



The State Bar of California

Title of Report: 2024 Adopted Final Budget
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The State Bar of California has submitted a report to the Legislature in accordance with Business and Professions Code section 6140.1 and 6140.12, which requires the State Bar to submit a final budget to the Legislature by February 28 of each year. This summary is provided pursuant to Government Code section 9795.

The State Bar Board of Trustees adopted a new five-year strategic plan in May 2022 structured around four goals: (1) protecting the public by strengthening the attorney discipline system; (2) improving access to and inclusion in the legal system; (3) regulating the legal profession; and (4) engaging partners. The State Bar's 2024 budget allocates resources to support the continued provision of core services and to advance the organization's five-year strategic plan.

The State Bar's budget is comprised of eleven funds. The General Fund, Admissions Fund, and grant-related funds support most State Bar activity and expenditures. The 2024 budget reflects the ongoing unfortunate reality of a structural General Fund operating deficit, a shrinking General Fund reserve, and no scheduled attorney licensing fee increases to improve the health of that fund. The State Bar is, however, pursuing a fee increase request for 2025. The Admissions Fund also faces a challenging deficit position; however, with recently adopted service program fee increases, this fund's deficit position decreased as compared to prior years.

Budgeted 2024 revenues of \$428.9 million reflect an increase of \$94.2 million compared to 2023, comprised entirely of grant-related revenue; overall budgeted expenses of \$400.9 million represent a net increase of \$106.9 million for over the same comparative period. Key changes from 2023 include:

- Revenue increased \$94.2 million from the 2023 budget mostly due to increased interest revenue from Lawyers' Trust Accounts (IOLTA) and state and federal grants revenue.
- Personnel expenses increased by \$10 million from the 2023 budget primarily due to cost-of-living adjustments, merit increases, and benefit healthcare rate increases.
- Building operations increased by \$4.4 million from the 2023 budget reflecting the impact of transitioning from owned to leased office space. The cost will decrease in 2025 when the State Bar reduces its San Francisco office footprint.
- Services expenditures increased by \$7.1 million reflecting critical one-time investments that support key strategic initiatives.

The 2024 Adopted Final Budget can be accessed at: <https://www.calbar.ca.gov/About-Us/Our-Mission/Protecting-the-Public/Reports>. A printed copy of the report may be obtained by calling 415-538- 2000.



The State Bar
of California

2024 Budget Report



February 28, 2024



EXECUTIVE DIRECTOR'S BUDGET MESSAGE

The State Bar holds paramount its responsibility to protect the public through the licensing, regulation, and discipline of California's 266,000 attorneys.

The 2024 budget allocates resources to support the continued provision of core services to further this responsibility and to advance the organization's 2022–2027 Strategic Plan. The budget also supports the institutional reform underway at the State Bar, as evidenced by investments in critical transparency and accountability measures.

The budget relies heavily on one-time revenue generated by the sale of the State Bar's headquarters at 180 Howard Street, San Francisco. The State Bar ended 2023 with a General Fund reserve balance of \$36 million, \$30 million of which came from proceeds from the building sale, and the budgeted 2024 deficit of \$22.1 million is closed entirely by building sale proceeds. Selling the organization's historic flagship headquarters was a necessary step toward interim financial stability. An ongoing licensing fee increase effective 2025 is, however, the only permanent solution to the State Bar's long-standing financial challenges.

The 2024 budget anticipates revenues of \$428.9 million and expenses of \$400.9 million. Although this picture looks positive, General Fund revenue, generated primarily by attorney licensing fees and the main source of funding for the attorney discipline system, is projected at \$96.3 million and expenses at \$118 million. The State Bar's reserve policy sets a floor of 17 percent for reserves in most funds. However, the 2024 adopted budget will result in a General Fund reserve balance totaling \$13.9 million, or 11.8 percent, at the end of 2024.

The State Bar has prudently managed its fiscal resources over the last two decades, enabling it to sustain and grow operations with only one fee increase in nearly 25 years. That said, the budget presented today reflects an undeniable reality: that a fee increase in 2025 is critically needed.

Leah Wilson,
Executive Director, State Bar of California

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BACKGROUND: THE STATE BAR OF CALIFORNIA



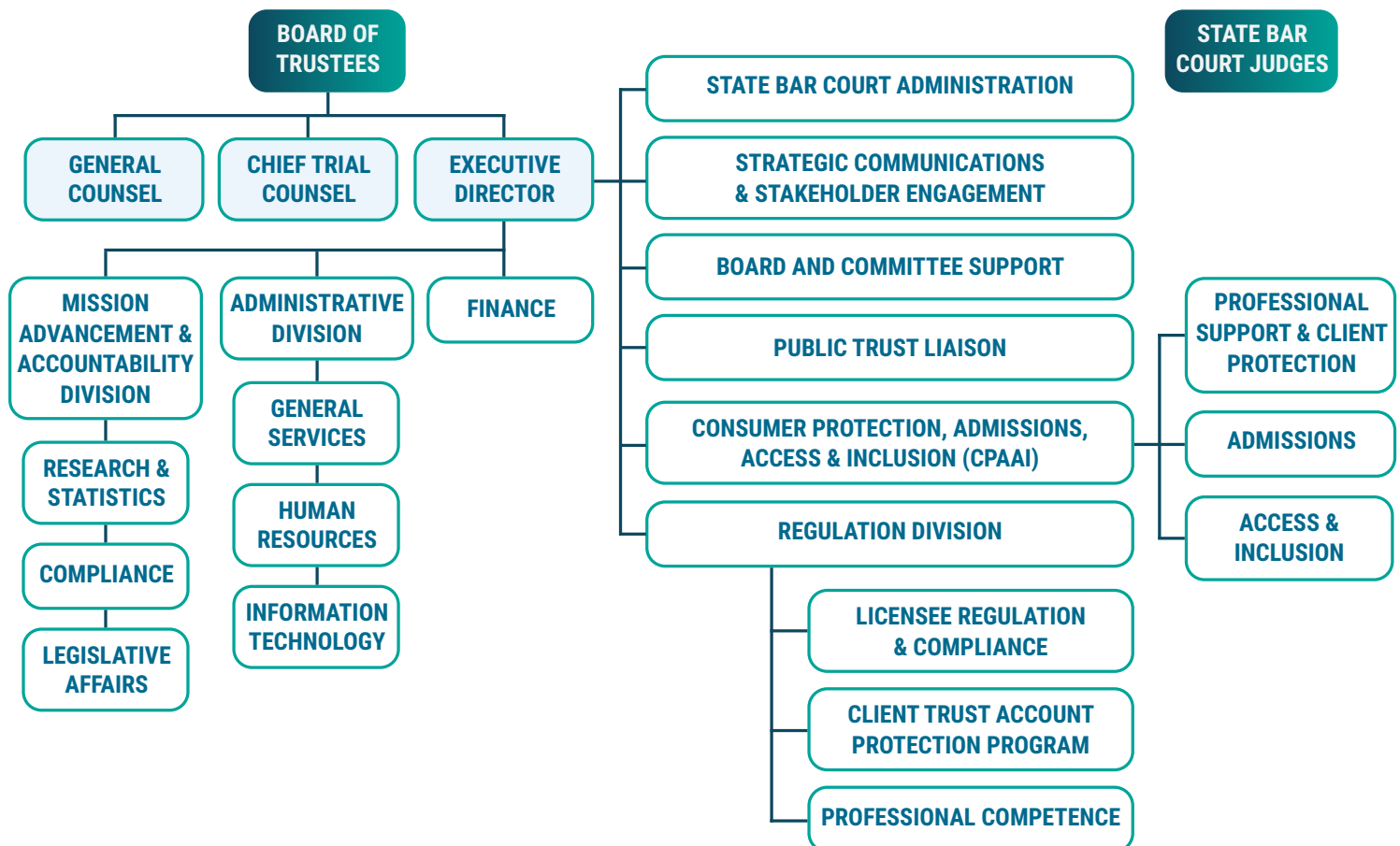
The State Bar of California is a public protection agency committed to transparency, accountability, and excellence. The State Bar serves as an administrative arm of the California Supreme Court on all matters pertaining to the admission, discipline, and regulation of California's lawyers.

The State Bar is governed by a Board of Trustees comprising 13 appointed members:

- Five attorneys appointed by the California Supreme Court;
- Two attorneys appointed by the Legislature, one by the Senate Committee on Rules, and one by the Speaker of the Assembly; and
- Six “public” or nonattorney members—four appointed by the governor, one by the Senate Committee on Rules, and one by the Speaker of the Assembly.

The Board of Trustees sets the strategic direction for the State Bar and oversees key staff to ensure execution of that direction.

With over 266,000 licensed attorneys, the State Bar of California is the largest state bar in the country. To practice law in California, attorneys must pass the California Bar Exam, meet moral character requirements, satisfy triennial Minimum Continuing Legal Education (MCLE) requirements, and pay annual licensing fees to the State Bar.



THE 2024 BUDGET SUPPORTS KEY STRATEGIC INITIATIVES

The [2022-2027 Strategic Plan](#) contains four broad goals reflecting the State Bar's vision for realizing its public protection mission. As shown below, key initiatives receiving funding in 2024 are designed to advance these goals.

PROTECT THE PUBLIC BY STRENGTHENING THE ATTORNEY DISCIPLINE SYSTEM

Updated Study on Racial Disparities in the State Bar Discipline System

- In 2019, the State Bar of California initiated a study to assess the impact of race/ethnicity on attorney discipline.
- The study found that, without controlling for any other factors, disproportionate discipline occurred particularly with respect to African American male attorneys, who were three times as likely to be placed on probation and almost four times as likely to be disbarred, as their white male counterparts.
- The study also found that racial disparities in discipline were explained by variables, such as a higher number of complaints filed against African American men, more investigations opened against them, and a lower likelihood of being represented by defense counsel in State Bar discipline proceedings.
- The State Bar implemented a number of measures to address these variables following the study's publication.
- The State Bar will update the 2019 study in 2024 to formally assess whether the mitigation measures implemented have achieved the goal of reducing racial disparities in the State Bar discipline system.

Increasing Diversionary Options

As part of its goal to strengthen the attorney discipline system and effectively manage investigative resources, the State Bar will be expanding diversionary programming in 2024. A three-pronged approach will be implemented including a pre-filing complaint alternative program, an expansion of post-complaint filing diversion options, and enhancement of the State Bar's Mandatory Fee Arbitration Program to increase its reach and effectiveness.

PROTECT THE PUBLIC BY ENHANCING ACCESS TO AND INCLUSION IN THE LEGAL SYSTEM

Updated California Justice Gap Study

- In 2019, the State Bar completed the first-ever [California Justice Gap Study](#), measuring the gulf between the need for civil legal services and access to legal representation. Overall, the study found that the justice gap is widespread, pervasive, and multifaceted, with Californians receiving no or inadequate legal help for 85 percent of the civil legal problems they experienced.
- In 2024, the State Bar will update the study to determine the amount of progress made in closing the justice gap over the last five years.

California Bar Exam Studies

In 2024, the State Bar will test the impact of various exam components (remote versus online, open book versus closed book, and length of time for exam questions) on exam performance by race/ethnicity, gender, and law school type. These studies will inform future decisions about the exam's delivery and format.

PROTECT THE PUBLIC BY REGULATING THE LEGAL PROFESSION

The Client Trust Account Protection Program (CTAPP)

To strengthen public protection and better support attorneys in fulfilling their client trust accounting duties, the State Bar implemented CTAPP. With few exceptions, all California lawyers must comply with new requirements to register their Interest on Lawyers' Trust Accounts (IOLTA) and non-IOLTA accounts annually with the State Bar, complete an annual self-assessment of client trust account management practices, and certify with the State Bar that they understand and comply with requirements and prohibitions outlined in [rule 1.15](#) of the Rules of Professional Conduct.

In 2024, there will be a continued expansion of CTAPP, which will involve further enhancements, including:

- Expanded public outreach and education on the rights of clients and attorney responsibilities;
- Enhanced education for attorneys on best practices in client trust account management; and
- Voluntary compliance reviews of selected lawyers by a certified public accountant to ensure adherence to client trust account management requirements.

PROTECT THE PUBLIC BY ENGAGING PARTNERS

Revamping the State Bar's Website to Increase Access, Usability, and Security

- The 2024 budget includes funding to support a complete overhaul of the State Bar's website, which will create more robust and accessible ways for the public to engage with the State Bar. The new website will support the specific goals of increasing access to State Bar data and performance outcomes; ensuring that licensees are aware of the State Bar's work and how it supports competent and ethical practice; and enhancing the visibility and accessibility of State Bar meetings. In addition, the 2024 effort will include overdue security enhancements.

RESPONSIBLE FISCAL STEWARDSHIP

- The 2024 budget reflects actions taken in 2023 by the Board of Trustees to increase Admissions and General Fund service fees. Admissions fee increases are estimated to generate an additional \$6.2 million in revenue in 2024, and General Fund service fee revenues are estimated to increase by \$3.4 million.
- The 2024 budget also reflects a continuation of cost-saving measures implemented post-pandemic, including strict restrictions on travel for staff and volunteers and catering costs for in-person committee meetings.
- In 2023, the Board also adopted a policy requiring annual adjustment of most service fees based on the CPI. This policy will go into effect in 2024.

BUDGET BACKGROUND

FUND STRUCTURE

The State Bar's budget represents a complex combination of 21 funding sources supporting over 40 distinct functions within the organization:

General Fund—Spendable financial resources that can generally be used to support most aspects of the State Bar's operations. The primary source of funding for the General Fund are fees paid by licensees of the State Bar, as authorized annually by Business and Professions Code section 6140.

Restricted Fund Group—Activities and financial resources that can only be used for specific purposes. The State Bar has 10 funds in this group:

- Admissions Fund
- Bank Settlement Fund
- Client Security Fund (CSF)
- Elimination of Bias Fund
- Equal Access Fund (EAF)
- Grants Fund
- Justice Gap Fund
- Lawyer Assistance Program (LAP) Fund
- Legal Services Trust Fund
- Legislative Activities Fund

Reserves—State Bar funds are generally required to maintain a net reserve balance minimum equating to two months—or 17 percent—of operating expenses, and a maximum reserve balance of 30 percent. Whenever the reserve level in a fund subject to the policy surpasses 30 percent, a reserve spend-down plan is developed.

2025–2027 FORECAST

Except for line items with known variances, the 2025–2027 forecast assumes the following:

- A 3 percent inflationary increase for expenses annually. The inflationary percentage is based on a rounded three-year historical average of the Consumer Price Index (CPI) for Urban—San Francisco-Oakland-Hayward for the period ending December 2023.
- A 2.5 percent cost-of-living adjustment (COLA) in 2025 per the negotiated memorandum of understanding (MOU).
- No COLA increases for 2026–2027, as they have not yet been negotiated with the State Bar's union. Annual step increases for qualifying employees are included.
- Flat staffing levels.
- Growth in mandatory fee revenue projected annually at 0.3 percent based on projected licensee counts.
- No statutory licensing fee increase.

Without a fee increase, the General Fund will become insolvent in 2025, as all remaining reserves will be depleted. In addition to the General Fund, the Admissions Fund faces a structural deficit and is projected to exhaust its reserves in 2026.

2024 REVENUE AND EXPENDITURE HIGHLIGHTS

REVENUE HIGHLIGHTS

- Reflecting responsible fiscal stewardship, the State Bar undertook an assessment of Admissions and General Fund service fees in 2023 to ensure that those fees at a minimum covered the cost of providing related services. Following this assessment, the Board of Trustees adopted increases in most service fees. This adjustment is projected to yield an additional \$9.6 million in Admissions and General Fund revenue in 2024.
- Revenue associated with legal services grantmaking has experienced significant growth, escalating from \$204 million in the amended 2023 budget to \$281 million in the 2024 budget.
- The State Bar is expected to earn \$8.9 million in interest revenue in 2024 due to the continuing favorable interest-rate environment.

EXPENDITURE HIGHLIGHTS

The 2024 budget includes critical one-time investments totaling \$7.1 million. These investments support key strategic initiatives, including:

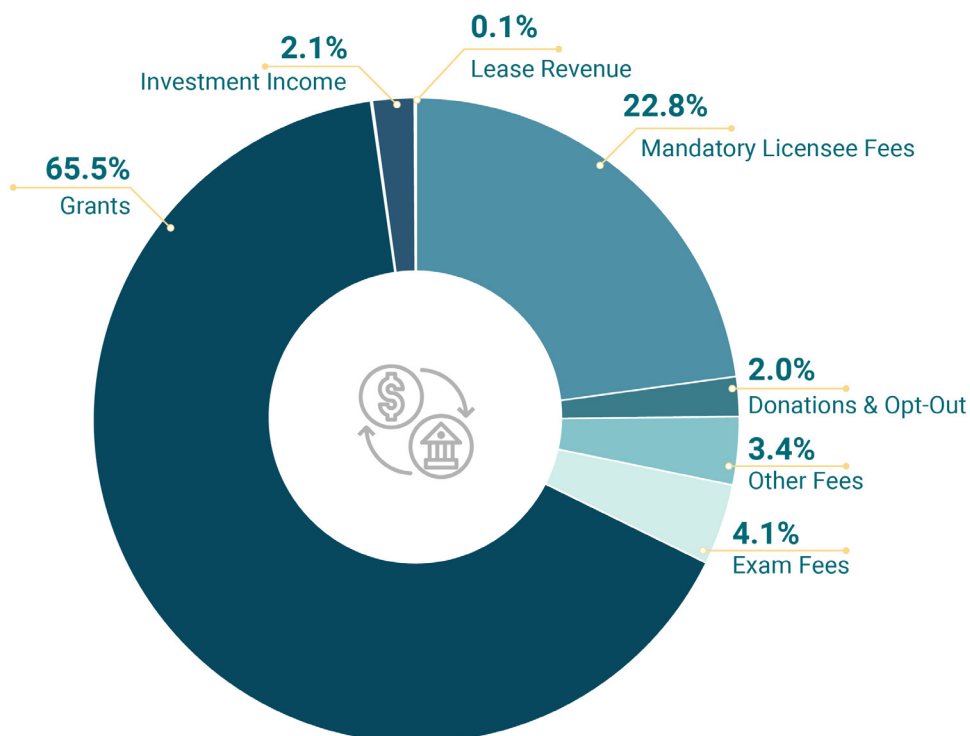
- Redesign and security improvements for the State Bar website (\$0.3M).
- Five-year update to the California Justice Gap Study (\$0.4M).
- Five-year update to the study of racial disparities in the attorney discipline system (\$0.1M).
- Transition to a reduced physical footprint in San Francisco, including digitization project (\$3.8M).
- Needed infrastructure investments in the Los Angeles building (\$1.5M).
- New contact center system to improve customer service (\$0.5M).
- Funding to address pending State Bar litigation (\$0.5M).

These investments are partially offset by a one-time deferral in 2024 of the \$2.8 million contribution payment to the Other Post-Employment Benefit Plan (OPEB).

2024 REVENUE OVERVIEW

SOURCES OF FUNDS

The State Bar's 2024 adopted budget reflects \$428.9 million in total revenue. Mandatory fees and grants revenues are the largest sources of revenue for the State Bar, totaling approximately \$378.5 million, or 88.3 percent.



GRANTS

The State Bar is responsible for the administration and distribution of grants generated through various mechanisms, including IOLTA funding, the Equal Access Fund, the Justice Gap Fund, bank settlements, and federal awards. These grants fund the provision of free legal services to low-income Californians through several programs. Some of these programs distribute funds according to a statutory formula and others through competitive grant processes.

MANDATORY LICENSEE FEES

Attorney licensing fees are set annually by the Legislature. As of 2024, active attorneys pay \$463. This amount includes the statutory base fee, plus a \$25 discipline fee, a \$40 CSF fee, a \$4 limited-term building special assessment, a \$5 limited-term information technology special assessment, and a \$10 LAP fee.

EXAM FEES

Exam fees, which are reported in the State Bar's Admissions Fund, include revenue from the First-Year Law Students' Exam and the California Bar Exam.

The 2024 budget projects a \$6.2 million increase in exam-related fees resulting from fee increases adopted in 2023.

DONATIONS

The State Bar generates revenue through donations, which fund specific program areas including legal services, the elimination of bias in the legal profession, and legislative relations.

OTHER FEES

The State Bar generates service fees from a number of activities, including law student registration, law school accreditation, penalty and late-fee assessments, registration of limited law partnerships and law corporations, and issuing certificates of good standing.

The 2024 budget reflects a \$3.6 million increase in Other Fees resulting from fee increases adopted in 2023.

OPT-INS AND OPT-OUTS

The State Bar generates revenue through voluntary fees from licensees. Voluntary fees and donations fund specific program areas, including legal services, the elimination of bias in the legal profession, and legislative relations.

Opt-Ins

- Access to Justice—\$100
- California Change Lawyers—\$95
- California Supreme Court Historical Society—\$25
- Legislative Activities Fund—\$5

Opt-Outs

- Elimination of Bias—\$2
- Legal Services Assistance—\$45

INVESTMENT INCOME

The State Bar generates revenue from interest on investment accounts.

The 2024 budget projects a \$8.1 million increase in investment income, reflecting an expected continuation of the positive interest-rate environment realized in 2023.

LEASE REVENUE

In November 2023, the State Bar sold its San Francisco headquarters and will no longer generate revenue related to leasing the unused space at 180 Howard Street. The 2024 budget does include lease revenue associated with the State Bar's Los Angeles building.

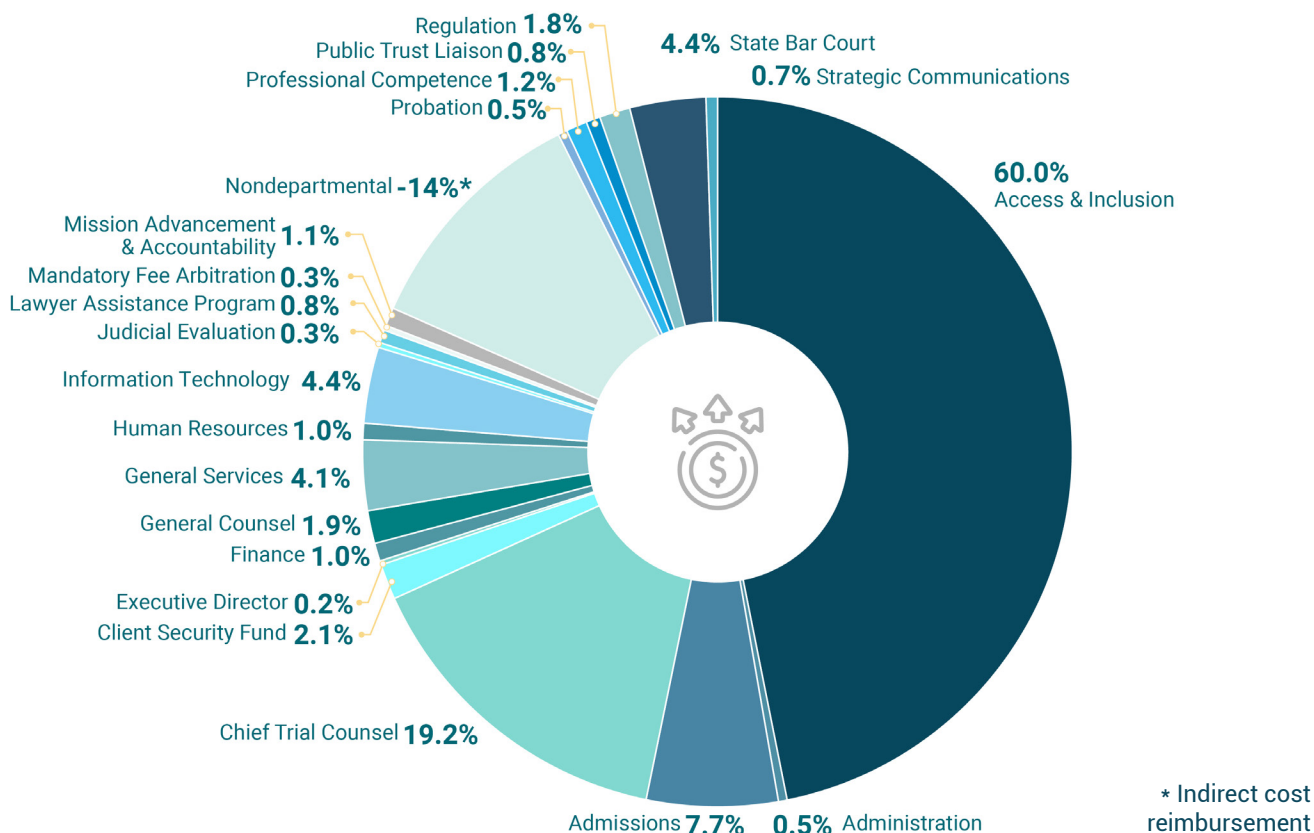
COMPARISON OF THE REVENUE BUDGET

Revenues	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Mandatory Licensee Fees	\$95,431,500	\$97,872,000	\$97,097,000	\$97,367,000	\$97,638,000
Donations & Opt-Out	8,902,000	8,512,000	8,536,000	8,560,000	8,584,000
Other Fees	11,090,230	14,659,500	15,530,000	15,758,000	16,466,000
Exam Fees	11,232,373	17,423,500	18,016,000	18,486,000	19,111,000
Grants	204,234,619	280,662,000	196,820,000	186,876,000	164,136,000
Other Revenues	330,700	363,000	672,000	691,000	711,000
Investment Income	797,309	8,927,000	9,194,000	9,467,000	9,750,000
Lease Revenue	2,695,200	451,000	451,000	451,000	451,000
Total Fund Sources	\$334.713.931	\$428,870,000	\$346,316,000	\$337,656,000	\$316,847,000

2024 EXPENDITURES OVERVIEW

USE OF FUNDS

The State Bar's 2024 adopted budget reflects \$400.9 million in total expenses. The budget for the Office of Access and Inclusion (OA&I), which includes all grant distributions made by the State Bar, comprises 60 percent of total expenses. The Office of Chief Trial Counsel (OCTC) comprises 19.2 percent of operating budget expenses. Together, these two offices comprise 79.2 percent of the State Bar's operating budget. General Fund expenses of \$118 million include \$7.1 million in one-time costs.



PERSONNEL COSTS

Costs include salary and benefits, supplemental staffing, employee healthcare, and retirement and total \$116.9 million of the State Bar's 2024 budget. The adopted budget represents a \$10 million increase from the prior year, resulting primarily from merit increases and a COLA (2.5 percent increase in 2024). In addition, the hiring freeze reflected in the 2023 budget was eliminated, with the vacancy rate for positions not funded by the General Fund adjusted to the actual rate, which is 8 percent. The budget also includes five additional positions as well as increases to healthcare and retirement contribution costs.

BUILDING OPERATIONS

The State Bar sold its San Francisco headquarters in late 2023 and began leasing office space in the building from the new owner. The 2024 budget includes \$11 million in building operations expenses, up from \$6.6 million in 2023, reflecting the impact of transitioning from owned to leased office space. This line item will decline in 2025 when the State Bar reduces its footprint in the San Francisco location.

SERVICES

Expenses include professional services and externally provided services, accounting for \$19.0 million of the 2024 budget.

GRANTS

Expenses reflect the distribution of grants to legal services entities, accounting for \$231.6 million of the 2024 budget.

SUPPLIES AND EQUIPMENT

Expenses include exam and software licensing, supplies and postage, computers and software, building improvements, equipment, and telecommunications, totaling \$8.1 million of the 2024 budget.

OTHER EXPENSES, PAYOUTS, AND REIMBURSEMENTS

This category primarily consists of Client Security Fund payments to claimants to reimburse them for monetary losses attributable to attorney theft, accounting for \$5.5 million of the 2024 budget.

SPECIAL ASSESSMENT

In the 2020 fee bill, the State Bar was afforded a special assessment of \$4 per attorney, approximately \$800,000 per year over a 10-year period, to fund building improvements, and \$5 per attorney, approximately \$1 million per year over a five-year period, to fund IT projects. Given that the 2020 fee bill funded these capital improvements over multiyear periods, sufficient funds were not available to finance the projects in the short term.

Accordingly, in August 2021, the State Bar obtained a bank loan to finance building improvements and IT projects and simultaneously refinanced an existing tenant improvement loan. Remaining debt related to this loan has been paid in full following the sale of the 180 Howard Street building in San Francisco.

DEBT-RELATED

Los Angeles, 845 South Figueroa

The State Bar has an outstanding loan on the Los Angeles building of \$11.6 million. Principal and interest for this loan, approximately \$1.1 million, is budgeted for 2024. Budgeting for principal repayments ensures that all uses of financial resources are subject to budgetary controls.

San Francisco, 180 Howard Street

The State Bar paid the remaining loan balance in full following the sale of the building in November 2023.

COMPARISON OF THE EXPENSE BUDGET

Expenses	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$106,858,681	\$116,875,500	\$125,408,500	\$127,732,500	\$129,997,500
Building Operations	6,612,094	11,069,000	9,504,000	9,787,000	10,079,000
Services	12,964,840	19,064,000	12,377,000	10,325,000	11,149,000
Grants Expenses	147,031,301	231,649,000	260,310,000	175,788,000	152,672,000
Supplies	750,455	827,000	865,000	888,000	911,000
Equipment	4,992,207	7,274,500	7,492,000	7,713,000	7,941,000
Other Expenses	1,089,085	1,392,000	1,431,000	1,465,000	1,501,000
Exam Related Expenses	7,484,309	7,591,000	7,592,000	7,804,000	8,021,000
Payouts and Reimbursements	3,586,532	4,095,000	4,218,000	4,344,000	4,475,000
Debt Related	2,640,168	1,108,000	1,109,000	1,109,000	1,108,000
Total Expenses	\$294,009,672	\$400,945,000	\$430,306,500	\$346,955,500	\$ 327,854,500

INDIRECT COST ALLOCATION

Unlike direct costs, indirect costs are not readily identifiable with a specific operating program. Instead, they are incurred for a joint purpose that benefits more than one program. State Bar indirect costs include those related to finance, human resources, recruitment and retention, IT, and building maintenance functions.

All indirect costs are housed in the General Fund. The total amount of the 2024 indirect cost pool being allocated to program areas is \$58.0 million. Indirect costs of \$14.4 million are allocated from the General Fund to other funds according to a methodology that apportions indirect costs to offices and divisions based on their proportional share of head count, total expenses, or square footage occupied. The increase year over year is due to increases in personnel costs and onetime General Fund expenses.

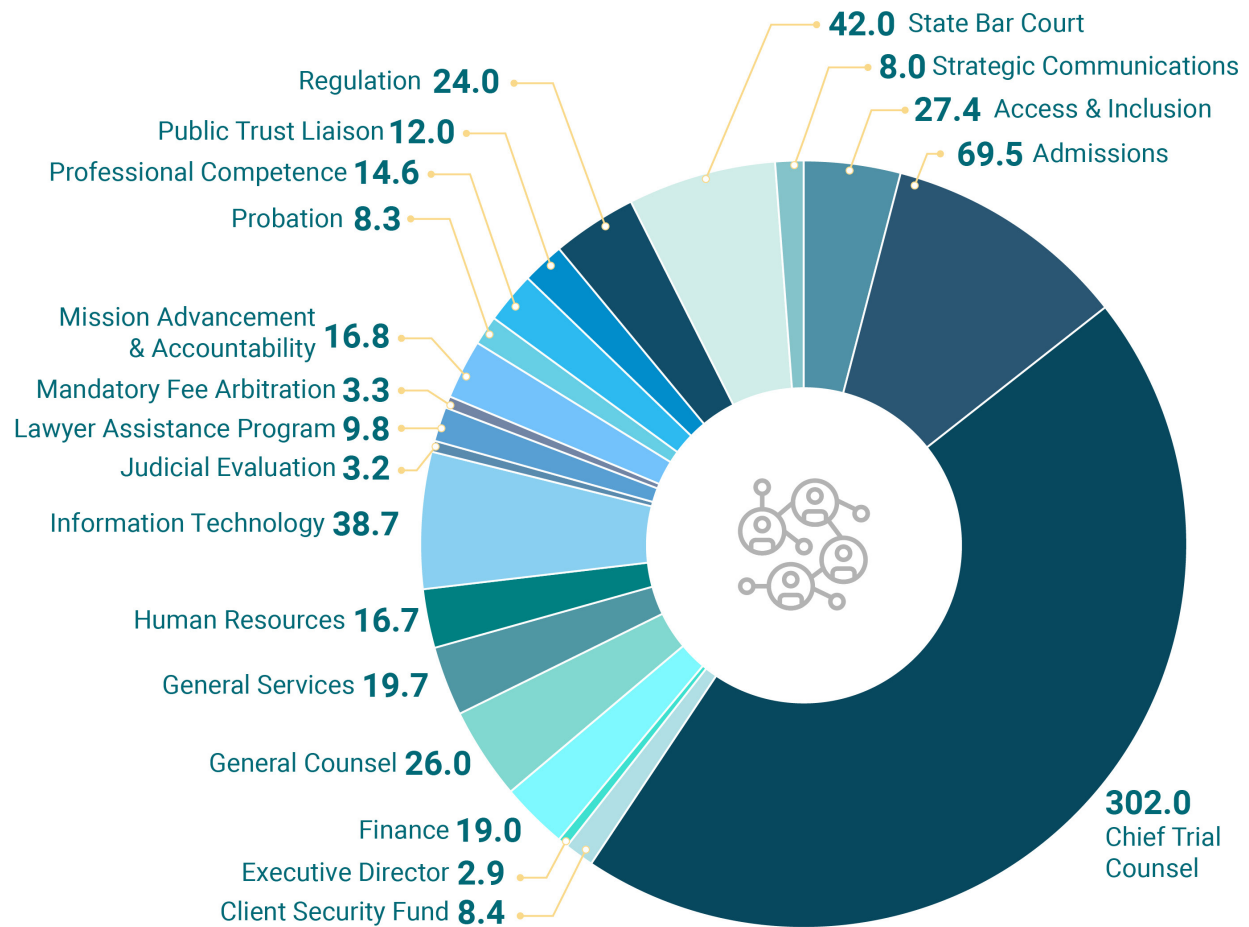
The tables below provide detail on both the indirect cost pool components and amounts charged to individual funds.

Fund	2023 Adopted Budget	2024 Budget	2023 vs 2024
Admissions	\$7,061,217	\$9,666,000	\$2,604,783
Bank Settlement	45,869	70,000	24,131
Client Security	767,343	856,500	89,157
Elimination of Bias	103,037	139,000	35,963
Equal Access	494,379	804,000	309,621
General Fund	34,093,327	43,691,000	9,597,673
Grants Fund	303,356	831,000	527,644
Justice Gap	9,973	8,000	(1,973)
Lawyer Assistance Program	647,532	730,000	82,468
Legal Services Trust	792,188	1,161,000	368,812
Legislative Activities	75,405	82,500	7,095
Total Fund Sources	\$44,393,626	\$58,039,000	\$13,645,374

Indirect Cost Pool	2023 Budget	2024 Budget	2023 vs 2024
General Services - LA	\$4,878,153	\$7,118,500	\$2,240,347
General Services - SF	4,181,332	12,476,000	8,294,668
Licensee Billing	732,620	794,500	61,880
Building/Capital Improvements	868,300		(868,300)
General Counsel	5,478,694	7,680,500	2,201,806
Ex. Dir./BOT	4,047,180	4,944,000	896,820
Information Technology	15,803,842	17,795,500	1,991,658
Human Resources	2,987,408	3,815,500	828,092
Finance	2,615,097	3,414,500	799,403
OPEB	2,801,000		(2,801,000)
Total Fund Sources	\$ 44,393,626	\$58,039,000	\$13,645,374

STAFFING

The 2024 adopted budget supports 672 FTE positions, an increase of 5 total FTEs compared to the prior year.



Division/Office	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Access & Inclusion	22.1	27.4	27.4	27.4	27.4
Admissions	70.5	69.5	69.5	68.5	68.5
Chief Trial Counsel	303.0	302.0	298.0	298.0	298.0
Client Security Fund	8.4	8.4	8.4	8.4	8.4
Executive Director	1.9	2.9	2.9	2.9	2.9
Finance	18.0	19.0	19.0	19.0	19.0
General Counsel	24.0	26.0	26.0	26.0	26.0
General Services	18.7	19.7	19.7	19.7	19.7
Human Resources	16.7	16.7	16.7	16.7	16.7
Information Technology	45.7	38.7	38.7	38.7	38.7
Judicial Evaluation	0.0	3.2	3.2	3.2	3.2
Lawyer Assistance Program	6.4	9.8	9.8	9.8	9.8
Mandatory Fee Arbitration	3.3	3.3	3.3	3.3	3.3
Mission Advancement & Accountability	15.0	16.8	16.8	16.8	16.8
Probation	8.4	8.3	8.3	8.3	8.3
Professional Competence	18.4	14.6	14.6	14.6	14.6
Public Trust Liaison	11.0	12.0	12.0	12.0	12.0
Programs	4.8	0.0	0.0	0.0	0.0
Regulation	22.0	24.0	24.0	24.0	24.0
State Bar Court	43.0	42.0	42.0	42.0	42.0
Strategic Communications	6.0	8.0	8.0	8.0	8.0
Total FTE	667.0	672.0	668.0	667.0	667.0

2024 OPERATING AREA PROFILES

Comparison of the 2024 budget to 2023 and forecasts for 2025-2027 by operating area.

Expenses	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Access & Inclusion	\$152,669,444	\$240,617,500	\$269,214,500	\$184,918,500	\$162,016,000
Administration	7,400	2,027,500	29,000	30,000	31,000
Admissions	26,292,145	30,704,500	29,149,000	29,826,000	30,557,000
Chief Trial Counsel	68,214,436	77,006,000	79,633,000	81,588,000	83,558,000
Client Security Fund	7,646,513	8,318,500	8,731,500	8,858,000	9,095,000
Executive Director	1,199,435	951,000	1,490,500	1,006,500	1,538,500
Finance	3,699,220	4,209,000	4,095,000	4,170,000	4,239,000
General Counsel	6,066,288	7,680,500	7,515,000	7,644,000	7,768,000
General Services	9,492,962	16,459,000	14,248,000	13,053,000	13,362,000
Human Resources	3,216,384	3,815,500	4,005,000	4,090,000	4,168,000
Information Technology	17,367,740	17,803,500	15,575,000	15,927,000	16,277,000
Judicial Evaluation	886,541	1,147,000	1,186,000	1,221,000	1,250,000
Lawyer Assistance Program	2,586,810	3,017,000	3,308,000	3,238,000	3,321,000
Mandatory Fee Arbitration	881,817	1,174,500	1,172,000	1,197,000	1,223,000
Mission Advancement & Accountability	3,452,401	4,289,000	3,968,000	4,046,500	4,111,000
Nondepartmental	(39,025,937)	(56,294,000)	(49,962,000)	(51,557,000)	(53,200,000)
Probation	1,949,831	2,135,000	2,230,000	2,281,000	2,332,000
Professional Competence	4,020,899	4,930,000	4,785,000	4,811,000	4,935,000
Public Trust Liaison	2,066,879	3,312,000	2,979,000	3,052,000	3,113,000
Regulation	5,698,475	7,190,000	6,992,000	7,140,000	7,289,500
State Bar Court	14,000,013	17,773,500	17,508,000	17,907,000	18,314,500
Strategic Communications	1,619,979	2,678,500	2,455,000	2,508,000	2,556,000
Total Expenses	\$294,009,672	\$400,945,000	\$430,306,500	\$346,955,500	\$327,854,500

OFFICE OF ACCESS AND INCLUSION (OA&I)

OA&I works to expand, support, and improve the delivery of legal services to low and moderate income Californians through the administration and distribution of grant funding to hundreds of legal services organizations statewide.

OA&I also works on programs and initiatives designed to promote diversity, equity, and inclusion (DEI) in the legal profession.

Effective 2024, the Judicial Nominees Evaluation Commission (JNE), a State Bar committee responsible for evaluating judicial candidates nominated by the governor, is housed in OA&I.

FISCAL YEAR 2024 PROJECTS AND OBJECTIVES

- ✓ Develop a strategic plan to guide the work of the Legal Services Trust Fund Commission.
- ✓ Assist legal aid programs in maximizing their ability to leverage technology to expand services for indigent Californians.
- ✓ Develop a strategy to increase the amount of pro bono services offered statewide.
- ✓ Update the Elimination of Bias implicit bias e-learning module.
- ✓ Expand the DEI Leadership Seal program.
- ✓ Conduct the legal services capacity analysis component of the 2024 Justice Gap Study.
- ✓ Execute amendments to JNE rules to enhance the effectiveness of JNE's work.
- ✓ Institutionalize the development and distribution of JNE metrics, including reporting on the number of candidates evaluated and appointed by demographics and commission ratings.

PERSONNEL

OA&I employs approximately 27 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Deputy Chief of Programs	0.00	0.15	0.15	0.15	0.15	\$38,682	\$39,704	\$39,709	\$39,709
Executive Director	0.10	0.05	0.05	0.05	0.05	16,238	16,644	16,644	16,644
Financial Analyst	1.00	2.00	2.00	2.00	2.00	200,884	210,152	214,573	215,986
Lead Program Analyst	2.00	3.00	3.00	3.00	3.00	382,409	398,423	400,070	400,747
Principal Program Analyst	0.00	1.00	1.00	1.00	1.00	132,813	136,133	136,133	136,133
Program Analyst	6.00	6.00	6.00	6.00	6.00	597,315	625,635	638,763	649,908
Program Coordinator	1.00	1.00	1.00	1.00	1.00	96,588	99,897	100,163	100,242
Program Director I	2.00	2.17	2.17	2.17	2.17	372,598	397,004	408,260	416,753
Program Director II	1.00	1.00	1.00	1.00	1.00	192,182	206,015	215,256	216,026
Program Manager I	0.00	1.00	1.00	1.00	1.00	132,813	136,133	136,133	136,133
Program Specialist	1.00	1.00	1.00	1.00	1.00	88,049	90,250	90,250	90,250
Program Specialist III	0.00	2.00	2.00	2.00	2.00	265,797	275,597	275,912	275,944
Program Supervisor	2.00	2.00	2.00	2.00	2.00	231,829	238,996	240,384	241,789
Senior Financial Analyst	2.00	5.00	5.00	5.00	5.00	538,761	561,474	571,000	578,091
Senior Program Analyst	4.00	0.00	0.00	0.00	0.00	0	0	0	0
Total FTE	22.10	27.37	27.37	27.37	27.37	\$3,286,957	\$3,432,059	\$3,483,250	\$3,514,357

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for OA&I are \$240.6 million. The increase in OA&I expenses is primarily due to grant expenses from Interest on Lawyers' Trust Accounts (IOLTA). IOLTA revenues significantly outpaced projections and generated sizable reserves that need to be passed through to grantees. Significant IOLTA grant disbursements are anticipated in 2024 and 2025 to bring down the reserve level.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$3,081,868	\$4,505,500	\$4,762,500	\$4,867,500	\$4,954,000
Services	672,884	1,132,000	1,164,000	1,198,000	1,233,000
Grants Expenses	147,031,301	231,649,000	260,310,000	175,788,000	152,672,000
Supplies	7,442	9,500	10,000	10,000	10,000
Equipment	631	1,000	1,000	1,000	1,000
Other Expenses	126,516	307,500	316,000	324,000	333,000
Indirect Costs	1,748,802	3,013,000	2,651,000	2,730,000	2,813,000
Total Expenses	\$152,669,444	\$240,617,500	\$269,214,500	\$184,918,500	\$162,016,000

INTERFUND TRANSACTIONS

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Interfund Transfer Out	\$1,000,000	\$1,000,000	\$1,030,000	\$1,061,000	\$1,093,000
Interfund Transfer In	1,400,000	1,000,000	1,030,000	1,061,000	1,093,000
Total Interfund Transactions	\$2,400,000	\$2,000,000	\$2,060,000	\$2,122,000	\$2,186,000

2024 BUDGETED REVENUE

Total 2024 budgeted revenue for OA&I is \$294.6 million. The increase in grant revenue in the Legal Services Trust Fund is due to increased earnings from Interest on Lawyers Trust Accounts (IOLTA).

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
EOB & Bar Relations					
Voluntary Fees & Donations	\$320,000	\$320,000	\$321,000	\$322,000	\$323,000
Investment Income	1,294	5,000	5,000	5,000	5,000
EOB & Bar Relations Total	321,294	325,000	326,000	327,000	328,000
Legal Services Trust					
Voluntary Fees & Donations	7,100,000	7,100,000	7,120,000	7,140,000	7,160,000
Grants	106,122,891	145,578,000	105,705,000	82,852,000	60,000,000
Investment Income	158,146	4,700,000	4,841,000	4,986,000	5,136,000
Legal Services Trust Total	113,381,037	157,378,000	117,666,000	94,978,000	72,296,000
Equal Access					
Grants	34,792,514	37,489,000	37,571,000	37,625,000	37,680,000
Investment Income	51,408	432,000	445,000	458,000	472,000
Equal Access Total	34,843,922	37,921,000	38,016,000	38,083,000	38,152,000
Justice Gap					
Voluntary Fees & Donations	1,440,000	1,050,000	1,053,000	1,056,000	1,059,000
Investment Income	11,368	178,000	183,000	188,000	194,000
Justice Gap Total	1,451,368	1,228,000	1,236,000	1,244,000	1,253,000
Bank Settlement Fund					
Investment Income	72,919	168,000	173,000	178,000	183,000
Bank Settlement Fund Total	72,919	168,000	173,000	178,000	183,000
Grants					
Grants	63,319,214	97,295,000	53,235,000	66,081,000	66,128,000
Investment Income	0	312,000	321,000	330,000	339,000
Grants Total	63,319,214	97,607,000	53,556,000	66,411,000	66,467,000
Total Fund Sources	\$213,389,754	\$294,627,000	\$210,973,000	\$201,221,000	\$178,679,000

Judicial Evaluations

PERSONNEL

JNE employs approximately three full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Deputy Chief of Programs	0.10	0.05	0.05	0.05	0.05	\$12,894	\$13,235	\$13,236	\$13,236
Program Analyst	1.00	1.00	1.00	1.00	1.00	100,539	107,489	112,117	113,762
Program Coordinator	1.00	1.00	1.00	1.00	1.00	94,550	99,967	100,247	100,273
Program Director I	0.00	0.10	0.10	0.10	0.10	17,941	19,232	19,610	19,642
Program Supervisor	1.00	1.00	1.00	1.00	1.00	126,985	135,764	137,667	137,931
Total FTE	3.10	3.15	3.15	3.15	3.15	\$352,908	\$375,687	\$382,878	\$384,845

EXPENSE

Total 2024 budgeted expenses for JNE are approximately \$1.15 million.

	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$473,392	\$531,000	\$570,000	\$587,000	\$598,000
Building Operations	625	6,000	6,000	6,000	6,000
Services	955	2,000	2,000	2,000	2,000
Supplies	141	500	1,000	1,000	1,000
Equipment	2,111	500	1,000	1,000	1,000
Other Expenses	165,000	266,000	273,000	281,000	289,000
Indirect Costs	244,317	341,000	333,000	343,000	353,000
Total Expenses	\$886,541	\$1,147,000	\$1,186,000	\$1,221,000	\$1,250,000

OFFICE OF ADMISSIONS

The Office of Admissions is responsible for all activities pertaining to admission to the practice of law in California. In April 2023, the Office of Admissions was reorganized. The unit designations below reflect these organizational changes.

ADMINISTRATION AND EXAMINATIONS

Develops, delivers, and grades all admissions-related exams, including legal specialization exams.

ELIGIBILITY AND TESTING ACCOMMODATIONS

Determines eligibility to take an exam, as well as oversight of special admissions programs.

MORAL CHARACTER DETERMINATIONS

Processes moral character applications from applicants seeking admission to practice law in California.

LAW SCHOOL REGULATION

Oversees the registration of unaccredited law schools and the accreditation process for California accredited law schools.

FISCAL YEAR 2024 PROJECTS AND OBJECTIVES

- ✓ Implement Supreme Court direction as related to the recommendations of the Blue Ribbon Commission on the Future of the Bar Exam and the Alternative Pathways Working Group.
- ✓ Implement a revised approach to testing accommodation request determination.
- ✓ Test components of the California Bar Exam administration on performance, including remote versus online, open versus closed book, and allotted time.
- ✓ Establish a privacy law specialty.
- ✓ Launch a joint accreditation application for law schools fully approved by non-State Bar accreditors.
- ✓ Develop officewide data quality and reporting practices that result in clearer insights into effectiveness, efficiency, and barriers to both.

PERSONNEL

The Office of Admissions employs just under 70 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Administrative Assistant I	2.00	0.00	0.00	0.00	0.00	\$0	\$0	\$0	\$0
Administrative Assistant II	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Administrative Supervisor	2.00	0.00	0.00	0.00	0.00	0	0	0	0
Attorney III	0.00	1.00	1.00	1.00	1.00	147,993	153,526	155,381	157,258
Chief Programs Officer	0.50	0.00	0.00	0.00	0.00	0	0	0	0
Deputy Chief of Programs	0.00	0.45	0.45	0.45	0.45	116,047	119,113	119,127	119,128
Fiscal Services Specialist	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Financial Analyst	0.00	1.00	1.00	1.00	1.00	97,332	100,028	100,292	100,557
Investigator I	4.00	2.00	2.00	2.00	2.00	185,265	192,974	196,048	198,804
Investigator II	5.00	7.00	7.00	7.00	7.00	723,773	751,276	761,000	767,097
Office Assistant II	3.00	0.00	0.00	0.00	0.00	0	0	0	0
Principal Program Analyst	2.00	2.00	2.00	2.00	2.00	305,499	309,200	309,200	309,200
Program Analyst	6.00	6.00	6.00	6.00	6.00	599,663	625,985	634,038	640,387
Program Assistant II	5.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Assistant III	3.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Coordinator	2.00	1.00	1.00	1.00	1.00	97,830	100,275	100,275	100,275
Program Director I	1.00	3.00	3.00	3.00	3.00	573,520	593,733	600,822	604,372
Program Director III	1.00	1.00	1.00	1.00	1.00	237,563	237,705	237,705	237,705
Program Manager I	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Manager II	3.00	3.00	3.00	3.00	3.00	462,795	477,592	480,891	484,261
Program Specialist	15.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Specialist I	0.00	9.00	9.00	9.00	9.00	619,737	644,869	653,970	660,669
Program Specialist II	0.00	4.00	4.00	4.00	4.00	318,687	328,827	330,694	331,913
Program Specialist III	0.00	17.00	17.00	17.00	17.00	1,395,398	1,445,550	1,458,420	1,467,949
Program Supervisor	7.00	9.00	9.00	9.00	9.00	1,143,169	1,186,838	1,202,068	1,208,595
Senior Administrative Assistant	3.00	0.00	0.00	0.00	0.00	0	0	0	0
Senior Attorney	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Senior Program Analyst	2.00	3.00	3.00	2.00	2.00	304,354	269,469	225,103	229,310
Total FTE	70.50	69.45	69.45	68.45	68.45	\$7,328,625	\$7,536,960	\$7,565,033	\$7,617,480

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for the Office of Admissions are \$30.7 million, an increase of \$4.4 million over 2023. The increase is attributable to a reduction in the staff vacancy rate and increases in salaries and benefits, alongside a temporary rise in indirect costs in 2024 related to one-time expenses as well as costs associated with the building sale.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$8,762,093	\$10,517,000	\$10,958,000	\$11,105,000	\$11,294,000
Building Operations	25,006	29,000	30,000	31,000	32,000
Services	2,185,094	1,975,500	2,037,000	2,100,000	2,163,000
Supplies	40,687	43,000	49,000	50,000	51,000
Equipment	452,149	642,500	663,000	683,000	703,000
Other Expenses	281,590	240,500	248,000	253,000	259,000
Exam Related Expenses	7,484,309	7,591,000	7,592,000	7,804,000	8,021,000
Indirect Costs	7,061,217	9,666,000	7,572,000	7,800,000	8,034,000
Total Expenses	\$26,292,145	\$30,704,500	\$29,149,000	\$29,826,000	\$30,557,000

Note: If the California Supreme Court approves pending recommendations related to a new California Bar Exam and/or a portfolio-based exam, the 2025-2027 forecast will be modified to reflect necessary investments needed to implement those recommendations.

INTERFUND TRANSACTIONS

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Interfund Transfer In	\$0	\$495,000	\$510,000	\$525,000	\$541,000
Total Interfund Transactions	\$0	\$495,000	\$510,000	\$525,000	\$541,000

2024 BUDGETED REVENUE

Total 2024 budgeted revenue for the Office of Admissions is approximately \$26.4 million, compared to \$19.6 million in 2023. The rise in 2024 Admissions budgeted revenue stems from fee increases implemented in 2023.

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Admissions					
Other Fees	\$8,282,630	\$8,489,000	\$8,966,000	\$8,998,000	\$9,504,000
Exam Fees	11,232,373	17,423,500	18,016,000	18,486,000	19,111,000
Investment Income	66,761	520,000	536,000	552,000	568,000
Admissions Total	19,581,764	26,432,500	27,518,000	28,036,000	29,183,000
Total Fund Sources	\$19,581,764	\$26,432,500	\$27,518,000	\$28,036,000	\$29,183,000

OFFICE OF CHIEF TRIAL COUNSEL (OCTC)

OCTC is the enforcement arm of the State Bar, responsible for investigating and prosecuting attorneys for violations of the Rules of Professional Conduct and the State Bar Act. OCTC is also responsible for regulatory proceedings before the State Bar Court, such as representing the Committee of Bar Examiners in moral character appeals and representing the Board of Legal Specialization in specialization certification appeals.

FISCAL YEAR 2024 PROJECTS AND OBJECTIVES

- ✓ Implement a formal disciplinary diversion program for attorneys accused of minor violations of the Rules of Professional Conduct and work with the Mission Advancement & Accountability Division to develop data to support recommendations by the Board to the Assembly and Senate Judiciary Committees for codifying such a program as required by the April 2024 legislative reports.
- ✓ Participate in an assessment of OCTC's performance related to recently established case-processing standards to support the State Bar's request for a mandatory attorney license fee increase.
- ✓ Reduce the inventory of open disciplinary cases outside of the current backlog standards (180 days for noncomplex cases and 365 days for complex cases) by 10 percent or more.

PERSONNEL

OCTC employs 302 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Administrative Assistant I	1.00	0.00	0.00	0.00	0.00	\$0	\$0	\$0	\$0
Administrative Assistant II	29.00	0.00	0.00	0.00	0.00	0	0	0	0
Administrative Supervisor	4.00	0.00	0.00	0.00	0.00	0	0	0	0
Assistant Chief Trial Counsel	5.00	6.00	6.00	6.00	6.00	1,401,006	1,469,958	1,475,061	1,476,248
Attorney	55.00	0.00	0.00	0.00	0.00	0	0	0	0
Attorney II	0.00	51.00	50.00	50.00	50.00	6,707,162	6,921,305	7,085,532	7,252,692
Attorney III	0.00	25.00	25.00	25.00	25.00	3,786,075	3,944,504	4,009,948	4,077,109
Attorney IV	0.00	5.00	5.00	5.00	5.00	938,776	975,425	987,372	998,537
Attorney V	0.00	3.00	3.00	3.00	3.00	630,873	659,628	671,315	682,791
Chief Trial Counsel	1.00	1.00	1.00	1.00	1.00	309,308	317,040	317,040	317,040
Deputy Chief Trial Counsel	1.00	1.00	1.00	1.00	1.00	257,979	264,703	264,726	264,728
Forensic Accountant	1.00	1.00	1.00	1.00	1.00	108,620	111,846	112,358	112,873
Investigator I	25.00	25.00	25.00	25.00	25.00	2,215,232	2,311,006	2,349,826	2,383,279
Investigator II	56.00	52.00	52.00	52.00	52.00	5,353,614	5,544,819	5,588,056	5,618,645
Investigator III	8.00	11.00	11.00	11.00	11.00	1,245,521	1,280,561	1,283,466	1,285,961
Lead Program Analyst	0.00	1.00	1.00	1.00	1.00	116,298	122,268	125,410	128,632
Legal Secretary II	15.00	14.00	14.00	14.00	14.00	1,178,390	1,216,628	1,223,984	1,228,112
Legal Secretary III	1.00	1.00	1.00	1.00	1.00	82,974	87,883	90,788	91,756
Office Assistant II	5.00	0.00	0.00	0.00	0.00	0	0	0	0
Paralegal	24.00	23.00	20.00	20.00	20.00	1,899,394	1,782,270	1,793,630	1,801,122
Program Analyst	0.00	1.00	1.00	1.00	1.00	98,008	104,197	108,076	112,098
Program Assistant II	19.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Coordinator	1.00	1.00	1.00	1.00	1.00	97,830	100,275	100,275	100,275
Program Specialist I	0.00	24.00	24.00	24.00	24.00	1,662,081	1,720,316	1,730,713	1,740,156
Program Specialist II	0.00	29.00	29.00	29.00	29.00	2,250,168	2,324,938	2,344,058	2,363,803
Program Specialist III	0.00	4.00	4.00	4.00	4.00	352,195	361,000	361,000	361,000
Program Supervisor	0.00	4.00	4.00	4.00	4.00	470,795	498,633	515,271	526,390
Senior Administrative Assistant	4.00	0.00	0.00	0.00	0.00	0	0	0	0
Senior Attorney	30.00	0.00	0.00	0.00	0.00	0	0	0	0
Supervising Attorney	0.00	0.00	0.00	0.00	0.00	0	0	0	0
Senior Paralegal	0.00	1.00	1.00	1.00	1.00	95,249	99,027	100,444	101,867
Supervising Attorney	16.00	15.00	15.00	15.00	15.00	2,950,142	3,054,429	3,078,412	3,101,241
Translator - Interpreter	2.00	3.00	3.00	3.00	3.00	278,434	289,308	290,280	290,452
Total FTE	303.00	302.00	298.00	298.00	298.00	\$34,486,124	\$35,561,969	\$36,007,044	\$36,416,810

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for OCTC are approximately \$77 million, compared to \$68.2 million in 2023. The rise in personnel expenses stems from eliminating the 2023 three-month hiring freeze, as well as increases in salaries and benefits.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$45,284,079	\$49,335,000	\$51,506,000	\$52,623,000	\$53,727,000
Building Operations	1,278	1,000	1,000	1,000	1,000
Services	1,915,914	1,908,000	1,965,000	2,023,000	2,082,000
Supplies	80,899	81,000	84,000	87,000	90,000
Equipment	47,000	90,000	92,000	94,000	96,000
Other Expenses	73,610	108,000	111,000	114,000	117,000
Payouts and Reimbursements	(1,800,000)	(1,800,000)	(1,854,000)	(1,910,000)	(1,967,000)
Indirect Costs	22,611,656	27,283,000	27,728,000	28,556,000	29,412,000
Total Expenses	\$68,214,436	\$77,006,000	\$79,633,000	\$81,588,000	\$83,558,000

2024 BUDGETED REVENUE

Total 2024 budgeted revenue for OCTC is \$75,000.

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
General Fund					
Other Fees	\$75,000	\$75,000	\$77,000	\$79,000	\$81,000
General Fund Total	75,000	75,000	77,000	79,000	81,000
Total Fund Sources	\$75,000	\$75,000	\$77,000	\$79,000	\$81,000

OFFICE OF EXECUTIVE DIRECTOR (OED)

The OED is responsible for ensuring that the State Bar executes its mission and achieves the goals and objectives outlined in the State Bar's Strategic Plan. It includes the Office of Strategic Communications & Stakeholder Engagement (SCSE) and the Office of the Public Trust Liaison (PTL).

SCSE ensures that the general public, oversight bodies such as the Legislature and Supreme Court, and all key audiences and stakeholders are informed about the agency's public protection role and know how to access the State Bar's services, resources, and public decision-making processes.

The PTL receives inquiries and responds to questions and concerns brought by members of the public that remain unresolved through other channels. The PTL also manages the Contact Center. The PTL has an independent dotted-line relationship to the Board's Audit Committee. Beginning in 2024, the PTL will deliver an annual report directly to that committee with recommendations for system improvement.

FISCAL YEAR 2024 PROJECTS AND OBJECTIVES

- ✓ Secure a fee increase for 2025.
- ✓ Launch a complaint alternative program in the PTL.
- ✓ Deliver inaugural annual PTL report to the Board's Audit Committee.
- ✓ Launch a new State Bar website.

PERSONNEL

The OED, exclusive of the two offices mentioned above, employs just under three full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Executive Director	0.85	0.90	0.90	0.90	0.90	\$292,292	\$299,600	\$299,600	\$299,600
Principal Program Analyst	1.00	1.00	1.00	1.00	1.00	140,978	147,071	148,745	149,823
Senior Program Analyst	0.00	1.00	1.00	1.00	1.00	96,687	100,894	102,715	104,570
Total FTE	1.85	2.90	2.90	2.90	2.90	\$529,957	\$547,565	\$551,060	\$553,992

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for the OED are \$951,000.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$572,525	\$748,500	\$784,500	\$795,500	\$807,500
Building Operations	160	1,000	1,000	1,000	1,000
Services	560,140	127,500	628,000	132,000	651,000
Supplies	1,729	3,000	4,000	4,000	4,000
Equipment	139	500	1,000	1,000	1,000
Other Expenses	64,742	70,500	72,000	73,000	74,000
Total Expenses	\$1,199,435	\$951,000	\$1,490,500	\$1,006,500	\$1,538,500

2024 BUDGETED REVENUE

The OED generates no revenue.

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
General Fund					
Investment Income	\$34,361	\$0	\$0	\$0	\$0
General Fund Total	34,361	0	0	0	0
Total Fund Sources	\$34,361	\$0	\$0	\$0	\$0

Public Trust Liaison (PTL)

PERSONNEL

The Office of Public Trust Liaison employs 12 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Investigator I	0.00	1.00	1.00	1.00	1.00	\$87,595	\$89,785	\$89,785	\$89,785
Lead Program Analyst	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Principal Program Analyst	0.00	1.00	1.00	1.00	1.00	140,514	148,008	150,092	151,023
Program Manager I	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Supervisor	0.00	1.00	1.00	1.00	1.00	133,105	137,340	137,713	137,867
Public Service Representative II	4.00	0.00	0.00	0.00	0.00	0	0	0	0
Public Service Representative III	4.00	0.00	0.00	0.00	0.00	0	0	0	0
Public Trust Liaison	1.00	1.00	1.00	1.00	1.00	173,969	186,492	195,039	196,331
Public Trust Representative II	0.00	4.00	4.00	4.00	4.00	320,117	329,751	331,142	331,985
Public Trust Representative III	0.00	4.00	4.00	4.00	4.00	349,325	367,185	368,902	368,959
Total FTE	11.00	12.00	12.00	12.00	12.00	\$1,204,626	\$1,258,561	\$1,272,673	\$1,275,950

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for the PTL are \$3.3 million, compared to \$2.1 million in 2023. The 2024 budget includes investment in a needed phone system upgrade for the contact center.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$1,341,480	\$1,800,000	\$1,900,000	\$1,941,000	\$1,969,000
Building Operations	0	6,000	6,000	6,000	6,000
Services	0	500,000	0	0	0
Other Expenses	0	2,000	2,000	2,000	2,000
Indirect Costs	725,399	1,004,000	1,071,000	1,103,000	1,136,000
Total Expenses	\$2,066,879	\$3,312,000	\$2,979,000	\$3,052,000	\$3,113,000

Strategic Communications & Stakeholder Engagement

PERSONNEL

In 2024, SCSE will employ eight full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
IT Manager I	0.00	1.00	1.00	1.00	1.00	\$132,813	\$136,133	\$136,133	\$136,133
Program Analyst	1.00	1.00	1.00	1.00	1.00	105,286	112,684	113,871	114,010
Program Coordinator	2.00	1.00	1.00	1.00	1.00	89,381	91,807	91,998	92,190
Program Director I	1.00	1.00	1.00	1.00	1.00	179,406	192,320	196,105	196,420
Program Manager III	0.00	1.00	1.00	1.00	1.00	153,479	157,316	157,316	157,316
Senior Program Analyst	2.00	3.00	3.00	3.00	3.00	332,916	343,290	345,382	347,516
Total FTE	6.00	8.00	8.00	8.00	8.00	\$993,280	\$1,033,549	\$1,040,805	\$1,043,584

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for SCSE are approximately \$2.7 million, compared to \$1.6 million in 2023. The increase is attributed primarily to added responsibility for the State Bar website, which involves two added staff positions and a one-time expense for website redesign.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$892,180	\$1,419,000	\$1,494,000	\$1,518,000	\$1,536,000
Services	276,726	517,000	217,000	223,000	230,000
Supplies	18,600	20,500	22,000	23,000	24,000
Equipment	142	64,500	67,000	69,000	71,000
Other Expenses	0	500	1,000	1,000	1,000
Indirect Costs	432,331	657,000	654,000	674,000	694,000
Total Expenses	\$1,619,979	\$2,678,500	\$2,455,000	\$2,508,000	\$2,556,000

OFFICE OF FINANCE

The Office of Finance is responsible for financial reporting and analysis, budget development and oversight, accounts payable, accounts receivable, general ledger, investments, payroll, and processing licensee and other fee payments for the State Bar.

2024 PROJECTS AND OBJECTIVES

- ✓ Facilitate completion of the April 2024 legislative reports to assist in securing a fee increase for 2025.
- ✓ Procure a new contract with an independent external auditor for the annual financial audit.
- ✓ Improve procedures related to financial projections and variance analysis.
- ✓ Increase number of collections cases remitted to the California Franchise Tax Board.

PERSONNEL

Finance employs 19 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Chief Financial Officer	1.00	1.00	1.00	1.00	1.00	\$276,741	\$290,566	\$291,141	\$291,189
Controller	1.00	1.00	1.00	1.00	1.00	191,657	196,449	196,449	196,449
Finance Manager	1.00	1.00	1.00	1.00	1.00	178,964	191,845	200,567	201,294
Financial Analyst	3.00	3.00	3.00	3.00	3.00	303,443	315,371	319,912	324,661
Fiscal Services Specialist	5.00	5.00	5.00	5.00	5.00	420,461	436,049	438,389	439,715
Principal Financial Analyst	3.00	4.00	4.00	4.00	4.00	562,503	579,037	581,553	584,115
Program Coordinator	1.00	1.00	1.00	1.00	1.00	87,745	89,939	89,939	89,939
Senior Financial Analyst	3.00	3.00	3.00	3.00	3.00	367,150	376,329	376,329	376,329
Total FTE	18.00	19.00	19.00	19.00	19.00	\$2,388,666	\$2,475,585	\$2,494,280	\$2,503,690

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for the Office of Finance are \$4.2 million.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$3,122,003	\$3,511,000	\$3,684,000	\$3,747,000	\$3,804,000
Building Operations	2,992	2,500	3,000	3,000	3,000
Services	547,042	666,500	378,000	389,000	400,000
Supplies	20,033	23,000	24,000	25,000	26,000
Equipment	2,250	4,000	4,000	4,000	4,000
Other Expenses	4,900	2,000	2,000	2,000	2,000
Total Expenses	\$3,699,220	\$4,209,000	\$4,095,000	\$4,170,000	\$4,239,000

OFFICE OF GENERAL COUNSEL (OGC)

OGC is the designated legal counsel to the State Bar and is responsible for providing legal advice and representation to the State Bar, the Board of Trustees, executive staff, and all State Bar subentities and programmatic clients. OGC also administers the Complaint Review Unit, which handles requests for a second look from complainants who have had their matters closed by OCTC without filing disciplinary charges.

FISCAL YEAR 2024 PROJECTS AND OBJECTIVES

- ✓ Support organizational goals and commitment to transparency and accountability while continuing to provide ethical and competent legal advice.
- ✓ Continue to provide timely and sound legal advice to the State Bar, and successfully represent and resolve legal matters brought by and against the organization.
- ✓ Continue to lead and provide support on conflicts-related initiatives, including a comprehensive training on Statements of Economic Interest (Form 700), conflicts of interest, ethics, gifts, and related topics for the Board and staff.

PERSONNEL

OGC employs 26 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Administrative Assistant II	2.00	0.00	0.00	0.00	0.00	\$0	\$0	\$0	\$0
Attorney I	0.00	1.00	1.00	1.00	1.00	122,705	130,925	136,290	141,874
Attorney II	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Attorney III	4.00	4.00	4.00	4.00	4.00	669,196	691,449	697,127	700,448
Attorney IV	6.00	8.00	8.00	8.00	8.00	1,526,927	1,567,587	1,568,607	1,569,079
Attorney V	3.00	3.00	3.00	3.00	3.00	678,327	697,708	699,169	700,049
Deputy General Counsel	1.00	1.00	1.00	1.00	1.00	257,522	264,664	264,723	264,728
General Counsel	1.00	1.00	1.00	1.00	1.00	309,307	317,040	317,040	317,040
Legal Secretary I	1.00	1.00	1.00	1.00	1.00	69,880	71,627	71,627	71,627
Legal Secretary III	1.00	1.00	1.00	1.00	1.00	89,990	92,240	92,240	92,240
Principal Program Analyst I	0.00	1.00	1.00	1.00	1.00	132,813	136,133	136,133	136,133
Program Analyst	1.00	1.00	1.00	1.00	1.00	98,943	105,557	109,868	113,265
Program Specialist	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Specialist II	0.00	2.00	2.00	2.00	2.00	146,413	150,073	150,073	150,073
Program Specialist III	0.00	1.00	1.00	1.00	1.00	88,049	90,250	90,250	90,250
Program Supervisor	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Senior Paralegal	1.00	1.00	1.00	1.00	1.00	96,437	103,681	105,381	105,419
Total FTE	24.00	26.00	26.00	26.00	26.00	\$4,286,510	\$4,418,937	\$4,438,528	\$4,452,225

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for OGC are approximately \$7.7 million, compared to \$6.1 million in 2023. The 2024 increase is driven primarily by personnel expenses, including the addition of two positions, as well as anticipated costs for outside counsel.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$4,987,394	\$6,279,000	\$6,557,000	\$6,660,000	\$6,757,000
Building Operations	2,698	2,000	2,000	2,000	2,000
Services	1,050,000	1,373,000	929,000	955,000	982,000
Supplies	9,748	13,500	14,000	14,000	14,000
Equipment	6,748	7,000	7,000	7,000	7,000
Other Expenses	9,700	6,000	6,000	6,000	6,000
Total Expenses	\$6,066,288	\$7,680,500	\$7,515,000	\$7,644,000	\$7,768,000

OFFICE OF PROFESSIONAL SUPPORT & CLIENT PROTECTION (OPSCP)

The OPSCP consists of two main service areas:

- **PROFESSIONAL SUPPORT:** The Lawyer Assistance Program offers substance-use disorder and mental health professional monitoring and support services for attorneys, law students, and State Bar applicants who must satisfy a specific monitoring or verification requirement.
- **CLIENT PROTECTION:** The Mandatory Fee Arbitration (MFA) program is a statutory client protection program that provides a confidential, informal, and affordable alternative dispute resolution forum for attorney-client fee disputes. The Client Security Fund program also protects the public and maintains confidence in the legal profession by reimbursing victims of attorney theft.

FISCAL YEAR 2024 PROJECTS AND OBJECTIVES

- ✓ Propose alternative dispute resolution options to enhance the MFA program and divert more fee-dispute complaints from OCTC.
- ✓ Develop and implement an outreach plan to increase the utilization of fee arbitration services.
- ✓ Facilitate stakeholder exploration of changes to the Alternative Discipline Program and make recommendations to the Board.
- ✓ Assess the risk of recidivism for each new attorney on probation and use data to understand the factors that influence recidivism.

Personnel, expense, and revenue for the OPSCP are broken out below by its four operating units:

- Client Security Fund
- Lawyer Assistance Program
- Mandatory Fee Arbitration
- Probation

Client Security Fund

PERSONNEL

The Client Security Fund employs approximately eight full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Attorney	2.00	0.00	0.00	0.00	0.00	\$0	\$0	\$0	\$0
Attorney II	0.00	1.00	1.00	1.00	1.00	138,510	144,161	146,384	148,640
Attorney III	0.00	2.00	2.00	2.00	2.00	344,493	359,057	365,230	371,632
Deputy Chief of Programs	0.15	0.10	0.10	0.10	0.10	25,788	26,470	26,473	26,473
Investigator II	1.00	1.00	1.00	1.00	1.00	107,433	110,119	110,119	110,119
Managing Attorney	0.50	0.50	0.50	0.50	0.50	113,635	116,862	116,895	116,897
Paralegal	1.00	1.00	1.00	1.00	1.00	89,433	91,669	91,669	91,669
Program Assistant II	0.50	0.00	0.00	0.00	0.00	0	0	0	0
Program Director III	0.25	0.25	0.25	0.25	0.25	59,993	59,993	59,993	59,993
Program Specialist III	0.00	1.50	1.50	1.50	1.50	124,451	129,406	130,174	130,495
Program Supervisor	1.00	1.00	1.00	1.00	1.00	134,609	137,974	137,974	137,974
Senior Administrative Assistant	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Senior Attorney	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Total FTE	8.40	8.35	8.35	8.35	8.35	\$1,138,345	\$1,175,711	\$1,184,910	\$1,193,893

EXPENSE

Total 2024 budgeted expenses for the Client Security Fund are approximately \$8.3 million.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$1,372,900	\$1,550,000	\$1,622,000	\$1,649,000	\$1,675,000
Building Operations	733	0	0	0	0
Services	104,288	3,000	128,000	18,000	13,000
Supplies	5,261	6,000	6,000	6,000	6,000
Equipment	2,956	3,000	3,000	3,000	3,000
Other Expenses	6,500	5,000	6,000	6,000	6,000
Payouts and Reimbursements	5,386,532	5,895,000	6,072,000	6,254,000	6,442,000
Indirect Costs	767,343	856,500	894,500	922,000	950,000
Total Expenses	\$7,646,513	\$8,318,500	\$8,731,500	\$8,858,000	\$9,095,000

REVENUE

Total 2024 budgeted revenue for the Client Security Fund is approximately \$8.9 million.

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Client Security					
Mandatory Licensee Fees	\$8,125,000	\$8,318,000	\$8,341,000	\$8,364,000	\$8,387,000
Other Revenues	\$67,500	\$120,000	\$124,000	\$128,000	\$132,000
Investment Income	\$12,172	\$427,000	\$440,000	\$453,000	\$467,000
Client Security Total	8,204,672	8,865,000	8,905,000	8,945,000	8,986,000
Total Fund Sources	\$8,204,672	\$8,865,000	\$8,905,000	\$8,945,000	\$8,986,000

Lawyer Assistance Program (LAP)

PERSONNEL

LAP employs approximately 10 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Administrative Assistant II	1.00	0.00	0.00	0.00	0.00	\$0	\$0	\$0	\$0
Clinical Rehabilitation Coordinator	4.00	0.00	0.00	0.00	0.00	0	0	0	0
Clinical Monitoring Analyst	0.00	4.00	4.00	4.00	4.00	395,025	418,152	429,171	439,711
Deputy Chief of Programs	0.10	0.10	0.10	0.10	0.10	25,788	26,470	26,473	26,473
Managing Attorney	0.00	0.25	0.25	0.25	0.25	49,835	53,422	55,871	58,234
Program Director III	0.25	0.40	0.40	0.40	0.40	92,676	94,986	95,577	95,641
Program Specialist II	0.00	1.00	1.00	1.00	1.00	81,626	83,667	83,667	83,667
Program Specialist III	0.00	1.00	1.00	1.00	1.00	88,049	90,250	90,250	90,250
Program Supervisor	1.00	1.00	1.00	1.00	1.00	134,609	137,974	137,974	137,974
Senior Program Analyst	0.00	2.00	2.00	2.00	2.00	232,146	237,950	237,950	237,950
Total FTE	6.35	9.75	9.75	9.75	9.75	\$1,099,754	\$1,142,870	\$1,156,932	\$1,169,900

EXPENSE

Total 2024 budgeted expenses for LAP are approximately \$3 million.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$1,298,200	\$1,607,000	\$1,693,000	\$1,729,000	\$1,767,000
Building Operations	148,518	196,000	202,000	208,000	214,000
Services	454,203	456,000	620,000	484,000	499,000
Supplies	6,018	7,000	7,000	7,000	7,000
Equipment	2,106	0	0	0	0
Other Expenses	30,233	21,000	21,000	21,000	21,000
Indirect Costs	647,532	730,000	765,000	789,000	813,000
Total Expenses	\$2,586,810	\$3,017,000	\$3,308,000	\$3,238,000	\$3,321,000

REVENUE

Total 2024 budgeted revenue for LAP is approximately \$2.25 million.

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Lawyer Assistance Program					
Mandatory Licensee Fees	\$2,127,300	\$2,177,000	\$2,183,000	\$2,189,000	\$2,195,000
Investment Income	13,253	72,000	74,000	76,000	78,000
Lawyer Assistance Program Total	2,140,553	2,249,000	2,283,000	2,318,000	2,353,000
Total Fund Sources	\$2,140,553	\$2,249,000	\$2,283,000	\$2,318,000	\$2,353,000

Mandatory Fee Arbitration (MFA)

PERSONNEL

MFA employs approximately three employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Attorney	1.00	0.00	0.00	0.00	0.00	\$0	\$0	\$0	\$0
Attorney III	0.00	1.00	1.00	1.00	1.00	153,397	160,377	163,585	166,856
Deputy Chief of Programs	0.05	0.05	0.05	0.05	0.05	12,894	13,235	13,236	13,236
Managing Attorney	0.50	0.50	0.50	0.50	0.50	113,635	116,862	116,895	116,897
Program Assistant II	0.50	0.00	0.00	0.00	0.00	0	0	0	0
Program Director III	0.25	0.25	0.25	0.25	0.25	59,993	59,993	59,993	59,993
Program Specialist III	0.00	0.50	0.50	0.50	0.50	39,486	40,473	40,473	40,473
Senior Program Analyst	1.00	1.00	1.00	1.00	1.00	122,383	125,443	125,443	125,443
Total FTE	3.30	3.30	3.30	3.30	3.30	\$501,789	\$516,384	\$519,625	\$522,900

EXPENSE

Total 2024 budgeted expenses for MFA are approximately \$1.2 million.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$640,495	\$723,000	\$754,000	\$767,000	\$780,000
Services	20,431	66,500	69,000	71,000	73,000
Supplies	2,000	6,000	6,000	6,000	6,000
Equipment	394	1,000	1,000	1,000	1,000
Other Expenses	5,151	0	0	0	0
Indirect Costs	213,346	378,000	342,000	352,000	363,000
Total Expenses	\$881,817	\$1,174,500	\$1,172,000	\$1,197,000	\$1,223,000

REVENUE

Total 2024 budgeted revenue for MFA is approximately \$100,000.

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
General Fund					
Other Fees	\$50,000	\$100,000	\$310,000	\$319,000	\$329,000
General Fund Total	50,000	100,000	310,000	319,000	329,000
Total Fund Sources	\$50,000	\$100,000	\$310,000	\$319,000	\$329,000

Probation

PERSONNEL

The Office of Probation employs approximately eight full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Administrative Assistant II	1.00	0.00	0.00	0.00	0.00	\$0	\$0	\$0	\$0
Deputy Chief of Programs	0.15	0.05	0.05	0.05	0.05	12,894	13,235	13,236	13,236
Probation Case Coordinator	0.00	6.00	6.00	6.00	6.00	511,564	529,918	534,545	538,912
Probation Case Specialist	6.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Director III	0.25	0.25	0.25	0.25	0.25	59,993	59,993	59,993	59,993
Program Specialist II	0.00	1.00	1.00	1.00	1.00	77,150	82,945	83,651	83,666
Supervising Attorney	1.00	1.00	1.00	1.00	1.00	219,681	226,802	228,123	229,194
Total FTE	8.40	8.30	8.30	8.30	8.30	\$881,283	\$912,892	\$919,548	\$925,002

EXPENSE

Total 2024 budgeted expenses for the Office of Probation are approximately \$2.1 million.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$1,274,651	\$1,366,000	\$1,435,000	\$1,462,000	\$1,489,000
Building Operations	731	1,000	1,000	1,000	1,000
Services	33,000	26,000	27,000	28,000	29,000
Supplies	2,727	4,500	5,000	5,000	5,000
Equipment	415	500	1,000	1,000	1,000
Indirect Costs	638,307	737,000	761,000	784,000	807,000
Total Expenses	\$1,949,831	\$2,135,000	\$2,230,000	\$2,281,000	\$2,332,000

STATE BAR COURT

California has the only state bar in the United States with independent professional judges dedicated to ruling on attorney disciplinary and regulatory cases. The State Bar Court impartially adjudicates matters filed by OCTC and has the power to recommend that the California Supreme Court suspend or disbar attorneys found to have committed acts of professional misconduct or to have been convicted of serious crimes. For lesser offenses, the court may issue public or private reproofs. In regulatory matters, the court adjudicates matters including attorney reinstatements and challenges to adverse moral character determinations.

FISCAL YEAR 2024 PROJECTS AND OBJECTIVES

- ✓ Implement mandatory e-filing, which will position the court to transition to an electronic (paperless) court.
- ✓ Revise the framework for and implement broad public reporting of court case-processing timelines.
- ✓ Publish a self-help practice guide to provide guidance to self-represented respondents and inform the public about court disciplinary and regulatory proceedings.

PERSONNEL

The State Bar Court employs 42 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Attorney	1.00	0.00	0.00	0.00	0.00	\$0	\$0	\$0	\$0
Attorney II	0.00	1.00	1.00	1.00	1.00	138,443	148,270	154,921	161,871
Attorney III	0.00	6.00	6.00	6.00	6.00	1,015,217	1,052,813	1,063,913	1,070,679
Attorney IV	1.00	1.00	1.00	1.00	1.00	180,670	193,880	202,982	211,957
Clerk of the Court	1.00	1.00	1.00	1.00	1.00	254,663	264,420	264,703	264,726
Court Clerk	0.00	12.00	12.00	12.00	12.00	1,130,052	1,162,768	1,167,328	1,171,984
Court Counsel	1.00	1.00	1.00	1.00	1.00	239,573	246,191	246,244	246,248
Court Specialist	12.00	0.00	0.00	0.00	0.00	0	0	0	0
Hearing Judge	5.00	5.00	5.00	5.00	5.00	1,001,811	1,001,811	1,001,811	1,001,811
Legal Secretary II	2.00	2.00	2.00	2.00	2.00	168,506	173,439	173,986	174,400
Paralegal	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Presiding Judge	1.00	1.00	1.00	1.00	1.00	219,401	219,401	219,401	219,401
Program Analyst	2.00	1.00	1.00	1.00	1.00	99,776	102,270	102,270	102,270
Program Manager II	1.00	1.00	1.00	1.00	1.00	159,187	163,167	163,167	163,167
Program Specialist III	0.00	2.00	2.00	2.00	2.00	171,570	176,728	177,493	178,102
Program Supervisor	3.00	3.00	3.00	3.00	3.00	388,679	400,001	401,441	402,813
Review Judge	2.00	2.00	2.00	2.00	2.00	438,801	438,801	438,801	438,801
Senior Paralegal	0.00	1.00	1.00	1.00	1.00	96,671	102,005	104,016	104,842
Senior Administrative Assistant	2.00	0.00	0.00	0.00	0.00	0	0	0	0
Senior Attorney	6.00	0.00	0.00	0.00	0.00	0	0	0	0
Supervising Attorney	2.00	2.00	2.00	2.00	2.00	421,509	438,531	444,260	449,526
Total FTE	43.00	42.00	42.00	42.00	42.00	\$6,124,529	\$6,284,496	\$6,326,736	\$6,362,598

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for the State Bar Court are approximately \$17.8 million, compared to \$14.0 million in 2023. The 2024 increase is primarily in personnel costs associated with increased salaries and benefits.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$8,362,978	\$9,251,000	\$9,617,000	\$9,782,000	\$9,950,500
Building Operations	1,207	2,000	2,000	2,000	2,000
Services	62,334	150,500	154,000	157,000	160,000
Supplies	21,672	28,500	31,000	31,000	31,000
Equipment	12,139	12,000	12,000	12,000	12,000
Other Expenses	70,797	73,000	75,000	77,000	79,000
Indirect Costs	5,468,886	8,256,500	7,617,000	7,846,000	8,080,000
Total Expenses	\$14,000,013	\$17,773,500	\$17,508,000	\$17,907,000	\$18,314,500

ADMINISTRATIVE DIVISION

The Administrative Division comprises the core support offices of General Services, Human Resources (HR), and Information Technology (IT):

GENERAL SERVICES

Provides a comprehensive range of facilities, administrative, and procurement services.

HR

Provides the full range of talent acquisition, development, and management services.

IT

Provides the technology capabilities and solutions that enable and support the State Bar's operations and programs.

FISCAL YEAR 2024 PROJECTS AND OBJECTIVES

- ✓ Consolidate San Francisco offices into new, reduced space at 180 Howard Street.
- ✓ Conduct a real estate analysis of the State Bar's Los Angeles building, including planning and design for infrastructure upgrades.
- ✓ Update records retention policies and procedures and digitize most paper records.
- ✓ Implement a new IT organizational structure and operating model.
- ✓ Implement an organizational talent review process.

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for the Administrative Division are approximately \$2 million, allocated primarily for a document digitization project necessitated by the sale of the San Francisco building, which will lead to a decrease in the space occupied by the State Bar.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Building Operations	\$0	\$2,000	\$2,000	\$2,000	\$2,000
Services	0	2,003,000	3,000	3,000	3,000
Supplies	0	500	1,000	1,000	1,000
Equipment	0	1,000	1,000	1,000	1,000
Other Expenses	7,400	21,000	22,000	23,000	24,000
Total Expenses	\$7,400	\$2,027,500	\$29,000	\$30,000	\$31,000

Personnel, expense, and revenue for the Administrative Division are broken out below by its three operating units below:

General Services

PERSONNEL

General Services employs approximately 20 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Administrative Supervisor	2.00	0.00	0.00	0.00	0.00	\$0	\$0	\$0	\$0
Chief Administrative Officer	0.34	0.34	0.34	0.34	0.34	96,559	99,003	99,005	99,006
Director, General Services	1.00	1.00	1.00	1.00	1.00	210,826	216,096	216,096	216,096
General Services Specialist II	9.00	10.00	10.00	10.00	10.00	763,256	786,311	789,858	793,287
General Services Specialist III	3.00	2.00	2.00	2.00	2.00	164,817	171,500	173,577	175,572
Principal Program Analyst	1.34	1.34	1.34	1.34	1.34	198,421	203,382	203,382	203,382
Principal Program Analyst II	0.00	1.00	1.00	1.00	1.00	142,779	146,349	146,349	146,349
Program Analyst	2.00	1.00	1.00	1.00	1.00	111,247	114,028	114,028	114,028
Program Coordinator	0.00	1.00	1.00	1.00	1.00	93,773	97,307	98,156	98,763
Program Supervisor	0.00	2.00	2.00	2.00	2.00	233,316	246,973	255,058	263,413
Total FTE	18.68	19.68	19.68	19.68	19.68	\$2,014,994	\$2,080,949	\$2,095,509	\$2,109,895

EXPENSE

Total 2024 budgeted expenses for General Services are approximately \$16.5 million, compared to \$9.5 million in 2023. The increase is primarily a result of budgeting for only six months of operations in 2023, higher leasing expense following the sale of the San Francisco building, and necessary elevator repairs in the Los Angeles building.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$2,500,497	\$2,880,000	\$3,008,000	\$3,058,000	\$3,105,000
Building Operations	5,891,448	10,127,000	8,533,000	8,787,000	9,050,000
Services	512,257	2,702,000	1,934,000	447,000	460,000
Supplies	463,902	502,000	518,000	533,000	548,000
Equipment	106,642	239,000	245,000	251,000	257,000
Other Expenses	18,042	9,000	9,000	9,000	9,000
Indirect Costs	(1,976,794)	(1,108,000)	(1,108,000)	(1,141,000)	(1,175,000)
Debt Related	1,976,968	1,108,000	1,109,000	1,109,000	1,108,000
Total Expenses	\$9,492,962	\$16,459,000	\$14,248,000	\$13,053,000	\$13,362,000

REVENUE

Total 2024 budgeted revenue for General Services is approximately \$1.3 million, compared to \$3.6 million in 2023. The reduced revenue is due to the sale of the San Francisco building and the resulting loss of rental income.

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
General Fund					
Mandatory Licensee Fees	\$812,000	\$831,000	\$833,000	\$835,000	\$837,000
Investment Income	48,027	0	0	0	0
Lease Revenue	2,695,200	451,000	451,000	451,000	451,000
General Fund Total	3,555,227	1,282,000	1,284,000	1,286,000	1,288,000
Total Fund Sources	\$3,555,227	\$1,282,000	\$1,284,000	\$1,286,000	\$1,288,000

Human Resources

PERSONNEL

HR employs approximately 17 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Chief Administrative Officer	0.33	0.33	0.33	0.33	0.33	\$93,719	\$96,091	\$96,094	\$96,094
Director, Human Resources	1.00	1.00	1.00	1.00	1.00	208,249	223,239	233,471	237,352
General Services Specialist II	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Human Resources Analyst	5.00	5.00	5.00	5.00	5.00	490,767	517,402	529,220	540,228
Human Resources Coordinator	1.00	1.00	1.00	1.00	1.00	89,612	93,855	95,902	97,809
Lead Human Resources Analyst	2.00	3.00	3.00	3.00	3.00	399,531	412,955	413,709	413,875
Principal Human Resources Analyst	3.00	0.00	0.00	0.00	0.00	0	0	0	0
Principal Human Resources Analyst II	0.00	3.00	3.00	3.00	3.00	474,718	488,755	489,309	489,451
Principal Program Analyst	0.33	0.33	0.33	0.33	0.33	48,865	50,087	50,087	50,087
Senior Human Resources Analyst	3.00	3.00	3.00	3.00	3.00	364,657	375,378	375,975	376,197
Total FTE	16.66	16.66	16.66	16.66	16.66	\$2,170,119	\$2,257,762	\$2,283,767	\$2,301,093

EXPENSE

Total 2024 budgeted expenses for HR are approximately \$3.8 million.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$2,927,176	\$3,446,000	\$3,623,000	\$3,698,000	\$3,766,000
Building Operations	4,227	5,000	5,000	5,000	5,000
Services	127,500	136,500	141,000	145,000	149,000
Supplies	1,541	4,500	6,000	6,000	6,000
Equipment	123	7,500	8,000	8,000	8,000
Other Expenses	155,817	216,000	222,000	228,000	234,000
Total Expenses	\$3,216,384	\$3,815,500	\$4,005,000	\$4,090,000	\$4,168,000

Information Technology

PERSONNEL

IT employs approximately 39 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Chief Administrative Officer	0.33	0.33	0.33	0.33	0.33	\$93,719	\$96,091	\$96,094	\$96,094
IT Analyst I	3.00	3.00	3.00	3.00	3.00	299,392	310,772	314,826	316,792
IT Analyst II	13.00	12.00	12.00	12.00	12.00	1,368,723	1,407,124	1,409,316	1,409,808
IT Business Systems Analyst I	1.00	1.00	1.00	1.00	1.00	103,165	105,744	105,744	105,744
IT Business Systems Analyst II	3.00	3.00	3.00	3.00	3.00	343,890	352,488	352,488	352,488
IT Director	1.00	1.00	1.00	1.00	1.00	231,907	237,705	237,705	237,705
IT Director I	2.00	2.00	2.00	2.00	2.00	376,500	392,315	392,849	392,893
IT Manager I	2.00	1.00	1.00	1.00	1.00	147,865	151,759	151,776	151,777
IT Manager II	1.00	1.00	1.00	1.00	1.00	142,779	146,349	146,349	146,349
IT Manager III	2.00	2.00	2.00	2.00	2.00	342,241	350,797	350,797	350,797
IT Support Technician II	1.00	1.00	1.00	1.00	1.00	87,999	90,199	90,199	90,199
Lead IT Analyst	3.00	2.00	2.00	2.00	2.00	269,217	275,948	275,948	275,948
Principal Program Analyst	0.33	1.33	1.33	1.33	1.33	185,212	195,297	200,423	201,548
Program Analyst	1.00	1.00	1.00	1.00	1.00	92,510	97,246	99,731	102,280
Senior IT Analyst	7.00	4.00	4.00	4.00	4.00	482,087	493,510	493,510	493,510
Senior IT Business Systems Analyst	1.00	1.00	1.00	1.00	1.00	120,368	123,378	123,378	123,378
Senior Program Analyst	4.00	2.00	2.00	2.00	2.00	244,147	250,357	250,445	250,519
Total FTE	45.66	38.66	38.66	38.66	38.66	\$4,931,722	\$5,077,078	\$5,091,575	\$5,097,826

EXPENSE

Total 2024 budgeted expenses for IT are approximately \$17.8 million.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$7,967,174	\$7,294,000	\$7,615,000	\$7,728,000	\$7,832,000
Building Operations	519,898	685,000	706,000	728,000	750,000
Services	3,786,731	3,612,000	865,000	891,000	917,000
Supplies	6,968	7,500	8,000	8,000	8,000
Equipment	4,338,258	6,181,000	6,365,000	6,556,000	6,754,000
Other Expenses	21,987	16,000	16,000	16,000	16,000
Indirect Costs	63,524	8,000	0	0	0
Debt Related	663,200	0	0	0	0
Total Expenses	\$17,367,740	\$17,803,500	\$15,575,000	\$15,927,000	\$16,277,000

REVENUE

Total 2024 budgeted revenue for IT is approximately \$1 million.

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
General Fund					
Mandatory Licensee Fees	\$1,020,600	\$1,045,000	\$0	\$0	\$0
Investment Income	21,364	0	0	0	0
General Fund Total	1,041,964	1,045,000	0	0	0
Total Fund Sources	\$1,041,964	\$1,045,000	\$0	\$0	\$0

MISSION ADVANCEMENT AND ACCOUNTABILITY DIVISION (MAAD)

MAAD conducts research, analytics, and compliance monitoring to improve institutional efficiency, effectiveness, and accountability.

The Legislative Affairs unit within MAAD is responsible for advocating and advancing the State Bar's legislative agenda, as well as for responding to legislative proposals initiated by other entities as appropriate.

FISCAL YEAR 2024 PROJECTS AND OBJECTIVES

- ✓ Complete the discipline case processing component of the April legislative reports.
- ✓ Conduct and publish a 2024 study of racial disparities in the attorney discipline system.
- ✓ Conduct and publish the 2024 California Justice Gap Study.
- ✓ Develop a risk model for CTAPP compliance.
- ✓ Refine the compliance and accountability function and conduct an internal review of State Bar risks in select offices.

PERSONNEL

MAAD employs approximately 17 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Chief Mission Officer	1.00	1.00	1.00	1.00	1.00	\$282,700	\$291,074	\$291,183	\$291,192
Chief Programs Officer	0.50	1.00	1.00	1.00	1.00	284,091	291,193	291,193	291,193
Deputy Chief of Programs	0.10	0.05	0.05	0.05	0.05	12,894	13,235	13,236	13,236
Executive Director	0.05	0.05	0.05	0.05	0.05	16,238	16,644	16,644	16,644
Lead Program Analyst	0.00	1.00	1.00	1.00	1.00	110,614	115,647	117,960	120,319
Principal Program Analyst	3.00	2.00	2.00	2.00	2.00	287,109	296,854	298,627	299,870
Principal Program Analyst III	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Analyst	4.00	3.00	3.00	3.00	3.00	295,762	312,395	321,562	325,705
Program Coordinator	1.00	1.00	1.00	1.00	1.00	89,296	94,935	98,469	99,814
Program Director I	3.00	1.73	1.73	1.73	1.73	312,185	319,990	319,990	319,990
Program Manager III	0.00	1.00	1.00	1.00	1.00	171,121	175,399	175,399	175,399
Senior Program Analyst	3.00	5.00	5.00	5.00	5.00	567,686	591,360	599,540	601,018
Total FTE	16.65	16.83	16.83	16.83	16.83	\$2,429,696	\$2,518,727	\$2,543,805	\$2,554,381

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for MAAD are approximately \$4.3 million.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$3,137,801	\$3,375,500	\$3,545,500	\$3,611,500	\$3,664,000
Building Operations	2,070	2,000	2,000	2,000	2,000
Services	197,800	815,000	340,000	350,000	360,000
Supplies	0	1,500	2,000	2,000	2,000
Equipment	5,400	6,000	6,000	6,000	6,000
Other Expenses	17,600	6,500	7,000	7,000	7,000
Indirect Costs	91,730	82,500	65,500	68,000	70,000
Total Expenses	\$3,452,401	\$4,289,000	\$3,968,000	\$4,046,500	\$4,111,000

2024 BUDGETED REVENUE

Total 2024 budgeted revenue for MAAD is \$355,500. This revenue is primarily derived from grants MAAD receives to support its research work.

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
General Fund					
Other Revenues	\$1,000	\$500	\$1,000	\$1,000	\$1,000
General Fund Total	1,000	500	1,000	1,000	1,000
Legislative Activities					
Voluntary Fees & Donations	42,000	42,000	42,000	42,000	42,000
Investment Income	2,369	13,000	13,000	13,000	13,000
Legislative Activities Total	44,369	55,000	55,000	55,000	55,000
Grants					
Grants	0	300,000	309,000	318,000	328,000
Grants Total	0	300,000	309,000	318,000	328,000
Total Fund Sources	\$45,369	\$355,500	\$365,000	\$374,000	\$384,000

REGULATION DIVISION

On behalf of the California Supreme Court, the Regulation Division maintains the official roll of attorneys, manages the registration of law corporations and limited law partnerships, is responsible for ensuring the compliance of all licensees with various administrative requirements, and is charged with implementing the State Bar's Client Trust Account Protection Program (CTAPP).

Effective 2024, the division houses the Office of Professional Competence (OPC), which administers the State Bar's attorney professional responsibility and attorney support programs and resources, including the Ethics Hotline; professional responsibility, outreach, and education; and the support function aspect of the LAP. OPC also administers other State Bar regulatory functions, including the MCLE provider certification program and the Lawyer Referral Service provider certification program.

FISCAL YEAR 2024 PROJECTS AND OBJECTIVES

- ✓ Complete the second year of CTAPP reporting and conduct volunteer compliance reviews.
- ✓ Recommend statutory changes to enable collection of additional bank data to assess trust accounting practices and finalize a framework for compliance reviews and investigative audits.
- ✓ Develop educational resources for attorneys, including CTA classes and webinars, and update the CTA Handbook.
- ✓ Update the New Attorney Training program, a 10-hour education requirement that all new licensees must complete within the first year of practice.

PERSONNEL

The Regulation Division, exclusive of OPC (broken out below) employs 24 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Deputy Special Counsel, Regulation	0.00	1.00	1.00	1.00	1.00	\$240,242	\$246,249	\$246,249	\$246,249
Lead Program Analyst	0.00	1.00	1.00	1.00	1.00	121,549	128,983	133,533	136,666
Principal Program Analyst	3.00	2.00	2.00	2.00	2.00	280,888	287,910	287,910	287,910
Program Analyst	1.00	1.00	1.00	1.00	1.00	111,247	114,028	114,028	114,028
Program Assistant II	4.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Assistant III	3.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Coordinator	4.00	4.00	4.00	4.00	4.00	391,319	401,102	401,102	401,102
Program Director II	1.00	1.00	1.00	1.00	1.00	210,826	216,096	216,096	216,096
Program Manager I	1.00	1.00	1.00	1.00	1.00	148,076	151,777	151,777	151,777
Program Specialist I	1.00	4.00	4.00	4.00	4.00	281,049	291,354	293,785	296,177
Program Specialist II	0.00	3.00	3.00	3.00	3.00	233,581	243,948	247,214	248,010
Program Specialist III	0.00	3.00	3.00	3.00	3.00	250,273	260,193	261,269	261,421
Program Supervisor	2.00	2.00	2.00	2.00	2.00	245,611	255,070	258,485	262,000
Senior Program Analyst	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Special Counsel, Regulation	1.00	1.00	1.00	1.00	1.00	258,272	264,728	264,728	264,728
Total FTE	22.00	24.00	24.00	24.00	24.00	\$2,772,933	\$2,861,438	\$2,876,176	\$2,886,165

2024 BUDGET BY EXPENSE CATEGORY

Total 2024 budgeted expenses for the Regulation Division are approximately \$7.2 million, compared to \$5.7 million in 2023. The increase is primarily in personnel.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$3,488,013	\$4,143,000	\$4,332,000	\$4,401,000	\$4,468,500
Building Operations	9,243	500	1,000	1,000	1,000
Services	286,041	203,000	209,000	215,000	221,000
Supplies	58,824	60,000	62,000	64,000	66,000
Equipment	8,157	8,500	9,000	9,000	9,000
Other Expenses	0	6,000	6,000	6,000	6,000
Indirect Costs	1,848,197	2,769,000	2,373,000	2,444,000	2,518,000
Total Expenses	\$5,698,475	\$7,190,000	\$6,992,000	\$7,140,000	\$7,289,500

2024 BUDGETED REVENUE

Total 2024 budgeted revenue for the Regulation Division is approximately \$2.9 million. In the 2024 budget, annual fees for Legal Specialization were transferred to Regulation, leading to an increase in revenue.

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
General Fund					
Other Fees	\$332,800	\$2,914,000	\$3,002,000	\$3,092,000	\$3,184,000
Other Revenues	7,000	7,000	7,000	7,000	7,000
General Fund Total	339,800	2,921,000	3,009,000	3,099,000	3,191,000
Total Fund Sources	\$339,800	\$2,921,000	\$3,009,000	\$3,099,000	\$3,191,000

Professional Competence

PERSONNEL

OPC employs approximately 15 full-time employees.

	Positions					Salaries			
	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Administrative Assistant II	1.00	0.00	0.00	0.00	0.00	\$0	\$0	\$0	\$0
Attorney II	0.00	1.00	1.00	1.00	1.00	139,539	146,643	150,349	154,150
Deputy Chief of Programs	0.35	0.00	0.00	0.00	0.00	0	0	0	0
Lead Program Analyst	1.00	2.00	2.00	2.00	2.00	267,775	275,681	275,899	275,939
Managing Attorney	1.00	0.75	0.75	0.75	0.75	149,505	160,266	167,612	174,702
Program Analyst	2.00	2.00	2.00	2.00	2.00	209,580	215,969	216,225	216,282
Program Assistant II	3.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Coordinator	1.00	1.00	1.00	1.00	1.00	97,725	100,261	100,273	100,275
Program Director II	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Program Director III	0.00	0.85	0.85	0.85	0.85	185,199	198,292	201,642	202,005
Program Manager I	1.00	1.00	1.00	1.00	1.00	148,076	151,777	151,777	151,777
Program Specialist I	0.00	3.00	3.00	3.00	3.00	210,447	219,419	222,761	225,909
Senior Attorney	1.00	0.00	0.00	0.00	0.00	0	0	0	0
Senior Program Analyst	6.00	3.00	3.00	3.00	3.00	354,423	363,390	363,393	363,393
Total FTE	18.35	14.60	14.60	14.60	14.60	\$1,762,269	\$1,831,698	\$1,849,932	\$1,864,432

EXPENSE

Total 2024 budgeted expenses for OPC are approximately \$4.9 million.

Expense Categories	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Personnel Costs	\$2,570,785	\$2,594,000	\$2,732,000	\$2,787,000	\$2,838,000
Building Operations	1,260	1,000	1,000	1,000	1,000
Services	171,500	689,000	567,000	494,000	522,000
Supplies	2,263	5,000	5,000	5,000	5,000
Equipment	4,447	5,000	5,000	5,000	5,000
Other Expenses	29,500	15,500	16,000	16,000	16,000
Indirect Costs	1,241,144	1,620,500	1,459,000	1,503,000	1,548,000
Total Expenses	\$4,020,899	\$4,930,000	\$4,785,000	\$4,811,000	\$4,935,000

REVENUE

Total 2024 budgeted revenue for OPC is approximately \$500,000.

Fund	2023 Budget	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
General Fund					
Other Fees	\$569,500	\$421,000	\$434,000	\$447,000	\$460,000
Other Revenues	80,200	80,500	381,000	392,000	404,000
General Fund Total	649,700	501,500	815,000	839,000	864,000
Total Fund Sources	\$649,700	\$501,500	\$815,000	\$839,000	\$864,000

PROJECTED RESERVE BALANCE BY FUND

State Bar of California
Projected Reserve Balance by Fund
December 31, 2024

	Projected Reserve Bal 12/31/23	2024 Budgeted Revenues	2024 Budgeted Expenses	2024 Indirect Costs	2024 Total Expenses	2024 Interfund Transfers	2024 Budgeted Surplus/ (Deficit)	Projected Reserve Bal 12/31/24	Reserve Level (%) *
General Fund	36,095,208	96,341,500	(132,340,000)	14,348,000	(117,992,000)	(495,000)	(22,145,500)	13,949,708	11.8%
Other Funds									
Admissions Fund (320)	7,051,104	26,432,500	(21,038,500)	(9,666,000)	(30,704,500)	495,000	(3,777,000)	3,274,104	10.7%
Elimination of Bias Fund (217)	(32)	325,000	(343,000)	(139,000)	(482,000)	-	(157,000)	(157,032)	-32.6%
Lawyer Assistance Program Fund (221)	1,010,768	2,249,000	(2,287,000)	(730,000)	(3,017,000)	-	(768,000)	242,768	8.0%
Legislative Activities Fund (216)	247,909	55,000	(213,000)	(82,500)	(295,500)	-	(240,500)	7,409	2.5%
Bank Settlement Fund (237)	4,844,134	168,000	(4,629,500)	(70,000)	(4,699,500)	-	(4,531,500)	312,634	N/A
Client Security Fund (227)	8,890,823	8,865,000	(7,462,000)	(856,500)	(8,318,500)	-	546,500	9,437,323	N/A
Equal Access Fund (229)	2,770,750	37,921,000	(37,928,000)	(804,000)	(38,732,000)	-	(811,000)	1,959,750	N/A
Grants Fund (312)	2,450,829	97,907,000	(95,941,500)	(831,000)	(96,772,500)	-	1,134,500	3,585,329	N/A
Justice Gap Fund (232)	4,918,707	1,228,000	-	(8,000)	(8,000)	(1,000,000)	220,000	5,138,707	N/A
Legal Services Trust Fund (228)	188,416,969	157,378,000	(98,762,500)	(1,161,000)	(99,923,500)	1,000,000	58,454,500	246,871,469	N/A
Other Funds Total	220,601,961	332,528,500	(268,605,000)	(14,348,000)	(282,953,000)	495,000	50,070,500	270,672,461	
Grand Total	256,697,170	428,870,000	(400,945,000)	-	(400,945,000)	-	27,925,000	284,622,170	

* Board Reserve Policy specifies that all grant related Funds are excluded from the Minimum Target Reserve requirement of 17%. The excluded funds are the Grant, Legal Service Trust, Equal Access, Justice Gap, Bank Settlement, and Client Security funds.

STATE BAR-WIDE BUDGET

State Bar Wide	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Mandatory Licensee Fees	\$95,431,500	\$97,266,771	\$97,872,000	\$97,097,000	\$97,367,000	\$97,638,000
Donations & Opt-Out	8,902,000	9,556,898	8,512,000	8,536,000	8,560,000	8,584,000
Other Fees	11,090,230	14,222,180	14,659,500	15,530,000	15,758,000	16,466,000
Exam Fees	11,232,373	12,997,254	17,423,500	18,016,000	18,486,000	19,111,000
Grants	204,234,619	297,662,943	280,662,000	196,820,000	186,876,000	164,136,000
Other Revenues	330,700	466,144	363,000	672,000	691,000	711,000
Investment Income	797,309	9,624,986	8,927,000	9,194,000	9,467,000	9,750,000
Lease Revenue	2,695,200	2,937,733	451,000	451,000	451,000	451,000
Total Revenues	\$334,713,931	\$444,734,909	\$428,870,000	\$346,316,000	\$337,656,000	\$316,847,000
Expenses						
Personnel Costs	\$106,858,681	\$116,353,286	\$116,875,500	\$125,408,500	\$127,732,500	\$129,997,500
Building Operations	6,612,094	7,480,071	11,069,000	9,504,000	9,787,000	10,079,000
Services	12,964,840	11,861,726	19,064,000	12,377,000	10,325,000	11,149,000
Grants Expenses	147,031,301	168,908,510	231,649,000	260,310,000	175,788,000	152,672,000
Supplies	750,455	751,055	827,000	865,000	888,000	911,000
Equipment	4,992,207	5,324,008	7,274,500	7,492,000	7,713,000	7,941,000
Other Expenses	1,089,085	904,975	1,392,000	1,431,000	1,465,000	1,501,000
Exam Related Expenses	7,484,309	7,548,397	7,591,000	7,592,000	7,804,000	8,021,000
Payouts and Reimbursements	3,586,532	3,700,565	4,095,000	4,218,000	4,344,000	4,475,000
Debt Related	2,640,168	1,170,817	1,108,000	1,109,000	1,109,000	1,108,000
Total Expenses	\$294,009,672	\$324,003,410	\$400,945,000	\$430,306,500	\$346,955,500	\$ 327,854,500
Interfund Transactions						
Transfer In	\$1,400,000	\$1,400,000	\$1,495,000	\$1,540,000	\$1,586,000	\$1,634,000
Transfer Out	(1,400,000)	(1,400,000)	(1,495,000)	(1,540,000)	(1,586,000)	(1,634,000)
Total Interfund Transactions	-	-	-	-	-	-
Change in Net Position	\$40,704,259	\$120,731,499	\$27,925,000	\$(83,990,500)	\$(9,299,500)	\$(11,007,500)

STATE BAR OF CALIFORNIA

BUDGET BY FUND

General Fund	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Mandatory Licensee Fees	\$85,179,200	\$86,749,658	\$87,377,000	\$86,573,000	\$86,814,000	\$87,056,000
Other Fees	2,807,600	4,690,922	6,170,500	6,564,000	6,760,000	6,962,000
Other Revenues	263,200	351,880	243,000	548,000	563,000	579,000
Investment Income	407,620	2,975,217	2,100,000	2,163,000	2,228,000	2,295,000
Lease Revenue	2,695,200	2,937,733	451,000	451,000	451,000	451,000
Total Revenues	91,352,820	97,705,410	96,341,500	96,299,000	96,816,000	97,343,000
Expenses						
Personnel Costs	92,123,288	98,633,576	98,486,000	106,155,000	108,162,000	110,084,500
Building Operations	6,437,837	7,279,714	10,844,000	9,272,000	9,548,000	9,833,000
Services	9,536,571	9,450,283	15,494,500	8,425,000	6,522,000	7,238,000
Supplies	691,047	699,725	761,500	793,000	815,000	837,000
Equipment	4,534,365	4,786,218	6,628,000	6,825,000	7,026,000	7,234,000
Other Expenses	644,246	641,457	818,000	840,000	861,000	882,000
Payouts and Reimbursements	(1,800,000)	(1,344,321)	(1,800,000)	(1,854,000)	(1,910,000)	(1,967,000)
Indirect Costs	(10,300,299)	(10,221,549)	(14,348,000)	(11,948,000)	(12,309,000)	(12,680,000)
Debt Related	2,640,168	1,170,817	1,108,000	1,109,000	1,109,000	1,108,000
Total Expenses	104,507,223	111,095,918	117,992,000	119,617,000	119,824,000	122,569,500
Interfund Transactions						
Transfer Out	(400,000)	(400,000)	(495,000)	(510,000)	(525,000)	(541,000)
Total Interfund Transactions	(400,000)	(400,000)	(495,000)	(510,000)	(525,000)	(541,000)
Change in Net Position	(\$13,554,403)	(\$13,790,509)	(\$22,145,500)	(\$23,828,000)	(\$23,533,000)	(\$25,767,500)

Legislative Activities Fund	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Donations & Opt-Out	\$42,000	\$52,511	\$42,000	\$42,000	\$42,000	\$42,000
Investment Income	2,369	16,038	13,000	13,000	13,000	13,000
Total Revenues	44,369	68,549	55,000	55,000	55,000	55,000
Expenses						
Personnel Costs	225,200	204,192	210,000	218,000	220,000	223,000
Services	11,800	2,515	3,000	3,000	3,000	3,000
Supplies	0	750	0	0	0	0
Other Expenses	0	191	0	0	0	0
Indirect Costs	75,405	74,827	82,500	65,500	68,000	70,000
Total Expenses	312,405	282,475	295,500	286,500	291,000	296,000
Change in Net Position	(\$268,036)	(\$213,926)	(\$240,500)	(\$231,500)	(\$236,000)	(\$241,000)

Elimination of Bias Fund	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Donations & Opt-Out	\$320,000	\$363,175	\$320,000	\$321,000	\$322,000	\$323,000
Investment Income	1,294	6,623	5,000	5,000	5,000	5,000
Total Revenues	321,294	369,798	325,000	326,000	327,000	328,000
Expenses						
Personnel Costs	166,900	188,702	221,500	235,500	242,500	246,500
Services	38,063	29,441	93,000	95,000	98,000	101,000
Equipment	0	41	0	0	0	0
Other Expenses	27,369	2,808	28,500	30,000	31,000	32,000
Indirect Costs	103,037	102,260	139,000	126,000	130,000	134,000
Total Expenses	335,369	323,252	482,000	486,500	501,500	513,500
Change in Net Position	(\$14,075)	\$46,546	(\$157,000)	(\$160,500)	(\$174,500)	(\$185,500)

Lawyer Assistance Program Fund	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Mandatory Licensee Fees	\$2,127,300	\$2,180,746	\$2,177,000	\$2,183,000	\$2,189,000	\$2,195,000
Investment Income	13,253	88,966	72,000	74,000	76,000	78,000
Total Revenues	2,140,553	2,269,712	2,249,000	2,257,000	2,265,000	2,273,000
Expenses						
Personnel Costs	1,298,200	1,564,233	1,607,000	1,693,000	1,729,000	1,767,000
Building Operations	148,518	177,747	196,000	202,000	208,000	214,000
Services	454,203	236,714	456,000	620,000	484,000	499,000
Supplies	6,018	1,782	7,000	7,000	7,000	7,000
Equipment	2,106	62	0	0	0	0
Other Expenses	30,233	16,565	21,000	21,000	21,000	21,000
Indirect Costs	647,532	642,571	730,000	765,000	789,000	813,000
Total Expenses	2,586,810	2,639,674	3,017,000	3,308,000	3,238,000	3,321,000
Change in Net Position	(\$446,257)	(\$369,963)	(\$768,000)	(\$1,051,000)	(\$973,000)	(\$1,048,000)

Client Security Fund	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Mandatory Licensee Fees	\$8,125,000	\$8,336,367	\$8,318,000	\$8,341,000	\$8,364,000	\$8,387,000
Other Revenues	67,500	112,444	120,000	124,000	128,000	132,000
Investment Income	12,172	529,650	427,000	440,000	453,000	467,000
Total Revenues	8,204,672	8,978,462	8,865,000	8,905,000	8,945,000	8,986,000
Expenses						
Personnel Costs	1,372,900	1,768,201	1,550,000	1,622,000	1,649,000	1,675,000
Building Operations	733	0	0	0	0	0
Services	104,288	778	3,000	128,000	18,000	13,000
Supplies	5,261	4,216	6,000	6,000	6,000	6,000
Equipment	2,956	3,359	3,000	3,000	3,000	3,000
Other Expenses	6,500	604	5,000	6,000	6,000	6,000
Payouts and Reimbursements	5,386,532	5,044,886	5,895,000	6,072,000	6,254,000	6,442,000
Indirect Costs	767,343	761,463	856,500	894,500	922,000	950,000
Total Expenses	7,646,513	7,583,507	8,318,500	8,731,500	8,858,000	9,095,000
Change in Net Position	\$558,159	\$1,394,955	\$546,500	\$173,500	\$87,000	(\$109,000)

Legal Services Trust Fund	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Donations & Opt-Out	\$7,100,000	\$7,337,663	\$7,100,000	\$7,120,000	\$7,140,000	\$7,160,000
Grants	106,122,891	176,403,380	145,578,000	105,705,000	82,852,000	60,000,000
Investment Income	158,146	3,982,375	4,700,000	4,841,000	4,986,000	5,136,000
Total Revenues	113,381,037	187,723,418	157,378,000	117,666,000	94,978,000	72,296,000
Expenses						
Personnel Costs	1,300,200	1,648,006	1,652,000	1,746,000	1,782,000	1,814,000
Building Operations	0	16	0	0	0	0
Services	325,631	369,992	774,000	797,000	821,000	846,000
Grant Expenses	50,585,254	51,424,673	96,139,000	175,035,000	77,713,000	54,597,000
Supplies	7,442	5,259	9,500	10,000	10,000	10,000
Equipment	631	1,791	1,000	1,000	1,000	1,000
Other Expenses	80,553	40,494	187,000	192,000	197,000	203,000
Indirect Costs	792,188	807,581	1,161,000	1,033,000	1,064,000	1,096,000
Total Expenses	53,091,899	54,297,812	99,923,500	178,814,000	81,588,000	58,567,000
Interfund Transactions						
Transfer In	1,400,000	1,400,000	1,000,000	1,030,000	1,061,000	1,093,000
Total Interfund Transactions	1,400,000	1,400,000	1,000,000	1,030,000	1,061,000	1,093,000
Change in Net Position	\$61,689,138	\$134,825,607	\$58,454,500	(\$60,118,000)	\$14,451,000	\$14,822,000

Equal Access Fund	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Grants	\$34,792,514	\$35,535,023	\$37,489,000	\$37,571,000	\$37,625,000	\$37,680,000
Investment Income	51,408	498,879	432,000	445,000	458,000	472,000
Total Revenues	34,843,922	36,033,902	37,921,000	38,016,000	38,083,000	38,152,000
Expenses						
Personnel Costs	913,800	1,089,796	1,252,000	1,328,000	1,358,000	1,381,000
Services	248,000	222,894	235,000	242,000	249,000	256,000
Grant Expenses	33,842,514	34,407,014	36,401,000	35,007,000	35,007,000	35,007,000
Other Expenses	0	0	40,000	41,000	42,000	43,000
Indirect Costs	494,379	490,577	804,000	772,000	795,000	819,000
Total Expenses	35,498,693	36,210,281	38,732,000	37,390,000	37,451,000	37,506,000
Change in Net Position	(\$654,771)	(\$176,379)	(\$811,000)	\$626,000	\$632,000	\$646,000

Justice Gap Fund	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Donations & Opt-Out	\$1,440,000	\$1,803,549	\$1,050,000	\$1,053,000	\$1,056,000	\$1,059,000
Investment Income	11,368	225,440	178,000	183,000	188,000	194,000
Total Revenues	1,451,368	2,028,989	1,228,000	1,236,000	1,244,000	1,253,000
Expenses						
Indirect Costs	9,973	9,897	8,000	8,000	8,000	8,000
Total Expenses	9,973	9,897	8,000	8,000	8,000	8,000
Interfund Transactions						
Transfer Out	(1,000,000)	(1,000,000)	(1,000,000)	(1,030,000)	(1,061,000)	(1,093,000)
Total Interfund Transactions	(1,000,000)	(1,000,000)	(1,000,000)	(1,030,000)	(1,061,000)	(1,093,000)
Change in Net Position	\$441,395	\$1,019,093	\$220,000	\$198,000	\$175,000	\$152,000

Bank Settlement Fund	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Investment Income	\$72,919	\$211,624	\$168,000	\$173,000	\$178,000	\$183,000
Total Revenues	72,919	211,624	168,000	173,000	178,000	183,000
Expenses						
Personnel Costs	77,700	68,639	104,500	111,500	113,500	116,000
Grant Expenses	0	0	4,521,000	0	0	0
Other Expenses	2,594	0	4,000	4,000	4,000	4,000
Indirect Costs	45,869	45,531	70,000	0	0	0
Total Expenses	126,163	114,169	4,699,500	115,500	117,500	120,000
Change in Net Position	(\$53,244)	\$97,454	(\$4,531,500)	\$57,500	\$60,500	\$63,000

Grants Fund	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Grants	\$63,319,214	\$85,724,540	\$97,595,000	\$53,544,000	\$66,399,000	\$66,456,000
Investment Income	0	446,329	312,000	321,000	330,000	339,000
Total Revenues	63,319,214	86,170,869	97,907,000	53,865,000	66,729,000	66,795,000
Expenses						
Personnel Costs	618,400	776,848	1,275,500	1,341,500	1,371,500	1,396,500
Services	61,190	37,903	30,000	30,000	30,000	30,000
Grant Expenses	62,603,533	83,076,823	94,588,000	50,268,000	63,068,000	63,068,000
Other Expenses	16,000	9,359	48,000	49,000	50,000	51,000
Exam Related Expenses	0	30,148	0	0	0	0
Indirect Costs	303,356	279,653	831,000	712,000	733,000	756,000
Total Expenses	63,602,479	84,210,734	96,772,500	52,400,500	65,252,500	65,301,500
Change in Net Position	(\$283,265)	\$1,960,135	\$1,134,500	\$1,464,500	\$1,476,500	\$1,493,500

Admissions Fund	2023 Budget	2023 Projection	2024 Budget	2025 Forecast	2026 Forecast	2027 Forecast
Revenues						
Other Fees	\$8,282,630	\$9,531,258	\$8,489,000	\$8,966,000	\$8,998,000	\$9,504,000
Exam Fees	11,232,373	12,997,254	17,423,500	18,016,000	18,486,000	19,111,000
Other Revenues	0	1,820	0	0	0	0
Investment Income	66,761	643,844	520,000	536,000	552,000	568,000
Total Revenues	19,581,764	23,174,176	26,432,500	27,518,000	28,036,000	29,183,000
Expenses						
Personnel Costs	8,762,093	10,411,094	10,517,000	10,958,000	11,105,000	11,294,000
Building Operations	25,006	22,595	29,000	30,000	31,000	32,000
Services	2,185,094	1,511,206	1,975,500	2,037,000	2,100,000	2,163,000
Supplies	40,687	39,322	43,000	49,000	50,000	51,000
Equipment	452,149	532,537	642,500	663,000	683,000	703,000
Other Expenses	281,590	193,498	240,500	248,000	253,000	259,000
Exam Related Expenses	7,484,309	7,518,249	7,591,000	7,592,000	7,804,000	8,021,000
Indirect Costs	7,061,217	7,007,190	9,666,000	7,572,000	7,800,000	8,034,000
Total Expenses	26,292,145	27,235,691	30,704,500	29,149,000	29,826,000	30,557,000
Interfund Transactions						
Transfer In	0	0	495,000	510,000	525,000	541,000
Total Interfund Transactions	0	0	495,000	510,000	525,000	541,000
Change in Net Position	(\$6,710,381)	(\$4,061,514)	(\$3,777,000)	(\$1,121,000)	(\$1,265,000)	(\$833,000)

2024 Budget Report

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