



THE STATE BAR OF CALIFORNIA

180 Howard Street
San Francisco, Ca 94105
(415) 538-2000

Date: November 30, 2009

To: Members, Board of Governors

From: Paul Kramer, Chair, Member Involvement, Relations and Services Committee

Re: November 13, 2009 Board Planning Session Breakout Topic IV – Helping
Lawyers in a Down Economy

Summary of Breakout Topic IV – Helping Lawyers in a Down Economy

We can help lawyers in a down economy by:

1. Promoting career counseling in conjunction with the Lawyer Assistance Program through individual and group career counseling sessions which include job search tools and strategies; Identifying the conditions necessary for change and possible barriers; key strategies for career development; and legal skills assessment.
2. Member Benefits - The *CalBar Connect* program has been aimed at providing new and solo attorneys with discounts on goods and services including:
 - a. New Attorney Toolkit: includes discount life insurance, Liability insurance and other products they might need.
 - b. Small and Solo Attorney Toolkit: Liability insurance, Worker's Compensation and Office insurance, Shipping, Supplies and a variety of law practice management tools. Discounts on commonly used items (shipping, office supplies and phone service) are also available.
 - c. State Bar Sections sponsor the Solo Summit which is designed to help attorneys build a law practice and publishes the "Opening a Law Practice" book.
3. Member Benefits Funding
 - a. Sections are self-sustaining

b. *CalBar Connect* programs generate revenue

- i. The Professional Liability Insurance Program funds competence, loss prevention programs and training.

\$940,000

- ii. The Life Insurance Programs fund the Member Services Center (MSC)

\$805,000

- iii. Credit Card revenue (B of A) partially funds the California Bar Foundation

\$395,943

- iv. Total 2008 Revenues:

\$2,209,000

4. Member Service Center ("MSC")

- a. MSC assists members with fee waivers, license status, and MCLE modification requests
- b. MSC staff refer members to Ethics Hotline
- c. MSC oversees Law Corporations and Limited Liability Partnerships, and as noted above, the State Bar Sponsored Liability Insurance Program.
- d. MSC Funding

- i. Miscellaneous Fees: \$812,420
- ii. Law Corporation/LLP: \$1,232,564
- iii. Life Insurance Royalties: \$805,139

5. New Initiatives

- a. Legal Research Tool: Staff has reviewed several legal research providers who may supply free online legal research to all members. The cost for the legal research tool would be paid for with money provided by the competence, loss prevention and training programs (Professional Liability Insurance funds).

At its November 13, 2009 meeting, the Board Planning, Program Development and Budget Committee resolved that the budget line item for the member legal research tool be removed from the 2010 budget pending

a cost benefit analysis and future consideration. Staff and a group of volunteer testers are evaluating the services of each of the potential providers for ease of use and features and will report back to the MIRS in 2010.

- b. Mentoring - Link to local bars
- c. Career Resource Page – need to create
 - i. Local links
- d. Continued use of the *CalBar Connect* centralized Web site to market exclusive offers, discounts, products and services to State Bar members and continue to contract with new affinity partners.
- e. Continued strategic marketing approach to introduce the State Bar membership to *CalBar Connect* by featuring it in the 2009 membership bar card package, the annual meeting, and in brochures to new members.