



BY THE NUMBERS 2021-2022

The State Bar of Texas collects the following information pursuant to section 81.0215 of the Texas Government Code chapter 81 (the State Bar Act), which requires the State Bar to adopt a strategic plan every two years that includes measureable goals and a system of performance measures. The State Bar Act further requires the bar to report to the Texas Supreme Court the outcomes of these strategic plan performance measures.

As the basis of its current strategic plan, the State Bar identified six broad strategic categories guiding its goals and performance measures: 1) Service to the Public; 2) Service to Members; 3) Protection of the Public; 4) Access to Justice; 5) Sound Administration and Resources; and 6) Financial Management. The following data reflect results and outcomes of State Bar core services for the 2021-2022 bar year.

SERVICE TO THE PUBLIC

*Distribution of information regarding legal issues of interest to the public: **15,372** pamphlets*

*Distribution of multimedia information regarding legal issues and topics of particular relevance to the public: **31** news releases, media advisories, and op-eds*

*Visits to page on State Bar website relating to disaster recovery resources for the public: **4,457** page views*

*Visits to page on State Bar website relating to disaster recovery resources for attorneys: **3,151** page views*

*Visits to pages on State Bar-related websites containing legal information on issues of importance to the public: **25,393** pamphlets page hits, **6,391** downloads of pamphlets, **19,270** downloads of articles, **1,207** media page hits, **20,647,744** total hits to the SBOT website, and **15,473,702** unique page views*

*Traffic to Texas Bar Blog on legal issues of importance to the public: **144,366** page views*

*Traffic to State Bar social media sites on legal issues of importance to the public: **89,980** engagements, **15,032** clicks, and **2,651,725** impressions*

*Courses provided to teachers by the Law-Related Education Department: **87** Law-Focused Education teacher training sessions and **1,655** participants trained by LRE*

*Degree of satisfaction: **99%** would recommend LRE training to other teachers*

*Students taught by LRE-trained teachers: **166,831** students impacted by teacher training sessions*

*Traffic to LRE/LFEI website and related sites and social media: **334,348** visits*

*Traffic to the After the Bar Exam online resource: **4,968** watched segments; **1,338** downloaded segments*

*Traffic to the TYLA Ten Minute Mentor online resource: **25,196** watched segments; **12,983** downloaded segments*

*Traffic to the TYLA Ten Minute Mentor Goes to Law School online resource: **4,198** watched segments; **1,297** downloaded segments*

*Number of TYLA presentations given at law schools: **7** law school orientation presentations; **1** virtual law school orientation presentation*

*Number of TYLA presentations by attorneys and judges in public schools: **18** presentations reaching **900** kids; presentations in schools have still been limited due to COVID-19*

*Distribution of TYLA resources and information regarding legal issues of interest to the public through community service and education: **600** project distributions*

Number of those helped by Texas Lawyers for Texas Veterans:
Since 2010, over **11,000** volunteer attorneys, paralegals, and law students have assisted more than **32,000** veterans through local bar associations and other attorney volunteer organizations

Number of people who received a referral through the Lawyer Referral and Information Service: **58,219** calls answered and **64,679** referrals made

SERVICE TO MEMBERS

Attendance for TexasBarCLE webcasts:
Offerings—**139**, Attendance—**9,832**

Attendance for TexasBarCLE online CLE:
Offerings—**866**, Attendance—**123,465**

Attendance for TexasBarCLE video courses:
Offerings—**104**, Attendance—**7,108**

Attendance for TexasBarCLE live courses:
Offerings—**91**, Attendance—**13,120**

Number of registrants for TexasBarCLE free 1/2-hour online classes: **26,220**

Number of low-cost offerings: **41**

Number of publications offered by TexasBarCLE:
299 course book titles for sale

Number of CLE scholarships given to members: **384**

Sales of books by Texas Bar Books: **21,754**

Number of CLE ethics publications offered by Texas Bar Books: **21**
Texas Bar Books publications that include ethics topics

Diversity of SBOT membership: **62%** male and **38%** female; **77%** White, **6%** Hispanic/Latino, **6%** Black/African American, **10%** Asian/Pacific Islander, less than **1%** American Indian/Alaska Native, and **2%** all others (numbers may not sum to 100% due to rounding)

Diversity of SBOT section membership: **61%** male and **39%** female; **76%** White, **11%** Hispanic/Latino, **7%** Black/African American, **3%** Asian/Pacific Islander, less than **1%** American Indian/Alaska Native, and **2%** all others (numbers may not sum to 100% due to rounding)

Diversity of SBOT committee membership: **55%** male and **44%** female; **68%** White, **10%** Hispanic/Latino, **10%** Black/African American, **4%** Asian/Pacific Islander, less than **1%** American Indian/Alaska Native, and **3%** all others (numbers may not sum to 100% due to rounding)

The State Bar remains committed to offering its members unique access to resources, goods, and services to help them in their professional as well as personal lives. In the 2021-2022 bar year, a total of **61** benefits were offered through the State Bar Member Benefits Program. Goods and services offered include lawyer-specific programs, financial services, travel discounts, car rentals, office supplies, health insurance through the Texas Bar Private Insurance Exchange, and professional liability insurance through TLIE.

Statistics related to the aging lawyer population: The median age of Texas attorneys increased from **48** to **49** between 2011 and 2021; during that same period, attorneys 65 and older went from making up **11%** of the attorney population to **19%**

Visits to SBOT Member Benefits homepage: **52,764** page views

Visits to Texas Bar Private Insurance Exchange website:
89,844 page views

Number of members enrolled in one or more insurance products through the Texas Bar Private Insurance Exchange: **21,744**

Number of members enrolled in major medical insurance: **15,774**

Number of attorneys, law firms, and legal departments attending and participating in the Texas Minority Attorney Program: **108**

Number of attorneys, law firms, and legal departments attending and participating in the Texas Minority Counsel Program:
The 2021 program was canceled due to COVID-19

Attendee satisfaction with the Texas Minority Counsel Program:
The 2021 program was canceled due to COVID-19

Attendee satisfaction with the Texas Minority Attorney Program:
Evaluation form results show an overall event rating of **3.9** out of **4.0**

The Texas Lawyers' Assistance Program handled a total of **917** consultations—**67%** were related to mental health, **28%** were related to substance use issues, and **5%** were related to cognitive issues. TLAP's website—tlaphelps.org—garnered **13,425** users and **21,124** page views. TLAP made **142** educational outreach presentations, including at law schools.

Number of distributed publications: **5** articles written by TLAP

Number of views of TLAP videos via the website: **1,335** page views of TLAP video page that houses *Just Ask: How We Must Stop Minding Our Own Business in the Legal World (Depression and Suicide Prevention Essentials)*; *Courage, Hope, Help—TLAP Is There*; the four-minute excerpt of *Courage, Hope, Help—TLAP Is There*; *Time Management and Practicing Law*; *Juggling the Roles of Caretaker and Lawyer*; *Challenges of Being a First Generation Lawyer*; and *Why Boundaries Are Important for Lawyer Well-being*

Number of registrants for TLAP/TexasBarCLE's online CLE *Just Ask: How We Must Stop Minding Our Own Business in the Legal World (Depression and Suicide Prevention Essentials)*: **13,533**

Number of attorneys and volunteers/mentors participating in the Texas Opportunity & Justice Incubator, or TOJI: **113** volunteers/mentors, including **79** lawyers

Number of TOJI-created resources shared with the State Bar membership at large: TOJI made **7** public presentations with supplemental materials

Number of hours of training to TOJI participants: **161**

Number of users and page views to TOJI website: **2,959** users, **7,001** page views, and **301** program inquiries

Number of counties served by participants: With the 2020 expansion to a statewide virtual program, TOJI has served clients in **125** of Texas' **254** counties

Number of page views to the Law Practice Management Program materials on texasbarpractice.com: **36,355**

Number of lawyers who attended live, video, webcast, or online CLE courses on law practice management topics: **18,406**

Number of phone calls and emails the Law Practice Management Program responded to: **87** phone calls and **75** emails (not including calls to the Cessations Docket)

Number who voted in the 2022 SBOT elections: **21,614** (**19.79%** of the **109,219** ballots sent)

Visits to pages on the State Bar of Texas website related to lawyer succession planning: **5,127** visits to the Succession Planning portal on the State Bar website and **2,758** views of Closing a Practice materials on the State Bar website

Visits to pages on the State Bar of Texas Law Management Program's texasbarpractice.com: **3,193** page views to texasbarpractice.com succession planning topics

Number of advanced designations of custodian attorneys received by the State Bar: **212**

PROTECTION OF THE PUBLIC

Contacts the Client-Attorney Assistance Program, or CAAP, received: **24,531** via mail, email, and phone

Dispute resolutions conducted by CAAP: **883**, with productive communication successfully reestablished in **88.3%** of the cases

Number of referrals by the Office of Chief Disciplinary Counsel to the CAAP program: **684**

Number of referrals by the Office of Chief Disciplinary Counsel that were closed by the CAAP program (Discretionary Grievance Review): **655** with a success rate of **89%**

Number of submissions reviewed by the Advertising Review Committee: **2,244**

ATTORNEY DISCIPLINE SYSTEM (CHIEF DISCIPLINARY COUNSEL)

Information regarding disciplinary trends: The number of barratry-related grievances filed with CDC increased by more than **18%**

Number of barratry-related complaints filed: **19** (number includes grievances that were pending classification at the end of the bar year)

Number of grievances filed: **7,175**

Number of grievances classified as complaints: **1,928**

Number of grievances dismissed as inquiries: **4,997**

Number of investigatory hearings held by CDC: **358**

BAR YEAR 2021-2022

| | |
|----------------------------|------------|
| Total Complaints Resolved | 559 |
| Total Sanctions | 400 |
| Disbarments | 21 |
| Resignations | 27 |
| Suspensions | 120 |
| Public Reprimands | 39 |
| Private Reprimands | 94 |
| Grievance Referral Program | 99 |

Eligible applications considered by the Client Security Fund: **122**

Eligible applications approved by the Client Security Fund: **61**

Total amount of grants approved by the Client Security Fund: **\$147,385.14**

Efforts to publicize the Client Security Fund to eligible recipients and to discourage theft of clients' funds by their attorneys: CDC continues to provide information on the Client Security Fund to complainants who have filed attorney grievances and to publicize the fund via the media

The ethics attorneys on the Ethics Helpline returned about **5,000** calls.

Number of continuing legal education ethics offerings: TexasBarCLE programs provided **7,268** total MCLE hours and of those hours, **1,889** hours (**26%**) were for ethics credit

Number of ethics publications by Texas Bar Books: **1** devoted solely to ethics and **20** that contain ethics topics

ACCESS TO JUSTICE

Legal aid and pro bono attorneys using free legal research: **450** attorneys; **90** paralegals

Legal aid referrals made by the State Bar of Texas Legal Access Division staff to members of the public and to inmates: **1,678** (**957** phone calls, **481** emails, **240** letters from inmates)

Legal aid and pro bono attorneys using the Texas Legal Services Network Malpractice Insurance Program offered through the State Bar of Texas Legal Access Division: **1,061** staff attorneys and **8,650** pro bono attorneys; **65** different organizations

Legal aid and pro bono attorneys who used the joint TexasBarCLE and Legal Access Division tuition waiver program: **43** staff attorneys and **4** pro bono attorneys

Legal aid and pro bono attorneys who participated in the Language Access Fund: **9,677** interpreted phone calls; **38** translated documents; **24** on-site interpreter reimbursements; served clients speaking **73** languages

Texas attorneys who participated in the Communication Access Fund: **12** attorneys

For 2021-2022, the Texas Student Loan Repayment Assistance Program approved **28** legal aid lawyers with private debt for up to **\$7,200** a year in repayment support. A further **75** lawyers with qualifying federal debt would have been approved except for the coronavirus suspension of payments/interest on certain federally held student debt.

Attendees at Legal Access Division annual seminars: **394** attended the Poverty Law Conference; **80** attended the Pro Bono Coordinators Retreat pre-conference only

Number of those helped by Texas Lawyers for Texas Veterans: Since 2010, over **11,000** attorneys, paralegals, and law students have assisted more than **32,000** veterans through local bar associations and other attorney volunteer organizations

Number of sections that have pro bono initiatives: **14** sections have pro bono initiatives, which include grants, CLE scholarships for legal aid providers or attorneys who agree to undertake a pro bono case, internships with legal aid providers, or other programs that support access to justice initiatives

Number of law students participating in access to justice initiatives: **74**

Number of legal aid lawyers who received Texas Bar College Summer School scholarships: **6**

Total voluntary ATJ contributions through membership fee statements: **\$1,537,570.52** from **11,061** attorneys

Number of pro bono contributions by non-lawyer professionals: **16** paralegals with **534** hours reported for the 2021 reporting year

Number of access to justice presentations made to attorneys and groups: **8**

Number of pro bono legal clinic resources, such as toolkits, provided by the Legal Access Division and the Texas Access to Justice Commission: **294** Limited Scope Representation Toolkits (**124** General Civil Law and **170** Family Law); **13,274** Texas Transfer Toolkits (**197** Spanish-language and **105** English-language downloads from TAJC website and **52** physical copies mailed, plus **12,893** downloads from texaslawhelp.org)

Total donated by lawyers in support of legal services to the poor as reported by lawyers through (2021) bi-annual pro bono survey: In 2021, lawyers contributed **\$1,537,570.52** through the Justice for All ATJ Contribution Campaign in conjunction with the dues statement; lawyers also contributed **\$16.5 million** in out-of-pocket expenses related to pro bono or legal services to the poor, **\$8.5 million** in direct donations to legal aid and pro bono organizations, and provided **2.7 million** hours of free legal services to the poor valued at **\$675 million**.

Publicity received for attorney volunteer efforts in Texas: **2** articles about the State Bar of Texas' pro bono efforts

Traffic to and usage of probonotexas.org: **16,066** users; **29,050** page views

Participation in New Opportunities Volunteer Attorney (NOVA) Pro Bono Program: **53** participants (**21** in-state attorneys and **32** out-of-state attorneys)

Types of services and number of hours of legal services provided to low-income and modest means persons by participants in the Texas Opportunity & Justice Incubator: TOJI lawyers represented **1,438** clients in **35** areas of law, including **286** pro bono clients and **243** modest-income clients, which equates to **2,183** modest-income hours and **1,836** pro bono hours (saving Texans **\$585,588** in legal fees)

Visits to page on State Bar website relating to disaster preparation and recovery resources for the public: **4,457** page views

Utilization of online disaster preparation and recovery resources on texasbarcle.com: **47,781** (includes all free pandemic-related CLE)

SOUND ADMINISTRATION AND RESOURCES

Trainings provided to staff: Mandatory EEO/harassment training for all new hires; tuition assistance offered to all staff for professional development in current or future positions at the State Bar; emotional intelligence leadership training for department and division directors; best practices for hybrid work, including leading hybrid teams training for managers and productive hybrid work environment training for staff; online training through the Employees Assistance Program service; monthly online cybersecurity training for all staff; new managers received **3** days of management development training; **4** full staff meetings were held

Statistics regarding staff retention and attrition: **15.2%** turnover rate

Number of customer service complaints received via the “Contact Us” page on the SBOT website: **22** and **22** resolved successfully

Implementation of disaster preparedness plan to assure continuity of State Bar administration and services in the event of any disaster affecting the State Bar: The State Bar makes every effort to stress test the approved Disaster Recovery and Communications plan
Effectiveness of disaster preparedness plan: The State Bar can be at normal operations in **24** hours

Number of periodic tests conducted of disaster preparedness plan and results of such test: Biannual tests prove all major systems can be operational in **24** hours

Ethnic and gender diversity of SBOT staff: **211 (73.5%)** female and **76 (26.5%)** male; **165 (57.5%)** White, **81 (28.2%)** Hispanic/Latino, **30 (10.5%)** Black/African American, **4 (1.47%)** Asian/Pacific Islander, **1 (.3%)** American Indian/Alaska Native, and **6 (2.1%)** Other

FINANCIAL MANAGEMENT

Financial audit: The result of the most recent financial audit (FY2021) resulted in an unmodified opinion on the State Bar’s Annual Financial Report for the year ended May 31, 2021—this opinion level is considered the best audit result available; the FY2022 financial audit began June 2022

This audit’s purpose is to provide assurance that the annual financial report presents the financial position of the State Bar fairly; in other words, the statements are free of material misstatements. To provide an opinion on the financial statements, the auditors test controls over financial operations and target financial areas that generate a significant amount of revenue or expense and confirm asset and liability controls and reporting. The auditors concluded that the financial statements comply with accounting principles generally accepted in the United States.

Annual internal control audit: The annual internal control audit examined MCLE, Information Technology, and public funds investment compliance. The auditors issued 3 internal audit reports, which concluded that controls over operations were generally effective to provide reasonable assurance that risks are being managed and objectives should be met—the detailed reports, recommendations, and management responses can be viewed at any time at texasbar.com/finances

Amount SBOT has set aside in general fund reserves: **\$11,408,307**, which represents **3.1** months of operating expenditures

Expenditure Protest Policy

The purpose of the State Bar of Texas is to engage in those activities enumerated at § 81.012 of the State Bar Act. The expenditure of funds by the State Bar of Texas is limited as set forth at § 81.034 of the State Bar Act and in *Keller v. State Bar of California*, 496 U.S. 1 (1990), and *McDonald v. Longley*, 4 F.4th 229 (5th Cir. 2021). If any member has a reasonable belief that any actual or proposed expenditure is not within such purposes of, or limitations on, the State Bar, then such member may object thereto and seek a refund of a *pro rata* portion of his or her dues expended, plus interest, by filing a written objection with the Executive Director. The objection must be made in writing, on the official State Bar Fees Objection Form, addressed to the Executive Director of the State Bar, P.O. Box 12487, Austin, TX 78711, or by email to objections@texasbar.com. The objection must be submitted no later than 60 calendar days after the annual audit of the State Bar for the fiscal year in which the transaction objected to occurred is published on the State Bar website. A copy of the State Bar Fees Objection Form may be obtained by written or in person request to the Executive Director or from the State Bar website at www.texasbar.com/objections.

Upon receipt of a member’s objection, the Executive Director shall within 60 calendar days review such objection together with the allocation of dues monies spent on the challenged activity and, in consultation with the President, shall have the discretion to resolve the objection, including refunding a *pro rata* portion of the member’s dues, plus interest. If the objecting member contests the Executive Director’s determination of the member’s claim, the objecting member may, within 30 calendar days of notice of the Executive Director’s determination, invoke the objection procedures set forth in Section 3.14 of the State Bar of Texas Board of Directors Policy Manual, which include an opportunity for the objection to be decided by an impartial decisionmaker. Any refund of a *pro rata* share of the member’s dues shall not be construed as an admission by the State Bar that the challenged activity was not or would not have been within the purposes of or limitations on the State Bar.