



# BY THE NUMBERS 2023-2024

*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 2023-2024 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: **28,561** printed pamphlets distributed; **24,471** page views of Free Legal Resources homepage*

*Distribution of multimedia information regarding legal issues and topics of particular relevance to the public: **30** news releases, media advisories, and op-eds*

*Visits to page on State Bar website relating to disaster recovery resources for the public: **4,518** page views*

*Number of disaster assistance hotline calls: **13,588** (includes calls from July 17, 2023, to May 31, 2024; stats from June 1, 2023, to July 16, 2023, are unavailable)*

*Number of disaster assistance manual updates: Document updated annually (last updated around July 2023)*

*Number of views for disaster manual: **38,702***

*Visits to disaster webpages: **4,518** page views for Disaster Relief homepage*

*Visits to pages on State Bar-related websites containing legal information on issues of importance to the public: **24,471** pamphlets page hits, **2,432** media page hits, **21,220,980** total hits to the SBOT website, and **6,021,641** website users (unique visitors)*

*Traffic to Texas Bar Blog on legal issues of importance to the public: **68,548** page views*

*Traffic to State Bar social media sites on legal issues of importance to the public: **85,471** engagements, **35,646** clicks, and **2,284,943** impressions*

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

*Courses provided to teachers by the Law-Related Education Department: **99** Law-Focused Education teacher training sessions and **2,287** participants trained by LRE*

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

*Students taught by LRE-trained teachers: **228,985** students impacted by teacher training sessions*

*Traffic to LRE/LFEI website and related sites and social media: **288,911** visits*

*Traffic to the After the Bar Exam online resource: **1,524** watched segments; **487** downloaded segments*

*Traffic to the TYLA Ten Minute Mentor online resource: **20,783** watched segments; **9,111** downloaded segments*

*Traffic to the TYLA Ten Minute Mentor Goes to Law School online resource: **1,739** watched segments; **260** downloaded segments*

Number of TYLA presentations given at law schools: **4**  
law school orientation presentations

Number of TYLA presentations by attorneys and judges in public schools: **15** presentations reaching **500** kids

Distribution of TYLA resources and information regarding legal issues of interest to the public through community service and education: **1,900** project distributions

Traffic to local bar starter kit materials: [texasbar.com/localbarguidance](https://texasbar.com/localbarguidance) = **126** views (total page views)

Participants in Texas Lawyers for Texas Veterans: Since 2010, over **12,000** volunteer attorneys, paralegals, and law students have assisted more than **37,000** 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: **15**

Number of people who received a referral through the Lawyer Referral and Information Service: For FY2023-2024, **106,198** people received referrals from the LRIS

## SERVICE TO MEMBERS

Attendance for TexasBarCLE webcasts:  
Offerings—**137**, Attendance—**12,030**

Attendance for TexasBarCLE online CLE:  
Offerings—**1,652**, Attendance—**110,789**

Attendance for TexasBarCLE video courses:  
Offerings—**111**, Attendance—**7,302**

Attendance for TexasBarCLE live courses:  
Offerings—**98**, Attendance—**14,214**

Number of registrants for TexasBarCLE free 1/2-hour online classes: **43,536**

Number of low-cost CLE offerings: **27**

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

Number of CLE scholarships given to members: **502**

Number of emerging issues program offerings: **21**

Number of attorneys in rural areas receiving free or reduced cost CLE: **11,003** (calendar year 2023; data unavailable for bar fiscal year 2023-2024)

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: **148** courses

Sales of books by Texas Bar Books: **31,781** 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: **61%** male and **39%** female; **76%** 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: **59%** male and **41%** female; **76%** White, **11%** Hispanic/Latino, **7%** 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: **52%** male and **48%** female; **67%** White, **16%** 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)

Diversity of SBOT board membership: **68%** male and **33%** female; **68%** White, **11%** Hispanic/Latino, **16%** Black/African American, **2%** Asian/Pacific Islander, **0%** American Indian/Alaska Native, and **0%** 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 practices. In the 2023-2024 bar year, a total of **47** benefits were offered through the State Bar Member Benefits Program. Goods and services offered include lawyer-specific programs, financial services, business 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 2013 and 2023; during that same period, attorneys 65 and older went from making up **13%** of the attorney population to **20%**

*Visits to SBOT Member Benefits homepage:* **77,173** visitors (page views)

*Data regarding usage trends of members participating in vendor discount member benefit offerings:* **10,140** unique visitors for June 2023 only

*Visits to Texas Bar Private Insurance Exchange website:* **130,746** page views

*Number of members enrolled in one or more insurance products through the Texas Bar Private Insurance Exchange:* **24,093**

*Number of members enrolled in major medical insurance:* **22,119**

*Number of attorneys, law firms, and legal departments attending and participating in the Texas Minority Attorney Program:* **85**

*Number of attorneys, law firms, and legal departments attending and participating in the Texas Minority Counsel Program:* **535** attendees, **38** interviewing corporations, and **94** 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 **94%**. In addition, **94%** 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 **3.8** out of **4.0**

*Number of hits to webpages on texasbar.com related to diversity in the legal profession:* texasbar.com/diversity—**838** page views, texasbar.com/tmcp—**37,699** page views

The Texas Lawyers' Assistance Program handled a total of **987** consultations—**61%** were related to mental health, **36%** were related to substance use issues, and **3%** were related to cognitive issues. TLAP's website—tlaphelps.org—garnered **8,130** users and **18,021** page views. For all social media platforms (Facebook, Instagram, and X), there were **106,400** impressions, **163** clicks, and **2,731** content interactions. TLAP made **122** educational outreach presentations, including to law schools, paralegals, court administrators, and justices of the peace.

*Number of distributed publications:* **6** articles written by TLAP and **1** newsletter

*Number of views of TLAP videos via the website:* **323** 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):* **28,308**

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

*Number of TOJI-created resources shared with the State Bar membership at large:* TOJI made **44** public presentations with supplemental materials

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

*Number of users and page views to TOJI website:* **2,972** users, **8,431** page views, and **106** 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](https://texasbarpractice.com): **73,185** total views of Law Practice Management Program materials on [texasbarpractice.com](https://texasbarpractice.com)

Number of lawyers who attended live, video, webcast, or online CLE courses on law practice management topics: **18,083**

Number of phone calls and emails the Law Practice Management Program responded to: **221** phone calls and **275** emails (In the past, calls related to the Cessations Docket Pilot Project have been excluded. That project is now a permanent part of the department's responsibility, and the tracking system includes those calls and emails in the total number.)

Number who voted in the 2024 SBOT elections: **21,572** (**18.94%** of the **113,897** ballots distributed)

Visits to pages on the State Bar of Texas website related to lawyer succession planning: **7,769** visits to the Succession Planning portal on the State Bar website and **4,838** 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](https://texasbarpractice.com): **5,367** page views to succession planning topics on [texasbarpractice.com](https://texasbarpractice.com)

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 advance designations of custodian attorneys received by the State Bar: **654**

Number of consultations and degree of satisfaction with such services among participants: TLAP handled **987** consultations, **325** of which regarded others and the rest were for self-help. Of all consultations, there were **0** complaints received

Member satisfaction with customer service: **9** customer service complaints received via the "Contact Us" page on the SBOT website and **9** resolved successfully

Visits to page on State Bar website relating to disaster recovery resources for attorneys: **1,714** page views

Visits to [texasbar.com/ethics](https://texasbar.com/ethics) and visits to Ethics Question of the Month: **9,392** visits to [texasbar.com/ethics](https://texasbar.com/ethics); **3,470** views at [legalethicstexas.com/ethics-question-of-the-month](https://legalethicstexas.com/ethics-question-of-the-month)

Trends in State Bar email click-through rates, open rates, and opt-outs: **5.8%** average click-through rate, **44.4%** average open rate, **2,967** opt-outs

Traffic to [www.afterthebarexam.com](https://www.afterthebarexam.com) resources: **1,524** watched segments; **487** downloaded segments

## PROTECTION OF THE PUBLIC

Contacts the Client-Attorney Assistance Program (CAAP) received: **22,579** calls and **9,872** emails or mail received

Dispute resolutions conducted by CAAP: **474** Requests for Assistance were closed with successful completion rate of **81.9%** and **733** Discretionary Grievance Referrals with productive communication successfully reestablished or direct responses received in **88.9%** of the cases

Degree of satisfaction with the Client-Attorney Assistance Program with those accessing the program: **88.9%** satisfied

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

Number of referrals by the Office of Chief Disciplinary Counsel (CDC) to the CAAP program: **723**

Number of referrals by the Office of Chief Disciplinary Counsel that were closed by the CAAP program (Discretionary Grievance Referrals): **733** DGRs with a success rate of **88.9%**

Number of submissions reviewed by the Advertising Review Department: **2,910**

## ATTORNEY DISCIPLINE SYSTEM (CHIEF DISCIPLINARY COUNSEL)

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

Number of barratry-related complaints filed: **13**  
(number includes grievances that were pending classification at the end of the bar year)

Number of grievances filed: **7,985**

Number of grievances classified as complaints: **2,659**

Number of grievances dismissed as inquiries: **5,326**

Number of investigatory hearings held by CDC: **403**  
IVHs convened/conducted

#### **BAR YEAR 2023-2024**

Total Complaints Resolved	<b>353</b>
Total Sanctions	<b>314</b>
Disbarments	<b>18</b>
Resignations	<b>12</b>
Suspensions	<b>74</b>
Public Reprimands	<b>40</b>
Private Reprimands	<b>91</b>
Grievance Referral Program	<b>79</b>

Eligible applications considered by the Client Security Fund: **205**

Eligible applications approved by the Client Security Fund: **121**

Total amount of grants approved by the Client Security Fund: **\$889,140**

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 **4,600** calls with **93%** returned within 24 hours.

Trendlines for the State Bar Ethics Helpline: 2023-2024: approximately **4,600** calls; 2022-2023: approximately **4,300** calls; 2021-2022: approximately **4,500** 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)*—**28,308** registrants; TLAP made **122** presentations regarding wellness, law practice management, avoiding burnout, and many other topics to lawyers, judges, and law students reaching **10,036** attendees

Number of continuing legal education ethics offerings: TexasBarCLE programs provided **7,666** total MCLE hours and of those hours, **1,917** 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: **240** pamphlets mailed by the Public Affairs Department; **671** page views for online pamphlets and video

Number of non-attorneys who attended a TexasBarCLE program: for calendar year 2023—**4,083** registered; for bar year 2023-2024—data unavailable

Number of hours of professionalism and ethics programming and publications offered by sections: **54.75** hours

## **ACCESS TO JUSTICE**

Legal aid and pro bono attorneys using free legal research: Free legal research was provided to **507** attorneys and **31** paralegals; additionally, **47** attorneys used 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: Legal aid referrals were made to **1,789** members of the public, including **607** phone calls, **649** emails, and **533** 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: The program provided malpractice insurance to **60** different organizations, covering **1,066** staff attorneys and **6,207** pro bono attorneys

Legal aid and pro bono attorneys who used the joint TexasBarCLE and Legal Access Department tuition waiver program: The TexasBarCLE and Legal Access Department tuition waiver program was used by **68** staff attorneys and **19** pro bono attorneys

Legal aid and pro bono attorneys who participated in the Language Access Fund: The Language Access Fund was utilized to provide services on **7,429** phone calls, **51** translated documents, and **18** video interpretation calls. Through these services, LAF served clients speaking **72** languages

Texas attorneys who participated in the Communication Access Fund: The Communication Access Fund provided services to **13** attorneys

Attendees at Legal Access Department annual seminars: **386** attended the Poverty Law Conference; **91** attended the Pro Bono Coordinators Retreat pre-conference only

Participants in Texas Lawyers for Texas Veterans: Since 2010, over **12,000** attorneys, paralegals, and law students have assisted more than **37,000** veterans through local bar associations and other attorney volunteer organizations

Number of sections that have pro bono initiatives: **23** 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: The Access to Justice Commission funded the participation of **62** law students in access to justice initiatives. Through the Access to Justice Intern Program, there were **6** summer interns, **2** fall interns, and **2** spring interns. There were **52** students involved in the Pro Bono Spring Break program

Number of legal aid lawyers who received Texas Bar College Summer School scholarships: **6** legal aid lawyers received Texas Bar College Summer School scholarships. The Summer School was canceled due to weather, however, and all six will be attending virtually at the rescheduled CLE

Total voluntary ATJ contributions through membership fee statements: Over **11,518** Texas attorneys made contributions in the amount of **\$1,610,190.51\*** through the bar dues access to justice donation check-off option (\*the reporting period for these ATJ numbers is from September 2022 to August 2023)

Number of pro bono contributions by non-lawyer professionals: **19** paralegals with **305** hours

Number of access to justice presentations made to attorneys and groups: Due to staffing transitions, only **4** presentations were made during this reporting time frame

Number of lawyers who participated in the Pro Bono Survey: **7,178** attorneys completed the 2024 pro bono survey, with **2,670 (37.2%)** reporting having provided pro bono in the year prior to the survey

Number of pro bono legal clinic resources, such as toolkits, provided by the Legal Access Department and the Texas Access to Justice Commission (TAJC): A number of toolkits are available online and interactions with these toolkits are tracked. Through the texasatj.org site: **186** downloads of the Limited Scope Representation Toolkit (**87** General Civil Law and **99** Family Law); **2,283** downloads of the Texas Transfer Toolkit, plus **371** of the Spanish language version of the Texas Transfer Toolkit. There were also a significant number of downloads from texaslawhelp.org, with **3,119** click-throughs from texasatj.org. On the probonotexas.org site, there were **37,110** views and downloads included: **21** Estate Planning & Wills, **18** Pro Bono Resource Guide, and **15** Tenants' Rights pamphlets

Total donated by lawyers in support of legal aid services to the poor as reported by lawyers through biannual pro bono survey: Based on results from the 2023 Texas Attorney Survey, lawyers contributed **\$21 million** in out-of-pocket expenses related to pro bono or legal services to the poor, **\$11 million** in direct donations to legal aid and pro bono organizations, and provided **3.18 million** hours of free legal services to the poor

Publicity received for attorney volunteer efforts in Texas: **216** articles regarding member pro bono and volunteer activities

Traffic to and usage of probonotexas.org: **22,520** users; **41,259** page views

Participation in New Opportunities Volunteer Attorney (NOVA) Pro Bono Program: **33** participants (**9** in-state attorneys and **24** out-of-state attorneys)

Number of people who applied to the Texas Opportunity & Justice Incubator program: **106**

Number of members who voluntarily report pro bono service: **3,575** attorneys voluntarily self-reported their pro bono hours from the previous year

*Benchmark of voluntary pro bono service by members:* There was a **2%** increase in the number of lawyers that self-reported hours in 2023 as compared to 2022. The number reporting remains low, however, at only **3,575** lawyers self-reporting their pro bono hours in 2023. Over the past five years, the number of members reporting has decreased from **6,043** in 2019 to **3,575** in 2022

*Number of members enrolled in the Pro Bono College:* A total of **268** attorneys, **37** law students, and **2** paralegals enrolled in the Pro Bono College

*Number of referrals:* The referral directory, which is updated every other year, is made available electronically as well as physically distributed. The online directory was accessed **3,330** times and **84** directories were distributed. The referral directory is also sent to the Texas Department of Criminal Justice to be installed on tablets available to inmates in all of Texas' prisons. Note that directory distributions are higher during the year the directory is updated

*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, and **\$3.7 million** targeted to youth dealing with pandemic-related mental health issues

*Federal funding to Legal Services Corporation in support of legal services to the poor in Texas:* The FY2023 Congressional Appropriation for legal services, administered by the Legal Services Corporation, was in the amount of **\$49,344,881** for the state of Texas. These funds were distributed as follows: **\$12,928,681** to Legal Aid of NorthWest Texas; **\$16,926,880** to Lone Star Legal Aid; and **\$19,489,320** to Texas Rio Grande Legal Aid, Inc.

*Changes to rules and regulations that increase access to justice:* Rule and regulation changes are monitored. There were no significant legislative changes for this reporting period due to there being no legislative session. Significant court changes include:

- Court order acknowledging that statute can further permit electronic participation (**[23-9050]**)
- Court adoption of revised protective order forms (**[23-9063]**)
- Court adoption of alternative record procedures, which is intended to reduce costs of appeals (**[23-9106]**; **[24-9022]**)
- Court adoption of rules allowing for the temporary licensure of military service members (**[24-9007]**)
- Court order requiring the integration of court management systems with re: SearchTX and requiring that courts provide orders, judgments, and other documents to litigants electronically (**[24-9030]**)

*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 **1,168** clients in more than **35** areas of law, including **120** pro bono matters and **131** modest-means matters, which equates to **1,443** modest-means hours and **1,477** pro bono hours (saving Texans **\$439,831** in legal fees)

*Visits to page on State Bar website relating to disaster preparation and recovery resources for the public:* **4,518** page views

*Utilization of online disaster preparation and recovery resources:* **13,588** disaster hotline calls (includes calls from July 17, 2023, to May 31, 2024; stats from June 1, 2023, to July 16, 2023, are unavailable); disaster manual updated annually (last revised in July 2023); **384** page views for disaster manual on State Bar of Texas website; **38,163** page views for disaster manual on Texas Law Help website; **19** page views for full disaster manual at Pro Bono Texas website; **120** page views for individual chapters; **19** PDF downloads for disaster manual from State Bar of Texas website; **4,518** page views for Disaster Relief homepage

## SOUND ADMINISTRATION AND RESOURCES

*Trainings provided to staff:* Staff and management training covering the Public Information Act, records retention, and current employment law updates; mandatory EEO/harassment training for all new hires; monthly online cybersecurity training for all staff; 3-day management development program for new managers; quarterly staff meetings following all board meetings; tuition assistance offered to all staff for professional development in current or future positions at the State Bar; online training through the Employee Assistance Program offered to all staff

*Statistics regarding staff retention and attrition:* **11.8%** turnover rate

*Number of customer service complaints received via the "Contact Us" page on the SBOT website:* **9** and **9** resolved successfully

*Participation at local outreach activities at the Local Bar Leaders Conference:* **213** people attended LBLC, **39** president and/or executive director appearances at local bar events

*Number of newly licensed lawyers who joined a section after licensure:* **1,377**

*Number of pathways to leadership opportunities:* Pathways to leadership opportunities were provided by information about LeadershipSBOT; information on [texasbar.com/voicesproject](http://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:* **0**

*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:* **5.8%** average click-through rate, **44.4%** average open rate, **2,967** opt-outs

*Ethnic and gender diversity of SBOT staff:* **221 (72%)** female and **86 (28%)** male; **179 (58.3%)** White, **91 (29.6%)** Hispanic/Latino, **24 (7.8%)** Black/African American, **7 (2.3%)** Asian/Pacific Islander, **1 (0.3%)** American Indian/Alaska Native, and **5 (1.6%)** 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 finance division procedures, communication division procedures, 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](http://texasbar.com/finances)

*Amount SBOT has set aside in general fund reserves:* **\$12,705,083**, 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. As of May 31, 2024, and before the completion of the annual financial audit, the Building fund had a fund balance of **\$6,795,148**; the Technology fund had a fund balance of **\$1,676,118**; and the Client Security fund had a fund balance of **\$4,524,235**

*Amount of targeted reserves in keeping with best practices of integrated bars/state agency guidelines:* The State Bar has set aside **\$12,705,083** 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:* During the fiscal year 2024-2025 budget process, the State Bar added **\$787,477** to its minimum reserves, maintaining its minimum reserves at **3.1** months of operating expenditures, or **\$12,705,083**. Additionally, the State Bar has reserved **\$7,460,451** to fund operations of the State Bar for the fiscal years 2024 through 2027

### 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.