

**APPENDIX A**

**DESIGNATED EMPLOYEE POSITIONS<sup>1</sup>**

<b><u>OFFICE AND POSITIONS</u></b>	<b><u>DISCLOSURE CATEGORIES</u></b>
<b><u>I. Executive Function/Operations</u></b>	
<b>Executive Director/Chief Executive Officer (CEO)</b>	1
<b>Dep. Exec. Director/Dep. Chief Executive Officer (DCEO)</b>	1
<b>Assistant Secretary</b>	4, 11, 12
<b>Managing Director, Planning &amp; Administration</b>	4, 11, 12
<i>Senior Administrative Specialist JNE &amp; Appointments</i>	4, 11, 12
<i>Senior Administrative Specialist</i>	20
<b>Senior Director, Administration of Justice</b>	1
<i>Program Coordinator</i>	2, 4, 10, 11, 18
<i>Program Developer</i>	2, 4, 10, 11, 14, 17, 18
<i>Senior Administrative Assistant</i>	2, 4, 10, 11, 14, 17, 18
<b>Managing Director, Legal Services Trust Fund</b>	2, 4, 6, 10, 11, 14, 18
<i>Senior Grants Administrator</i>	20
<i>Senior Administrative Assistant</i>	20
<b>Director, Communications &amp; Information Services</b>	2, 7, 14, 18, 19
<i>Web Editor</i>	2, 7, 19
<i>Program / Court Systems Analyst</i>	2, 4, 10, 11, 17, 18, 19
<i>Public Information Officer</i>	20
<b>Managing Director, Bar Relations Outreach</b>	2, 4, 10, 11, 14, 17, 18, 19
<i>Program/Court Systems Analyst</i>	2, 4, 10, 11, 14, 17, 18, 19
<b>Director, Professional Competence</b>	2, 4, 7, 9, 10, 11, 14, 17
<i>Senior Administrative Specialist</i>	2, 4, 7, 9, 10, 11, 14, 17
<i>Attorney, Professional Competence</i>	20
<b>Director, Human Resources &amp; Labor Relations</b>	5, 7, 8
<i>Senior Human Resources Analyst</i>	5, 7, 8
<i>Human Resources Employment Representative</i>	8
<i>Human Resources Representative</i>	20
<b>Managing Director Diversity Outreach</b>	2, 4, 10, 11, 14, 17, 18

<sup>1</sup> Where employees in both San Francisco and Los Angeles have the same job title, only the job title appears and not the location. Employees in either location with the indicated job title should file conflicts reports according to the category listed.

<b><u>OFFICE AND POSITIONS</u></b>	<b><u>DISCLOSURE CATEGORIES</u></b>
<i>Senior Administrative Assistant</i>	2, 4,10, 11, 14, 17, 18
<b>State Bar Court Judge</b>	20
<b>Senior Director, State Bar Court</b>	1
<b>Director, Client Security Fund</b>	20
<i>Senior Administrative Supervisor</i>	20
<b>Director, Fee Arbitration</b>	4
<i>Senior Administrative Assistant</i>	20
<b>Chief Court Counsel</b>	20
<b>Chief Assistant Court Counsel</b>	20
<b>Court Administrator</b>	20
<i>Court Services Analyst Technician</i>	20
<i>Administrative Specialist II</i>	20
<i>Senior Attorney, Probation</i>	20
<b>Senior Director, Admissions</b>	1
<i>Senior Administrative Assistant</i>	2, 3, 4, 7, 9, 10, 11, 13
<i>Administrative Specialist</i>	20
<b>Director, Educational Standards</b>	2, 3, 4, 7, 10, 11, 13, 14, 17, 18
<i>Senior Administrative Assistant</i>	4, 11, 17
<b>Director, Examinations</b>	2, 3, 4, 7, 10, 11, 13, 14, 17, 18
<i>Examination Technician</i>	2, 4, 7, 10, 11, 18
<b>Director, Legal Specialization</b>	2, 3, 4, 7, 10, 11, 13, 14, 17, 18, 19
<i>Senior Administrative Assistant</i>	4, 11
<i>Section Chief</i>	2, 4, 7, 8, 9, 10, 11, 13, 14
<b>Director, Admissions Administration</b>	2, 3, 4, 7, 8, 9, 10, 11, 13, 14, 18
<i>Section Chief</i>	2, 4, 7, 10, 14
<b>Director, Moral Character Determinations</b>	2, 3, 4, 7, 10, 11, 16, 18
<i>Section Chief</i>	20
<b>Director, Operations &amp; Management</b>	2, 4, 6, 7, 10, 11, 13, 14
<b>Deputy Director, Operations &amp; Management</b>	2, 4, 6, 7, 10, 11, 13, 14
<i>Section Chief</i>	2, 4, 7, 8, 10, 11, 13, 14
<i>Section Chief</i>	2, 4, 7, 10, 14
<i>Section Chief</i>	20
<b>Acting Director, Lawyer Assistance Program</b>	2, 4, 7, 10, 16, 17, 18, 19
<b>Senior Director, Education</b>	2, 4, 10, 11, 17, 18
<b>Managing Director ,Section Education &amp; Meeting Services</b>	2, 4, 10, 11, 17, 18

<b><u>OFFICE AND POSITIONS</u></b>	<b><u>DISCLOSURE CATEGORIES</u></b>
<i>Meeting &amp; Event Administrator</i>	2, 4, 10, 11, 17, 18
<i>Section Coordinator</i>	2, 4, 10, 11, 17, 18
<i>Senior Administrative Assistant</i>	2, 4, 11, 14
<b><u>II. Regulation</u></b>	
<b>Chief Trial Counsel</b>	1
<b>Special Assistant to Chief Trial Counsel</b>	20
<b>Deputy Chief Trial Counsel</b>	20
<b>Assistant Chief Trial Counsel</b>	20
<i>Director, Central Administration</i>	7, 10
<i>Supervisor, Administrative Services</i>	20
<b><u>III. Finance / General Services / Member Information</u></b>	
<b>Chief Financial Officer</b>	1
<i>Administrative Specialist, Confidential</i>	20
<b>Director, Budget &amp; Performance Analysis</b>	1
<i>Budget &amp; Performance Analyst</i>	10
<b>Director, Finance / Controller</b>	1
<i>Senior Financial Analyst</i>	6
<b>Finance Manager</b>	1
<b>Director, General Services</b>	1
<i>Supervisor Office &amp; Reception Services - LA</i>	2, 4, 10, 11, 14, 18
<i>Administrative Specialist</i>	2, 4, 10, 11, 13
<b>Deputy Director, General Services</b>	2, 4, 5, 6, 10,11,13,14,15,18
<i>Supervisor Office &amp; Reception Services - SF</i>	2, 4, 10, 11, 14, 18
<i>Supervisor Offset Printing</i>	2, 10, 14
<b>Managing Director, Member Records &amp; Info Services</b>	2, 4, 5, 6, 7, 10, 11, 14, 17
<i>Senior Administrative Assistant</i>	2, 4, 10, 11, 17, 18
<i>Senior Administrative Supervisor</i>	2, 4, 5, 6, 7, 10, 11, 14, 17
<i>Senior Administrative Supervisor</i>	20
<b>Senior Director, Information Technology</b>	1
<b>Director, Technology Systems</b>	7, 10
<b>Director, Information Systems</b>	7, 10
<b>Managing Director, Systems Development</b>	7, 10
<b>Managing Director, Telecommunications</b>	7, 10
<b>Managing Dir, Information Technology/Systems Projects</b>	7, 10
<b>Director, Project Management</b>	7, 10

<b><u>OFFICE AND POSITIONS</u></b>	<b><u>DISCLOSURE CATEGORIES</u></b>
<b>Director, Applications</b>	7, 10
<i>Administrative Specialist</i>	7, 10
<i>Technical Support Administrator</i>	20
<i>Webmaster</i>	7
<b><u>IV. General Counsel</u></b>	
<b>Chief Legal Officer</b>	1
<b>Chief Assistant General Counsel</b>	20
<b>Director, Administration</b>	9, 10
<i>Attorney III (Confidential)</i>	20
<i>Senior Librarian / Archivist</i>	10, 17
<b><u>V. Miscellaneous Boards &amp; Commissions</u></b>	
Committee on Group Insurance	20
Committee on Professional Liability Insurance	20
Lawyer Assistance Program Oversight Committee	20
Board of Legal Specialization	20
Advisory Commission, Legal Specialization	20
Committee of Bar Examiners	20
Client Security Fund Commission	20
Legal Services Trust Fund Commission	20
Consultants/Contractors	30

<b><u>APPENDIX B</u></b>	
<b><u>DISCLOSURE CATEGORIES</u></b>	
(Amended by the Board of Governors on January 9, 2010)	
<b><u>Category 1.</u></b>	Designated Employees in this category shall disclose, as required by Government Code sections 87206 and 87207 and this Code sections 6 and 7, all reportable investments, business positions in business entities, interests in real property, and sources of income.
	Designated Employees in this category shall disclose, as required by Government Code sections 87206 and 87207 and the State Bar's Conflict of Interest Code, all reportable investments in, business positions held in, and sources of income received from the following business entities or individuals:

<u>Category 2.</u>	Vendors of typesetting, printing or duplicating services or equipment, and vendors of messenger services.
<u>Category 3.</u>	Accredited and unaccredited law schools, admissions related consultants.
<u>Category 4.</u>	Vendors of meeting space, food services, and entertainment.
<u>Category 5.</u>	Insurance companies, insurance brokerage firms, carriers, holding companies, underwriters, brokers, solicitors, agents, adjusters, claims managers, actuaries, and third-party administrators.
<u>Category 6.</u>	Banks and other financial institutions.
<u>Category 7.</u>	Vendors of computers, computer hardware, computer maintenance, software, data processing, web hosting, web design, and computer consulting services.
<u>Category 8.</u>	Employee benefit providers and administrators of employee benefits, personnel consulting services and employment agencies.
<u>Category 9.</u>	Court reporting services.
<u>Category 10.</u>	Vendors of office supplies, office equipment, office furniture or building maintenance supplies or services, video or telecom supplies, services, or equipment, and moving and storage services.
<u>Category 11.</u>	Travel agencies, hotels, meeting planning services, airlines, car rental agencies and ground transport.
<u>Category 12.</u>	Providers of voting and election related services.
<u>Category 13.</u>	Security services.
<u>Category 14.</u>	Mass mailing services.
<u>Category 15.</u>	Real estate brokerage firms, real estate agents, real estate brokers and companies that engage in property management, land development, construction or the acquisition or sale or leasing or subleasing of real property.

<u>Category 16.</u>	Providers of treatment or services related to chemical dependency.
<u>Category 17.</u>	Providers of continuing legal education, legal publications, online legal research.
<u>Category 18.</u>	Providers of audio-visual production services.
<u>Category 19.</u>	Public relations and / or media management consultants.
<u>Category 20.</u>	Designated Employees in this category shall only be required to disclose financial interests on their Statement of Economic Interests under the following circumstances: If during a reporting period, a Designated Employee in this category has been required to make a disclosure under the provisions of Business and Professions Code section 6036, he or she shall disclose the disqualifying interest on a Statement of Economic Interests.
<u>Category 30.</u>	The disclosure category for Designated Employees in this category shall be determined by the Executive Director in consultation with the Board of Governors.