# First Year at a Glance

## Bar Center at 401

### Total Visitors
- **7000** total visitors to the Bar Center at 401 since January 2013
- **760** walk-ins + reservations for meetings and workspace

### Signature Events
- Judicial Reception
- Law Student Welcome Reception
- Dialogue on Diversity
- Bench Bar Media Event
- Stepping Up to the Bar

### Online Member Directory
- **3,812** unique visitors since April 17, 2013

### Volunteer Opportunities
- **2371** members of the community served through SDCBA volunteer projects

### Serving Lunch to Seniors
- Crawford Law Academy
- High School Mock Trial Competition
- Porter Readers
- Porter Peace Patrol
- Adopt a Family
- Clairemont High Motivational Series
- Peace Patrol/Conflict Resolutions

### Mentoring Program
- **280** participants

### Signature Events
- Law Week Luncheon
- Bench-Bar Luncheon
- Golf Tournament

### Online Stats
- **1,295,087** unique visitors since January 1, 2013
- **3,144** unique visitors per day since January 1, 2013
- **3,812** unique visitors since April 17, 2013

### SDCBA Web App
- **2,123** unique visitors since launch August 2013

### Crisis Textline
- **658 Facebook Likes**
- **679 Twitter Followers**
- **432 LinkedIn Group Members**

### ON-SITE EVENTS
- 4 Weight Watchers Meetings per month
- 4 Wellness Workshops
- 4 Friday Socials
- 3 TED Talks & Brews
- 2 Cabi Fashion Events
- 3 PR Power Hours
- 2 Bar Book Clubs
- 3 Lunch & Learns

### OFF-SITE EVENTS
- Judicial Reception
- Law Student Welcome Reception
- Dialogue on Diversity
- Bench Bar Media Event
- Stepping Up to the Bar

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**SDCBA Website:**
- **1,295,087** unique visitors since January 1, 2013
- **3,144** unique visitors per day since January 1, 2013

**SDCBA Web App:**
- **2,123** unique visitors since launch August 2013

**This Week at the Bar:**
- **13,868** opens per month

**Webcasts:**
- **78** in 2013

**Listserves:**
- **5843** total messages sent

**Social Media:**
- **679** Twitter Followers
- **658** Facebook Likes
- **432** LinkedIn Group Members
2013 HIGHLIGHTS:

The San Diego County Bar Association (SDCBA) became the “new bar” in 2013, reinventing how members interact with the Association and raising the proverbial bar on how services are delivered to members. In January of 2013, we opened the doors of our headquarters and introduced the new “hub” of San Diego’s legal community, the Bar Center at 401. Ever since, the Bar Center at 401 has served as a national model for Bar Associations and larger national associations for how to serve the changing needs of an association’s membership. With over 60% of the SDCBA’s membership comprised of small and solo firm practitioners and a slowly recovering economy, the Bar Center at 401 was designed to give members a workspace they could use as their own outside of their office – and in some cases, a space members use as their only office. The “office away from your office” concept led the planning and design of the Bar Center at 401, which includes a shared member workspace, a member lounge, and small and large conference rooms for meetings with colleagues or clients, in addition to a Conference Center for education and networking events. New service offerings introduced in 2013 at the Bar Center at 401 include free mail service, conference room reservations, and an easily accessible member lounge.

To introduce our members to the new Bar Center at 401, we launched and continue to host a series of business, lifestyle, and general interest programs including:

- **Quarterly PR Power Hour**
  Expert advice from PR and marketing professionals

- **TED Talks and Brews**
  Discussion with SDCBA Executive Director Ellen Miller-Sharp

- **Bar Book Club**

- **Weekly Weight Watchers meetings**

- **Wellness Workshops**
  Leading stress, diet, and fitness experts led informative sessions for members

- **Pre-Padres Happy Hours**

- **Breakfast with the Board**

- **Bar Center Tours**

- **Quarterly fashion and style events**

In 2013 there were over 7,000 unique visitors to the Bar Center at 401. A great number of members have become regular bar center users.

For the first time ever, 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 78 programs – from the comfort of their own office, home, or any place they happened to be.

Another technological advancement in 2013 was the introduction of the SDCBA smartphone application (App). Available for both Android and iPhone models, the SDCBA App brought the power of the SDCBA to our members pockets and purses – allowing for use of our attorney directory (which
includes information for all attorneys in the county regardless of SDCBA membership status) on the go. We were the first Bar Association in the country to develop an Association-wide app, and have become the model for associations that want to create an app nationwide.

Of great significance in 2013 is the continued work of the SDCBA’s Court Funding Action Committee, known as CFAC. CFAC, a committee comprised of a diverse and distinguished panel of attorneys, created an advocacy movement; meeting with elected officials locally and across the state to discuss the state of our local courts, which have endured nearly $653 million in budget cuts since 2007. The Committee, under the leadership of Jon R. Williams and Richard Huver, published a first of its kind report called the “State of the Judiciary” in San Diego County in May of 2013. This report provided a snapshot of improper funding was affecting San Diego's justice system, illustrated the real world impacts on citizens and businesses as a result of an underfunded court system, and warned of the perils if reinvestment was not an immediate priority. In addition to educating the public and the community about the issues related to underfunded courts, CFAC members met with each of our local legislatures to advocate for more funding for our courts. It too became a model for other bar associations in California to replicate.

The SDCBA was awarded a highly coveted “Gold Circle” award from the American Society of Association Executives for the Association’s launch of the Bar Center at 401 in 2013, an incredible natural recognition.

THANK YOU

Thank you to all of you for being a part of the SDCBA and your part in making it one of the leading legal organizations in the county, state and country. Your involvement contributed to the greater good of San Diego's legal community, and 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 in 2013. The SDCBA’s 114th year will be considered one of the Association’s strongest ever. It was a time of great growth and incredible movement. We thank each of you for guiding, engaging, and participating in our programs and initiatives this year, and for all you continue to do to ensure our success.

Our annual report follows, with additional detail on our year of successes. On page 11 of the report, you will find charts detailing the Association's fund breakdown for 2013. 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 offices.
MEMBERSHIP:

In 2013, the SDCBA's membership was as strong as ever, comprised of over 10,000 lawyers, legal professionals, and law students. The SDCBA provided members with more than 128 low-cost seminars, offering hours of General, Elimination of Bias, Substance Abuse and Ethics Continuing Legal Education (CLE) credits. 78 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 2013 in order to better connect with members and the community via social media and speak to members “where they are” ending 2012 with nearly triple the amount of social media friends and followers than in previous years. In addition, the SDCBA introduced a new “Coming Attractions” service monthly to let members know about the new business, general interest and lifestyle programming offered by the Association throughout the year.

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 e-community listserves.

“In San Diego just when I was starting to wonder if bar membership was still important, our local bar changed buildings and moved into a space where they have work space available for members. For a young solo who gets stuck downtown where they have no office, having a place you can go to sit down and work is a god send.”

— Paul McGuire
LEADERSHIP:

The Leadership Outreach Committee recruited a diverse group of candidates to run for the 2013 Board of Directors. Eleven candidates ran for the Board of Directors, Lizette Herrara-Castellanos, Andy Cook, Loren Freestone, and Kristin Rizzo were elected, with Dan Bacal elected to serve as the East County representative. Jim Crosby was elected Treasurer, and Danielle Hickman was elected to serve as Secretary. Richard Huver was elected to serve as the SDCBA’s President in 2015.

The California Conference of Bar Associations, known previously as the Conference of Delegates, met in San José in October, with a delegation of ten attorneys representing San Diego and submitting over 12 resolutions.

Section, Committee, Division leadership:

The SDCBA’s over 70 sections and committees (as well as the New Lawyer Division) were led by an engaged and dynamic group of Chairs in 2014. Our sections and committees continued to thrive as they planned networking and education programs and events, discussed various aspects of the law via our listserves, and participated in community service projects. Engagement in sections, committees, and divisions remains vital to the SDCBA’s success in serving its mission.

SDCBA SIGNATURE EVENTS:

The SDCBA produced the following signature annual events in 2013:

- Annual SDCBA Golf Tournament
- Dialogue on Diversity
- Annual Law Week Luncheon and Celebration of Community Service
- Law Student Welcome Reception
- Bar Night at the Opera
- Stepping Up to the Bar

“I’m writing to express appreciation for the beautiful bar center space and welcoming staff. As a new sole practitioner, I have gained instant credibility with clients by using the mail service and meeting rooms. Many thanks to you all.”

– Felicia Yearwood
COMMUNITY SERVICE INITIATIVES:

In 2013, Members served 2,371 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 the Bench-Bar 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 participating 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.

Through the Children at Risk Committee, volunteers also participated in the Porter Peace Patrol program, Clairemont High School’s Academy of Business & Technology program, Conflict Resolution program and the Mock Trial Video program.

Additionally, 50 state and federal judges/commissioners, 179 attorney scorers, 60 courtroom monitors (law students, paralegals, Justice Corps) volunteered for the annual High School Mock Trial Competition. Teams from 26 high schools competed in the 2013 Competition, with the largest number of trials involved in the program to date.
PUBLIC SERVICE PROGRAMS:

The SDCBA’s Lawyer Referral and Information Service (LRIS) service was able to assist more San Diego residents to 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 60,000 phone calls and email requests resulting in over 26,000 case referrals. Twenty percent of all calls were referred to public agencies. The SDCBA also maintained its fee dispute program. In 2013, LRIS also launched a new referral system, allowing attorney panelists to receive and report on their referrals online.

The Attorney-Client Fee Dispute and Client Relations Programs continued to thrive.
INVESTMENTS AND OPPORTUNITIES:

The SDCBA, as part of its investment strategy, has always included real estate as part of its portfolio diversification. With the desire to serve as the true "hub" of San Diego's legal community, the SDCBA was fortunate enough to have the opportunity to purchase property at 1241 State Street, directly adjacent to the Bar Center at 401 Conference Center and a parking lot which we currently own. The SDCBA is carefully reviewing options for the new space, from renting to single or multiple tenants, to renovating and utilizing the space and will make the decision that logistically and economically best serves the Association. This opportunity allows the SDCBA to be progressive and forward-thinking, and work in the best interests of the future generations of SDCBA members.

For management and oversight of the new property, the SDCBA established a Legal Liability Corporation, known as 1241 State Street, LLC. The SDCBA also established an LLC for the parking lot at the corner of Union and B streets, known as Union and B, LLC.

The SDCBA’s investment portfolio remains very strong, and the SDCBA ended the year financially sound with very strong reserves.

“...It has literally been the best of both worlds. Having worked in large and small firms, I made a decision in early 2013 to open my own firm for various different reasons. The member lounge gives me a place to ‘suit up and be counted’ every day. It gives me the structure I need to keep myself involved in San Diego’s legal community. It gives me a place to go to on a daily basis, with an incredibly warm, helpful and supportive staff. Everyone has welcomed me into the Bar Association space, and I am grateful every day to have access to this space. “

— Robert Gallagher
**FINANCIAL REPORT 2013**

**Income Statement**

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<th>Revenues</th>
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<td>Dues Revenue</td>
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<tr>
<td>Non Dues Revenue</td>
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**Total** $3,257,648

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<th>Expenses</th>
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<tr>
<td>*Programs &amp; Services</td>
<td>$2,098,476</td>
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<tr>
<td>Support Services, Events &amp; Activities</td>
<td>$1,057,838</td>
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**Total** $3,156,314

*Adjusted to subtract deferred rent

**Balance Sheet**

**Assets**

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<tr>
<td>Cash, Cash Equivalents &amp; Investments</td>
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<td>Prepaid Expenses &amp; Receivables</td>
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<td>Property &amp; Equipment</td>
<td>$607,018</td>
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**Total Assets** $8,566,646

**Liabilities & Net Assets**

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<tr>
<td>Deferred Revenues</td>
<td>$779,765</td>
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<td>Accrued Expenses &amp; Other Liabilities</td>
<td>$686,207</td>
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**Total Liabilities** $1,465,972

**Net Assets**

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<td>Temporarily Restricted</td>
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**Total Net Assets** $7,100,674

**Total Liabilities & Net Assets** $8,566,646

The SDCBA ended 2013 in a solid financial position, evidence of the effective management of its expenses and investments.