



**THE
STATE BAR
OF CALIFORNIA**

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Title of Report: 2014 Proposed Final Budget
Statutory Citation: Business and Professions Code section 6140.1
Date of Report: February 15, 2013

The State Bar of California has submitted a report to the Legislature in accordance with Business and Professions Code section 6140.1.

This summary is provided under Government Code section 9795.

Business and Professions Code section 6140.1 requires the State Bar of California to submit a proposed baseline budget to the Legislature by November 15 and later a proposed final budget February 15 so that the budget may be reviewed in conjunction with any bill that authorizes the State Bar's imposition of membership fees on its members. The authority for the State Bar to assess annual membership fees is provided under Business and Professions Code section 6140 et seq. A State Bar fee bill related to the membership fees it may impose in 2014 will be introduced in the Regular Session 2013-2014 of the Legislature by February 18, 2013. (J.R. 54(a), 61(a)(1) .) The State Bar has submitted its proposed final budget for 2014, as required by Business and Professions Code section 6140.1.

The 2014 proposed final budget can be accessed at:
<http://www.calbar.ca.gov/AboutUs/Reports.aspx>.

A printed copy of the report may be obtained by calling 916-442-8018.

THE STATE BAR OF CALIFORNIA



2014 Proposed Final Budget

February 15, 2013

February 15, 2013

Mr. Edgar Cabral
Fiscal and Policy Analyst
Office of the Legislative Analyst
925 L Street
Suite 1000
Sacramento, CA 95814

Re: 2014 Proposed Final Budget

Dear Mr. Cabral:

Enclosed are two copies of the 2014 Proposed Final Budget for the State Bar of California. This document is sent to you as required by the State Bar Act.

If you have any questions regarding the 2014 Proposed Final Budget, please contact me at (415) 538-2208.

Sincerely,

A handwritten signature in blue ink, reading "Joseph L. Dunn". The signature is fluid and cursive, with the first name "Joseph" and last name "Dunn" clearly legible.

Senator Joseph L. Dunn (Ret.)
Executive Director/CEO

Enclosures

Copy: Starr Babcock, CLO/General Counsel
John Chiappetta, Budget Director
Jennifer Wada, The W Group

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Admissions

The Office of Admissions is responsible for all activities pertaining to the admission of attorneys to the practice of law in the State of California. Its principal activities include developing, administering and grading the Bar Exam as well as conducting moral character investigations. The Office also carries out the Bar's responsibility to accredit and register law schools. Finally, Admissions administers programs to allow non-members to practice in certain defined, limited areas, as well as programs to certify specialists in areas of legal practice.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Admissions Administration	11.0	9.0	9.0	1,184	1,439	1,488
Examination Development	2.0	2.0	2.0	849	1,072	1,086
Application Processing	13.0	15.0	15.0	1,051	1,389	1,435
Admissions Operations	16.0	15.0	15.0	6,925	7,219	7,614
Examination Grading	5.0	5.0	5.0	2,283	2,449	2,472
Moral Character Determinations	12.0	14.0	14.0	1,429	1,605	1,659
Law School Regulation	2.0	2.0	2.0	256	306	319
Special Admissions	3.0	2.0	2.0	169	192	196
Specialization	8.0	8.0	8.0	794	1,270	1,313
MCLE Providers	2.0	2.0	2.0	152	166	173
Admissions Projects	0.0	0.0	0.0	23	0	0
TOTAL (All Programs)	74.0	74.0	74.0	15,114	17,106	17,755
FUNDING				2012*	2013*	2014*
General Fund				0	0	0
Admissions Fund				14,320	15,836	16,443
Legal Specializations Fund				794	1,270	1,313
TOTAL (All Funds)				15,114	17,106	17,755

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6046, 6063 and 6060-67.

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSAdmissions Administration

Staff in this area provides general oversight and management of the Office of Admissions. The responsibilities of this area include: developing and implementing policies and procedures; supporting the activities of the Committee of Bar Examiners, Board of Governors and its Committee on Regulation, Admissions and Discipline Oversight; compiling and monitoring the departmental budget; interacting with law schools and communicating with applicants and the public; coordinating the production of Admissions certificates for new admittees; monitoring and implementing the IT projects for the office; and processing and determining reasonable testing accommodations for applicants with disabilities taking the examinations.

Examination Development

Staff in this area is responsible for the acquisition, development, editing and production of examination questions. The primary goal of this service area is to ensure that the questions administered on the First-Year Law Students' Examination and the California Bar Examination are valid, reliable, appropriately edited and printed.

Application Processing

Staff in this area is responsible for the receipt and processing of applications for registration, the First-Year Law Students' Examination, the California Bar Examination, moral character determinations, moral character determination extension, multi-jurisdictional practice moral character applications, and eligibility of applicants to take the examinations administered by the Committee of Bar Examiners. The primary goal of this service area is to ensure that applications received are processed correctly and timely.

Admissions Operations

Staff in this area is responsible for oversight of the Los Angeles application processing and examination administration functions. In addition, this area is responsible for the reception and telephone services provided by the Los Angeles office, development of the overall Office of Admissions budget and processing petitions for relief from Committee of Bar Examiners' policies. One of the primary goals of this service area is to ensure that the examinations administered by the Committee of Bar Examiners are done so consistently, efficiently, in conformance with established policies and protocols, and without any major incidents.

Examination Grading

Staff in this area is responsible for ensuring that examinations administered by the Committee of Bar Examiners are graded using the standards and protocols adopted by the Committee, and that the results provided to applicants are error free and on time. In addition to the permanent employees in this area, for each bar examination grading cycle (of which there are 2), approximately 120 Graders are retained as independent contractors. For the First-Year Law Students' Examination, 8 independent contractors are hired to lead the grading groups. Temporary employees are hired to assist in the sorting, processing and entry of data related to handling the examination answers.

Moral Character Determinations

Staff in this area is responsible for completing the moral character investigations of applicants seeking admission to practice law in California and scheduling and coordinating informal conferences for applicants with the Committee of Bar Examiners' Subcommittee on Moral Character. The primary goal of this service area is to ensure that the moral character investigation of applicants is thorough and complies with the standards and protocols required by the Committee of Bar Examiners, within specified time constraints.

Law School Regulation

Staff in this area is responsible for the registration of unaccredited law schools and the accreditation of law schools in California. The workload of the staff includes monitoring applications received, reviewing annual reports, completing law school visitations and reporting findings and recommendations to the Committee of Bar Examiners. The primary goal of this service area is to ensure that law schools meet the requirements for registration or accreditation.

Special Admissions

Staff in this area process applications for the Pro Hac Vice, Out-of-State Attorney Arbitration Counsel, Foreign Legal Consultants, and Multijurisdictional Practice programs, which allow attorneys from other jurisdictions to practice law in California in a limited way. Eligibility requirements are set by the California Rules of Court and the State Bar Rules. Staff also process applications from law students who wish to expand their legal training by participating in the Practice Training of Law Students' Program. Law students eligible for the program must have completed at least one year of law study, taken certain law school courses and have a designated Supervising Attorney, who is responsible for overseeing the work of the law student and ensuring that the student only engages in the activities permitted by the California Rules of Court. The primary goal of this department is to ensure that applications are timely processed and only those persons qualified for the programs are certified.

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Specialization

Staff in this area support the work of the Legal Specialization department, which is responsible for administering the requirements for certification in 11 different areas of law. They facilitate meetings of the Board of Legal Specialization, which is responsible for setting policies and rules for the program, and the Legal Specialization Advisory Commissions, which are responsible for the development and grading of questions for the legal specialization examinations. In addition, staff coordinate the administration of the legal specialization examinations that are administered every other year. Legal Specialists must demonstrate proficiency in their specialty area, which includes completion of tasks and standards, engaging in extensive legal education, rigorous peer review and passage of an examination. The primary goal of this department is to ensure that only qualified attorneys are certified as legal specialists.

MCLE Providers

Staff in this area process applications from Mandatory Continuing Legal Education (MCLE) providers seeking certification as single or multiple educational activity providers. Certification is required in order for the legal education to count toward an attorney's MCLE requirements. The department ensures that the appropriate documentation is submitted by the providers that allows the State Bar to exercise its audit and compliance functions. Consistent criteria are applied so only qualified education programs are approved. The primary goal of this department is to ensure only legal education programs that have met the established standards are eligible for MCLE credit.

Admissions Projects

(n/a)

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Admissions Administration</u>			
Admissions Fund	1,184	1,439	1,488
Total Admissions Administration	1,184	1,439	1,488
<u>Examination Development</u>			
Admissions Fund	849	1,072	1,086
Total Examination Development	849	1,072	1,086
<u>Application Processing</u>			
Admissions Fund	1,051	1,389	1,435
Total Application Processing	1,051	1,389	1,435
<u>Admissions Operations</u>			
Admissions Fund	6,925	7,219	7,614
Total Admissions Operations	6,925	7,219	7,614
<u>Examination Grading</u>			
Admissions Fund	2,283	2,449	2,472
Total Examination Grading	2,283	2,449	2,472
<u>Moral Character Determinations</u>			
Admissions Fund	1,429	1,605	1,659
Total Moral Character Determinations	1,429	1,605	1,659
<u>Law School Regulation</u>			
Admissions Fund	256	306	319
Total Law School Regulation	256	306	319
<u>Special Admissions</u>			
General Fund	0	0	0
Admissions Fund	168	192	196
Total Special Admissions	169	192	196
<u>Specialization</u>			
Legal Specializations Fund	794	1,270	1,313
Total Specialization	794	1,270	1,313
<u>MCLE Providers</u>			
Admissions Fund	152	166	173
Total MCLE Providers	152	166	173
<u>Admissions Projects</u>			
Admissions Fund	23	0	0
Total Admissions Projects	23	0	0
TOTAL	15,114	17,106	17,755

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	74.0	74.0	74.0	5,924	7,298	7,616
Supplemental Staffing				538	581	581
Travel & Training				505	632	632
Supplies and Postage				412	458	458
Professional Services				442	456	456
Exam & Software Licensing				1,405	1,360	1,360
Exam Room Rental				1,664	1,800	2,131
Exam Proctors				1,417	1,403	1,403
Exam Graders				873	889	889
Occupancy				289	169	169
Telecommunications				92	84	84
Other Outside Services				1,477	1,926	1,926
Computers & Software				3	0	0
Buildings & Equipment				50	9	9
Retiree Medical Funding				0	0	0
Other Expenditures				24	43	43
Indirect Costs				0	0	0
TOTAL	74.0	74.0	74.0	15,114	17,106	17,755

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Chief Trial Counsel

The Office of the Chief Trial Counsel has primary responsibility for carrying out the disciplinary functions of the State Bar. This includes receiving and investigating complaints from members of the public, and, where necessary, acting as the prosecution in the quasi-judicial proceedings leading to the suspension and/or disbarment of attorneys in California.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Management	9.0	6.0	6.0	325	1	40
Intake	32.0	41.8	41.8	4,720	5,066	5,212
Investigation	68.0	66.0	66.0	7,891	8,405	8,680
Trial	66.0	55.8	55.8	7,600	7,715	8,017
Audit & Review	2.9	5.6	5.6	625	792	821
Central Administration	58.8	59.8	59.8	4,855	5,231	5,427
Abandoned and Unauthorized Practices	7.0	7.0	7.0	571	698	723
TOTAL (All Programs)	243.7	242.0	242.0	26,586	27,908	28,921
FUNDING				2012*	2013*	2014*
General Fund				26,586	27,908	28,921
TOTAL (All Funds)				26,586	27,908	28,921

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6043, 6044, 6044.5, 6049, 6077, 6078, 6092.5, subd (f) et seq

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSManagement

OCTC Management is responsible for the overall leadership of the department including ensuring compliance with statutes, rules and procedures, as well as specific duties including statistics gathering and performance reporting, employee supervision, fiscal oversight and management team development, case involvement and outreach activities.

Intake

Intake functions and responsibilities play a critical role in ensuring that the State Bar fulfills its public protection responsibilities. Intake provides direct customer support services to members of the public. Staff interactions with consumers and other individuals is a significant portion of the State Bar's direct consumer contact. Therefore, the quality of services provided has the potential to significantly affect public opinion about the State Bar and the legal profession. Intake operates as a legal "triage" function by identifying areas in which potential action needs to be taken, while effectively and efficiently pursuing appropriate remedies for those who have been harmed. Intake includes the complaint hotline, complaint processing in all its forms, other information sharing and consumer support services and mediation referral and monitoring.

Investigation

In previous years, the investigative function has been budgeted as an integral component of the Enforcement service area. In practice, drawing a precise line between the investigative and prosecutorial activities is necessarily somewhat artificial. However, in an effort to more clearly present the relative balance of resources committed to the investigation and trial phases of the enforcement process, the State Bar has begun presenting Investigation, Trial and Audit & Review as distinct service areas within the Office of Chief Trial Counsel. The division presented in 2010 is a "first pass" at this task, and modifications are to be expected.

The Investigation service area encompasses staff and other resources dedicated primarily (though not exclusively) to the investigative phase of the enforcement process.

Trial

In previous years, the investigative, prosecutorial (trial) and internal review phases of the enforcement process have been presented as a single service area in the budget, called Enforcement. This reflected the integrated nature of these functions as well as the Office's flexibility in assigning staff as needed to meet shifting workloads. However, in an effort to more clearly present the relative balance of resources committed to the investigation, trial and review phases of the enforcement process, the State Bar has begun presenting Investigation, Trial and Audit & Review as distinct service areas within the Office of Chief Trial Counsel. The division presented in 2010 is a "first pass" at this task, and modifications are to be expected.

The Trial service area encompasses staff and other resources dedicated primarily (though not exclusively) to the prosecutorial phase of the enforcement process.

Audit & Review

When the Office of Chief Trial Counsel decides to close a complaint against a member of the Bar without disciplinary action, the complainant may request a review ("second look") of the decision. These requests are handled by the Audit & Review unit, which was formed in OCTC in 2004. The unit also conducts random audits of OCTC's files twice each year and engages in other specifically designated audit and quality assurance measures.

In previous years, the Audit & Review unit was budgeted within the Enforcement service area. However, in an effort to more clearly present the relative balance of resources committed to the investigation, trial and review phases of the enforcement process, the State Bar has begun presenting Investigation, Trial and Audit & Review as distinct service areas within the Office of Chief Trial Counsel. The division presented in 2010 is a "first pass" at this task, and modifications are to be expected.

Central Administration

OCTC's Central Administration Unit ("Central Admin") provides critical support to the work of OCTC. It is the intention of Central Admin to develop and maintain consistency in administrative support practices between the two offices to the extent possible. Central Admin provides administrative and clerical assistance to all other professionals in OCTC. Like all good administrative operations, Central Admin staff must multi-task and trouble shoot to complete a wide range of duties. Administrative services are categorized as case/litigation support, office and financial services and training and technical support.

In previous years, Central Administration was budgeted separately only in the Los Angeles office, with administrative staff in San Francisco being included in the San Francisco trial unit budget. In an effort to improve comparability between SF and LA presentations, the Central Administration service area now includes administrative support staff from both Los Angeles and San Francisco.

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Abandoned and Unauthorized Practices

The State Bar is authorized by law to petition the courts to assume jurisdiction over abandoned law practices, and over the practices of non-attorneys engaged in the unauthorized practice of law. In past years, the costs associated with these duties were not shown separately. Beginning in 2009, these activities will be identified as a separate service area in the Office of Chief Trial Counsel.

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Management</u>			
General Fund	325	1	40
Total Management	325	1	40
<u>Intake</u>			
General Fund	4,720	5,066	5,212
Total Intake	4,720	5,066	5,212
<u>Investigation</u>			
General Fund	7,891	8,405	8,680
Total Investigation	7,891	8,405	8,680
<u>Trial</u>			
General Fund	7,600	7,715	8,017
Total Trial	7,600	7,715	8,017
<u>Audit & Review</u>			
General Fund	625	792	821
Total Audit & Review	625	792	821
<u>Central Administration</u>			
General Fund	4,855	5,231	5,427
Total Central Administration	4,855	5,231	5,427
<u>Abandoned and Unauthorized Practices</u>			
General Fund	571	698	723
Total Abandoned and Unauthorized Practices	571	698	723
TOTAL	26,586	27,908	28,921

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	243.7	242.0	242.0	24,487	27,030	28,043
Supplemental Staffing				1,800	534	534
Travel & Training				225	142	142
Supplies and Postage				379	413	413
Professional Services				65	33	33
Occupancy				-2	4	4
Telecommunications				190	227	227
Other Outside Services				389	479	479
Computers & Software				0	0	0
Buildings & Equipment				-6	8	8
Retiree Medical Funding				0	0	0
Other Expenditures				58	57	57
Indirect Costs				0	0	0
Reimbursements				-999	-1,019	-1,019
TOTAL	243.7	242.0	242.0	26,586	27,908	28,921

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Probation

The Office of Probation monitors probationer compliance with court orders, providing timely information to Superior Court, State Bar Court and probationers regarding non-compliance, and assisting probationers to successfully return to the practice of law.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Probation	8.0	8.0	8.0	804	841	872
TOTAL (All Programs)	8.0	8.0	8.0	804	841	872
FUNDING				2012*	2013*	2014*
General Fund				804	841	872
TOTAL (All Funds)				804	841	872

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6043, 6044, 6044.5, 6049, 6077, 6078, 6092.5, subd (f) et seq

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Probation

The Office of Probation (OP) aims to timely and accurately open and maintain files. In order to do so, OP staff must receive the order or stipulation to be monitored, create a physical file, contact the attorney to ensure compliance, and monitor non/compliance. The monitoring may require the OP staff to contact other departments of the State Bar and/or third parties.

OP also aims to timely and accurately obtain and receive information. In order to do so, OP staff must regularly receive updated information and provide information to people both internal and external to the State Bar.

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Probation</u>			
General Fund	804	841	872
Total Probation	804	841	872
TOTAL	804	841	872

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	8.0	8.0	8.0	751	780	810
Supplemental Staffing				32	5	5
Travel & Training				1	13	13
Supplies and Postage				11	13	13
Professional Services				0	1	1
Occupancy				0	5	5
Telecommunications				5	5	5
Other Outside Services				2	9	9
Buildings & Equipment				1	9	9
Other Expenditures				1	1	1
Indirect Costs				0	0	0
TOTAL	8.0	8.0	8.0	804	841	872

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Client Security Fund

The main purpose of CSF is to reimburse victims of attorney theft by processing, investigating, reviewing and making decisions on applications for reimbursement. There are four main areas that encompass the work of CSF: (a) case processing; (b) support for the CSF Commission, the Board of Governors and other State Bar departments; (c) financial management; and (d) basic internal administrative functions.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Client Security Fund	11.0	11.0	11.0	15,235	8,789	8,832
TOTAL (All Programs)	11.0	11.0	11.0	15,235	8,789	8,832
FUNDING				2012*	2013*	2014*
Client Security Fund				15,235	8,789	8,832
TOTAL (All Funds)				15,235	8,789	8,832

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6140.5, 6028 and 6029.

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Client Security Fund

The main purpose of CSF is to reimburse victims of attorney theft by processing, investigating, reviewing and making decisions on applications for reimbursement. There are four main areas that encompass the work of CSF: (a) case processing; (b) support for the CSF Commission, the Board of Governors and other State Bar departments; (c) financial management; and (d) basic internal administrative functions.

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Client Security Fund</u>			
Client Security Fund	15,235	8,789	8,832
Total Client Security Fund	15,235	8,789	8,832
TOTAL	15,235	8,789	8,832

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	11.0	11.0	11.0	1,147	1,274	1,317
Supplemental Staffing				41	50	50
Travel & Training				10	17	17
Supplies and Postage				20	25	25
Professional Services				0	25	25
Telecommunications				8	7	7
Other Outside Services				16	16	16
CSF Applications				6,871	7,800	7,800
Computers & Software				1	3	3
Buildings & Equipment				1	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				-4	-1	-1
Indirect Costs				0	0	0
Reimbursements				-482	-427	-427
TOTAL	11.0	11.0	11.0	7,628	8,789	8,832

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Mandatory Fee Arbitration

The Mandatory Fee Arbitration program provides arbitration in cases of attorney-client disputes over legal fees, primarily through local bar associations.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Mandatory Fee Arbitration	5.0	5.0	5.0	607	633	657
TOTAL (All Programs)	5.0	5.0	5.0	607	633	657
FUNDING				2012*	2013*	2014*
General Fund				607	633	657
TOTAL (All Funds)				607	633	657

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6200, 6203, 6203(d)

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Mandatory Fee Arbitration

The Mandatory Fee Arbitration program provides arbitration in cases of attorney-client disputes over legal fees, primarily through local bar associations.

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Mandatory Fee Arbitration</u>			
General Fund	607	633	657
Total Mandatory Fee Arbitration	607	633	657
TOTAL	607	633	657

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	5.0	5.0	5.0	450	503	527
Supplemental Staffing				23	6	6
Travel & Training				39	30	30
Supplies and Postage				10	11	11
Professional Services				1	0	0
Occupancy				0	0	0
Telecommunications				3	3	3
Other Outside Services				80	80	80
Computers & Software				0	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				1	0	0
Indirect Costs				0	0	0
TOTAL	5.0	5.0	5.0	607	633	657

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

State Bar Court

The California State Bar is the only state bar in the United States with independent professional judges dedicated to ruling on attorney disciplinary and regulatory cases. The independent State Bar Court hears the charges and has the power to recommend that the California Supreme Court suspend or disbar those attorneys found to have committed acts of professional misconduct or convicted of serious crimes. For lesser offenses, public or private reprimands may be issued.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Administration	2.8	2.8	2.8	503	561	581
Hearing Department & Effectuations Unit	31.0	31.0	31.0	4,787	4,756	4,865
Review Department	8.2	8.2	8.2	1,571	1,555	1,599
TOTAL (All Programs)	42.0	42.0	42.0	6,861	6,872	7,044
FUNDING				2012*	2013*	2014*
General Fund				6,861	6,872	7,044
TOTAL (All Funds)				6,861	6,872	7,044

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6007, 6086.5, Cal Rules of Ct, rules 951, 952.6; Rules Proc.Of State Bar, rules 680-687, 700, 711, 4602-4304

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Administration

Administration encompasses the day-to-day administration of the State Bar Court, as well as the State Bar Court Reporter.

Hearing Department & Effectuations Unit

The Hearing Department of the State Bar Court hears disciplinary cases brought by the Office of the Chief Trial Counsel, regulatory matters brought by petitioners, motions for modification and revocation of attorney probation and other matters. The Effectuations Unit of the State Bar Court transmits cases to the California Supreme Court and processes all other cases not requiring Supreme Court action.

Review Department

The Review Department of the State Bar Court decides cases on appeal, exercises suspension and other powers delegated pursuant to Rule 9.10, California Rules of Court, and conducts interlocutory review on issues materially affecting the outcome of Hearing Department cases.

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED EXPENDITURES BY PROGRAM

	2012*	2013*	2014*
<u>Administration</u>			
General Fund	503	561	581
Total Administration	503	561	581
<u>Hearing Department & Effectuations Unit</u>			
General Fund	4,787	4,756	4,865
Total Hearing Department & Effectuations Unit	4,787	4,756	4,865
<u>Review Department</u>			
General Fund	1,571	1,555	1,599
Total Review Department	1,571	1,555	1,599
TOTAL	6,861	6,872	7,044

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	42.0	42.0	42.0	6,433	6,480	6,651
Supplemental Staffing				122	28	28
Travel & Training				75	100	100
Supplies and Postage				96	108	108
Professional Services				3	28	28
Occupancy				15	11	11
Telecommunications				51	49	49
Other Outside Services				47	41	41
Computers & Software				6	8	8
Buildings & Equipment				1	11	11
Retiree Medical Funding				0	0	0
Other Expenditures				10	10	10
Indirect Costs				0	0	0
TOTAL	42.0	42.0	42.0	6,861	6,872	7,044

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Member Records & Compliance

The Office of Member Records and Compliance maintains the official roll of attorneys for the State of California, and it manages the registration of law corporations and of LLPs providing legal services. It is also responsible for ensuring the compliance of all bar members with the requirements for mandatory continuing legal education (MCLE).

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Member Service Center	20.0	19.0	19.0	2,081	2,214	2,306
TOTAL (All Programs)	20.0	19.0	19.0	2,081	2,214	2,306
FUNDING				2012*	2013*	2014*
General Fund				2,081	2,214	2,306
TOTAL (All Funds)				2,081	2,214	2,306

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6002.1

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Member Service Center

The Member Service Center (MSC) (which includes Membership Records services) is dedicated solely to improving service to members beyond traditional fee payment processing and discipline proceedings. MSC is dedicated to bringing a positive State Bar experience to all members thus enhancing the State Bar's relationships with its members.

The State Bar maintains, on behalf of the Supreme Court, the official "Roll of Attorneys," i.e., the list of all attorneys who are licensed to practice law in the State of California. Upon admission to the practice of law in California, an attorney becomes a "member" of the State Bar. That "membership" or licensing record is a public record accessible to the public.

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Member Service Center</u>			
General Fund	2,081	2,214	2,306
Total Member Service Center	2,081	2,214	2,306
TOTAL	2,081	2,214	2,306

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	20.0	19.0	19.0	1,333	1,678	1,769
Supplemental Staffing				356	111	111
Travel & Training				11	23	23
Supplies and Postage				169	156	156
Professional Services				0	0	0
Occupancy				0	0	0
Telecommunications				23	27	27
Other Outside Services				176	207	207
Computers & Software				0	0	0
Buildings & Equipment				2	2	2
Retiree Medical Funding				0	0	0
Other Expenditures				11	11	11
Indirect Costs				0	0	0
TOTAL	20.0	19.0	19.0	2,081	2,214	2,306

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Professional Competence

The Office of Professional Competence is responsible for developing and publishing standards and guidelines pertaining to ethics in the practice of law in California.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Ethics Hotline	0.0	0.0	0.0			
COPRAC & RRC	0.0	0.0	0.0	56	237	237
Outreach & Education	13.0	13.0	13.0	1,471	1,492	1,542
Publications	0.0	0.0	0.0	29	29	29
TOTAL (All Programs)	13.0	13.0	13.0	1,555	1,758	1,807
FUNDING				2012*	2013*	2014*
General Fund				1,555	1,758	1,807
TOTAL (All Funds)				1,555	1,758	1,807

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6028, 6029, 6030.

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSEthics Hotline

The Ethics Hotline, a confidential research service for attorneys only, helps lawyers identify and analyze their professional responsibilities. Although staff members cannot provide legal counsel, advice, or opinions, they can discuss issues and authorities with lawyers. By referring callers to statutes, rules, cases, and bar opinions, staff members strive to assist attorneys in reaching informed decisions about their professional responsibility questions.

COPRAC & RRC

Professional Competence staff provides a full range of staffing support for issues related to ethics and professional competence for the Board of Governors, the Committee on Professional Responsibility and Conduct, the State Bar Rules Revision Commission, and other special task forces and committees as directed. These supports services include developing meetings agendas, attending meetings, distributing assignments, making logistical arrangements for meetings, completing legal research and writing, maintaining records of all official materials, assisting in the appointment process for members of COPRAC, implementing approved work product (such as distributing ethics opinions and submitting rules to the Supreme Court for approval, etc.), serving as liaison between groups and others both inside and outside the State Bar, tracking commission/committee expenditures, facilitating the development of work plans, and facilitating development of year to date accomplishment reports.

Outreach & Education

Professional Competence staff regularly participates in outreach and educational activities to enhance the awareness of ethics issues and professional competence resources in an effort to help prevent ethics violations and to protect the public. Professional Competence's outreach and educational activities include: preparing and presenting the State Bar's Annual Ethics Symposium; staffing an exhibit booth and providing educational programs for MCLE credit at the State Bar Annual Meeting; preparing and making presentations to local and specialty bar associations, related legal professional associations, and law schools; hosting and making presentations to out-of-state or out-of-country delegations visiting the State Bar; making presentations and providing information to other State Bar Departments; and writing articles for publication in the California Bar Journal. To complete delivery of these educational and outreach services, Professional Competence staff identifies speakers, compiles written materials, completes legal research, prepares and updates slide presentations, attends programs, arranges for program publicity, produces materials, makes speaker travel and other logistical arrangements, updates mailing lists, updates and sets-up/tears down Professional Competence annual meeting booth, and solicits and reviews feedback about the quality of services.

Publications

Professional Competence staff produces, updates, and distributes publications related to attorney professional responsibility including: The California Compendium on Professional Responsibility; The Handbook on Client Trust Accounting for California Attorneys; and Publication 250 - The California Rules of Professional Conduct, The State Bar Act, and Related Statutes.

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>COPRAC & RRC</u>			
General Fund	56	237	237
Total COPRAC & RRC	56	237	237
<u>Outreach & Education</u>			
General Fund	1,471	1,492	1,542
Total Outreach & Education	1,471	1,492	1,542
<u>Publications</u>			
General Fund	29	29	29
Total Publications	29	29	29
TOTAL	1,555	1,758	1,807

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	13.0	13.0	13.0	1,414	1,444	1,494
Supplemental Staffing				2	2	2
Travel & Training				61	82	82
Supplies and Postage				19	32	32
Professional Services				5	144	144
Occupancy				1	2	2
Telecommunications				18	18	18
Other Outside Services				20	30	30
Computers & Software				0	0	0
Buildings & Equipment				1	1	1
Retiree Medical Funding				0	0	0
Other Expenditures				15	1	1
Indirect Costs				0	0	0
TOTAL	13.0	13.0	13.0	1,555	1,758	1,807

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Education

The Office of Education provides opportunities for continuing legal education and professional development. It encompasses the Sections of the State Bar as well as the bar's Annual Meeting.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Sections	20.0	20.0	20.0	6,545	5,987	6,060
Annual Meeting	0.0	0.0	0.0	769	899	913
Affinity & Insurance	1.8	1.8	1.8	489	408	416
CYLA	0.0	0.0	0.0	133	112	117
TOTAL (All Programs)	21.8	21.8	21.8	7,936	7,406	7,505
FUNDING				2012*	2013*	2014*
General Fund				133	112	117
Admin of Justice Fund				489	408	416
Grants Fund				0	0	0
Annual Meeting Fund				769	899	913
Sections Funds				6,545	5,987	6,060
TOTAL (All Funds)				7,936	7,406	7,505

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Sections 6025, 6026 and 6031.5

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSSections

The Sections are voluntary organizations of attorneys and associates who share an area of interest. The Sections help their members maintain expertise in their various fields of law, expand their professional contacts, and serve the profession, the public and the legal system. The State Bar of California has 16 Sections. Each Section is governed by an executive committee of members appointed by the State Bar Board of Governors.

Annual Meeting

In addition to its formal functions, such as the swearing in of newly elected and appointed trustees, the Annual Meeting of the State Bar offers a wide variety of continuing legal education opportunities for attorneys.

Affinity & Insurance

The State Bar of California sponsors several insurance programs specifically designed to serve the needs of State Bar members. These programs are monitored by Standing Committees of the State Bar comprised of volunteer attorney members who work with carriers and underwriters to provide competitive products at reasonable rates. These Standing Committees monitor carrier performance for each line of insurance.

CYLA

CYLA is the nation's largest association of young lawyers. A young lawyer has been in practice for five years or less or is 36 years old or younger.

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Sections</u>			
Sections Funds	6,545	5,987	6,060
Total Sections	6,545	5,987	6,060
<u>Annual Meeting</u>			
Annual Meeting Fund	769	899	913
Total Annual Meeting	769	899	913
<u>Affinity & Insurance</u>			
Admin of Justice Fund	489	408	416
Grants Fund	0	0	0
Total Affinity & Insurance	489	408	416
<u>CYLA</u>			
General Fund	133	112	117
Grants Fund	0	0	0
Total CYLA	133	112	117
TOTAL	7,936	7,406	7,505

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	21.8	21.8	21.8	2,249	2,235	2,334
Supplemental Staffing				64	40	40
Travel & Training				2,983	2,699	2,699
Supplies and Postage				349	345	345
Professional Services				520	406	406
Occupancy				232	206	206
Telecommunications				73	62	62
Other Outside Services				1,227	1,218	1,218
Legal Services Grants				0	0	0
Computers & Software				0	0	0
Buildings & Equipment				0	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				238	195	195
Indirect Costs				0	0	0
TOTAL	21.8	21.8	21.8	7,936	7,406	7,505

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Legal Services

The Office of Legal Services operates several programs intended to ensure that all Californians have appropriate access to the legal system, regardless of income.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Access To Justice	0.0	0.0	0.0	21	54	54
Program Development	8.0	8.0	8.0	1,051	1,075	1,110
Legal Services Funding	11.0	12.0	12.0	28,121	27,486	22,429
TOTAL (All Programs)	19.0	20.0	20.0	29,194	28,615	23,593
FUNDING				2012*	2013*	2014*
General Fund				1,065	1,128	1,164
Grants Fund				8	0	0
Justice Gap Fund				0	830	830
Legal Services Trust Fund				28,121	26,656	21,599
TOTAL (All Funds)				29,194	28,615	23,593

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Sections 6210 - 6228

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSAccess To Justice

This Service Area addresses the development of policy and initiatives in collaboration with other institutions working to expand access to justice for low income Californians (e.g. Judicial Council; legal services entities; local, state and national organizations such as the American Bar Association and National Legal Aid and Defender Association). Services are provided through the Legal Services Outreach Unit and the California Commission on Access to Justice.

Program Development

This Service Area supports and promotes the direct delivery of legal services to low and middle income Californians with an emphasis on increasing and enhancing pro bono participation by members of the bar. The services are provided through the Program Development Unit, the Standing Committee on the Delivery of Legal Services and a comprehensive, statewide legal services conference ("Pathways to Justice") held every three years. The Program Development Unit provides technical assistance and resources to legal services providers, pro bono programs and certified lawyer referral services, oversees the certification process for lawyer referral services, and administers the Emeritus Attorney Pro Bono Participation program and Wiley Manuel certificate program. The Unit also coordinates a statewide Disaster Legal Services Response network, administers the Standing Committee on the Delivery of Legal Services, and presents the Pathways to Justice conference.

Legal Services Funding

This Service Area focuses on the administration of grants generated through Interest on Lawyer Trust Accounts (IOLTA) and the state Equal Access Fund to fund the provision of free legal services to low income Californians.

DETAILED EXPENDITURES BY PROGRAM

	2012*	2013*	2014*
<u>Access To Justice</u>			
General Fund	13	54	54
Grants Fund	8	0	0
Total Access To Justice	21	54	54
<u>Program Development</u>			
General Fund	1,051	1,075	1,110
Total Program Development	1,051	1,075	1,110
<u>Legal Services Funding</u>			
Justice Gap Fund	0	830	830
Legal Services Trust Fund	28,121	26,656	21,599
Total Legal Services Funding	28,121	27,486	22,429
TOTAL	29,194	28,615	23,593

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	19.0	20.0	20.0	1,954	2,140	2,219
Supplemental Staffing				16	58	58
Travel & Training				117	85	85
Supplies and Postage				29	32	32
Professional Services				211	314	314
Occupancy				0	0	0
Telecommunications				24	23	23
Other Outside Services				5	11	11
Legal Services Grants				26,828	25,107	20,007
Computers & Software				1	0	0
Buildings & Equipment				0	7	7
Retiree Medical Funding				0	0	0
Other Expenditures				7	8	8
Indirect Costs				0	0	0
Interfund Transfers				0	830	830
TOTAL	19.0	20.0	20.0	29,194	28,615	23,593

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Diversity & Bar Relations

Diversity & Bar Relations encompasses programs aimed at eliminating bias in the legal system as well as the State Bar's relationships with voluntary bar associations and related groups. Programs in this area are financed with non-mandatory dues revenues, with the exception of support for the California Young Lawyers Association (CYLA).

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Elimination of Bias	2.0	2.0	2.0	357	494	402
Bar Relations	2.0	2.0	2.0	243	244	254
TOTAL (All Programs)	4.0	4.0	4.0	600	738	656
FUNDING				2012*	2013*	2014*
Admin of Justice Fund				589	738	656
Grants Fund				11	0	0
TOTAL (All Funds)				600	738	656

LEGAL CITATIONS & AUTHORITY

(n/a)

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Elimination of Bias

This Service Area focuses on local and statewide programs and initiatives to diversify the legal profession and to eliminate bias in the practice of law. The activity in this area is funded solely through voluntary contributions to the State Bar. Services are provided by the Center for Access & Fairness and the Council on Access & Fairness. The Center staff supports and promotes local and statewide programs and projects to increase diversity and eliminate bias in the legal profession. Staff also compiles and disseminates demographic information and other materials to inform and facilitate diversity efforts by the State Bar and other organizations.

Bar Relations

This Service Area focuses on supporting the work of the 240 local, minority and specialty voluntary bar associations in California and providing support to the California Young Lawyers Association Board and members. Activity in conjunction with voluntary bar associations is funded solely through voluntary contributions to the State Bar.

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Elimination of Bias</u>			
Admin of Justice Fund	352	494	402
Grants Fund	6	0	0
Total Elimination of Bias	357	494	402
<u>Bar Relations</u>			
Admin of Justice Fund	237	244	254
Grants Fund	6	0	0
Total Bar Relations	243	244	254
TOTAL	600	738	656

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	4.0	4.0	4.0	448	471	489
Supplemental Staffing				0	0	0
Travel & Training				94	100	100
Supplies and Postage				16	15	15
Professional Services				10	32	32
Occupancy				4	2	2
Telecommunications				7	6	6
Other Outside Services				17	110	10
Buildings & Equipment				2	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				2	0	0
Indirect Costs				0	0	0
TOTAL	4.0	4.0	4.0	600	738	656

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Lawyer Assistance Program

The Lawyer Assistance Program (LAP) seeks to rehabilitate attorneys with impairment due to abuse of drugs or alcohol, or due to mental illness, affecting competency so that attorneys so afflicted may be treated and returned to the practice of law in a manner that will not endanger the public health and safety.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Lawyer Assistance Program	13.0	8.0	8.0	987	1,214	1,255
TOTAL (All Programs)	13.0	8.0	8.0	987	1,214	1,255
FUNDING				2012*	2013*	2014*
General Fund				0	0	0
Admin of Justice Fund				0	0	0
Lawyer Asst Program Fund				987	1,214	1,255
TOTAL (All Funds)				987	1,214	1,255

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Sections 6230 - 6232

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Lawyer Assistance Program

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Lawyer Assistance Program</u>			
General Fund	0	0	0
Admin of Justice Fund	0	0	0
Lawyer Asst Program Fund	987	1,214	1,255
Total Lawyer Assistance Program	987	1,214	1,255
TOTAL	987	1,214	1,255

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	13.0	8.0	8.0	804	865	906
Supplemental Staffing				76	21	21
Travel & Training				89	85	85
Supplies and Postage				5	13	13
Professional Services				47	196	196
Occupancy				1	1	1
Telecommunications				17	26	26
Other Outside Services				-56	5	5
Computers & Software				0	0	0
Buildings & Equipment				1	1	1
Retiree Medical Funding				0	0	0
Other Expenditures				3	1	1
Indirect Costs				0	0	0
TOTAL	13.0	8.0	8.0	987	1,214	1,255

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Executive Director

The Office of the Executive Director is responsible for the overall direction and administration of the day-to-day operations of the State Bar, as well as for legislative activities on behalf of the Bar.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Management, Oversight and Planning	6.0	6.0	6.0	1,228	1,365	1,403
Board Support - Secretariat	2.0	2.0	2.0	471	583	587
Judicial Evaluations	3.0	3.0	3.0	575	744	754
Governmental Affairs	2.0	2.0	2.0	410	438	451
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	13.0	13.0	13.0	2,684	3,130	3,195
FUNDING				2012*	2013*	2014*
General Fund				2,274	2,465	2,512
Admin of Justice Fund				410	450	463
Admissions Fund				0	115	117
Client Security Fund				0	16	16
Lawyer Asst Program Fund				0	16	16
Legal Services Trust Fund				0	20	20
Legal Specializations Fund				0	14	15
Annual Meeting Fund				0	5	5
Sections Funds				0	29	30
TOTAL (All Funds)				2,684	3,130	3,195

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6028, 6029, 6030

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSManagement, Oversight and Planning

OED, through the Deputy Executive Director's office (DED) provides support and direction to all management within the State Bar regarding personnel administration, facilities operation and all other management related matters. In its management leadership role, OED staff leads the Senior Management Team in establishing and effectively completing operational/programmatic oversight. OED establishes Bar-wide operating policies and procedures, communicates those policies and procedures to all staff through Administrative Advisories, and follows-up on those advisories to ensure that policies and practices are being followed. OED leads the State Bar's efforts to ensure accountability for the use of resources and compliance with all mandated functions and/or requirements. OED takes the lead in working with the union to reach agreeable memoranda of understanding between the union and management. OED oversees facilities, security, and related functions. OED in collaboration with the Senior Management Team serves as the focus for problem-solving analysis and resolution Bar-wide.

Board Support - Secretariat

OED provides staff support to the Board of Governors to support its effective and efficient operation. In fulfilling the Secretariat responsibilities, OED staff sets the schedule of Board meetings, oversees production of Board agendas, travels to and attends all Board meetings, oversees production of minutes and action summaries, maintains the Board Book and all official permanent records of the State Bar, and timely processes Board member expense reports. OED staff provides expert assistance to Board members and ensures that appropriate State Bar staff timely responds to all Board member inquiries.

In addition to providing support for regular Board meetings and business, OED staff coordinates all Board appointments to commissions, committees, and special task forces, administers annual Board elections, and prepares and conducts orientations for Board candidates, Board members & Committee Chairs. OED staff ensures effective relationships are developed between Board members and State Bar staff and clearly inform board and staff about and enforce policies related to lines of authority. OED staff is responsible for ensuring that all Board directives are carried out.

Judicial Evaluations

The Commission on Judicial Nominees Evaluation (JNE), established pursuant to Government Code Section 12011.5, is the State Bar agency which evaluates all candidates who are under consideration for a judicial appointment by the Governor. The mission of the Commission is to assist the Governor in the judicial selection process and thereby to promote a California judiciary of quality and integrity by providing independent, comprehensive, accurate, and fair evaluations of candidates for judicial appointment and nomination.

Governmental Affairs

The Office of Governmental Affairs serves as the liaison between the State Bar and the Legislative and Executive Branches of Government. Using only non-mandatory, voluntarily-contributed funds, the office identifies and tracks legislative bills affecting or of interest to the State Bar; and advocates the position of the State Bar's Board of Governors on non-ideological issues of significance relating to the Bar, the ethical duties of attorneys, consumer protection relating to the practice of law by lawyers and non-lawyers, increasing access to legal services for the people of California, maintaining and improving the operation of the state's judicial/dispute resolution system, and related issues dealing with the administration of justice. The office also provides technical assistance and information to Legislators and to the Governor on issues of relevance to the practice of law, the legal profession, and consumers of legal services, and responds to inquiries from Legislative and Executive Branch staff. The office also initiates and implements education and assistance programs to increase state policy-makers' understanding of the legal profession, the practice of law and the State Bar's role in the administration of justice.

Cost Recovery

(n/a)

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Management, Oversight and Planning</u>			
General Fund	1,228	1,365	1,403
Total Management, Oversight and Planning	1,228	1,365	1,403
<u>Board Support - Secretariat</u>			
General Fund	471	583	587
Total Board Support - Secretariat	471	583	587
<u>Judicial Evaluations</u>			
General Fund	575	744	754
Total Judicial Evaluations	575	744	754
<u>Governmental Affairs</u>			
Admin of Justice Fund	410	438	451
Total Governmental Affairs	410	438	451
<u>Cost Recovery</u>			
General Fund	0	-227	-232
Admin of Justice Fund	0	12	12
Admissions Fund	0	115	117
Client Security Fund	0	16	16
Lawyer Asst Program Fund	0	16	16
Legal Services Trust Fund	0	20	20
Legal Specializations Fund	0	14	15
Annual Meeting Fund	0	5	5
Sections Funds	0	29	30
Total Cost Recovery	0	0	0
TOTAL	2,684	3,130	3,195

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	13.0	13.0	13.0	1,869	2,046	2,111
Supplemental Staffing				136	165	165
Travel & Training				482	466	466
Supplies and Postage				53	152	152
Professional Services				189	273	273
Occupancy				4	5	5
Telecommunications				17	21	21
Other Outside Services				23	65	65
Computers & Software				0	0	0
Buildings & Equipment				0	5	5
Retiree Medical Funding				0	0	0
Other Expenditures				-89	-68	-68
Indirect Costs				0	0	0
TOTAL	13.0	13.0	13.0	2,684	3,130	3,195

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

Finance

The Finance department is responsible for accounting, payroll, financial reporting and financial analysis for the State Bar.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Financial Planning and Analysis	6.0	4.0	4.0	915	941	977
Accounting	7.6	6.6	6.6	774	994	1,021
Procurement	3.0	3.0	3.0	326	330	343
Member Billing	6.0	7.0	7.0	1,494	1,726	1,758
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	22.6	20.6	20.6	3,510	3,991	4,101
FUNDING				2012*	2013*	2014*
General Fund				3,510	2,970	3,145
Admin of Justice Fund				0	71	72
Admissions Fund				0	308	319
Building Assessment Fund				0	51	0
Client Security Fund				0	217	222
IT Assessment Fund				0	41	0
Justice Gap Fund				0	19	20
Lawyer Asst Program Fund				0	89	92
Legal Services Trust Fund				0	53	55
Legal Specializations Fund				0	39	40
Annual Meeting Fund				0	14	14
Sections Funds				0	119	122
TOTAL (All Funds)				3,510	3,991	4,101

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6028, 6029, 6030

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSFinancial Planning and Analysis

This service area is responsible for the Bar's budgeting, financial planning, financial analysis and accounting. It also works closely with the Bar's outside auditors and the California Bureau of State Audits to ensure the implementation of sound financial controls and public accountability.

Accounting

This service area is responsible for making accurate and timely payments to the State Bar's employees (payroll) and outside vendors (accounts payable), and for implementing related procedures and internal controls.

Procurement

A key area of Office of Finance service is organizational support of its contracting for the purchase of goods and service agreements to ensure effective and appropriate use of State Bar resources.

Providing procurement services encompasses a wide range of activities including: developing and implementing general procurement policies and procedures; developing equipment and service standards for acquisition, purchasing specific products and services; documenting deviations from standard procedures; maintaining and developing standardized forms and contract templates; and management of Bar-wide master purchasing agreements with vendors.

Member Billing

Member Billing is responsible for ensuring attorneys are billed appropriately for annual fees and other costs. The primary task for the Member Billing Staff is the collection and recording of the annual membership fees. In addition to the primary task, staff responds to member's billing inquiries, calculates and tracks discipline and CSF cost assessments, assists in the annual suspension process, and reinstates members previously suspended for failure to pay annual fees upon payment of delinquent costs.

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Financial Planning and Analysis</u>			
General Fund	915	941	977
Total Financial Planning and Analysis	915	941	977
<u>Accounting</u>			
General Fund	774	994	1,021
Total Accounting	774	994	1,021
<u>Procurement</u>			
General Fund	326	330	343
Total Procurement	326	330	343
<u>Member Billing</u>			
General Fund	1,494	1,726	1,758
Total Member Billing	1,494	1,726	1,758
<u>Cost Recovery</u>			
General Fund	0	-1,020	-956
Admin of Justice Fund	0	71	72
Admissions Fund	0	308	319
Building Assessment Fund	0	51	0
Client Security Fund	0	217	222
IT Assessment Fund	0	41	0
Justice Gap Fund	0	19	20
Lawyer Asst Program Fund	0	89	92
Legal Services Trust Fund	0	53	55
Legal Specializations Fund	0	39	40
Annual Meeting Fund	0	14	14
Sections Funds	0	119	122
Total Cost Recovery	0	0	0
TOTAL	3,510	3,991	4,101

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	22.6	20.6	20.6	2,000	2,252	2,362
Supplemental Staffing				292	387	387
Travel & Training				31	16	16
Supplies and Postage				46	115	115
Professional Services				124	244	244
Occupancy				0	0	0
Telecommunications				23	26	26
Other Outside Services				987	944	944
Computers & Software				1	0	0
Buildings & Equipment				5	4	4
Retiree Medical Funding				0	0	0
Other Expenditures				1	2	2
Indirect Costs				0	0	0
TOTAL	22.6	20.6	20.6	3,510	3,991	4,101

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

Budget & Performance Analysis

The Office of Budget & Performance Analysis develops and monitors the budget for the State Bar, assists in the development and implementation of the bar's Five-Year Strategic Plan, and develops systems and processes to measure and improve the performance of the organization.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Budget & Performance	0.0	3.0	3.0	141	839	864
Cost Recovery	0.0	0.0	0.0	0	-6	-6
TOTAL (All Programs)	0.0	3.0	3.0	141	833	858
FUNDING				2012*	2013*	2014*
General Fund				141	613	631
Admin of Justice Fund				0	6	6
Admissions Fund				0	114	118
Client Security Fund				0	16	17
Lawyer Asst Program Fund				0	16	17
Legal Services Trust Fund				0	20	20
Legal Specializations Fund				0	14	15
Annual Meeting Fund				0	5	5
Sections Funds				0	29	30
TOTAL (All Funds)				141	833	858

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6028, 6029, 6030

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Budget & Performance

(n/a)

Cost Recovery

(n/a)

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Budget & Performance</u>			
General Fund	141	839	864
Total Budget & Performance	141	839	864
<u>Cost Recovery</u>			
General Fund	0	-226	-233
Admin of Justice Fund	0	6	6
Admissions Fund	0	114	118
Client Security Fund	0	16	17
Lawyer Asst Program Fund	0	16	17
Legal Services Trust Fund	0	20	20
Legal Specializations Fund	0	14	15
Annual Meeting Fund	0	5	5
Sections Funds	0	29	30
Total Cost Recovery	0	-6	-6
TOTAL	141	833	858

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	0.0	3.0	3.0	73	493	518
Travel & Training				14	26	26
Supplies and Postage				0	3	3
Professional Services				50	215	215
Telecommunications				0	0	0
Other Outside Services				3	102	102
Computers & Software				0	0	0
Other Expenditures				0	0	0
Indirect Costs				0	-6	-6
TOTAL	0.0	3.0	3.0	141	833	858

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

General Counsel

The General Counsel functions as the State Bar's lawyer, and the OGC is responsible for providing legal advice and counsel to all departments of the Bar. In addition to its general legal duties, OGC also provides such services in specialty areas such as insurance/group insurance, real property, Lawyer Assistance Program, Admissions, Lawyer Referral Services, membership, and discipline.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
General Counsel	20.0	19.6	19.6	3,910	4,027	4,151
Law Library & Archives	2.0	2.0	2.0	468	444	453
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	22.0	21.6	21.6	4,378	4,471	4,604
FUNDING				2012*	2013*	2014*
General Fund				4,378	3,389	3,488
Admin of Justice Fund				0	57	59
Admissions Fund				0	547	564
Client Security Fund				0	77	79
Lawyer Asst Program Fund				0	77	79
Legal Services Trust Fund				0	94	97
Legal Specializations Fund				0	68	70
Annual Meeting Fund				0	24	25
Sections Funds				0	138	142
TOTAL (All Funds)				4,378	4,471	4,604

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6028, 6029, 6030

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSGeneral Counsel

OGC provides contract, litigation and legal opinion services for a wide range of matters for the State Bar. In addition to its general legal duties, OGC also provides such services in specialty areas such as insurance/group insurance, real property, Lawyer Assistance Program, Admissions, Lawyer Referral Services, membership, and discipline.

Law Library & Archives

This unit maintains the State Bar's law library, including hardcopy and electronic materials; provides legal research assistance to the Bar's attorney staff; and provides institutional archive services to maintain the Bar's historical records.

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM

	2012*	2013*	2014*
<u>General Counsel</u>			
General Fund	3,910	4,027	4,151
Total General Counsel	3,910	4,027	4,151
<u>Law Library & Archives</u>			
General Fund	468	444	453
Total Law Library & Archives	468	444	453
<u>Cost Recovery</u>			
General Fund	0	-1,083	-1,116
Admin of Justice Fund	0	57	59
Admissions Fund	0	547	564
Client Security Fund	0	77	79
Lawyer Asst Program Fund	0	77	79
Legal Services Trust Fund	0	94	97
Legal Specializations Fund	0	68	70
Annual Meeting Fund	0	24	25
Sections Funds	0	138	142
Total Cost Recovery	0	0	0
TOTAL	4,378	4,471	4,604

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	22.0	21.6	21.6	3,248	3,309	3,442
Supplemental Staffing				73	181	181
Travel & Training				62	41	41
Supplies and Postage				319	290	290
Professional Services				595	576	576
Telecommunications				23	23	23
Other Outside Services				50	41	41
Computers & Software				2	3	3
Buildings & Equipment				1	1	1
Retiree Medical Funding				0	0	0
Other Expenditures				5	5	5
Indirect Costs				0	0	0
TOTAL	22.0	21.6	21.6	4,378	4,471	4,604

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Human Resources

The Human Resources department is responsible for policies governing the compensation of Bar employees, for negotiation with the Bar's collective bargaining units, and for advising Bar staff with regard to personnel matters.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
HR Administration	0.0	0.0	0.0	0	3	3
Compensation Administration	2.0	1.0	1.0	296	195	199
Recruiting and Development	3.0	3.0	3.0	371	623	640
Employee Relations	2.0	3.0	3.0	205	444	474
Records and Information Systems	6.0	6.0	6.0	636	553	581
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	13.0	13.0	13.0	1,508	1,818	1,897
FUNDING				2012*	2013*	2014*
General Fund				1,508	1,328	1,386
Admin of Justice Fund				0	26	27
Admissions Fund				0	247	258
Client Security Fund				0	35	36
Lawyer Asst Program Fund				0	35	36
Legal Services Trust Fund				0	43	44
Legal Specializations Fund				0	31	32
Annual Meeting Fund				0	11	12
Sections Funds				0	62	65
TOTAL (All Funds)				1,508	1,818	1,897

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6028, 6029, 6030

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSHR Administration

This service area provides overall management and administrative support for the Office of Human Resources.

Compensation Administration

The Office of Human Resources plays the leading role in developing, benchmarking and administering the Bar's employee compensation structure, including its salary schedules, benefit offerings and retirement alternatives. This service area also includes day-to-day operations of the Bar's payroll and benefit programs.

Recruiting and Development

This service area encompasses recruiting new staff, institutional training, and administering the Bar's system of performance reviews for current employees. This service area also handles employee separations.

Employee Relations

Employee relations encompasses activities ranging from health and wellness promotion to collective bargaining. It includes workplace safety efforts, contract negotiations, and management of the employee grievance process.

Records and Information Systems

This service area is responsible for maintaining required employment records, processing security clearances, and operating the Bar's Human Resources Information System (HRIS).

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>HR Administration</u>			
General Fund	0	3	3
Total HR Administration	0	3	3
<u>Compensation Administration</u>			
General Fund	296	195	199
Total Compensation Administration	296	195	199
<u>Recruiting and Development</u>			
General Fund	371	623	640
Total Recruiting and Development	371	623	640
<u>Employee Relations</u>			
General Fund	205	444	474
Total Employee Relations	205	444	474
<u>Records and Information Systems</u>			
General Fund	636	553	581
Total Records and Information Systems	636	553	581
<u>Cost Recovery</u>			
General Fund	0	-490	-511
Admin of Justice Fund	0	26	27
Admissions Fund	0	247	258
Client Security Fund	0	35	36
Lawyer Asst Program Fund	0	35	36
Legal Services Trust Fund	0	43	44
Legal Specializations Fund	0	31	32
Annual Meeting Fund	0	11	12
Sections Funds	0	62	65
Total Cost Recovery	0	0	0
TOTAL	1,508	1,818	1,897

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	13.0	13.0	13.0	1,116	1,533	1,613
Supplemental Staffing				170	33	33
Travel & Training				46	31	31
Supplies and Postage				17	14	14
Professional Services				129	154	154
Telecommunications				15	14	14
Other Outside Services				6	37	37
Computers & Software				1	0	0
Buildings & Equipment				6	1	1
Retiree Medical Funding				0	0	0
Other Expenditures				2	0	0
Indirect Costs				0	0	0
TOTAL	13.0	13.0	13.0	1,508	1,818	1,897

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

Information Technology

The Information Technology department is responsible for the Bar's IT infrastructure (including PC's, networks, servers, and mini-computers), for custom software development, for maintenance and administration of the Bar's existing software, and for the Bar's public-facing internet presence.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Base Services	32.0	31.0	31.0	5,173	5,137	5,344
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	32.0	31.0	31.0	5,173	5,137	5,344
FUNDING				2012*	2013*	2014*
General Fund				5,173	3,753	3,904
Admin of Justice Fund				0	73	76
Admissions Fund				0	699	727
Client Security Fund				0	98	102
Lawyer Asst Program Fund				0	98	102
Legal Services Trust Fund				0	120	125
Legal Specializations Fund				0	87	91
Annual Meeting Fund				0	31	32
Sections Funds				0	176	184
TOTAL (All Funds)				5,173	5,137	5,344

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6028, 6029, 6030

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSBase Services

IT provides important operational support for completion of State Bar business including a) supporting daily operations; b) providing technical support to State Bar staff; and c) standardizing hardware and software specifications, deployment, and compliance bar-wide.

IT staff directly ensures smooth running of the State Bar's daily operations including: completion of bank file transfers; data processing with external entities; completing systems backups and off-site storage; monitoring systems, managing software/hardware warranties; identifying, documenting and resolving technology incidents; ensuring compliance with hardware/software licensing requirements; updating documentation for users; moving, adding, changing and installing hardware and software; and disposing of outdated or damaged equipment.

Providing quality customer care, the Help Desk receives telephone calls and emails regarding use of desktop applications. IT staff troubleshoots problems and resolves them. IT staff also use support opportunities to educate State Bar staff about systems applications and their use.

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Base Services</u>			
General Fund	5,173	5,137	5,344
Total Base Services	5,173	5,137	5,344
<u>Cost Recovery</u>			
General Fund	0	-1,384	-1,440
Admin of Justice Fund	0	73	76
Admissions Fund	0	699	727
Client Security Fund	0	98	102
Lawyer Asst Program Fund	0	98	102
Legal Services Trust Fund	0	120	125
Legal Specializations Fund	0	87	91
Annual Meeting Fund	0	31	32
Sections Funds	0	176	184
Total Cost Recovery	0	0	0
TOTAL	5,173	5,137	5,344

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	32.0	31.0	31.0	3,497	4,007	4,214
Supplemental Staffing				323	73	73
Travel & Training				77	70	70
Supplies and Postage				14	11	11
Professional Services				175	335	335
Occupancy				52	0	0
Telecommunications				31	42	42
Other Outside Services				11	10	10
Computers & Software				944	543	543
Buildings & Equipment				49	46	46
Retiree Medical Funding				0	0	0
Other Expenditures				0	0	0
Indirect Costs				0	0	0
TOTAL	32.0	31.0	31.0	5,173	5,137	5,344

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Communications

Media & Information Services is primarily responsible for communications between the Bar and both its members and the general public. MIS produces the California Bar Journal, a major channel of communication with the membership. In addition, MIS is responsible for public outreach, press relations, and the content of the Bar's website.

SUMMARY OF PROGRAM REQUIREMENTS	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Media Relations	5.0	4.0	4.0	334	544	573
California Bar Journal	2.0	2.0	2.0	352	429	450
Public Education	0.0	0.0	0.0	0	0	0
Cost Recovery	0.0	0.0	0.0			
TOTAL (All Programs)	7.0	6.0	6.0	686	973	1,022
FUNDING				2012*	2013*	2014*
General Fund				686	973	1,022
Grants Fund				0	0	0
TOTAL (All Funds)				686	973	1,022

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6092.5 subd. (h)

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSMedia Relations

Media Relations is the State Bar's principal day-to-day liaison with the news media. Media Relations staff are responsible for fielding inbound inquiries from the press and electronic media and for actively communicating the Bar's message via press releases and other means. Media Relations also provides support and training for other Bar staff that may have contact with the press.

California Bar Journal

Prepared and distributed monthly, the California Bar Journal is a primary communication tool between the State Bar and its members. Staff researches and writes stories, compiles monthly discipline summaries, solicits articles from outside authors, hires and oversees freelance writers, edits/rewrites submissions, identifies opportunities for and takes or obtains photographs relevant to stories, completes design and layout of stories and advertising, and solicits MCLE self-study tests. Staff in this area also obtains advertisers, oversees advertising and other contracts, and collects advertising and other revenue.

Public Education

Staff in this service area participates in the development of consumer education pamphlets, brochures and guides. These public education materials are initially researched and written by staff whose work is then reviewed by volunteer attorneys for completeness and accuracy. Staff designs, lies out, edits, and oversees the translation of the final materials in multiple languages. In addition, staff also organizes and attends public education forums throughout the state and helps to market those forums to encourage attorney participation and public attendance.

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Media Relations</u>			
General Fund	334	544	573
Total Media Relations	334	544	573
<u>California Bar Journal</u>			
General Fund	352	429	450
Total California Bar Journal	352	429	450
<u>Public Education</u>			
Grants Fund	0	0	0
Total Public Education	0	0	0
TOTAL	686	973	1,022

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	7.0	6.0	6.0	360	788	837
Supplemental Staffing				131	4	4
Travel & Training				9	12	12
Supplies and Postage				4	13	13
Professional Services				144	112	112
Telecommunications				4	6	6
Other Outside Services				34	51	51
Computers & Software				1	0	0
Buildings & Equipment				0	0	0
Retiree Medical Funding				0	0	0
Other Expenditures				-2	-13	-13
Indirect Costs				0	0	0
TOTAL	7.0	6.0	6.0	686	973	1,022

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

General Services

The Office of Operations provides a comprehensive range of administrative and facilities services that support the work of all State Bar departments.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Administrative Services	24.0	23.0	23.0	2,048	2,220	2,287
Facilities Management	0.0	0.0	0.0	6,767	16,881	6,279
Risk Management	0.0	0.0	0.0	738	769	769
Library & Research Services	0.0	0.0	0.0			
Cost Recovery	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	24.0	23.0	23.0	9,552	19,870	9,335
FUNDING				2012*	2013*	2014*
General Fund				9,552	7,634	7,366
Admin of Justice Fund				0	87	84
Admissions Fund				0	1,294	1,227
Building Assessment Fund				0	10,182	0
Client Security Fund				0	66	67
Lawyer Asst Program Fund				0	157	150
Legal Services Trust Fund				0	80	82
Legal Specializations Fund				0	58	60
180 Howard Street Fund				0	0	0
Annual Meeting Fund				0	21	21
Sections Funds				0	291	277
TOTAL (All Funds)				9,552	19,870	9,335

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6028, 6029, 6030

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSAdministrative Services

As the organization's administrative support arm, the Office of Operations manages mail and courier services; reception and public inquiry; document imaging and printing; fax and copier support; meeting and conference support; and travel services.

Facilities Management

The Office of Operations manages over 300,000 square feet of owned and leased office space for Bar staff and tenants. Operations maintains the Bar's facilities and safeguards its physical assets by managing engineering and janitorial services; landlord/tenant relations; space planning and use; safety and security programs; parking; and recycling programs.

Risk Management

Responsibilities include managing the Bar's business insurance program (covering property, financial and professional liability, etc), and coordinating business continuity and disaster recovery planning.

Library & Research Services

This unit maintains the State Bar's law library, including hardcopy and electronic materials; provides legal research assistance to the Bar's attorney staff; and provides institutional archive services to maintain the Bar's historical records.

Cost Recovery

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Administrative Services</u>			
General Fund	2,048	2,220	2,287
Total Administrative Services	2,048	2,220	2,287
<u>Facilities Management</u>			
General Fund	6,767	6,699	6,279
Building Assessment Fund	0	10,182	0
180 Howard Street Fund	0	0	0
Total Facilities Management	6,767	16,881	6,279
<u>Risk Management</u>			
General Fund	738	769	769
Total Risk Management	738	769	769
<u>Cost Recovery</u>			
General Fund	0	-2,054	-1,969
Admin of Justice Fund	0	87	84
Admissions Fund	0	1,294	1,227
Client Security Fund	0	66	67
Lawyer Asst Program Fund	0	157	150
Legal Services Trust Fund	0	80	82
Legal Specializations Fund	0	58	60
Annual Meeting Fund	0	21	21
Sections Funds	0	291	277
Total Cost Recovery	0	0	0
TOTAL	9,552	19,870	9,335

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits	24.0	23.0	23.0	1,806	2,015	2,082
Supplemental Staffing				50	59	59
Travel & Training				30	26	26
Supplies and Postage				31	145	145
Professional Services				208	266	266
Occupancy				7,282	7,165	4,315
Telecommunications				34	36	36
Other Outside Services				34	34	34
Computers & Software				2	0	0
Buildings & Equipment				141	19	19
Retiree Medical Funding				0	0	0
Debt Service				0	0	2,430
Other Expenditures				-66	-76	-76
Indirect Costs				0	0	0
Interfund Transfers				0	10,182	0
TOTAL	24.0	23.0	23.0	9,552	19,870	9,335

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Technology Projects

This category includes telecommunications and IT infrastructure upgrades as well as upgrades to and replacement of software applications.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Technology Projects	0.0	0.0	0.0	1,349	6,200	2,300
TOTAL (All Programs)	0.0	0.0	0.0	1,349	6,200	2,300
FUNDING				2012*	2013*	2014*
Technology Projects Fund				1,349	6,200	2,300
TOTAL (All Funds)				1,349	6,200	2,300

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Section 6001

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Technology Projects

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Technology Projects</u>			
Technology Projects Fund	1,349	6,200	2,300
Total Technology Projects	1,349	6,200	2,300
TOTAL	1,349	6,200	2,300

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Supplemental Staffing				41	0	0
Travel & Training				21	0	0
Supplies and Postage				0	0	0
Professional Services				511	0	0
Other Outside Services				1	350	0
Computers & Software				775	5,850	2,300
Buildings & Equipment				0	0	0
TOTAL				1,349	6,200	2,300

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Facilities Projects

This category includes capital improvement projects at the State Bar's headquarters at 180 Howard Street in San Francisco as well as at its recently acquired offices at 845 South Figueroa in Los Angeles.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Facilities Projects	0.0	0.0	0.0	264	30,130	0
TOTAL (All Programs)	0.0	0.0	0.0	264	30,130	0
FUNDING				2012*	2013*	2014*
General Fund				0	0	0
180 Howard Street Fund				0	11,700	0
LA Facilities Fund				264	18,430	0
TOTAL (All Funds)				264	30,130	0

LEGAL CITATIONS & AUTHORITY

Business and Professions Code Section 6001

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONS

Facilities Projects

(n/a)

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Facilities Projects</u>			
General Fund	0	0	0
180 Howard Street Fund	0	11,700	0
LA Facilities Fund	264	18,430	0
Total Facilities Projects	264	30,130	0
TOTAL	264	30,130	0

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Professional Services				264	0	0
Other Outside Services				0	1,000	0
Buildings & Equipment				0	26,700	0
Debt Service				0	2,430	0
TOTAL				264	30,130	0

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Non-Departmental

The Non-Departmental budget accounts for a variety of line items which are not associated with specific departments, programs or Bar operations.

	Positions			Expenditures		
SUMMARY OF PROGRAM REQUIREMENTS	2012	2013	2014	2012*	2013*	2014*
Bar-Wide Accounts	0.0	0.0	0.0	23	51	51
Fund Level Accounts	0.0	0.0	0.0	5,846	14,470	4,905
Fixed Assets	0.0	0.0	0.0			
Obsolete Accounts	0.0	0.0	0.0	0	0	0
TOTAL (All Programs)	0.0	0.0	0.0	5,868	14,522	4,956
FUNDING				2012*	2013*	2014*
General Fund				-6,640	38	38
Admin of Justice Fund				2,434	6,584	751
Admissions Fund				3,736	333	333
Building Assessment Fund				38	0	0
Client Security Fund				542	48	48
Discipline Fund				0	0	0
Grants Fund				0	0	0
IT Assessment Fund				31	4,113	2,300
Justice Gap Fund				2,209	0	0
Lawyer Asst Program Fund				1,642	95	95
Legal Services Trust Fund				519	48	48
Legal Specializations Fund				475	2,528	48
180 Howard Street Fund				564	0	800
LA Facilities Fund				159	0	400
Technology Projects Fund				-1,015	640	0
Annual Meeting Fund				58	14	14
Sections Funds				1,116	81	81
Public Protection Fund				0	0	0
TOTAL (All Funds)				5,868	14,522	4,956

LEGAL CITATIONS & AUTHORITY

Business & Professions Code Sections 6028, 6029, 6030

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

DETAILED BUDGET ADJUSTMENTS

Not applicable: no adjustments have been made to date.

PROGRAM DESCRIPTIONSBar-Wide Accounts

Bar-Wide Accounts includes a number of revenue and expenditure lines which are meaningful for the Bar as a whole, but which are not connected with specific departments, programs or operations.

Fund Level Accounts

Fund level accounts reflect charges attributed to particular State Bar funds, but not to the operations of specific departments. Major examples include indirect costs and inter-fund transfers.

Fixed Assets

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

Obsolete Accounts

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

DETAILED EXPENDITURES BY PROGRAM	2012*	2013*	2014*
<u>Bar-Wide Accounts</u>			
Admin of Justice Fund	23	51	51
Total Bar-Wide Accounts	23	51	51
<u>Fund Level Accounts</u>			
General Fund	-6,640	38	38
Admin of Justice Fund	2,411	6,533	700
Admissions Fund	3,736	333	333
Building Assessment Fund	38	0	0
Client Security Fund	542	48	48
Discipline Fund	0	0	0
IT Assessment Fund	31	4,113	2,300
Justice Gap Fund	2,209	0	0
Lawyer Asst Program Fund	1,642	95	95
Legal Services Trust Fund	519	48	48
Legal Specializations Fund	475	2,528	48
180 Howard Street Fund	564	0	800
LA Facilities Fund	159	0	400
Technology Projects Fund	-1,015	640	0
Annual Meeting Fund	58	14	14
Sections Funds	1,116	81	81
Public Protection Fund	0	0	0
Total Fund Level Accounts	5,846	14,470	4,905
<u>Obsolete Accounts</u>			
General Fund	0	0	0
Discipline Fund	0	0	0
Grants Fund	0	0	0
Total Obsolete Accounts	0	0	0
TOTAL	5,868	14,522	4,956

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

EXPENDITURES BY CATEGORY	Positions			Expenditures		
	2012	2013	2014	2012*	2013*	2014*
Regular Salary & Benefits				4	-979	-979
Travel & Training				43	31	31
Supplies and Postage				0	0	0
Professional Services				-284	0	0
Telecommunications				-141	-200	-200
Other Outside Services				1	100	0
CSF Applications				0	0	0
Legal Services Grants				10	0	0
Computers & Software				-1,101	640	0
Buildings & Equipment				-64	0	0
Retiree Medical Funding				1,234	2,000	2,000
Debt Service				159	0	0
Other Expenditures				0	0	0
Indirect Costs				0	6	6
Reimbursements				-16	0	0
Interfund Transfers				5,459	12,924	4,098
TOTAL				5,305	14,522	4,956

DETAIL OF APPROPRIATIONS & ADJUSTMENTS

Not applicable: no adjustments have been made to date.

CHANGES IN AUTHORIZED POSITIONS

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

* 2012 Pre-Close Actuals, 2013-14 Budget, \$ thousands

Statements of Fund Condition

General Fund	2012*	2013*	2014*
Beginning Balance	8,063	3,600	704
<u>Revenues</u>			
Mandatory Dues	54,082	56,950	62,050
Administrative Fees	1,961	1,830	1,830
Penalties and Late Fees	2,583	2,395	2,395
Other Fees and Charges	221	161	161
Grants	27	0	0
Interest Income	97	80	80
Other Revenues	510	317	317
Interfund Transfers	0	0	0
Total Revenues	59,481	61,733	66,833
<u>Expenditures</u>			
Admissions	0	0	0
Chief Trial Counsel	26,586	27,908	28,921
Probation	804	841	872
Mandatory Fee Arbitration	607	633	657
State Bar Court	6,861	6,872	7,044
Member Records & Compliance	2,081	2,214	2,306
Professional Competence	1,555	1,758	1,807
Education	133	112	117
Legal Services	1,065	1,128	1,164
Lawyer Assistance Program	0	0	0
Executive Director	2,274	2,465	2,512
Finance	3,510	2,970	3,145
Budget & Performance Analysis	141	613	631
General Counsel	4,378	3,389	3,488
Human Resources	1,508	1,328	1,386
Information Technology	5,173	3,753	3,904
Communications	686	973	1,022
General Services	9,552	7,634	7,366
Facilities Projects	0	0	0
Non-Departmental	-6,640	38	38
Total Expenditures	60,275	64,629	66,381
Estimated Closing Adjustments	-3,669		
Ending Balance	3,600	704	1,155

* 2012 Pre-Close Actual, 2013-14 Budget, \$ thousands

Admin of Justice Fund	2012*	2013*	2014*
Beginning Balance	5,067	5,500	389
<u>Revenues</u>			
Voluntary Dues & Donations	1,588	1,580	1,580
Lease Revenues	0	0	0
Insurance Commissions	1,785	1,700	1,700
Other Fees and Charges	0	0	0
Interest Income	13	1	1
Other Revenues	21	106	106
Interfund Transfers	1,250	0	400
Total Revenues	4,657	3,387	3,787
<u>Expenditures</u>			
Education	489	408	416
Diversity & Bar Relations	589	738	656
Lawyer Assistance Program	0	0	0
Executive Director	410	450	463
Finance	0	71	72
Budget & Performance Analysis	0	6	6
General Counsel	0	57	59
Human Resources	0	26	27
Information Technology	0	73	76
General Services	0	87	84
Non-Departmental	2,434	6,584	751
Total Expenditures	3,922	8,498	2,609
Estimated Closing Adjustments	-302		
Ending Balance	5,500	389	1,567

* 2012 Pre-Close Actual, 2013-14 Budget, \$ thousands

Admissions Fund	2012*	2013*	2014*
Beginning Balance	3,846	2,800	2,603
<u>Revenues</u>			
Administrative Fees	639	659	659
Penalties and Late Fees	462	459	459
Student Registration Fees	1,205	1,158	1,142
Exam Fees	12,812	12,814	12,624
Moral Character Fees	4,083	3,903	3,713
Other Fees and Charges	299	276	276
Interest Income	28	28	28
Other Revenues	0	0	0
Interfund Transfers	0	0	0
Total Revenues	19,528	19,297	18,901
<u>Expenditures</u>			
Admissions	14,320	15,836	16,443
Executive Director	0	115	117
Finance	0	308	319
Budget & Performance Analysis	0	114	118
General Counsel	0	547	564
Human Resources	0	247	258
Information Technology	0	699	727
General Services	0	1,294	1,227
Non-Departmental	3,736	333	333
Total Expenditures	18,056	19,494	20,106
Estimated Closing Adjustments	-2,518		
Ending Balance	2,800	2,603	1,398
Building Assessment Fund	2012*	2013*	2014*
Beginning Balance	6,041	8,133	0
<u>Revenues</u>			
Mandatory Dues	2,114	2,100	0
Interest Income	19	0	0
Other Revenues	1	0	0
Total Revenues	2,134	2,100	0
<u>Expenditures</u>			
Finance	0	51	0
General Services	0	10,182	0
Non-Departmental	38	0	0
Total Expenditures	38	10,233	0
Estimated Closing Adjustments	-4		
Ending Balance	8,133	0	0

* 2012 Pre-Close Actual, 2013-14 Budget, \$ thousands

Client Security Fund	2012*	2013*	2014*
Beginning Balance	-7,215	10,400	8,440
<u>Revenues</u>			
Mandatory Dues	7,299	7,370	7,444
Interest Income	34	32	25
Other Revenues	20	0	0
Total Revenues	7,353	7,402	7,469
<u>Expenditures</u>			
Client Security Fund	15,235	8,789	8,832
Executive Director	0	16	16
Finance	0	217	222
Budget & Performance Analysis	0	16	17
General Counsel	0	77	79
Human Resources	0	35	36
Information Technology	0	98	102
General Services	0	66	67
Non-Departmental	542	48	48
Total Expenditures	15,776	9,361	9,420
Estimated Closing Adjustments	26,038		
Ending Balance	10,400	8,440	6,490
Discipline Fund	2012*	2013*	2014*
Beginning Balance	1,156	0	0
<u>Revenues</u>			
Interest Income	3	0	0
Total Revenues	3	0	0
<u>Expenditures</u>			
Non-Departmental	0	0	0
Total Expenditures	0	0	0
Estimated Closing Adjustments	-1,159		
Ending Balance	0	0	0

* 2012 Pre-Close Actual, 2013-14 Budget, \$ thousands

Grants Fund	2012*	2013*	2014*
Beginning Balance	201	100	100
<u>Revenues</u>			
Grants	56	0	0
Other Revenues	15	0	0
Total Revenues	71	0	0
<u>Expenditures</u>			
Education	0	0	0
Legal Services	8	0	0
Diversity & Bar Relations	11	0	0
Communications	0	0	0
Non-Departmental	0	0	0
Total Expenditures	19	0	0
Estimated Closing Adjustments	-153		
Ending Balance	100	100	100
IT Assessment Fund	2012*	2013*	2014*
Beginning Balance	4,102	4,704	2,300
<u>Revenues</u>			
Mandatory Dues	1,726	1,750	0
Interest Income	13	0	0
Other Revenues	1	0	0
Total Revenues	1,741	1,750	0
<u>Expenditures</u>			
Finance	0	41	0
Non-Departmental	31	4,113	2,300
Total Expenditures	31	4,154	2,300
Estimated Closing Adjustments	-1,107		
Ending Balance	4,704	2,300	0

* 2012 Pre-Close Actual, 2013-14 Budget, \$ thousands

Justice Gap Fund	2012*	2013*	2014*
Beginning Balance	307	75	76
<u>Revenues</u>			
Voluntary Dues & Donations	2,215	850	850
Interest Income	4	0	0
Other Revenues	1	0	0
Total Revenues	2,219	850	850
<u>Expenditures</u>			
Legal Services	0	830	830
Finance	0	19	20
Non-Departmental	2,209	0	0
Total Expenditures	2,209	849	850
Estimated Closing Adjustments	-242		
Ending Balance	75	76	76
Lawyer Asst Program Fund	2012*	2013*	2014*
Beginning Balance	1,576	665	767
<u>Revenues</u>			
Mandatory Dues	1,922	1,900	1,900
Insurance Commissions	0	0	0
Interest Income	4	0	0
Other Revenues	1	0	0
Interfund Transfers	0	0	0
Total Revenues	1,927	1,900	1,900
<u>Expenditures</u>			
Lawyer Assistance Program	987	1,214	1,255
Executive Director	0	16	16
Finance	0	89	92
Budget & Performance Analysis	0	16	17
General Counsel	0	77	79
Human Resources	0	35	36
Information Technology	0	98	102
General Services	0	157	150
Non-Departmental	1,642	95	95
Total Expenditures	2,629	1,798	1,843
Estimated Closing Adjustments	-209		
Ending Balance	665	767	824

* 2012 Pre-Close Actual, 2013-14 Budget, \$ thousands

Legal Services Trust Fund	2012*	2013*	2014*
Beginning Balance	744	474	445
<u>Revenues</u>			
Voluntary Dues & Donations	3,305	3,300	0
Administrative Fees	527	500	500
Grants	15,708	15,600	15,600
IOLTA	5,008	4,859	4,859
Interest Income	9	15	15
Other Revenues	64	0	0
Interfund Transfers	4,209	2,830	1,230
Total Revenues	28,829	27,104	22,204
<u>Expenditures</u>			
Legal Services	28,121	26,656	21,599
Executive Director	0	20	20
Finance	0	53	55
Budget & Performance Analysis	0	20	20
General Counsel	0	94	97
Human Resources	0	43	44
Information Technology	0	120	125
General Services	0	80	82
Non-Departmental	519	48	48
Total Expenditures	28,640	27,133	22,091
Estimated Closing Adjustments	-459		
Ending Balance	474	445	558

* 2012 Pre-Close Actual, 2013-14 Budget, \$ thousands

Legal Specializations Fund	2012*	2013*	2014*
Beginning Balance	2,040	2,950	1,004
<u>Revenues</u>			
Administrative Fees	1,935	1,843	1,880
Penalties and Late Fees	0	1	1
Exam Fees	77	300	65
Other Fees and Charges	11	10	10
Interest Income	7	8	8
Other Revenues	3	3	3
Interfund Transfers	0	0	800
Total Revenues	2,034	2,164	2,767
<u>Expenditures</u>			
Admissions	794	1,270	1,313
Executive Director	0	14	15
Finance	0	39	40
Budget & Performance Analysis	0	14	15
General Counsel	0	68	70
Human Resources	0	31	32
Information Technology	0	87	91
General Services	0	58	60
Non-Departmental	475	2,528	48
Total Expenditures	1,268	4,110	1,683
Estimated Closing Adjustments	145		
Ending Balance	2,950	1,004	2,088
180 Howard Street Fund	2012*	2013*	2014*
Beginning Balance	7,632	8,470	0
<u>Revenues</u>			
Mandatory Dues	3	0	0
Penalties and Late Fees	1	0	0
Lease Revenues	796	750	800
Interest Income	21	0	0
Other Revenues	15	0	0
Interfund Transfers	0	2,480	0
Total Revenues	835	3,230	800
<u>Expenditures</u>			
General Services	0	0	0
Facilities Projects	0	11,700	0
Non-Departmental	564	0	800
Total Expenditures	564	11,700	800
Estimated Closing Adjustments	567		
Ending Balance	8,470	0	0

* 2012 Pre-Close Actual, 2013-14 Budget, \$ thousands

LA Facilities Fund	2012*	2013*	2014*
Beginning Balance		3,700	0
<u>Revenues</u>			
Lease Revenues	0	264	400
Interest Income	0	0	0
Other Revenues	24,561	0	0
Interfund Transfers	0	14,466	0
Total Revenues	24,561	14,730	400
<u>Expenditures</u>			
Facilities Projects	264	18,430	0
Non-Departmental	159	0	400
Total Expenditures	424	18,430	400
Estimated Closing Adjustments			
Ending Balance	3,700	0	0
Technology Projects Fund	2012*	2013*	2014*
Beginning Balance	106	2,727	0
<u>Revenues</u>			
Interest Income	0	0	0
Other Revenues	0	0	0
Interfund Transfers	0	4,113	2,300
Total Revenues	0	4,113	2,300
<u>Expenditures</u>			
Technology Projects	1,349	6,200	2,300
Non-Departmental	-1,015	640	0
Total Expenditures	335	6,840	2,300
Estimated Closing Adjustments	2,957		
Ending Balance	2,727	0	0

* 2012 Pre-Close Actual, 2013-14 Budget, \$ thousands

Annual Meeting Fund	2012*	2013*	2014*
Beginning Balance	213	302	0
<u>Revenues</u>			
Other Fees and Charges	482	0	40
Interest Income	1	1	1
Other Revenues	303	674	803
Interfund Transfers	0	48	198
Total Revenues	786	723	1,042
<u>Expenditures</u>			
Education	769	899	913
Executive Director	0	5	5
Finance	0	14	14
Budget & Performance Analysis	0	5	5
General Counsel	0	24	25
Human Resources	0	11	12
Information Technology	0	31	32
General Services	0	21	21
Non-Departmental	58	14	14
Total Expenditures	827	1,025	1,042
Estimated Closing Adjustments	130		
Ending Balance	302	0	0
Sections Funds	2012*	2013*	2014*
Beginning Balance	7,299	8,100	8,426
<u>Revenues</u>			
Sections Member Dues	4,876	4,871	4,871
Other Fees and Charges	0	0	0
Grants	5	5	5
Interest Income	23	22	22
Other Revenues	2,567	2,341	2,341
Total Revenues	7,470	7,239	7,239
<u>Expenditures</u>			
Education	6,545	5,987	6,060
Executive Director	0	29	30
Finance	0	119	122
Budget & Performance Analysis	0	29	30
General Counsel	0	138	142
Human Resources	0	62	65
Information Technology	0	176	184
General Services	0	291	277
Non-Departmental	1,116	81	81
Total Expenditures	7,661	6,913	6,991
Estimated Closing Adjustments	993		
Ending Balance	8,100	8,426	8,674

* 2012 Pre-Close Actual, 2013-14 Budget, \$ thousands

Public Protection Fund	2012*	2013*	2014*
Beginning Balance	6,469	1,700	1,706
<u>Revenues</u>			
Interest Income	16	6	6
Total Revenues	16	6	6
<u>Expenditures</u>			
Non-Departmental	0	0	0
Total Expenditures	0	0	0
Estimated Closing Adjustments	-4,785		
Ending Balance	1,700	1,706	1,712

* 2012 Pre-Close Actual, 2013-14 Budget, \$ thousands

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Wages & Salary Supplement

	Budgeted FTE			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
Admissions						
<u>Admissions Administration</u>						
Senior Director Admissions	0.00	1.00	1.00	10,375 - 15,272	160,430	168,450
Sr Executive, Admissions	1.00	0.00	0.00	10,375 - 15,272		
Section Chief	1.00	1.00	1.00	5,861 - 7,717	70,735	74,248
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	55,950	60,988
Administrative Specialist Conf	1.00	1.00	1.00	4,566 - 6,174	56,394	59,618
Administrative Assistant II	2.00	1.00	1.00	3,969 - 5,288	45,800	50,157
Administrative Secretary	1.00	0.00	0.00	3,969 - 5,288		
Admissions Analyst III	1.00	1.00	1.00	3,969 - 5,288	61,938	63,340
Accounting Technician	1.00	1.00	1.00	3,592 - 4,788	41,450	45,408
Administrative Assistant I	2.00	2.00	2.00	3,592 - 4,788	90,540	95,324
Admissions Administration Total	11.00	9.00	9.00	629,124	583,237	617,533
<u>Examination Development</u>						
Director, Examinations	1.00	1.00	1.00	7,795 - 11,303	116,324	122,136
Examinations Technician	1.00	1.00	1.00	5,333 - 7,031	79,008	82,494
Examination Development Total	2.00	2.00	2.00	185,783	195,332	204,630
<u>Application Processing</u>						
Section Chief	2.00	3.00	3.00	5,861 - 7,717	238,781	245,842
Sr Administrative Assistant	0.00	2.00	2.00	4,850 - 6,400	138,800	141,792
Admis Eligibility Analyst III	1.00	1.00	1.00	4,366 - 5,818	69,810	69,810
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	50,972	53,624
Admis Eligibility Analyst II	2.00	2.00	2.00	3,969 - 5,288	120,530	123,156
Admissions Analyst III	1.00	0.00	0.00	3,969 - 5,288		
Coordinator Of Records	6.00	6.00	6.00	3,592 - 4,788	283,945	297,815
Application Processing Total	13.00	15.00	15.00	738,093	902,838	932,039
<u>Admissions Operations</u>						
Director, Operations & Mgmt	1.00	1.00	1.00	7,795 - 11,303	116,324	122,136
Deputy Dir, Operations & Mgmt	1.00	1.00	1.00	7,086 - 10,280	107,200	112,564
Section Chief	2.00	2.00	2.00	5,861 - 7,717	161,531	166,562
Technology Svce Analyst Techn	1.00	1.00	1.00	5,333 - 7,031	77,648	81,154
Sr Administrative Assistant	2.00	2.00	2.00	4,850 - 6,400	130,552	136,667
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	53,726	56,378
Admissions Analyst III	1.00	1.00	1.00	3,969 - 5,288	61,837	63,290
Accounting Technician	1.00	1.00	1.00	3,592 - 4,788	45,132	47,524
Administrative Assistant I	2.00	2.00	2.00	3,592 - 4,788	95,784	100,568
Admissions Analyst II	1.00	1.00	1.00	3,592 - 4,788	44,856	47,248
Admissions Analyst I	3.00	2.00	2.00	2,948 - 3,932	81,037	84,963
Admissions Operations Total	16.00	15.00	15.00	934,770	975,627	1,019,054

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

	Positions (FTE)			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
<u>Examination Grading</u>						
Director, Admissions Admin	1.00	1.00	1.00	7,795 - 11,303	105,648	110,934
Section Chief	1.00	1.00	1.00	5,861 - 7,717	78,861	82,492
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	55,950	60,988
Admissions Coordinator	1.00	1.00	1.00	3,242 - 4,321	50,363	51,639
Admissions Processing Clerk II	1.00	1.00	1.00	2,666 - 3,554	42,640	42,640
Examination Grading Total	5.00	5.00	5.00	329,028	333,462	348,693
<u>Moral Character Determinations</u>						
Dir, Moral Char Determinations	1.00	1.00	1.00	7,795 - 11,303	106,278	111,590
Section Chief	2.00	2.00	2.00	5,861 - 7,717	184,412	185,172
Moral Character Analyst	8.00	10.00	10.00	4,850 - 6,400	659,578	685,799
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	59,211	61,837
Moral Character Determinations Total	12.00	14.00	14.00	900,068	1,009,479	1,044,398
<u>Law School Regulation</u>						
Director, Educational Standards	1.00	1.00	1.00	7,795 - 11,303	116,324	122,136
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	59,756	62,668
Law School Regulation Total	2.00	2.00	2.00	170,948	176,080	184,804
<u>Special Admissions</u>						
Administrative Assistant II	2.00	1.00	1.00	3,969 - 5,288	126,880	126,880
Administrative Assistant I	1.00	1.00	1.00	3,592 - 4,788	44,580	46,972
Special Admissions Total	3.00	2.00	2.00	152,348	171,460	173,852
<u>Specialization</u>						
Director, Legal Specialization	1.00	1.00	1.00	7,795 - 11,303	116,324	122,136
Section Chief	1.00	1.00	1.00	5,861 - 7,717	67,625	73,705
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	55,950	60,988
Administrative Assistant II	3.00	3.00	3.00	3,969 - 5,288	148,047	155,976
Administrative Assistant I	2.00	2.00	2.00	3,592 - 4,788	92,012	96,780
Specialization Total	8.00	8.00	8.00	480,799	479,958	509,585
<u>MCLE Providers</u>						
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	49,850	52,502
Administrative Assistant I	1.00	1.00	1.00	3,592 - 4,788	50,076	52,490
MCLE Providers Total	2.00	2.00	2.00	96,824	99,926	104,992
Admissions Total	74.00	74.00	74.00	4,617,785	4,927,399	5,139,580

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

	Positions (FTE)			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
Chief Trial Counsel						
<u>Management</u>						
Chief Trial Counsel	0.00	1.00	1.00	11,412 - 16,799	185,360	194,518
Acting Chief Trial Counsel	1.00	0.00	0.00	10,375 - 15,272		
Deputy Chief Trial Counsel	2.00	1.00	1.00	9,432 - 13,802	158,404	164,700
Special Asst. Chief Trial Cnsl	1.00	1.00	1.00	8,574 - 12,612	86,004	90,310
Program Court Sys Analyst	2.00	0.00	0.00	4,850 - 6,400		
Executive Secretary	2.00	2.00	2.00	4,566 - 6,174	138,393	144,143
Administrative Secretary	1.00	1.00	1.00	3,969 - 5,288	63,440	63,440
Management Total	9.00	6.00	6.00	770,432	631,601	657,111
<u>Intake</u>						
Assistant Chief Trial Counsel	1.00	1.00	1.00	8,574 - 12,612	146,840	151,320
Senior Attorney	4.00	4.00	4.00	7,717 - 11,625	530,219	541,784
Attorney	7.00	8.75	8.75	6,258 - 9,755	905,044	925,696
Complaint Analyst	17.00	17.00	17.00	4,850 - 6,400	1,148,595	1,183,272
Paralegal	2.00	4.00	4.00	4,850 - 6,400	304,638	306,728
Complaint Analyst I	0.00	6.00	6.00	4,366 - 5,818	323,412	340,803
Administrative Secretary	1.00	1.00	1.00	3,969 - 5,288	48,238	50,870
Intake Total	32.00	41.75	41.75	2,592,860	3,406,986	3,500,473
<u>Investigation</u>						
Assistant Chief Trial Counsel	0.00	1.00	1.00	8,574 - 12,612	140,338	146,980
Senior Attorney	9.00	7.00	7.00	7,717 - 11,625	809,951	845,823
Managing Dir Investigation	0.00	1.00	1.00	7,086 - 10,280	99,128	104,090
Attorney	10.00	7.00	7.00	6,258 - 9,755	714,241	736,588
Lead Investigator	0.00	5.00	5.00	5,861 - 7,717	338,125	368,525
Investigator II	49.00	44.00	44.00	5,333 - 7,031	3,428,604	3,507,310
Paralegal	0.00	1.00	1.00	4,850 - 6,400	65,598	68,796
Investigation Total	68.00	66.00	66.00	5,298,557	5,595,985	5,778,112
<u>Trial</u>						
Assistant Chief Trial Counsel	4.00	3.00	3.00	8,574 - 12,612	406,239	429,834
Senior Attorney	9.00	10.00	10.00	7,717 - 11,625	1,189,441	1,234,862
Attorney	27.00	18.84	18.84	6,258 - 9,755	1,561,142	1,643,294
Investigator II	8.00	9.00	9.00	5,333 - 7,031	709,180	727,131
Paralegal	14.00	11.00	11.00	4,850 - 6,400	737,885	766,274
Administrative Secretary	4.00	4.00	4.00	3,969 - 5,288	217,928	228,013
Trial Total	66.00	55.84	55.84	5,376,805	4,821,815	5,029,408
<u>Audit & Review</u>						
Senior Attorney	0.00	1.00	1.00	7,717 - 11,625	111,986	117,023
Attorney	1.90	3.60	3.60	6,258 - 9,755	387,942	399,999
Legal Secretary	1.00	1.00	1.00	3,969 - 5,288	55,052	57,683
Audit & Review Total	2.90	5.60	5.60	275,314	554,980	574,705

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

	Positions (FTE)			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
<u>Central Administration</u>						
Director, Central Admin, Ctc	1.00	1.00	1.00	7,795 - 11,303	116,324	122,136
Sr Administrative Supervisor	2.00	2.00	2.00	5,861 - 7,717	139,710	149,313
Complaint Analyst	1.00	1.00	1.00	4,850 - 6,400	60,540	63,452
Program Court Sys Analyst	0.00	2.00	2.00	4,850 - 6,400	122,760	128,734
Sr Administrative Assistant	3.00	3.00	3.00	4,850 - 6,400	204,313	210,943
Administrative Assistant II	2.00	2.00	2.00	3,969 - 5,288	111,880	114,514
Administrative Secretary	1.00	1.00	1.00	3,969 - 5,288	49,955	52,604
Legal Secretary	15.83	15.83	15.83	3,969 - 5,288	831,224	868,463
Administrative Assistant I	3.00	3.00	3.00	3,592 - 4,788	172,380	172,380
Coordinator Of Records	13.00	13.00	13.00	3,592 - 4,788	638,968	664,142
Secretary II	11.00	11.00	11.00	3,592 - 4,788	541,591	561,392
General Clerk II	3.00	4.00	4.00	2,948 - 3,932	146,194	153,994
General Clerk III	2.00	1.00	1.00	2,948 - 3,932	45,746	46,962
Investigative Assistant	1.00	0.00	0.00	2,948 - 3,932		
Central Administration Total	58.83	59.83	59.83	2,997,351	3,181,585	3,309,029
<u>Abandoned and Unauthorized Practices</u>						
Attorney	1.00	1.00	1.00	6,258 - 9,755	77,626	81,724
Paralegal	1.00	1.00	1.00	4,850 - 6,400	76,804	76,804
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	60,764	63,676
Coordinator Of Records	4.00	4.00	4.00	3,592 - 4,788	180,804	190,356
Abandoned and Unauthorized Practices Total	7.00	7.00	7.00	404,538	395,998	412,560
Chief Trial Counsel Total	243.73	242.02	242.02	17,715,857	18,588,950	19,261,398
Probation						
<u>Probation</u>						
Senior Attorney	1.00	1.00	1.00	7,717 - 11,625	136,084	139,490
Probation Deputy	6.00	6.00	6.00	4,366 - 5,818	346,876	361,378
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	50,870	53,522
Probation Total	8.00	8.00	8.00	518,609	533,830	554,390
Probation Total	8.00	8.00	8.00	518,609	533,830	554,390
Client Security Fund						
<u>Client Security Fund</u>						
Director, Client Security Fund	1.00	1.00	1.00	8,574 - 12,612	138,572	145,494
Senior Attorney	2.00	2.00	2.00	7,717 - 11,625	267,696	273,662
Sr Administrative Supervisor	1.00	1.00	1.00	5,861 - 7,717	91,598	92,586
Paralegal	2.00	2.00	2.00	4,850 - 6,400	116,266	124,216
Administrative Assistant II	2.00	2.00	2.00	3,969 - 5,288	114,922	117,574
Administrative Secretary	1.00	1.00	1.00	3,969 - 5,288	62,640	63,440
Legal Secretary	1.00	1.00	1.00	3,969 - 5,288	49,753	52,400
Coordinator Of Records	1.00	1.00	1.00	3,592 - 4,788	57,460	57,460
Client Security Fund Total	11.00	11.00	11.00	757,847	898,907	926,832

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

	Positions (FTE)			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
Client Security Fund Total	11.00	11.00	11.00	757,847	898,907	926,832
Mandatory Fee Arbitration						
<u>Mandatory Fee Arbitration</u>						
Director, Fee Arbitration	1.00	1.00	1.00	7,795 - 11,303	95,102	99,862
Sr Administrative Assistant	3.00	3.00	3.00	4,850 - 6,400	181,620	190,356
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	53,930	56,572
Mandatory Fee Arbitration Total	5.00	5.00	5.00	319,252	330,652	346,790
Mandatory Fee Arbitration Total	5.00	5.00	5.00	319,252	330,652	346,790
State Bar Court						
<u>Administration</u>						
Chf Admin Officer State Bar Ct	1.00	0.00	0.00	11,412 - 16,799		
Sr Director State Bar Court	0.00	1.00	1.00	10,375 - 15,272	155,514	163,294
Admin Specialist II (Conf)	1.00	1.00	1.00	5,610 - 7,463	85,794	88,644
Sr Admin Secretary	0.75	0.75	0.75	4,366 - 5,818	47,843	50,012
Administration Total	2.75	2.75	2.75	284,362	289,151	301,950
<u>Hearing Department & Effectuations Unit</u>						
Hearing Judge	5.00	5.00	5.00	13,606 - 14,899	816,270	816,270
Chief Assistant Court Counsel	1.00	1.00	1.00	8,574 - 12,612	136,994	143,838
Court Administrator	2.00	2.00	2.00	7,795 - 11,303	246,038	257,840
Senior Attorney	5.00	5.00	5.00	7,717 - 11,625	625,610	639,953
Case Administrator	10.00	10.00	10.00	5,333 - 7,031	794,757	808,037
Court Services Analyst/Tech	1.00	1.00	1.00	5,333 - 7,031	84,370	84,370
Lead Data Analyst	1.00	1.00	1.00	5,333 - 7,031	73,840	77,376
Program Court Sys Analyst	2.00	2.00	2.00	4,850 - 6,400	114,698	122,648
Deputy Court Clerk IV	2.00	2.00	2.00	4,366 - 5,818	124,440	127,332
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	45,800	50,157
Legal Secretary	1.00	1.00	1.00	3,969 - 5,288	63,440	63,440
Hearing Department & Effectuations Unit Total	31.00	31.00	31.00	3,112,807	3,126,257	3,191,261
<u>Review Department</u>						
Presiding Judge	1.00	1.00	1.00	13,606 - 14,899	178,776	178,776
Review Judge	1.20	1.20	1.20	13,606 - 14,899	214,552	214,552
Chief Court Counsel	1.00	1.00	1.00	9,432 - 13,802	153,884	161,100
Senior Attorney	3.00	3.00	3.00	7,717 - 11,625	335,048	349,520
Case Administrator	2.00	2.00	2.00	5,333 - 7,031	145,895	151,431
Review Department Total	8.20	8.20	8.20	1,028,040	1,028,155	1,055,379
State Bar Court Total	41.95	41.95	41.95	4,425,209	4,443,563	4,548,590

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

	Positions (FTE)			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
Member Records & Compliance						
<u>Member Service Center</u>						
Sr Executive, Communications	1.00	0.00	0.00	10,375 - 15,272		
Director Admin Member Svcs	1.00	0.00	0.00	7,795 - 11,303		
Mging Dir Mem Rec & Info Svcs	0.00	1.00	1.00	7,086 - 10,280	94,602	99,336
Sr Administrative Supervisor	2.00	2.00	2.00	5,861 - 7,717	154,882	162,002
Lead Data Analyst	1.00	1.00	1.00	5,333 - 7,031	61,525	67,061
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	58,636	61,548
Administrative Specialist Conf	1.00	1.00	1.00	4,566 - 6,174	52,675	57,882
Membership Services Rep	2.00	2.00	2.00	4,366 - 5,818	121,666	126,407
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	61,240	63,440
Member Services Associate	6.00	6.00	6.00	3,969 - 5,288	317,652	335,212
Administrative Assistant I	4.00	4.00	4.00	3,592 - 4,788	171,140	183,840
Member Service Center Total	20.00	19.00	19.00	1,110,004	1,094,018	1,156,728
Member Records & Compliance Total	20.00	19.00	19.00	1,110,004	1,094,018	1,156,728
Professional Competence						
<u>Outreach & Education</u>						
Director, Professnl Competence	1.00	1.00	1.00	8,574 - 12,612	144,780	150,520
Attorney	1.00	1.00	1.00	6,258 - 9,755	77,908	82,054
Sr Administrative Specialist	1.00	1.00	1.00	6,164 - 8,151	97,652	97,812
Paralegal	7.00	7.00	7.00	4,850 - 6,400	478,113	492,902
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	68,919	72,118
Administrative Secretary	1.00	1.00	1.00	3,969 - 5,288	53,828	56,471
Data Analyst II	1.00	1.00	1.00	3,242 - 4,321	50,529	51,721
Outreach & Education Total	13.00	13.00	13.00	973,516	971,729	1,003,598
Professional Competence Total	13.00	13.00	13.00	973,516	971,729	1,003,598
Education						
<u>Sections</u>						
Dir, Section Educ & Mtg Svcs	1.00	1.00	1.00	7,795 - 11,303	126,006	131,916
Manager, Section Ed & Mtg Svcs	1.00	1.00	1.00	7,086 - 10,280	92,816	97,466
Meeting & Event Administrator	2.00	2.00	2.00	5,861 - 7,717	169,066	173,337
Section Coordinator	6.00	6.00	6.00	5,861 - 7,717	486,905	505,648
Web Administrator	1.00	1.00	1.00	5,333 - 7,031	68,672	71,992
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	68,548	71,761
Administrative Assistant II	7.00	7.00	7.00	3,969 - 5,288	352,771	371,262
Data Analyst II	1.00	1.00	1.00	3,242 - 4,321	38,979	41,137
Sections Total	20.00	20.00	20.00		1,403,763	1,464,519
<u>Affinity & Insurance</u>						
Sr Administrative Assistant	1.80	1.80	1.80	4,850 - 6,400	122,084	127,864
Affinity & Insurance Total	1.80	1.80	1.80	98,682	122,084	127,864

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

	Positions (FTE)			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
Education Total	21.80	21.80	21.80	353,732	1,525,847	1,592,383
Legal Services						
<u>Program Development</u>						
Director Legal Services	1.00	1.00	1.00	7,795 - 11,303	118,616	124,558
Program Developer	3.00	3.00	3.00	5,861 - 7,717	268,790	275,174
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	65,964	69,168
Program Coordinator	1.00	1.00	1.00	4,366 - 5,818	55,302	58,188
Administrative Assistant II	2.00	2.00	2.00	3,969 - 5,288	117,894	121,224
Program Development Total	8.00	8.00	8.00	608,647	626,566	648,312
<u>Legal Services Funding</u>						
Mngng Dir, Lgl Svcs Trust Fnd	1.00	1.00	1.00	7,086 - 10,280	111,512	117,090
Senior Accountant/Auditor	2.00	2.00	2.00	5,861 - 7,717	153,241	160,462
Senior Grants Administrator	1.00	1.00	1.00	5,861 - 7,717	92,586	92,586
Sr Administrative Assistant	2.00	3.00	3.00	4,850 - 6,400	212,408	216,052
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	54,338	56,976
Compliance Auditor I	3.00	3.00	3.00	3,969 - 5,288	161,844	168,853
General Clerk II	1.00	1.00	1.00	2,948 - 3,932	34,025	37,261
Legal Services Funding Total	11.00	12.00	12.00	749,048	819,954	849,280
Legal Services Total	19.00	20.00	20.00	1,357,695	1,446,520	1,497,592
Diversity & Bar Relations						
<u>Elimination of Bias</u>						
Managing Dir Diversity Outreach	1.00	1.00	1.00	7,086 - 10,280	123,264	123,344
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	55,950	60,988
Elimination of Bias Total	2.00	2.00	2.00	181,428	179,214	184,332
<u>Bar Relations</u>						
Director, Bar Relations Outreach	1.00	1.00	1.00	7,086 - 10,280	108,434	113,856
Program Court Sys Analyst	1.00	1.00	1.00	4,850 - 6,400	69,042	72,242
Bar Relations Total	2.00	2.00	2.00	124,396	177,476	186,098
Diversity & Bar Relations Total	4.00	4.00	4.00	305,824	356,690	370,430
Lawyer Assistance Program						
<u>Lawyer Assistance Program</u>						
Director, Lawyers Assist Prgm	1.00	1.00	1.00	7,795 - 11,303	99,128	104,090
Special Asst To Director, Lap	1.00	0.00	0.00	7,086 - 10,280		
Case Specialist	1.00	1.00	1.00	5,861 - 7,717	81,062	84,834
Case Manager	8.00	4.00	4.00	5,333 - 7,031	284,708	298,508
Program Court Sys Analyst	1.00	1.00	1.00	4,850 - 6,400	59,980	62,892
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	49,349	51,992
Lawyer Assistance Program Total	13.00	8.00	8.00	620,653	574,227	602,316

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

	Positions (FTE)			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
Lawyer Assistance Program Total	13.00	8.00	8.00	620,653	574,227	602,316
Executive Director						
<u>Management, Oversight and Planning</u>						
Executive Director	1.00	0.00	0.00	19,750 - 19,750		
Executive Director/Ceo	0.00	1.00	1.00	19,750 - 19,750	236,990	236,990
Deputy Ceo/Chief Ops Officer	0.00	1.00	1.00	11,412 - 16,799	185,360	194,518
Deputy Executive Director	1.00	0.00	0.00	10,375 - 15,272		
Special Asst To Exec Director	1.00	0.00	0.00	9,432 - 13,802		
Assistant Secretary	0.00	1.00	1.00	7,795 - 11,303	120,376	126,396
Manager Planning And Admin	1.00	1.00	1.00	7,086 - 10,280	99,284	104,252
Sr Administrative Specialist	1.00	1.00	1.00	6,164 - 8,151	97,812	97,812
Admin Specialist II (Conf)	0.00	1.00	1.00	5,610 - 7,463	68,130	71,666
Administrative Specialist Conf	1.00	0.00	0.00	4,566 - 6,174		
Management, Oversight and Planning Total	6.00	6.00	6.00	664,296	807,952	831,634
<u>Board Support - Secretariat</u>						
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	76,804	76,804
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	61,837	63,290
Board Support - Secretariat Total	2.00	2.00	2.00	90,036	138,641	140,094
<u>Judicial Evaluations</u>						
Sr Administrative Specialist	1.00	1.00	1.00	6,164 - 8,151	86,094	90,074
Executive Secretary	1.00	1.00	1.00	4,566 - 6,174	74,074	74,074
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	54,236	56,875
Judicial Evaluations Total	3.00	3.00	3.00	197,446	214,404	221,023
<u>Governmental Affairs</u>						
Attorney III Conf	1.00	1.00	1.00	8,193 - 11,895	122,416	127,508
Sr Administrative Assistant	1.00	1.00	1.00	4,850 - 6,400	69,416	72,622
Governmental Affairs Total	2.00	2.00	2.00	185,068	191,832	200,130
Executive Director Total	13.00	13.00	13.00	1,136,846	1,352,829	1,392,881
Finance						
<u>Financial Planning and Analysis</u>						
Chief Financial Officer	1.00	1.00	1.00	11,412 - 16,799	185,360	194,518
Director, Budget & Perf. Anls	1.00	0.00	0.00	9,432 - 13,802		
Director, Finance	1.00	1.00	1.00	8,574 - 12,612	121,376	127,448
Senior Financial Analyst	1.00	1.00	1.00	6,164 - 8,151	74,270	78,168
Budget & Performance Analyst	1.00	0.00	0.00	5,610 - 7,463		
Administrative Specialist Conf	1.00	1.00	1.00	4,566 - 6,174	52,675	57,882
Financial Planning and Analysis Total	6.00	4.00	4.00	447,948	433,681	458,016

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

	Positions (FTE)			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
<u>Accounting</u>						
Finance Manager	1.00	0.00	0.00	7,086 - 10,280		
Senior Financial Analyst	1.00	1.00	1.00	6,164 - 8,151	76,670	80,552
Payroll Specialist	0.00	1.00	1.00	5,103 - 6,790	68,024	71,328
Auditor/Accountant	1.00	1.00	1.00	4,366 - 5,818	55,524	58,412
Payroll Technician II	1.00	0.00	0.00	4,150 - 5,613		
Payroll Technician I	1.00	1.00	1.00	3,754 - 5,081	60,970	60,970
Accounting Technician	1.55	1.55	1.55	3,592 - 4,788	71,726	75,414
Accounting Clerk	1.00	1.00	1.00	2,948 - 3,932	34,025	37,261
Accounting Total	7.55	6.55	6.55	446,726	366,939	383,937
<u>Procurement</u>						
Finance Manager	1.00	1.00	1.00	7,086 - 10,280	86,004	90,310
Purchasing Assistant	2.00	2.00	2.00	4,366 - 5,818	120,185	125,000
Procurement Total	3.00	3.00	3.00	205,205	206,189	215,310
<u>Member Billing</u>						
Finance Manager	1.00	1.00	1.00	7,086 - 10,280	91,336	95,894
Sr Administrative Supervisor	0.00	1.00	1.00	5,861 - 7,717	73,165	76,696
Asst Supervisor Memb Billing	1.00	1.00	1.00	4,850 - 6,400	55,950	60,988
Membership Billing Technician	4.00	4.00	4.00	3,969 - 5,288	213,344	222,475
Member Billing Total	6.00	7.00	7.00	364,378	433,795	456,053
Finance Total	22.55	20.55	20.55	1,464,257	1,440,604	1,513,316
Budget & Performance Analysis						
<u>Budget & Performance</u>						
Director, Budget & Perf. Anls	0.00	1.00	1.00	9,432 - 13,802	141,604	148,696
Director Is & Bus Solutions	0.00	1.00	1.00	7,795 - 11,303	120,376	126,396
Budget & Performance Analyst	0.00	1.00	1.00	5,610 - 7,463	68,130	71,666
Budget & Performance Total	0.00	3.00	3.00	186,998	330,110	346,758
Budget & Performance Analysis Total	0.00	3.00	3.00	186,998	330,110	346,758

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

	Positions (FTE)			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
General Counsel						
<u>General Counsel</u>						
Chief Legal Officer	0.00	1.00	1.00	11,412 - 16,799	185,360	194,518
General Counsel	1.00	0.00	0.00	10,375 - 15,272		
Chief Assist. General Counsel	2.00	2.00	2.00	9,432 - 13,802	317,160	324,738
Attorney III Conf	8.00	8.00	8.00	8,193 - 11,895	950,249	980,599
Director, Administration	1.00	1.00	1.00	7,086 - 10,280	109,486	114,954
Admin Specialist II (Conf)	1.00	1.00	1.00	5,610 - 7,463	83,994	87,744
Legal Assistant (Confidential)	1.00	0.56	0.56	5,103 - 6,790	38,227	40,056
Program/Court Sys Anlst (Conf)	1.00	1.00	1.00	5,103 - 6,790	65,544	68,768
Admin Assistant II (Conf)	1.00	1.00	1.00	4,150 - 5,613	51,259	54,184
Administrative Secretary (Conf)	1.00	1.00	1.00	4,150 - 5,613	51,146	54,072
Legal Secretary (Confidential)	2.00	2.00	2.00	4,150 - 5,613	104,997	112,675
Coordinator Rec Conf	0.00	1.00	1.00	3,754 - 5,081	45,650	48,328
Data Entry / File Clerk	1.00	0.00	0.00	3,083 - 4,172		
General Counsel Total	20.00	19.56	19.56	2,053,584	2,003,072	2,080,636
<u>Law Library & Archives</u>						
Senior Librarian/Archivist	1.00	1.00	1.00	5,333 - 7,031	70,182	73,568
Administrative Assistant II	1.00	1.00	1.00	3,969 - 5,288	54,542	57,178
Law Library & Archives Total	2.00	2.00	2.00	121,706	124,724	130,746
General Counsel Total	22.00	21.56	21.56	2,175,290	2,127,796	2,211,382
Human Resources						
<u>Compensation Administration</u>						
Human Resources Representative	2.00	1.00	1.00	5,103 - 6,790	79,036	81,484
Compensation Administration Total	2.00	1.00	1.00	132,457	79,036	81,484
<u>Recruiting and Development</u>						
Human Resources Representative	1.00	1.00	1.00	5,103 - 6,790	81,484	81,484
Human Resources Administrator	1.00	0.00	0.00	4,566 - 6,174		
Sr Human Resources Assistant	0.00	1.00	1.00	4,150 - 5,613	51,259	54,184
Human Resources Assistant	1.00	1.00	1.00	3,754 - 5,081	43,300	47,607
Recruiting and Development Total	3.00	3.00	3.00	220,777	176,043	183,275
<u>Employee Relations</u>						
Director Hr & Labor Relations	1.00	1.00	1.00	7,795 - 11,303	120,376	126,396
Mgr Hr & Emp/Labor Relations	1.00	1.00	1.00	7,086 - 10,280	100,175	109,182
Program/Court Sys Anlst (Conf)	0.00	1.00	1.00	5,103 - 6,790	58,875	64,305
Employee Relations Total	2.00	3.00	3.00	219,177	279,426	299,883

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

	Positions (FTE)			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
<u>Records and Information Systems</u>						
Sr Human Resources Analyst	1.00	1.00	1.00	6,164 - 8,151	74,870	78,764
Program/Court Sys Anlst (Conf)	1.00	0.00	0.00	5,103 - 6,790		
Human Resources Administrator	1.00	2.00	2.00	4,566 - 6,174	112,665	121,080
Sr Human Resources Assistant	2.00	2.00	2.00	4,150 - 5,613	121,337	126,917
Human Resources Assistant	1.00	1.00	1.00	3,754 - 5,081	45,650	48,328
Records and Information Systems Total	6.00	6.00	6.00	366,310	354,522	375,089
Human Resources Total	13.00	13.00	13.00	938,721	889,027	939,731
Information Technology						
<u>Base Services</u>						
Senior Director It	0.00	1.00	1.00	10,375 - 15,272	151,722	159,300
Sr Executive Info Technology	1.00	0.00	0.00	10,375 - 15,272		
Director Of Applications	0.00	1.00	1.00	7,795 - 11,303	110,175	120,082
Director, Information Systems	1.00	0.00	0.00	7,795 - 11,303	0	0
Director, Project Management	0.00	1.00	1.00	7,795 - 11,303	110,175	120,082
Director, Technology Systems	1.00	1.00	1.00	7,795 - 11,303	116,324	122,136
Manager Telecommunications	1.00	1.00	1.00	7,086 - 10,280	102,336	107,460
Manager, Info Tech/Sys Projects	1.00	1.00	1.00	7,086 - 10,280	111,512	117,090
Manager, Systems Development	1.00	0.00	0.00	7,086 - 10,280	0	0
Computer Analyst/Programmer	10.00	10.00	10.00	6,563 - 8,565	878,470	919,782
Webmaster	2.00	2.00	2.00	6,563 - 8,565	185,114	191,948
Technical Support Administrator	8.00	8.00	8.00	5,861 - 7,717	626,128	658,886
Technology Svce Analyst Techn	4.00	4.00	4.00	5,333 - 7,031	284,771	300,633
Program/Court Sys Anlst (Conf)	0.00	1.00	1.00	5,103 - 6,790	61,968	65,172
Administrative Specialist Conf	1.00	0.00	0.00	4,566 - 6,174	0	0
Administrative Assistant II	1.00	0.00	0.00	3,969 - 5,288		
Base Services Total	32.00	31.00	31.00	2,716,358	2,738,695	2,882,571
Information Technology Total	32.00	31.00	31.00	2,716,358	2,738,695	2,882,571
Communications						
<u>Media Relations</u>						
Dir, Media & Info Svcs	1.00	0.00	0.00	7,795 - 11,303		
Director Communications	0.00	1.00	1.00	7,795 - 11,303	106,200	111,512
Web Editor	1.00	1.00	1.00	7,086 - 10,280	73,705	77,248
Public Information Officer	2.00	2.00	2.00	5,333 - 7,031	123,050	134,122
General Clerk II	1.00	0.00	0.00	2,948 - 3,932		
Media Relations Total	5.00	4.00	4.00	375,698	302,955	322,882
<u>California Bar Journal</u>						
Editor & Gm, Ca Bar Journal	1.00	0.00	0.00	7,086 - 10,280		
Managing Dir Comm & Info Svcs	0.00	1.00	1.00	7,086 - 10,280	100,175	109,182
Program Court Sys Analyst	1.00	1.00	1.00	4,850 - 6,400	67,308	70,531
California Bar Journal Total	2.00	2.00	2.00	218,957	167,483	179,713

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

	Positions (FTE)			Expenditures		
	2012	2013	2014	2012 Range	2013 Budget	2014 Budget
Communications Total	7.00	6.00	6.00	594,655	470,438	502,595
General Services						
<u>Administrative Services</u>						
Director, Operations	1.00	1.00	1.00	9,432 - 13,802	141,604	148,696
Deputy Director, Operations	1.00	1.00	1.00	7,086 - 10,280	86,004	90,310
Admin Specialist II (Conf)	1.00	1.00	1.00	5,610 - 7,463	69,626	73,166
Supervisor, Off. & Recep. Svcs	2.00	2.00	2.00	5,333 - 7,031	162,018	165,524
Supervisor, Offset Printing	1.00	0.00	0.00	4,850 - 6,400		
Administrative Assistant II	2.00	2.00	2.00	3,969 - 5,288	109,240	113,597
Printing Technician II	2.00	2.00	2.00	3,969 - 5,288	126,880	126,880
Travel & Info Svcs Coordinator	2.00	2.00	2.00	3,592 - 4,788	102,592	104,984
Maintenance Technician	1.00	1.00	1.00	3,242 - 4,321	44,606	46,772
Printing Technician I	2.00	2.00	2.00	3,242 - 4,321	94,807	96,942
Sr Office Services Coordinator	1.00	1.00	1.00	3,242 - 4,321	51,844	51,844
Sr Office Services Clerk	5.00	5.00	5.00	2,948 - 3,932	193,305	201,413
Receptionist/Reservation Coord	3.00	3.00	3.00	2,666 - 3,554	108,257	111,888
Administrative Services Total	24.00	23.00	23.00	1,341,863	1,290,783	1,332,016
General Services Total	24.00	23.00	23.00	1,341,863	1,290,783	1,332,016

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