28	28	28
Other Revenues	2,525	2,510	2,500
Total Revenues	7,946	7,931	7,921
<u>Expenditures</u>			
Education	8,161	8,254	8,387
Executive Director	124	129	132
Finance	468	397	427
Budget & Performance Analysis	71	72	74
General Counsel	199	196	201
Human Resources	94	96	98
Information Technology	279	281	287
Communications	29	31	32
General Services	105	105	107
Non-Departmental	-1,304	-1,242	-1,291
Total Expenditures	8,228	8,320	8,453
Ending Balance	6,188	5,799	5,267

* Budget, \$ thousands

Public Protection Fund	2015*	2016*	2017*
Beginning Balance	6,494	6,494	6,494
<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	6,494	6,494	6,494

* Budget, \$ thousands

Wages & Salary Supplement

	Budgeted FTE			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
Admissions						
<u>Admissions Administration</u>						
Senior Director Admissions	1.00	1.00	1.00	11,672 - 17,182	202,641	208,208
Section Chief	2.00	2.00	2.00	6,594 - 8,682	178,650	187,014
Program/Court Sys Anlst (Conf)	1.00	1.00	1.00	5,741 - 7,639	90,616	92,560
Administrative Specialist Conf	1.00	1.00	1.00	5,137 - 6,946	74,444	78,178
Administrative Assistant II	2.00	2.00	2.00	4,466 - 5,949	120,735	126,721
Admissions Analyst III	1.00	1.00	1.00	4,466 - 5,949	72,098	72,098
Administrative Assistant I	2.00	2.00	2.00	4,041 - 5,387	108,940	114,360
Admissions Administration Total	10.00	10.00	10.00	801,528	848,124	879,139
<u>Examination Development</u>						
Director, Examinations	1.00	1.00	1.00	8,769 - 12,716	146,005	152,031
Examinations Technician	1.00	1.00	1.00	6,001 - 7,911	95,862	95,862
Examination Development Total	2.00	2.00	2.00	232,267	241,867	247,893
<u>Application Processing</u>						
Section Chief	3.00	3.00	3.00	6,594 - 8,682	294,052	302,886
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	81,262	84,893
Admis Eligibility Analyst III	1.00	1.00	1.00	4,912 - 6,546	79,326	79,326
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	67,064	70,046
Admis Eligibility Analyst II	2.00	2.00	2.00	4,466 - 5,949	130,844	133,846
Coordinator Of Records	6.00	6.00	6.00	4,041 - 5,387	355,985	371,893
Application Processing Total	14.00	14.00	14.00	961,305	1,008,533	1,042,890
<u>Admissions Operations</u>						
Director, Operations & Mgmt	1.00	1.00	1.00	8,769 - 12,716	146,005	152,031
Deputy Dir, Operations & Mgmt	1.00	1.00	1.00	7,972 - 11,565	135,675	140,140
Section Chief	1.00	1.00	1.00	6,594 - 8,682	94,415	98,832
Technology Svce Analyst Techn	1.00	1.00	1.00	6,001 - 7,911	95,862	95,862
Sr Administrative Assistant	2.00	2.00	2.00	5,457 - 7,201	166,978	170,618
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	70,156	71,870
Admissions Analyst III	1.00	1.00	1.00	4,466 - 5,949	72,098	72,098
Accounting Technician	1.00	1.00	1.00	4,041 - 5,387	59,537	62,267
Administrative Assistant I	2.00	2.00	2.00	4,041 - 5,387	124,566	127,868
Admissions Analyst II	1.00	1.00	1.00	4,041 - 5,387	59,222	61,952
Admissions Analyst I	2.00	2.00	2.00	3,317 - 4,424	102,236	104,472
Admissions Operations Total	14.00	14.00	14.00	1,076,584	1,126,750	1,158,010

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

	Positions (FTE)			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
<u>Examination Grading</u>						
Director, Admissions Admin	1.00	1.00	1.00	8,769 - 12,716	132,622	139,258
Sr Administrative Assistant	2.00	2.00	2.00	5,457 - 7,201	142,424	149,388
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	58,746	61,748
Admssions Coordinator	1.00	1.00	1.00	3,648 - 4,861	58,916	58,916
Admissions Processing Clerk II	1.00	1.00	1.00	2,999 - 3,999	48,464	48,464
Examination Grading Total	6.00	6.00	6.00	420,412	441,172	457,774
<u>Moral Character Determinations</u>						
Dir, Moral Char Determinations	1.00	1.00	1.00	8,769 - 12,716	133,409	140,078
Section Chief	2.00	2.00	2.00	6,594 - 8,682	195,468	199,556
Moral Character Analyst	9.00	9.00	9.00	5,457 - 7,201	726,855	744,972
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	72,098	72,098
Moral Character Determinations Total	13.00	13.00	13.00	1,084,487	1,127,830	1,156,704
<u>Law School Regulation</u>						
Director, Educational Standards	1.00	1.00	1.00	8,769 - 12,716	144,632	150,986
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	72,492	76,084
Law School Regulation Total	2.00	2.00	2.00	204,470	217,124	227,070
<u>Special Admissions</u>						
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	72,098	72,098
Administrative Assistant I	1.00	1.00	1.00	4,041 - 5,387	58,907	61,637
Special Admissions Total	2.00	2.00	2.00	126,890	131,005	133,735
<u>Specialization</u>						
Director, Legal Specialization	1.00	1.00	1.00	8,769 - 12,716	146,005	152,031
Section Chief	1.00	1.00	1.00	6,594 - 8,682	91,910	96,252
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	71,212	74,694
Administrative Assistant II	3.00	3.00	3.00	4,466 - 5,949	188,029	197,013
Administrative Assistant I	2.00	2.00	2.00	4,041 - 5,387	107,484	112,892
Specialization Total	8.00	8.00	8.00	569,129	604,640	632,882
<u>MCLE Providers</u>						
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	65,786	68,776
Administrative Assistant I	1.00	1.00	1.00	4,041 - 5,387	53,586	56,290
MCLE Providers Total	2.00	2.00	2.00	112,306	119,372	125,066
Admissions Total	73.00	73.00	73.00	5,589,378	5,866,417	6,061,163

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

	Positions (FTE)			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
Chief Trial Counsel						
<u>Management</u>						
Chief Trial Counsel	1.00	1.00	1.00	12,839 - 18,900	229,060	229,060
Deputy Chief Trial Counsel	1.00	1.00	1.00	10,612 - 15,528	188,188	188,188
Special Asst. Chief Trial Cnsl	1.00	1.00	1.00	9,646 - 14,189	161,620	168,854
Executive Secretary	2.00	2.00	2.00	5,137 - 6,946	168,324	168,324
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	72,098	72,098
Management Total	6.00	6.00	6.00	793,975	819,290	826,524
<u>Intake</u>						
Assistant Chief Trial Counsel	1.00	1.00	1.00	9,646 - 14,189	171,938	171,938
Senior Attorney	2.00	2.00	2.00	8,682 - 13,079	310,152	315,364
Attorney	5.75	5.75	5.75	7,041 - 10,976	739,992	750,407
Complaint Analyst	17.00	17.00	17.00	5,457 - 7,201	1,381,759	1,416,961
Paralegal	5.00	5.00	5.00	5,457 - 7,201	436,280	436,280
Complaint Analyst I	6.00	6.00	6.00	4,912 - 6,546	423,978	443,837
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	64,636	67,639
Intake Total	37.75	37.75	37.75	3,413,271	3,528,735	3,602,426
<u>Investigation</u>						
Managing Dir Investigation	1.00	1.00	1.00	7,972 - 11,565	124,424	130,644
Managing Dir Investigation	0.00	0.00	0.00	7,972 - 11,565		
Investigator Supervisor	4.00	4.00	4.00	6,594 - 8,682	371,528	384,005
Investigator II	45.00	45.00	45.00	6,001 - 7,911	4,164,462	4,210,016
Investigator I	1.00	1.00	1.00	5,457 - 7,201	72,492	76,084
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	65,680	68,674
Investigation Total	52.00	52.00	52.00	4,673,611	4,798,586	4,869,423
<u>Trial</u>						
Assistant Chief Trial Counsel	4.00	4.00	4.00	9,646 - 14,189	656,798	678,500
Senior Attorney	26.00	26.00	26.00	8,682 - 13,079	3,796,088	3,873,564
Attorney	26.00	26.00	26.00	7,041 - 10,976	2,709,783	2,826,705
Paralegal	10.00	10.00	10.00	5,457 - 7,201	819,304	839,435
Administrative Secretary	3.00	3.00	3.00	4,466 - 5,949	202,942	205,944
Trial Total	69.00	69.00	69.00	7,825,253	8,184,915	8,424,148
<u>Audit & Review</u>						
Attorney	3.60	3.60	3.60	7,041 - 10,976	451,566	461,614
Audit & Review Total	3.60	3.60	3.60	432,717	451,566	461,614

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

	Positions (FTE)			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
<u>Central Administration</u>						
Director Of Administration	1.00	1.00	1.00	8,769 - 12,716	124,795	131,034
Director, Central Admin, Ctc	1.00	1.00	1.00	8,769 - 12,716	147,397	153,076
Managing Director Admin	0.00	0.00	0.00	7,972 - 11,565	0	0
Sr Administrative Supervisor	2.00	2.00	2.00	6,594 - 8,682	180,320	188,734
Lead Data Analyst	1.00	1.00	1.00	6,001 - 7,911	78,742	82,552
Complaint Analyst	1.00	1.00	1.00	5,457 - 7,201	79,442	83,082
Program Court Sys Analyst	2.00	2.00	2.00	5,457 - 7,201	160,984	168,248
Sr Administrative Assistant	3.00	3.00	3.00	5,457 - 7,201	254,540	260,661
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	72,098	72,098
Administrative Secretary	2.00	2.00	2.00	4,466 - 5,949	130,203	136,185
Legal Secretary	16.00	16.00	16.00	4,466 - 5,949	1,070,361	1,103,905
Administrative Assistant I	2.00	2.00	2.00	4,041 - 5,387	130,572	130,572
Coordinator Of Records	15.00	15.00	15.00	4,041 - 5,387	914,385	938,654
Secretary II	12.00	12.00	12.00	4,041 - 5,387	731,280	751,499
General Clerk II	0.00	0.00	0.00	3,317 - 4,424		
General Clerk III	5.00	5.00	5.00	3,317 - 4,424	238,820	247,764
Central Administration Total	64.00	64.00	64.00	4,124,229	4,313,939	4,448,064
<u>Abandoned and Unauthorized Practices</u>						
Paralegal	0.00	0.00	0.00	5,457 - 7,201		
Coordinator Of Records	3.00	3.00	3.00	4,041 - 5,387	178,611	186,784
Abandoned and Unauthorized Practices Total	3.00	3.00	3.00	168,430	178,611	186,784
Chief Trial Counsel Total	235.35	235.35	235.35	21,431,486	22,275,642	22,818,983
Probation						
<u>Probation</u>						
Senior Attorney	1.00	1.00	1.00	8,682 - 13,079	158,496	158,496
Probation Deputy	6.00	6.00	6.00	4,912 - 6,546	443,951	458,521
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	66,949	69,932
Probation Total	8.00	8.00	8.00	643,029	669,396	686,949
Probation Total	8.00	8.00	8.00	643,029	669,396	686,949
Client Security Fund						
<u>Client Security Fund</u>						
Director, Client Security Fund	1.00	1.00	1.00	9,646 - 14,189	171,938	171,938
Senior Attorney	2.00	2.00	2.00	8,682 - 13,079	316,992	316,992
Sr Administrative Supervisor	1.00	1.00	1.00	6,594 - 8,682	105,222	105,222
Paralegal	2.00	2.00	2.00	5,457 - 7,201	166,418	170,058
Administrative Assistant II	2.00	2.00	2.00	4,466 - 5,949	139,724	142,714
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	72,098	72,098
Legal Secretary	1.00	1.00	1.00	4,466 - 5,949	65,680	68,674
Coordinator Of Records	1.00	1.00	1.00	4,041 - 5,387	65,286	65,286
Client Security Fund Total	11.00	11.00	11.00	1,076,068	1,103,358	1,112,982

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

	Positions (FTE)			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
Client Security Fund Total	11.00	11.00	11.00	1,076,068	1,103,358	1,112,982
Mandatory Fee Arbitration						
<u>Mandatory Fee Arbitration</u>						
Director, Fee Arbitration	1.00	1.00	1.00	8,769 - 12,716	119,395	125,374
Sr Administrative Assistant	3.00	3.00	3.00	5,457 - 7,201	238,326	249,246
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	70,388	72,098
Mandatory Fee Arbitration Total	5.00	5.00	5.00	403,728	428,109	446,718
Mandatory Fee Arbitration Total	5.00	5.00	5.00	403,728	428,109	446,718
State Bar Court						
<u>Administration</u>						
Sr Director State Bar Court	1.00	1.00	1.00	11,672 - 17,182	195,205	203,857
Admin Specialist III (Conf)	1.00	1.00	1.00	6,312 - 8,397	83,611	87,745
Admin Specialist II (Conf)	0.00	0.00	0.00	6,311 - 8,396		
Sr Admin Secretary	0.80	0.80	0.80	4,912 - 6,546	63,466	63,466
Administration Total	2.80	2.80	2.80	322,458	342,282	355,068
<u>Hearing Department & Effectuations Unit</u>						
Hearing Judge	5.00	5.00	5.00	14,049 - 15,384	880,750	880,750
Chief Assistant Court Counsel	1.00	1.00	1.00	9,646 - 14,189	170,285	171,938
Court Administrator	2.00	2.00	2.00	8,769 - 12,716	303,853	308,204
Senior Attorney	5.00	5.00	5.00	8,682 - 13,079	744,376	756,361
Case Administrator	10.00	10.00	10.00	6,001 - 7,911	932,840	940,602
Court Services Analyst/Tech	1.00	1.00	1.00	6,001 - 7,911	95,862	95,862
Lead Data Analyst	1.00	1.00	1.00	6,001 - 7,911	92,062	95,862
Program Court Sys Analyst	2.00	2.00	2.00	5,457 - 7,201	148,414	155,536
Deputy Court Clerk IV	2.00	2.00	2.00	4,912 - 6,546	151,434	154,741
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	63,128	66,144
Legal Secretary	1.00	1.00	1.00	4,466 - 5,949	72,098	72,098
Hearing Department & Effectuations Unit Total	31.00	31.00	31.00	3,551,303	3,655,102	3,698,098
<u>Review Department</u>						
Presiding Judge	1.00	1.00	1.00	14,049 - 15,384	192,894	192,894
Review Judge	1.60	1.60	1.60	14,049 - 15,384	291,876	291,876
Chief Court Counsel	1.00	1.00	1.00	10,612 - 15,528	188,188	188,188
Senior Attorney	3.00	3.00	3.00	8,682 - 13,079	370,037	386,881
Case Administrator	2.00	2.00	2.00	6,001 - 7,911	176,914	180,849
Review Department Total	8.60	8.60	8.60	1,175,145	1,219,909	1,240,688
State Bar Court Total	42.40	42.40	42.40	5,048,906	5,217,293	5,293,854

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

	Positions (FTE)			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
Member Records & Compliance						
<u>Member Service Center</u>						
Managing Dir Member Rec & Comp	1.00	1.00	1.00	7,972 - 11,565	118,757	124,691
Sr Administrative Supervisor	2.00	2.00	2.00	6,594 - 8,682	201,954	208,965
Lead Data Analyst	1.00	1.00	1.00	6,001 - 7,911	83,902	87,932
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	77,062	80,702
Membership Services Rep	3.00	3.00	3.00	4,912 - 6,546	218,825	225,433
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	72,098	72,098
Member Services Associate	6.00	6.00	6.00	4,466 - 5,949	410,314	420,447
Administrative Assistant I	4.00	4.00	4.00	4,041 - 5,387	233,428	242,742
Member Service Center Total	19.00	19.00	19.00	1,348,088	1,416,340	1,463,010
Member Records & Compliance Total	19.00	19.00	19.00	1,348,088	1,416,340	1,463,010
Professional Competence						
<u>Outreach & Education</u>						
Director, Professnl Competnce	1.00	1.00	1.00	9,646 - 14,189	171,938	171,938
Attorney	1.00	1.00	1.00	7,041 - 10,976	104,177	109,569
Sr Administrative Specialist	1.00	1.00	1.00	6,935 - 9,170	111,124	111,124
Paralegal	7.00	7.00	7.00	5,457 - 7,201	566,004	580,234
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	87,256	87,256
Administrative Secretary	1.00	1.00	1.00	4,466 - 5,949	70,274	72,098
Data Analyst II	1.00	1.00	1.00	3,648 - 4,861	58,916	58,916
Outreach & Education Total	13.00	13.00	13.00	1,130,855	1,169,689	1,191,135
Professional Competence Total	13.00	13.00	13.00	1,130,855	1,169,689	1,191,135
Education						
<u>Sections</u>						
Senior Director Education	1.00	1.00	1.00	11,672 - 17,182	181,392	190,455
Dir, Section Educ & Mtg Svcs	1.00	1.00	1.00	8,769 - 12,716	126,981	133,331
Managing Dir Sec Ed & Mtg Svcs	1.00	1.00	1.00	7,972 - 11,565	132,458	137,968
Meeting & Event Administrator	2.00	2.00	2.00	6,594 - 8,682	205,946	210,271
Section Coordinator	6.00	6.00	6.00	6,594 - 8,682	611,054	619,928
Web Administrator	1.00	1.00	1.00	6,001 - 7,911	89,921	93,886
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	71,084	74,555
Administrative Assistant II	7.00	7.00	7.00	4,466 - 5,949	447,693	465,680
Administrative Assistant I	1.00	1.00	1.00	4,041 - 5,387	54,210	56,914
Data Analyst II	0.00	0.00	0.00	3,648 - 4,861		
Sections Total	21.00	21.00	21.00	1,829,749	1,920,739	1,982,988
<u>Affinity & Insurance</u>						
Sr Administrative Assistant	1.80	1.80	1.80	5,457 - 7,201	154,846	157,066
Affinity & Insurance Total	1.80	1.80	1.80	149,418	154,846	157,066
Education Total	22.80	22.80	22.80	1,979,167	2,075,585	2,140,054

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

	Positions (FTE)			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
Legal Services						
<u>Program Development</u>						
Sr Director Admin Justice	1.00	1.00	1.00	11,672 - 17,182	181,392	190,455
Program Developer	3.00	3.00	3.00	6,594 - 8,682	315,666	315,666
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	85,866	87,256
Program Coordinator	1.00	1.00	1.00	4,912 - 6,546	70,316	73,637
Administrative Assistant II	3.00	3.00	3.00	4,466 - 5,949	203,992	207,324
Program Development Total	9.00	9.00	9.00	826,618	857,232	874,338
<u>Legal Services Funding</u>						
Mngng Dir, Lgl Svcs Trust Fnd	1.00	1.00	1.00	7,972 - 11,565	138,658	140,140
Senior Accountant/Auditor	2.00	2.00	2.00	6,594 - 8,682	199,917	205,946
Senior Grants Administrator	1.00	1.00	1.00	6,594 - 8,682	105,222	105,222
Sr Administrative Assistant	3.00	3.00	3.00	5,457 - 7,201	252,694	256,334
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	58,746	61,748
Compliance Auditor I	3.00	3.00	3.00	4,466 - 5,949	199,748	205,602
Legal Services Funding Total	11.00	11.00	11.00	917,894	954,985	974,992
Legal Services Total	20.00	20.00	20.00	1,744,512	1,812,217	1,849,330
Diversity & Bar Relations						
<u>Elimination of Bias</u>						
Managing Dir Diversity Outrec	1.00	1.00	1.00	7,972 - 11,565	140,140	140,140
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	77,202	80,842
Elimination of Bias Total	2.00	2.00	2.00	211,472	217,342	220,982
<u>Bar Relations</u>						
Managing Director Bar Relation	1.00	1.00	1.00	7,972 - 11,565	135,884	140,140
Program Court Sys Analyst	1.00	1.00	1.00	5,457 - 7,201	87,256	87,256
Bar Relations Total	2.00	2.00	2.00	212,852	223,140	227,396
Diversity & Bar Relations Total	4.00	4.00	4.00	424,324	440,482	448,378
Lawyer Assistance Program						
<u>Lawyer Assistance Program</u>						
Director, Lawyers Assist Prgm	1.00	1.00	1.00	8,769 - 12,716	124,424	130,644
Case Specialist	1.00	1.00	1.00	6,594 - 8,682	104,178	105,222
Case Manager	4.00	4.00	4.00	6,001 - 7,911	358,612	369,688
Program Court Sys Analyst	1.00	1.00	1.00	5,457 - 7,201	78,742	82,382
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	65,216	68,214
Lawyer Assistance Program Total	8.00	8.00	8.00	691,740	731,172	756,150
Lawyer Assistance Program Total	8.00	8.00	8.00	691,740	731,172	756,150

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

	Positions (FTE)			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
Executive Director						
<u>Management, Oversight and Planning</u>						
Executive Director/Ceo	1.00	1.00	1.00	19,750 - 19,750	236,990	236,990
Deputy Ceo/Chief Ops Officer	1.00	1.00	1.00	12,839 - 18,900	229,060	229,060
Assistant Secretary	1.00	1.00	1.00	8,769 - 12,716	150,435	154,102
Managing Dir Planning Admin	1.00	1.00	1.00	7,972 - 11,565	124,632	130,859
Special Asst To Exec Director	1.00	1.00	1.00	7,972 - 11,565	103,871	109,063
Sr Administrative Specialist	1.00	1.00	1.00	6,935 - 9,170	111,124	111,124
Admin Specialist II (Conf)	0.00	0.00	0.00	6,311 - 8,396		
Administrative Specialist Conf	1.00	1.00	1.00	5,137 - 6,946	79,785	83,060
Management, Oversight and Planning Total	7.00	7.00	7.00	1,001,400	1,035,897	1,054,258
<u>Board Support - Secretariat</u>						
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	87,256	87,256
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	72,098	72,098
Board Support - Secretariat Total	2.00	2.00	2.00	157,768	159,354	159,354
<u>Judicial Evaluations</u>						
Sr Administrative Specialist	1.00	1.00	1.00	6,935 - 9,170	110,364	111,124
Executive Secretary	1.00	1.00	1.00	5,137 - 6,946	84,162	84,162
Administrative Assistant II	2.00	2.00	2.00	4,466 - 5,949	132,593	136,966
Judicial Evaluations Total	4.00	4.00	4.00	313,491	327,119	332,252
<u>Governmental Affairs</u>						
Attorney III Conf	1.00	1.00	1.00	9,217 - 13,383	158,084	162,188
Sr Administrative Assistant	1.00	1.00	1.00	5,457 - 7,201	87,256	87,256
Governmental Affairs Total	2.00	2.00	2.00	234,626	245,340	249,444
Executive Director Total	15.00	15.00	15.00	1,707,285	1,767,710	1,795,308
Finance						
<u>Financial Planning and Analysis</u>						
Chief Financial Officer	1.00	1.00	1.00	12,839 - 18,900	229,060	229,060
Director, Finance	1.00	1.00	1.00	9,646 - 14,189	153,806	161,496
Senior Financial Analyst	1.00	1.00	1.00	6,935 - 9,170	102,843	107,780
Administrative Specialist Conf	1.00	1.00	1.00	5,137 - 6,946	81,936	83,982
Financial Planning and Analysis Total	4.00	4.00	4.00	539,919	567,645	582,318
<u>Accounting</u>						
Senior Financial Analyst	1.00	1.00	1.00	6,935 - 9,170	100,501	105,530
Payroll Specialist	1.00	1.00	1.00	5,741 - 7,639	89,634	92,560
Auditor/Accountant	1.00	1.00	1.00	4,912 - 6,546	66,004	69,306
Payroll Technician I	1.00	1.00	1.00	4,224 - 5,717	69,290	69,290
Accounting Technician	2.00	2.00	2.00	4,041 - 5,387	107,588	112,996
Accounting Clerk	1.00	1.00	1.00	3,317 - 4,424	43,636	45,872
Accounting Total	7.00	7.00	7.00	451,425	476,653	495,554

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

	Positions (FTE)			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
Procurement & Risk						
Dir Procurement & Risk Mgmt	1.00	1.00	1.00	8,769 - 12,716	135,888	142,680
Finance Manager	0.00	0.00	0.00	7,972 - 11,565	0	0
Purchasing Assistant	2.00	2.00	2.00	4,912 - 6,546	143,946	147,234
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	59,094	62,093
Procurement & Risk Total	4.00	4.00	4.00	322,412	338,928	352,007
Member Billing						
Finance Manager	1.00	1.00	1.00	7,972 - 11,565	114,652	120,390
Sr Administrative Supervisor	1.00	1.00	1.00	6,594 - 8,682	92,244	96,596
Membership Billing Technician	4.00	4.00	4.00	4,466 - 5,949	271,196	279,934
Member Billing Total	6.00	6.00	6.00	454,333	478,092	496,920
Finance Total	21.00	21.00	21.00	1,768,089	1,861,318	1,926,799
Budget & Performance Analysis						
Budget & Performance						
Director, Budget & Perf. Anls	1.00	1.00	1.00	10,612 - 15,528	181,132	187,808
Director Is & Bus Solutions	1.00	1.00	1.00	8,769 - 12,716	150,454	154,102
Budget & Performance Analyst	1.00	1.00	1.00	6,311 - 8,396	90,592	95,127
Budget & Performance Total	3.00	3.00	3.00	397,968	422,178	437,037
Budget & Performance Analysis Total	3.00	3.00	3.00	397,968	422,178	437,037
General Counsel						
General Counsel						
Chief Legal Officer	1.00	1.00	1.00	12,839 - 18,900	229,060	229,060
Deputy General Counsel	1.00	1.00	1.00	11,672 - 17,182	208,208	208,208
Chief Assist. General Counsel	1.00	1.00	1.00	10,612 - 15,528	187,846	188,188
Attorney III Conf	6.00	6.00	6.00	9,217 - 13,383	901,398	921,046
Senior Attorney	0.00	0.00	0.00	8,682 - 13,079	0	0
Director, Administration	1.00	1.00	1.00	7,972 - 11,565	132,458	137,968
Attorney	0.00	0.00	0.00	7,041 - 10,976	0	0
Attorney I	3.00	3.00	3.00	6,958 - 8,678	293,416	302,954
Admin Specialist III (Conf)	1.00	1.00	1.00	6,312 - 8,397	83,611	87,745
Admin Specialist II (Conf)	1.00	1.00	1.00	6,311 - 8,396	74,047	77,755
Investigator II	0.00	0.00	0.00	6,001 - 7,911	0	0
Legal Assistant (Confidential)	1.00	1.00	1.00	5,741 - 7,639	90,616	92,560
Program/Court Sys Anlst (Conf)	1.00	1.00	1.00	5,741 - 7,639	87,560	91,211
Administrative Secretary (Conf)	1.00	1.00	1.00	4,668 - 6,316	74,486	76,364
Legal Secretary (Confidential)	2.00	2.00	2.00	4,668 - 6,316	148,972	152,728
Legal Secretary	0.00	0.00	0.00	4,466 - 5,949	0	0
Admin Assistant II (Conf)	1.00	1.00	1.00	4,224 - 5,717	66,991	69,290
Coordinator Rec Conf	1.00	1.00	1.00	4,224 - 5,717	60,052	63,058
General Counsel Total	22.00	22.00	22.00	2,519,231	2,638,721	2,698,135

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

	Positions (FTE)			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
<u>Law Library & Archives</u>						
Senior Librarian/Archivist	1.00	1.00	1.00	6,001 - 7,911	91,758	94,798
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	70,958	72,098
Law Library & Archives Total	2.00	2.00	2.00	154,063	162,716	166,896
General Counsel Total	24.00	24.00	24.00	2,673,294	2,801,437	2,865,031
Human Resources						
<u>Compensation Administration</u>						
Hr Specialist	1.00	1.00	1.00	5,741 - 7,639	92,560	92,560
Compensation Administration Total	1.00	1.00	1.00	91,650	92,560	92,560
<u>Recruiting and Development</u>						
Hr Specialist	1.00	1.00	1.00	5,741 - 7,639	92,560	92,560
Human Resources Coordinator	1.00	1.00	1.00	4,668 - 6,316	60,208	63,214
Recruiting and Development Total	2.00	2.00	2.00	148,328	152,768	155,774
<u>Employee Relations</u>						
Director Hr & Labor Relations	1.00	1.00	1.00	8,769 - 12,716	151,461	154,102
Mgr Hr & Emp/Labor Relations	0.00	0.00	0.00	7,972 - 11,565	0	0
Employee Relations Total	1.00	1.00	1.00	143,546	151,461	154,102
<u>Records and Information Systems</u>						
Senior Hr Specialist	1.00	1.00	1.00	6,935 - 9,170	106,168	110,307
Human Resources Administrator	1.00	1.00	1.00	5,137 - 6,946	78,100	81,787
Human Resources Coordinator	3.00	3.00	3.00	4,668 - 6,316	214,244	219,284
Admin Assistant II (Conf)	1.00	1.00	1.00	4,224 - 5,717	67,414	69,122
Records and Information Systems Total	6.00	6.00	6.00	440,920	465,926	480,500
Human Resources Total	10.00	10.00	10.00	824,444	862,715	882,936
Information Technology						
<u>IT Admin</u>						
Senior Director It	1.00	1.00	1.00	11,672 - 17,182	188,640	198,074
Director Of Applications	0.00	0.00	0.00	8,769 - 12,716		
Director, Project Management	0.00	0.00	0.00	8,769 - 12,716		
Director, Technology Systems	0.00	0.00	0.00	8,769 - 12,716		
Managing Director Telecom	0.00	0.00	0.00	7,972 - 11,565		
Computer Analyst/Programmer	0.00	0.00	0.00	7,384 - 9,637		
Webmaster	0.00	0.00	0.00	7,384 - 9,637		
Technical Support Administratr	0.00	0.00	0.00	6,594 - 8,682		
Technology Svce Analyst Techn	0.00	0.00	0.00	6,001 - 7,911		
Program/Court Sys Anlst (Conf)	1.00	1.00	1.00	5,741 - 7,639	81,633	85,719
Administrative Specialist Conf	0.00	0.00	0.00	5,137 - 6,946	0	0
IT Admin Total	2.00	2.00	2.00	254,356	270,273	283,793

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

	Positions (FTE)			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
<u>IT Operations</u>						
Director, Technology Systems	1.00	1.00	1.00	8,769 - 12,716	144,632	150,986
Managing Director Telecom	1.00	1.00	1.00	7,972 - 11,565	128,477	134,886
Technical Support Administratr	8.00	8.00	8.00	6,594 - 8,682	755,872	776,342
Technology Svce Analyst Techn	1.00	1.00	1.00	6,001 - 7,911	90,542	94,190
IT Operations Total	11.00	11.00	11.00	1,068,885	1,119,523	1,156,404
<u>IT Applications</u>						
Director Of Applications	1.00	1.00	1.00	8,769 - 12,716	154,102	154,102
Computer Analyst/Programmer	10.00	10.00	10.00	7,384 - 9,637	1,089,690	1,112,216
Webmaster	2.00	2.00	2.00	7,384 - 9,637	227,928	232,816
Technology Svce Analyst Techn	2.00	2.00	2.00	6,001 - 7,911	191,344	191,724
IT Applications Total	15.00	15.00	15.00	1,606,620	1,663,064	1,690,858
<u>IT Project Mgt</u>						
Director, Project Management	1.00	1.00	1.00	8,769 - 12,716	144,632	150,986
IT Project Mgt Total	1.00	1.00	1.00	136,104	144,632	150,986
Information Technology Total	29.00	29.00	29.00	3,065,965	3,197,492	3,282,041
Communications						
<u>Media Relations</u>						
Chief Executive Communications	1.00	1.00	1.00	12,839 - 18,900	220,312	228,471
Director Communications	1.00	1.00	1.00	8,769 - 12,716	133,305	139,974
Web Editor	1.00	1.00	1.00	6,594 - 8,682	93,580	97,972
Public Information Officer	3.60	3.60	3.60	6,001 - 7,911	304,796	314,904
Web Administrator	1.00	1.00	1.00	6,001 - 7,911	78,322	82,102
Media Relations Total	7.60	7.60	7.60	786,898	830,315	863,423
<u>California Bar Journal</u>						
Program Court Sys Analyst	1.00	1.00	1.00	5,457 - 7,201	87,256	87,256
California Bar Journal Total	1.00	1.00	1.00	82,948	87,256	87,256
Communications Total	8.60	8.60	8.60	869,846	917,571	950,679

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

	Positions (FTE)			Expenditures		
	2015	2016	2017	2015 Range	2016 Budget	2017 Budget
General Services						
<u>Administrative Services</u>						
Director, Operations	1.00	1.00	1.00	10,612 - 15,528	181,132	187,808
Deputy Director, Operations	1.00	1.00	1.00	7,972 - 11,565	107,957	113,357
Admin Specialist III (Conf)	1.00	1.00	1.00	6,312 - 8,397	83,611	87,745
Admin Specialist II (Conf)	0.00	0.00	0.00	6,311 - 8,396		
Supervisor, Off. & Recep. Svcs	2.00	2.00	2.00	6,001 - 7,911	191,724	191,724
Administrative Assistant II	1.00	1.00	1.00	4,466 - 5,949	72,098	72,098
Printing Technician II	2.00	2.00	2.00	4,466 - 5,949	144,196	144,196
Travel & Info Svcs Coordinator	2.00	2.00	2.00	4,041 - 5,387	124,823	127,553
Maintenance Technician	1.00	1.00	1.00	3,648 - 4,861	58,164	58,916
Printing Technician I	2.00	2.00	2.00	3,648 - 4,861	115,198	117,550
Sr Office Services Coordinator	1.00	1.00	1.00	3,648 - 4,861	58,916	58,916
Sr Office Services Clerk	5.00	5.00	5.00	3,317 - 4,424	239,250	248,194
Receptionist/Reservation Coord	3.00	3.00	3.00	2,999 - 3,999	135,382	139,411
Administrative Services Total	22.00	22.00	22.00	1,455,094	1,512,451	1,547,468
General Services Total	22.00	22.00	22.00	1,455,094	1,512,451	1,547,468

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