2014 ANNUAL REPORT

STATE OF THE JUDICIARY IN SAN DIEGO COUNTY

BE WHERE YOU BELONG™

SAN DIEGO COUNTY BAR ASSOCIATION®
In 2014, the San Diego County Bar Association (SDCBA) continued to serve as the “hub” of the legal community, and the convener for lawyers and legal professionals in San Diego. In its second year at its new headquarters, the Bar Center at 401, the SDCBA continued to raise the proverbial bar on how members interact with their professional Association. The SDCBA served as an “office away from your office” for SDCBA members who used the shared workspace and meeting rooms to work between court appearances, meet with clients and colleagues, or just grab a cup of coffee and read the papers. Members took advantage of all of the SDCBA’s service offerings at the Bar Center at 401, with a full house nearly every day in the member lounge and consistent bookings for conference rooms.

Through its webcasting capabilities, the SDCBA was able to offer live Continuing Legal Education (CLE) programs to anyone, any place in the world with an internet connection via livestream. New technology in the Bar Center at 401 allowed members to participate in over 80 livestreamed programs – from the comfort of their own office, home, or anyplace they happened to be. Additionally, members participated in educational roundtables and other networking programs every month at the Bar Center at 401.

In 2014, the SDCBA also modified its smart phone and created a tablet app – available both in the iTunes and GooglePlay stores and accessible for free to all tablet users. Through the app, users are able to register for programs, read our weekly newsletter This Week at the Bar, and access our
attorney directory (which includes information for all attorneys in the county regardless of SDCBA membership status) on the go. As the first Bar Association in the country to develop an Association-wide smartphone and table app, we continue to be the model for associations that want to create an app nationwide.

In conjunction with the California Court of Appeal, Fourth Appellate District, Division One; the Legal Aid Society of San Diego, Inc.; and the San Diego Law Library, we launched a series of Civil Appellate Self-Help workshops, designed to help appellants work their way through the appeal process. California Supreme Court Chief Justice Tani Cantil-Sakauye was the guest of honor at a special reception at the Bar Center at 401 to celebrate the launch of the new Civil Appellate Self-Help Workshop series.

The work of the SDCBA’s Court Funding Action Committee, known as CFAC, continued in 2014, with a committee comprised of a diverse and distinguished panel of attorneys meeting with elected officials locally and across the state to discuss the state of our local courts, which have faced historic and devastating budget cuts since 2007. The Committee published a report on the state of the courts for 2014, an update to the comprehensive report published by the Association in 2013. The update provided a snapshot of how improper funding was affecting San Diego’s justice system and warned of the perils if reinvestment was not an immediate priority. Over the past year CFAC’s efforts also included meeting and joining forces with other community business leaders, including the San Diego Chamber of Commerce, to discuss the impacts and future impacts of an underfunded court system on our community.

THANK YOU

Today, the SDCBA is a thriving organization – recognized and awarded nationally for its innovation, forward-thinking leadership, and dynamic and engaged membership. Thank you to all of you for being a part of the SDCBA and your part in making it one of the leading business associations in the county, state and country. Your involvement allowed the SDCBA to continue to fulfill its mission of serving as San Diego County’s representative of the legal profession, serving the public and the profession by enhancing the legal system and promoting justice, professional excellence and respect for the law. The SDCBA’s 115th year was a great success, and we thank each of you for guiding, engaging, and participating in our programs and initiatives this year.

Our annual report follows. On page 7 of the report, you will find charts detailing the Association’s fund breakdown for 2014. An independent auditor has audited the SDCBA’s finances for the year, and the full Auditor’s report is available upon request at the SDCBA’s offices.
MEMBERSHIP:

The SDCBA’s membership was as strong as ever in 2014, comprised of over 10,000 lawyers, legal professionals, and law students. The SDCBA provided members with more than 130 low-cost seminars, offering hours of General, Elimination of Bias, Substance Abuse and Ethics Continuing Legal Education (CLE) credits. Over 80 hours of programming was webcast live over the internet, while the Association also continued to offer a full catalog of self-study and participatory programming.

The SDCBA also worked to expand our social media presence in 2014 in order to better connect with members and the community via social media and speak to members “where they are.” Members continued to use the SDCBA as a way to connect with one another, sending nearly 6,000 messages to one another via the SDCBA’s 26 unique section e-community listserves.

BAR CENTER AT 401:

In 2014, we continued to serve as a convener for the legal community at the Bar Center at 401. Non-traditional programs included:

- Quarterly PR Power Hour – Expert advice from PR and Marketing Professionals
- TED Talks and Brews – Discussion with SDCBA Executive Director
- Bar Book Club
- Weekly Weight Watchers meetings
- Social Media workshops
- Wellness Seminars
- Happy Hours
- Bar Center Tours

LEADERSHIP & GOVERNANCE:

The leadership Outreach Committee recruited a diverse group of candidates to run for the 2014 Board of Directors. Roger Haerr, Lilys McCoy, Dino Paraskevopoulos, and Rick Layon were elected to serve on the Board of Directors, with Nicole Heeder serving as the representative for the Forum for Emerging Lawyers. Kristin Rizzo was elected Treasurer, and Loren Freestone was elected Secretary.

With over 70 Sections, Committees and Divisions, the SDCBA continued to rely on leadership from chairs to further the Association’s initiatives and mission. The section and Committee governance...
was restructured in 2014 for 2015 to ensure consistency and provide each group with an executive committee.

In 2014, the SDCBA transitioned its approach to how new attorneys are supported by the Association, and more fully integrated into their professional network. After considerable research and analysis, it became clear that attorneys in their first few years of practice were missing the opportunity to network with more seasoned attorneys in different areas of practice given the scope of programs and activities offered and produced by the New Lawyer Division (“NLD”). Additionally, attorneys with more than 5 years in practice had a bit of experience, and did not want to be considered or labeled “new.” To address these issues and provide a structure that balanced the differing needs of lawyers in various stages of early practice, the SDCBA eliminated the NLD in order to offer new attorneys more options. Previously anyone with less than 7 full years of practice was automatically placed in the NLD; the new structure now allows new attorneys in their first full 4 years of practice to have the option of joining the Forum for Emerging Lawyers, known as “the Forum,” a soft landing spot for new attorneys where they can connect with each other and forge strong relationships as they develop their practice. A new Board-level committee was also created to ensure that sections and committees produced programming and CLEs with newer lawyers in mind. The e-publication For The Record shifted its focus to become a more of a filter for highlighted SDCBA programs or services – encouraging new lawyers to reach into the comprehensive offerings of the SDCBA to better meet their stated needs.

**SDCBA SIGNATURE EVENTS:**

The SDCBA produced the following signature annual events in 2014:

• Annual Judicial Reception
• 5th Annual Bench-Bar Luncheon
• 3rd Annual Bench-Bar-Media Event
• Annual SDCBA Golf Tournament
• Dialogue on Diversity
• Annual Law Week Luncheon and Celebration of Community Service
• Law Student Welcome Reception
• Stepping Up to the Bar
COMMUNITY SERVICE INITIATIVES:

In 2014, Members served nearly 2,500 members of the greater San Diego community at-large through a variety of projects and initiatives, including Serving Lunch to Seniors, Big Brothers Big Sisters, Juvenile Court Book Club, Street Law, Teen Court, Family Justice Center Alliance, Crawford Law Academy, and a Beach Clean Up.

Attorneys also volunteered to assist military servicemembers in securing a stay of proceedings through the Servicemembers Civil Relief Act Program, with attorneys volunteering and taking place in the program’s training and providing limited pro bono assistance for our active military personnel in civil litigation and family law matters. In total, SDCBA members were able to assist over 130 military members.

Civics education continued to be a focus for the SDCBA with volunteers participating in the Porter Peace Patrol program, Clairemont High School’s Academy of Business & Technology program, Conflict Resolution program and the Mock Trial Video program, and dozens of students participating in our annual poster and essay contest. In addition, SDCBA volunteers went into area elementary schools to facilitate an important anti-bullying discussion.

In addition, 50 state and federal judges/commissioners, nearly 200 attorney scorers, 60 courtroom monitors (law students, paralegals, Justice Corps) volunteered for the annual High School Mock Trial Competition. Teams from 25 high schools competed in the 2014 competition.

LEGAL SERVICE PROGRAMS:

The SDCBA’s Lawyer Referral and Information Service (LRIS) service was able to assist more San Diego residents find qualified lawyers than ever before, as for the first time ever, they began a live online chat service. Live chat is expected to garner over 2000 additional referrals per year.

LRIS received nearly 30,000 phone calls and email requests resulting in over 32,275 case referrals. Twenty percent of all calls were referred to public agencies. The SDCBA also maintained its fee dispute program.

The Attorney-Client Fee Dispute and Client Relations Programs continued to thrive.
## FINANCIAL REPORT 2014

### From Consolidated Statement of Activities¹:

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<td>Revenue</td>
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<td>Program services, support services and rental expenses</td>
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### From Consolidated Statement of Financial Position³:

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<td>Assets</td>
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<td>Cash, cash equivalents and investments</td>
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<td>Property and equipment</td>
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<td>Total Assets</td>
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<td>Total liabilities &amp; net assets</td>
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Of Note:
The Association established two single member LLCs in 2014 - 1241 State Street LLC and Union and B LLC - with the SDCBA as the single member of each entity. These LLCs were created to house the Association’s real property assets.

¹ Includes 2 LLCs
² Expenses include depreciation, rent adjustments and activities funded by Association investments to support additional member services and benefits.
³ Includes 2 LLCs