



THE STATE BAR OF CALIFORNIA

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Date November 1, 2007

Item IV.A

To: Members of the Board Planning, Program Development and Budget Committee

From: Peggy Van Horn, Chief Financial Officer

Subject: Anticipated time line for preparation of the 2009 State Bar Budget

In August of 2002, the Board of Governors formally established a planning cycle whereby the Board will adopt the State Bar Budget at the last meeting of the Board year. As such, the 2009 State Bar Budget is scheduled for adoption by the current Board on July 18, 2008. During the month of June, the Board Planning, Program Development, and Budget Committee (PPDB) will review and recommend the State Bar's 2009 budget for adoption by the full Board.

Listed below are the anticipated key dates for the 2009 budget process:

- Feb 25 Office of Finance prepares a 5-year forecast of General Fund Revenue and Expenses with preliminary operating results for 2007.
- Mar 24 Office of Finance prepares baseline service area budgets for 2009.
- April 7 Staff liaisons complete 2009 service area budgets.
- April 21 All 2009 budget data input to the budget system.
- May 5 Senior Management reviews the preliminary 2009 budget and long range forecasts.
- June (TBD) Senior Management presents the preliminary 2009 budget and long range forecasts to the State Bar President; the Chair of the PPDB Committee and members of the PPDB Budget Subcommittee.
- June/July (TBD) The Board Planning, Program Development and Budget Committee recommends a fee level for each mandatory fund and the 2009 State Bar budget for Board adoption.
- July 18 The Board of Governors sets mandatory fees for 2009 and adopts the 2009 State Bar budget.