



# BY THE NUMBERS 2022-2023

*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 measurable goals and a system of performance measures. The State Bar Act further requires the bar to report to the Supreme Court of Texas 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 2022-2023 bar year.*

*For prior years' data, go to [texasbar.com/governingdocuments](https://texasbar.com/governingdocuments) and click on "Performance Measures."*

## SERVICE TO THE PUBLIC

*Distribution of information regarding legal issues of interest to the public: **17,074** printed pamphlets; **24,601** page views of Free Legal Resources homepage*

*Distribution of multimedia information regarding legal issues and topics of particular relevance to the public: **26** news releases, media advisories, and op-eds*

*Visits to page on State Bar website relating to disaster recovery resources for the public: **3,128** page views*

*Number of disaster assistance hotline calls: **21,191** (includes calls from July 1, 2022, to May 31, 2023; stats from June 2022 are unavailable)*

*Number of disaster assistance manual updates: Document updated annually (last updated around July 2022)*

*Number of views for disaster manual: **24,062***

*Visits to disaster webpages: **3,128** page views for Disaster Relief homepage*

*Visits to pages on State Bar-related websites containing legal information on issues of importance to the public: **24,601** pamphlets page hits, **9,414** downloads of pamphlets, **24,415** downloads of articles, **809** media page hits, **19,813,442** total hits to the SBOT website, and **14,979,153** unique page views*

*Traffic to Texas Bar Blog on legal issues of importance to the public: **97,911** page views*

*Traffic to State Bar social media sites on legal issues of importance to the public: **244,635** engagements, **61,263** clicks, and **5,174,628** impressions*

*News releases focused on member pro bono and public service: **7***

*Courses provided to teachers by the Law-Related Education Department: **102** Law-Focused Education teacher training sessions and **2,239** participants trained by LRE*

*Degree of satisfaction: **98%** would recommend LRE training to other teachers*

*Students taught by LRE-trained teachers: **182,994** students impacted by teacher training sessions*

*Traffic to LRE/LFEI website and related sites and social media: **291,860** visits*

*Traffic to the After the Bar Exam online resource: **1,120** watched segments; **331** downloaded segments*

*Traffic to the TYLA Ten Minute Mentor online resource: **19,479** watched segments; **7,567** downloaded segments*

*Traffic to the TYLA Ten Minute Mentor Goes to Law School online resource: **596** watched segments; **147** downloaded segments*

Number of TYLA presentations given at law schools: **5** law school orientation presentations

Number of TYLA presentations by attorneys and judges in public schools: **2** presentations reaching **70** kids

Participation in career fairs: **1** career fair, **1,000** kids participated

Distribution of TYLA resources and information regarding legal issues of interest to the public through community service and education: **1,930** project distributions

Traffic to local bar starter kit materials: texasbar.com/localbarguidance—**72** page views, **52** unique page views, **11** downloads (PDF of sample bylaws)

Participants in Texas Lawyers for Texas Veterans: Since 2010, over **11,600** volunteer attorneys, paralegals, and law students have assisted more than **34,000** veterans through local bar associations and other attorney volunteer organizations

Number of veterans clinics provided by TLTV partners: More than **20** local bar associations and organizations are currently participating statewide

Number of “Clinic in a Box” packages distributed to local clinics: **2**

Number of people who received a referral through the Lawyer Referral and Information Service: **60,263** calls answered and **71,542** referrals made

## SERVICE TO MEMBERS

Attendance for TexasBarCLE webcasts: Offerings—**158**, Attendance—**9,672**

Attendance for TexasBarCLE online CLE: Offerings—**927**, Attendance—**117,229**

Attendance for TexasBarCLE video courses: Offerings—**106**, Attendance—**6,812**

Attendance for TexasBarCLE live courses: Offerings—**96**, Attendance—**12,865**

Number of registrants for TexasBarCLE free 1/2-hour online classes: **28,840**

Number of low-cost CLE offerings: **28**

Number of publications offered by TexasBarCLE: **263** course book titles for sale

Number of CLE scholarships given to members: **464**

Number of emerging issues program offerings: **34**

Number of attorneys in rural areas receiving free or reduced cost CLE: **9,177** (calendar year 2022; data unavailable for bar year 2022-2023)

Number of resources provided to practitioners in areas not supported by local bars: Nearly all TexasBarCLE programs are recorded and made available online (to view offline, programs can be ordered on a USB flash drive). The past 25 years of TexasBarCLE course articles are available online.

Number of section CLE courses on educational and law practice management topics: **55** courses

Sales of books by Texas Bar Books: **25,784** books sold

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, **11%** Hispanic/Latino, **6%** Black/African American, **4%** Asian/Pacific Islander, less than **1%** American Indian/Alaska Native, and **2%** all others (numbers may not total 100% due to rounding)

Diversity of SBOT section membership: **60%** male and **40%** female; **77%** White, **11%** Hispanic/Latino, **6%** Black/African American, **4%** Asian/Pacific Islander, less than **1%** American Indian/Alaska Native, and **2%** all others (numbers may not total 100% due to rounding)

Diversity of SBOT committee membership: **55%** male and **45%** female; **68%** White, **14%** Hispanic/Latino, **10%** Black/African American, **4%** Asian/Pacific Islander, less than **1%** American Indian/Alaska Native, and **3%** all others (numbers may not total 100% due to rounding)

Trends in diversity, including age groups, among State Bar sections, committees, divisions, and other State Bar entities, and compare those trends to those seen among State Bar membership: These trends are measured and reported throughout this document

*Diversity of SBOT board membership:* **60%** male and **40%** female; **73%** White, **13%** Hispanic/Latino, **10%** Black/African American, **3%** Asian/Pacific Islander, **0%** American Indian/Alaska Native, and **3%** all others (numbers may not total 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 2022-2023 bar year, a total of **42** 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 2012 and 2022; during that same period, attorneys 65 and older went from making up **12%** of the attorney population to **20%**

*Visits to SBOT Member Benefits homepage:* **158,014** page views

*Data regarding usage trends of members participating in vendor discount member benefit offerings:* **123,800** unique visitors

*Visits to Texas Bar Private Insurance Exchange website:* **127,192** page views

*Number of members enrolled in one or more insurance products through the Texas Bar Private Insurance Exchange:* **22,863**

*Number of members enrolled in major medical insurance:* **19,132**

*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:* **583** attendees, **40** interviewing corporations, and **97** sponsoring firms/organizations

*Attendee satisfaction with the Texas Minority Counsel Program:* Through a conference evaluation survey, the overall course was given a positive rating of **97%**; **99%** of respondents stated they are likely to recommend the conference to others

*Attendee satisfaction with the Texas Minority Attorney Program:* Evaluation survey event rating of **3.9** out of **4.0**

*Number of hits to diversity-related webpages on texasbar.com:* texasbar.com/diversity—**165** page views, **133** unique page views; texasbar.com/tmcp—**12,101** page views, **9,279** unique page views

The Texas Lawyers' Assistance Program handled a total of **1,060** consultations—**66.5%** were related to mental health, **30.5%** were related to substance use issues, and **3%** were related to cognitive issues. TLAP's website—tlaphelps.org—garnered **9,166** users and **18,199** page views. TLAP's Facebook page garnered **18,369** clicks. TLAP made **132** 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:* **2,749** 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):* **7,198**

*Number of attorneys and volunteers/mentors participating in the Texas Opportunity & Justice Incubator, or TOJI:* **114** volunteers/mentors, including **80** lawyers

*Number of TOJI-created resources shared with the State Bar membership at large:* TOJI made **9** public presentations with supplemental materials

*Number of hours of training to TOJI participants:* **144**

*Number of users and page views to TOJI website:* **3,263** users, **6,848** page views, and **101** program inquiries

*Number of counties served by TOJI 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:* **57,201**

*Number of lawyers who attended live, video, webcast, or online CLE courses on law practice management topics:* **25,806**

Number of phone calls and emails the Law Practice Management Program responded to: **44** phone calls and **37** emails (not including calls to the cessations docket)

Number who voted in the 2023 SBOT elections: **23,310 (20.87%** of the **111,703** ballots distributed)

Visits to pages on the State Bar of Texas website related to lawyer succession planning: **6,121** visits to the Succession Planning portal on the State Bar website and **3,490** views of Closing a Practice materials on the State Bar website

Visits to pages related to succession planning topics on the State Bar of Texas Law Practice Management Program's [texasbarpractice.com](http://texasbarpractice.com): **5,057** page views to [texasbarpractice.com](http://texasbarpractice.com)

Number of career-life balance programs provided: **21**

Dissemination of information about State Bar member services and benefits: Presentations were made by State Bar leadership and staff at conferences and other events around the state

Number of advanced designations of custodian attorneys received by the State Bar: **318**

Number of consultations and degree of satisfaction with such services among participants: TLAP handled **1,060** consultations, **349** of which regarded others and the rest were for self-help. Of all consultations, there were **2** complaints received

Member satisfaction with customer service: **12** customer service complaints received via the "Contact Us" page on the SBOT website and **12** resolved successfully

Visits to page on State Bar website relating to disaster recovery resources for attorneys: **631** page views

Visits to [texasbar.com/ethics](http://texasbar.com/ethics) and visits to Ethics Question of the Month: **6,778** visits to [texasbar.com/ethics](http://texasbar.com/ethics); **711** visits to [legalethictexas.com/ethics-question-of-the-month](http://legalethictexas.com/ethics-question-of-the-month)

Trends in State Bar email click-through rates, open rates, and opt-outs, and analytics with targeted communications by channel: **2.1%** average click-through rate, **44.3%** average open rate, **2,962** opt-outs

Traffic to [www.afterthebarexam.com](http://www.afterthebarexam.com) resources: **1,120** watched segments; **331** downloaded segments

Number of members satisfied with the State Bar: Member satisfaction with customer service—**12** customer service complaints received via the "Contact Us" page on the SBOT website and **12** resolved successfully

Number of presentations and other methods of collaborative targeted outreach: Presentations are measured and reported by departments throughout this document

## PROTECTION OF THE PUBLIC

Contacts the Client-Attorney Assistance Program, or CAAP, received:

**26,265** via mail, email, and phone

Dispute resolutions conducted by CAAP: **733**, with productive communication successfully reestablished in **83.5%** of the cases

Degree of satisfaction with the Client-Attorney Assistance Program with those accessing the program: **89.48%** satisfied

Number of CAAP program adjustments in response to analysis and feedback: **8**

Number of referrals by the Office of Chief Disciplinary Counsel, or CDC, to the CAAP program: **973**

Number of referrals by the Office of Chief Disciplinary Counsel that were closed by the CAAP program (Discretionary Grievance Review): **844** with a success rate of **86.09%**

Number of submissions reviewed by the Advertising Review Department: **2,587**

## ATTORNEY DISCIPLINE SYSTEM (CHIEF DISCIPLINARY COUNSEL)

Information regarding disciplinary trends: The number of barratry-related grievances filed with CDC decreased by more than **15%**

Number of barratry-related complaints filed: **16** (number includes grievances that were pending classification at the end of the bar year)

Number of grievances filed: **8,472**

Number of grievances classified as complaints: **2,520**

Number of grievances dismissed as inquiries: **5,562**

Number of investigatory hearings held by CDC: **335**



## BAR YEAR 2022-2023

Total Complaints Resolved	397
Total Sanctions	316
Disbarments	24
Resignations	17
Suspensions	90
Public Reprimands	35
Private Reprimands	92
Grievance Referral Program	58

Eligible applications considered by the Client Security Fund: **234**

Eligible applications approved by the Client Security Fund: **137**

Total amount of grants approved by the Client Security Fund: **\$892,449.72**

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 approximately **5,290** calls.

Trendlines for the State Bar Ethics Helpline: 2022-2023: approximately 5,290 calls; 2021-2022: approximately 5,000 calls; 2020-2021: approximately 5,000 calls

Participation in preventative programming across the bar, including Law Practice Management and client relations programming: TLAP/TexasBarCLE's online CLE *Just Ask: How We Must Stop Minding Our Own Business in the Legal World (Depression and Suicide Prevention Essentials)*— **7,198** registrants; TLAP made **132** presentations regarding wellness, law practice management, avoiding burnout, and many other topics to lawyers, judges, and law students reaching **10,796** attendees

Number of continuing legal education ethics offerings: TexasBarCLE programs provided **7,149** total MCLE hours and of those hours, **1,787** hours (**25%**) were for ethics credit

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

Number of pamphlets and other legal resources related to the grievance system distributed: **263** pamphlets mailed by Public Affairs Department; **5,442** page views for online pamphlets and video

Number of non-attorneys who attended a TexasBarCLE program: For calendar year 2022: **2,781** registered; For bar year 2022-2023: data unavailable

Number of hours of professionalism and ethics programming and publications offered by sections: **16.5** hours

Trends in professionalism and ethics communications efficacy using web and electronic communications analytics: These trends are measured and reported throughout this document

## ACCESS TO JUSTICE

Legal aid and pro bono attorneys using free legal research: **433** attorneys; **36** paralegals; **49** attorneys using Westlaw Doc & Form Builder

Legal aid referrals made by the State Bar of Texas Legal Access Department staff to members of the public and to inmates: **994** (**417** phone calls, **427** emails, **150** 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 Department: **1,066** staff attorneys and **7,794** pro bono attorneys across **60** different organizations

Legal aid and pro bono attorneys who used the joint TexasBarCLE and Legal Access Department tuition waiver program: **37** staff attorneys and **25** pro bono attorneys

Legal aid and pro bono attorneys who participated in the Language Access Fund: **11,550** interpreted phone calls; **29** translated documents; **13** on-site interpreter reimbursements; served clients speaking **62** languages

Texas attorneys who participated in the Communication Access Fund: **11** attorneys

For 2022-2023, the Texas Student Loan Repayment Assistance Program approved **22** legal aid lawyers with a total combined amount of private debt for up to **\$3,051,712.39** a year in repayment support. An additional **56** 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 Department annual seminars: **474** attended the Poverty Law Conference; **71** attended the Pro Bono Coordinators Retreat pre-conference only

Participants in Texas Lawyers for Texas Veterans: Since 2010, over **11,600** attorneys, paralegals, and law students have assisted more than **34,000** veterans through local bar associations and other attorney volunteer organizations

Number of sections that have pro bono initiatives: **28** 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: **60** (with the Texas Access to Justice Commission's funding—**9** Access to Justice Internship Program-Summer, **2** Access to Justice Internship Program-Fall, **2** Access to Justice Internship Program-Spring, **47** Pro Bono Spring Break)

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

Total voluntary ATJ contributions through membership fee statements: **\$1,532,507.85** from **11,329** attorneys

Number of pro bono contributions by non-lawyer professionals: **18** paralegals with **471** hours

Number of access to justice presentations made to attorneys and groups: **3**

Number of lawyers who participated in the Pro Bono Survey: **5,566** completed the biennial survey with **2,202** attorneys providing information about their pro bono activities

Number of pro bono legal clinic resources, such as toolkits, provided by the Legal Access Department and the Texas Access to Justice Commission, or TAJC: **310** Limited Scope Representation Toolkits (**118** General Civil Law and **192** Family Law); **13,234** Texas Transfer Toolkits (**24** Spanish-language and **11,200** English-language downloads from texaslawhelp.org, **312** Spanish language and **1,693** English-language downloads from TAJC website, and **5** physical copies mailed)

Total donated by lawyers in support of legal aid services to the poor as reported by lawyers through biannual pro bono survey: In 2022, lawyers contributed **\$1,532,507.85** through the Justice for All ATJ Contribution Campaign in conjunction with the dues statement; lawyers also contributed **\$17 million** in out-of-pocket expenses related to pro bono or legal services to the poor, **\$8 million** in direct donations to legal aid and pro bono organizations, and provided **2.72 million** hours of free legal services to the poor.

Publicity received for attorney volunteer efforts in Texas: **5** articles about the State Bar of Texas' pro bono efforts

Traffic to and usage of [probonotexas.org](http://probonotexas.org): **17,967** users; **33,111** page views

Participation in New Opportunities Volunteer Attorney (NOVA) Pro Bono Program: **41** participants (**14** in-state attorneys and **27** out-of-state attorneys)

Number of people who applied to the Texas Opportunity & Justice Incubator program: **101**

Number of members who voluntarily report pro bono service: **3,514**

Benchmark of voluntary pro bono service by members: There was a **22%** decrease in the number of lawyers that self-reported hours in 2022 as compared to 2021

Number of members enrolled in the Pro Bono College: **293** attorneys; **51** law students; **2** paralegals

Number of referrals: **9,398** click-throughs for online referral directory; **921** physical copies of referral directories distributed

State legislative funding in support of legal services to the poor: **\$20.28 million** in general revenue over the biennium in basic civil legal services funds; **\$7 million** in general revenue over the biennium to provide legal services to veterans and their immediate families; **\$10 million** in general revenue over the biennium for the Legal Aid for Survivors of Sexual Assault (LASSA) Program; **\$5 million** for legal services stemming from the opioid crisis

Federal funding to Legal Services Corporation in support of legal services to the poor in Texas: **\$45,806,579** to the Legal Services Corporation

Changes to rules and regulations that increase access to justice: Changes were monitored and identified

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 **469** clients in **35** areas of law, including **55** pro bono clients and **72** modest-income clients, which equates to **1,176** modest-income hours and **469** pro bono hours (saving Texans **\$211,292** in legal fees)

Visits to page on State Bar website relating to disaster preparation and recovery resources for the public: **3,128** page views

*Utilization of online disaster preparation and recovery resources:* **21,191** disaster hotline calls (includes calls from July 1, 2022, to May 31, 2023; stats from June 2022 are unavailable); **0** public printed information dissemination; disaster manual updated annually (last around July 2022); and **24,062** views for disaster manual and **3,128** page views for Disaster Relief homepage

*Utilization of online disaster preparation and recovery resources on texasbarcle.com:* **27,606** (includes all free pandemic-related CLE)

## SOUND ADMINISTRATION AND RESOURCES

*Trainings provided to staff:* Mandatory EEO/harassment training for all new hires; online training through the Employee Assistance Program service; monthly online cybersecurity training for all staff; new managers received **3** days of management development training; quarterly full staff meetings following all board meetings; for additional trainings as appropriate, tuition assistance offered to all staff for professional development in current or future positions at the State Bar

*Statistics regarding staff retention and attrition:* **13.6%** turnover rate

*Number of customer service complaints received via the “Contact Us” page on the SBOT website:* **12** and **12** resolved successfully

*Participation at local outreach activities at the Local Bar Leaders Conference:* **189** people attended LBLC, **16** president and/or executive director appearances at local bar events

*Number of newly licensed lawyers who joined a section after licensure:* **1,360**

*Measuring the adoption of State Bar of Texas and section proposed affirmative legislation:* The State Bar of Texas did not have a proposal and no section requested permission to take a position through the regular State Bar process of developing a State Bar of Texas legislative package

*Number of pathways to leadership opportunities:* Pathways to leadership opportunities were provided by information about LeadershipSBOT; information on texasbar.com/voicesproject; information about running for State Bar of Texas president-elect sent to local bars via email; and State Bar of Texas at-large director positions are advertised in the *Texas Bar Journal*

Number of contested races for district director: **3**

*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 can be at normal operations in **24** hours

*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

*Measuring the efficacy of targeted email communications and marketing efforts:* **2.1%** average click-through rate, **44.3%** average open rate, **2,962** opt-outs

*Efficacy of targeted communications through downloads, web analytics, and social media analytics, including trend lines and comparisons:* Targeted communications were measured and reported throughout this document

*Ethnic and gender diversity of SBOT staff:* **221 (74%)** female and **78 (26%)** male; **171 (57.2%)** White, **89 (29.8%)** Hispanic/Latino, **27 (9%)** Black/African American, **5 (1.7%)** Asian/Pacific Islander, **1 (0.3%)** American Indian/Alaska Native, and **6 (2%)** Other

## FINANCIAL MANAGEMENT

*Financial audit:* The result of the most recent financial audit (FY2023) resulted in an unmodified opinion on the State Bar’s Annual Financial Report for the year ended May 31, 2023—this opinion level is considered the best audit result available.

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 review asset 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 membership dues collection, attorney compliance departments, and investment compliance, in addition to following up on prior audit findings. The auditors issued three 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: **\$11,917,606**, which represents **3.1** months of operating expenditures

*Sufficiency of operating and capital reserves relative to contingencies using financial forecasting:* The operating and capital reserves are reviewed by using five-year forecasting models. The amount of reserves, operating transfers, and capital contributions set aside during the budget cycle is determined by using at least a five-year cash flow projection.

*Amount of targeted reserves in keeping with best practices of integrated bars/state agency guidelines:* The State Bar has set aside **\$11,917,606** in minimum reserves, which represents **3.1** months of operating expenditures. The board policy manual requires at a

minimum, **2** months of operating expenditures to be held in reserves, and, at a maximum, **4** months to be held in reserves during a fiscal year.

*Program efficiency and ROI:* During fiscal year 2022-2023, the State Bar budgeted to add **\$609,299** to the minimum reserves for fiscal year 2023-2024, which maintained its minimum reserves at **3.1** months of operating expenditures. Additionally, the State Bar reserved **\$1,548,340** to fund operations of the State Bar for fiscal year 2023-2024 and reserved **\$2,850,000** to fund operations of the State Bar for fiscal year 2024-2025.

### 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](mailto: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](http://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.