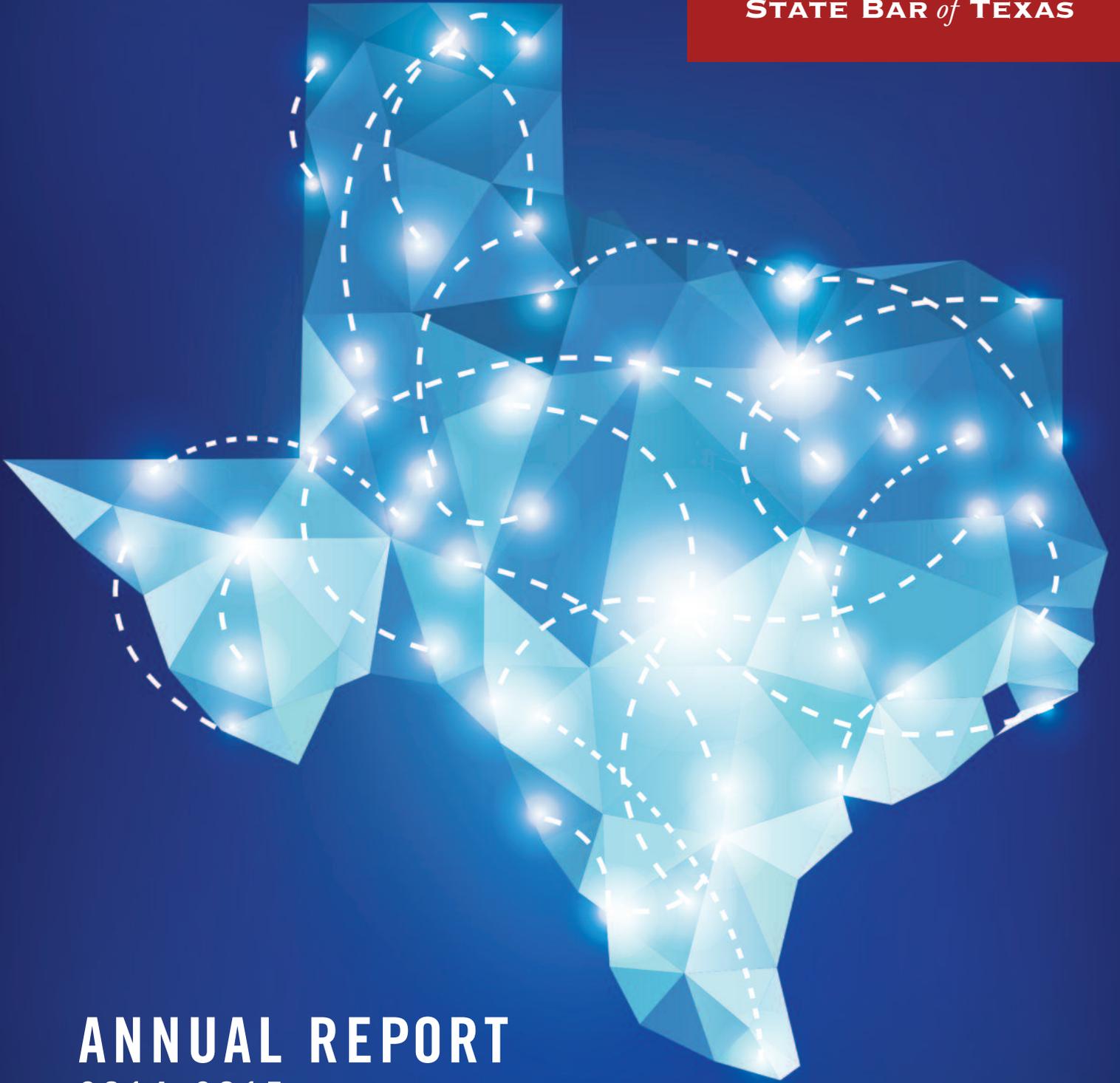


STATE BAR *of* TEXAS



ANNUAL REPORT
2014-2015

STATE BAR OF TEXAS
MISSION STATEMENT

The mission of the State Bar of Texas is to support the administration of the legal system, assure all citizens equal access to justice, foster high standards of ethical conduct for lawyers, enable its members to better serve their clients and the public, educate the public about the rule of law, and promote diversity in the administration of justice and the practice of law.

If I had to choose a word to characterize 2014-2015, it would be “outreach.” In a variety of ways—both planned and unforeseen—the State Bar of Texas engaged in meaningful outreach this year, spurred on by our mission to support the administration of the legal system and assure all citizens equal access to justice.

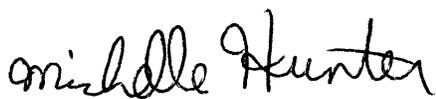
First, the planned outreach: 2014-2015 President Trey Apffel made it his goal to “engage, inform, and inspire,” and he led the way in connecting with members and the public through his written messages and public appearances. Trey was also among a core group of bar leaders who toured the state and offered free CLE to members through our Solo and Small Firm Outreach Program. And under the leadership of our Board of Directors, we continued to grow and improve existing outreach programs such as Texas Lawyers for Texas Veterans, which has now served more than 18,000 members of our veterans community through the work of approximately 5,000 volunteer attorneys.

The State Bar also continued to serve as a catalyst in advancing law-related and civics education across Texas through our Law-Related Education Department and programs such as the Hatton W. Sumners Institutes and the Texas Citizen Bee. The year 2015 marks the 25th anniversary of our partnership with the Hatton W. Sumners Foundation, which provides critical grant funding to make many of these programs possible.

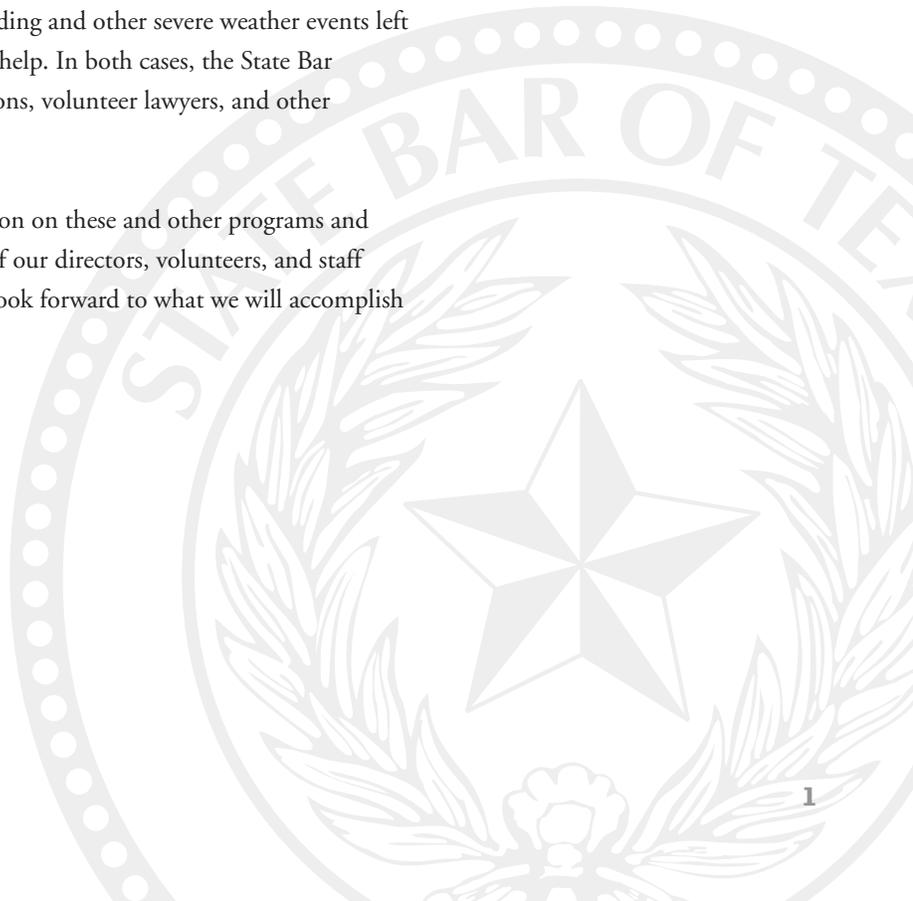
Other outreach opportunities arose unexpectedly. The year started with an influx of unaccompanied minors crossing our southern border, which created a unique need for pro bono legal assistance. Toward the end of May, flooding and other severe weather events left many Texans throughout the state in need of legal help. In both cases, the State Bar worked with legal aid providers, local bar associations, volunteer lawyers, and other partners to help address those needs.

The 2014-2015 Annual Report is full of information on these and other programs and services that your State Bar provides. I am proud of our directors, volunteers, and staff members for their hard work and dedication and look forward to what we will accomplish together in the year ahead.

Sincerely,



Michelle Hunter
Executive Director



2014-2015 PRESIDENT

At the beginning of his term, Trey Apffel wrote a column in the *Texas Bar Journal* outlining what he wanted to accomplish during his presidency. His mission involved three words: Engage, Inform, Inspire. The plan was a focus on communications—to expand tools, to publicize the many programs and services that the State Bar offers to members and the public, and to inspire the lawyers of Texas to recommit themselves to the profession. During the course of his tenure, Apffel remained strong to his commitment and succeeded not only by personally traveling



across the state, reaching out to practitioners and meeting with judges, but also by pushing forward on a broad level through improved messaging capabilities.



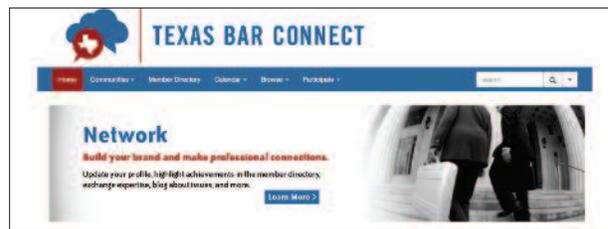
SOCIAL MEDIA

An increased emphasis was placed on using social media to make members, the media, and the public aware of the State Bar programs and services available, from pro bono veterans clinics via Texas Lawyers for Texas Veterans to free CLE through the Solo and Small Firm Outreach Program. At the close of the 2014-2015 bar year, there were 15,911 interactions, 10,055 unique users, and 27,375,625 impressions for the State Bar of Texas Facebook and Twitter sites. People commented on *Texas Bar Journal* stories, favorited tweets about Annual Meeting, shared Facebook posts, and more.



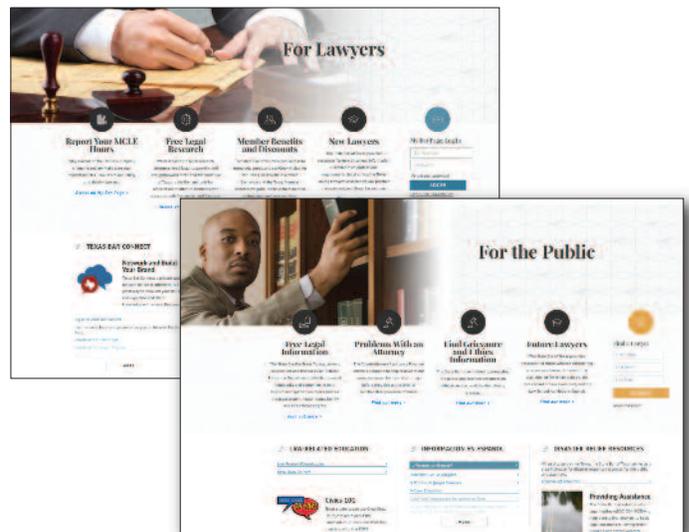
TEXAS BAR CONNECT

This past year, the State Bar launched a private social network for Texas attorneys. Texas Bar Connect is a great way to network with peers, build a brand, and share knowledge with colleagues. An Annual Meeting group was added to kick off the conference, and a growing list of sections and committees is regularly discussing topics pertaining to their practice areas. In addition to gaining insights from practitioners, attorneys can share files, update their profiles, and use Connect as a blogging platform. There's also an app so that lawyers can stay connected 24/7 from anywhere.



TEXASBAR.COM

At Annual Meeting, the State Bar launched a new responsive website that can be easily viewed on any device. The look is uncluttered and crisp, and the navigation is improved and streamlined. The home page, which features a carousel of rotating content that highlights important news and programs, is divided into a “Public” side and a “Lawyer” side, and items such as “Find a Lawyer” and “My Bar Page” are easily accessible. A dashboard for monetary transactions is user-friendly, and a new tabbed system allows for easy access to MCLE records and other popular areas.



OUTREACH

Texas lawyers are quick to volunteer when disaster strikes. The 2014-2015 bar year offered unique opportunities for attorneys to serve people in desperate need of legal services, and the State Bar of Texas helped lead the way.

IMMIGRATION

The State Bar has extensive experience responding to the needs of attorneys and the public in times of crisis and is committed to training lawyers who work “in the trenches” for people who can’t afford legal help. When the country experienced an influx of unaccompanied minors crossing the U.S.-Mexico border, the State Bar created a Web page, texasbar.com/volunteer, to provide up-to-date information on training and pro bono opportunities, important websites, and other helpful information. The State Bar also coordinated requests from attorneys who wanted to volunteer, helping to ensure they were placed where their skills were most needed. The bar also created texasbar.com/immigration to provide general resources on immigration law to the public, including Spanish-language videos warning about the problem of *notario* fraud.

FLOOD RESPONSE

When flooding, tornadoes, straight-line winds, and other severe weather hit multiple areas of Texas in spring 2015, the State Bar’s disaster hotline—(800) 504-7030—was ready to help people find answers to basic legal questions and get connected to local legal aid providers. The State Bar also launched a Web page at texasbar.com/floodresponse to share resources and offered an online survey form to connect attorneys with volunteer opportunities. Local bars and legal aid groups also stepped up with helpful resources, including legal call lines and clinics, and they continue to serve those impacted by the storms.



Benny Agosto Jr., 2014-2015 chair of the State Bar of Texas Hispanic Issues Section, speaks with Univision Houston in August 2014 about how to detect and report notario fraud.



WHAT WE DO

BUILDING YOUR PRACTICE

The State Bar of Texas offers tools to help attorneys grow their practices. One is the Lawyer Referral and Information Service, which connects clients in need of legal representation with attorneys who can help. LRIS provides referrals in more than 240 Texas counties—areas that don't have a local system in place. Callers to the service are given a 30-minute consultation with a participating attorney for \$20, with the attorney charging regular fees afterward if retained. LRIS attorney members receive 20 percent off TexasBarCLE products and services. The bar also offers the Texas Bar Career Center, which is a great online tool for both employers and job seekers. Visit the Career Center to post open positions or search online for Texas legal-related jobs. Every other week, State Bar of Texas members receive a Job Flash featuring the latest jobs posted to the Career Center.

COMMUNICATIONS

The bar keeps members informed in a variety of ways. Each month, excluding August, members receive the *Texas Bar Journal*, which includes information and in-depth stories on current legal topics, human interest features, disciplinary actions, technology, and more. It can also be viewed online at texasbar.com/tbj. Members and the public can follow the bar on Facebook, Twitter, LinkedIn, Instagram, Pinterest, and Flickr for timely announcements on lawyers in the news, reminders about their membership, links to special articles, and information about events. The Texas Bar Blog provides more information about special events, award recipients, *Bar Journal* summaries, and attorney profiles, while Texas Bar Today offers curated legal news and commentary by Texas lawyer bloggers. Finally, the bar's YouTube channel, Texas Bar TV, showcases interviews with experts on the latest legal trends and hot topics.

CONTINUING LEGAL EDUCATION

TexasBarCLE is one of the top providers of continuing legal education in the country and often sets the national standard for CLE content and delivery. During the

2014-2015 bar year, TexasBarCLE offered 149 webcasts, 749 online classes, 99 live courses, and 58 video replays. All programs are filmed and archived for online viewing, with more than 2,000 hours available as online classes. Also, more than 20,000 CLE articles are featured in the online library, including more than 1,500 ethics-related articles.

DIVERSITY AND STATE BAR PARTICIPATION

Without its members' participation, the State Bar would be unable to meet its standards of excellence in service. In the 2014-2015 bar year, approximately 41,490 State Bar members were members of one or more sections. The Office of Minority Affairs and other State Bar initiatives include the Texas Minority Counsel Program, which matches minority attorneys with corporations looking to hire counsel, and the Texas Minority Attorney Program—CLE events geared toward women and minority attorneys. In bar year 2014-2015, TMCP participants included 449 attorneys, 36 corporations, and 56 sponsoring law firms. In bar year 2014-2015, 149 attorneys, law firms, and legal departments participated in the Texas Minority Attorney Program.

EDUCATING THE PUBLIC

In an effort to reach as many members of the public as possible with useful information about the Texas legal system and the law, the State Bar, the Texas Young Lawyers Association, and the bar's Law-Related Education Department publish, in print and online, dozens of handbooks and pamphlets in both English and Spanish on such topics as health issues, senior citizen issues, employment law, veterans rights, family law, school law, and consumer and tenants rights. Law-Related Education holds teacher workshops and publishes educational materials for teachers and children. With Law-Related Education's newest resource, *Justiceville, U.S.A.*, students explore a city's points of interest—like the post office, airport, and library—to study citizenship, geography, and government concepts that are part of the TEKS standards. The interactive website introduces elementary-age learners

to community helpers, navigation, and coordinates, while older students examine federalism and separation of powers. Games, maps, trading cards, and resources provide additional context and add to the experience. Information is also available in Spanish. To learn more, go to http://texasregames.org/Justiceville_USA/.

EDUCATING YOUNG LAWYERS

In addition to providing continuing legal education for all lawyers, the bar also plays an important role in educating young lawyers, helping them build a strong foundation for the practice of law. Programs include: *After the Bar Exam*, which offers links to more than 2,000 hours of CLE online classes and access to other helpful resources for students who have graduated from law school and are awaiting the results of the bar exam; *Transition to Practice*, a template mentoring program that is adaptable for bar associations of all sizes; and *Ten Minute Mentor*, a collection of 10-minute online videos of lawyers offering practical advice or tips on specific legal topics. Also, many State Bar sections offer free or discounted membership for first-year lawyers and law students. Sections often partner together for law school seminars and mentoring programs. Finally, the State Bar of Texas Law Student Division provides an avenue for law students to connect to the bar before graduating, offering educational, networking, and scholarship opportunities.

ETHICS HELPLINE

The Ethics Helpline at (800) 532-3947 provides non-binding, non-confidential advice to licensed Texas attorneys on ethics questions, including information on how to access the rules and find relevant ethics opinions and caselaw to help them make informed decisions.

LAW PRACTICE MANAGEMENT

The Law Practice Management Program provides members with information on starting, maintaining, growing, or closing a practice. Free resources available at texaslawpracticemanagement.com include how-to brochures on topics such as setting billing rates and running a paperless office and links to the popular *Ten Minute Mentor* video series. Another guide to hanging out a shingle is the Texas Young Lawyers Association project *Office in a Flash*. This initiative provides useful materials for starting a practice, including information about business plans, firm structure, office logistics, technology,

and how to obtain and manage revenue. Don't forget to look for the Solo and Small Firm column in each issue of the *Texas Bar Journal*.

LEGAL SERVICES FOR ALL TEXANS

The State Bar of Texas is committed to ensuring that all Texans, regardless of income, have access to our courts. The Legal Access Division provides support to legal service programs and volunteer attorneys. It refers low-income Texans in need of legal assistance to local legal aid providers and works with local bar associations and legal aid providers to expand pro bono efforts in their communities, including recruiting and training volunteers. Last year, more than \$1.1 million was raised for legal services through contributions and as a result of access-to-justice campaign initiatives. These funds were distributed to the Texas Access to Justice Foundation and the Texas Bar Foundation to provide grants to expand direct legal services to poor and low-income Texans.

LOCAL BAR SERVICES

The State Bar of Texas Local Bar Services Department fosters and maintains relationships between the State Bar and local bar associations, offering a number of support services. Each year, a Bar Leaders Conference offers education and networking for local bar executives and volunteer leaders. Outreach to local bars helps to fulfill one of the purposes outlined in the State Bar Act.

MEMBER BENEFITS AND ONLINE TOOLS

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. State Bar members can manage their member profiles and MCLE hours online on My Bar Page at texasbar.com. The State Bar of Texas is the first and only bar association in the country to offer its members free access to both Fastcase and Casemaker legal research. The State Bar of Texas Member Benefits Program offers access to an extensive list of benefits, including car rentals, legal publications, travel offerings, financial information, computers, and other lawyer-specific products. Currently attorneys have access to more than 280 benefits. In addition to the member benefits program, professional liability insurance is offered at special rates by USI Affinity and the Texas Lawyers' Insurance Exchange.

WHAT WE DO

PRESERVING HISTORY

The State Bar Archives Department serves as the official repository for the records of the State Bar of Texas (1939-present), the Texas Bar Association (1882-1939), and donated legal history materials. The staff members of the Archives Department also serve as staff members of the Governor Bill and Vara Daniel Center for Legal History.

PROTECTING THE PUBLIC

The Client-Attorney Assistance Program answers a hotline at (800) 932-1900 to help resolve minor issues between clients and attorneys before they rise to the level of sanctionable grievance offenses. During 2014-2015, the CAAP staff took action more than 21,500 times and provided dispute resolution services for more than 1,000 Texas lawyers and their clients. The Texas attorney discipline system is administered by the Office of Chief Disciplinary Counsel, whose work is overseen by the Commission for Lawyer Discipline. CDC represents the commission in disciplinary litigation. In 2014-2015, the CDC Ethics Helpline received more than 6,200 calls, and the State Bar disciplinary system issued a total of 318 sanctions, resolving 416 filed grievances. Also, the Client Security Fund assists clients whose lawyers take funds belonging to them. Clients can apply to the fund after disciplinary proceedings are completed. Payouts are funded through an annual appropriation from the bar, interest on the corpus, and any restitution received. In 2014-2015, 138 applications were presented and 102 were approved, resulting in grants totaling \$639,581.

TEXAS BAR CONNECT

In 2007, the bar launched the first members-only private social network, Texas Bar Circle. In 2014-2015, a new platform with advanced features, called Texas Bar Connect, was launched to offer lawyers an enhanced way to interact and share practice tips. Texas Bar Connect features single sign-on, which enables users to easily log in

to the platform using their My Bar Page log-in information; special communities designed to facilitate discussion of practice-area-specific legal questions; a resource library that allows users to upload and share documents and articles; and a directory to easily search for a colleague, or connect with an attorney in a specific field of law.

TEXAS BAR PRIVATE INSURANCE EXCHANGE

The State Bar of Texas offers the Texas Bar Private Insurance Exchange, a multi-carrier private exchange designed for State Bar of Texas members, their staffs, and their dependents. Available to both individuals and employer groups, the Texas Bar Private Insurance Exchange offers a wide variety of insurance choices. In 2014-2015, the total number of individuals enrolled in one or more insurance products increased by 46 percent (6,975 to 10,184).

TEXAS LAWYERS' ASSISTANCE PROGRAM

The Texas Lawyers' Assistance Program helps lawyers, judges, and law students whose professional performance and personal wellbeing is impaired because of mental health or substance abuse concerns, chronic stress, or cognitive decline. In 2014-2015, TLAP provided direct assistance to more than 600 members of the legal profession and made 124 presentations at local bar association events, judicial conferences, TexasBarCLE events, and law schools. All communication with TLAP is confidential by statute.

TEXAS LAWYERS FOR TEXAS VETERANS

Texas Lawyers for Texas Veterans, a State Bar of Texas program, continues to grow, and more than 30 local bar associations are now participating. Since its inception in 2010, some 5,000 volunteer attorneys have helped more than 18,000 veterans.

BY THE NUMBERS

The following information is collected pursuant to Section 81.0215 of the Texas Government Code Ch. 81 (the State Bar Act), which requires the State Bar of Texas 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 Supreme Court of Texas the outcomes of these strategic plan performance measures.

As the basis of its current strategic plan, the 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 provide a snapshot of results and outcomes of State Bar core services for the 2014-2015 bar year.

SERVICE TO THE PUBLIC

*Distribution of printed information regarding legal issues and topics of particular relevance to the public: **18,602** pamphlets*

*Distribution of multimedia information regarding legal issues and topics of particular relevance to the public: **47** news releases, media advisories, and op-eds*

*Distribution of online information regarding legal issues and related topics of particular relevance to the public: **45,361** pamphlets page hits and **1,883** media page hits*

*Visits to pages on State Bar-related websites containing legal information on legal issues of importance to the public: **45,361** pamphlets page hits, **1,883** media page hits, **1,229** unique hits, **20,840,793** total hits to the SBOT website, and **12,468,288** unique page views*

*Traffic to State Bar social media sites on legal issues of importance to the public: **15,911** interactions, **10,055** unique users, and **27,375,625** impressions for Facebook and Twitter*

*Courses provided to teachers by the Law-Related Education Department: **151** Law-Focused Education teacher training sessions and **7,268** teachers trained by LRE*

*Students taught by teachers trained by LRE: **256,475** students impacted by teacher training sessions*

*LRE/LFEI website hits: **122,645** visits to texaslre.org, **81,135** visits to texasbar.com/civics, and **29,620** visits to texasbar.com/iwasthefirst*

*Presentations by attorneys/judges in public schools using TYLA materials: More than **50** presentations*

*Number of those helped by Texas Lawyers for Texas Veterans: Since 2010, more than **5,000** attorneys have assisted more than **18,000** veterans through local bar associations and other attorney volunteer organizations*

*Lawyer Referral and Information Service referrals: More than **60,000** referrals*

SERVICE TO MEMBERS

Attendance for TexasBarCLE webcasts:

FY 2015 Offerings — **149**, Attendance — **7,546**

Attendance for TexasBarCLE online CLE:

FY 2015 Offerings — **749**, Attendance — **75,992**

Attendance for TexasBarCLE video courses:

FY 2015 Offerings — **58**, Attendance — **3,097**

Attendance for TexasBarCLE live courses:

FY 2015 Offerings — **99**, Attendance — **17,266**

Sales of books, DVDs, and digital licenses by

TexasBarBooks: **14,000**

Diversity of SBOT membership: **66%** male and **34%** female;

81% Caucasian, **8%** Hispanic/Latino, **5%** African-American,

3% Asian, less than **1%** American Indian, and **2%** not specified

Diversity of SBOT section membership:

41,491 attorneys are members in sections;

66% are males, **34%** are females;

16% of members are an ethnic minority

Diversity of SBOT committee membership: **53%** male,

47% female, and **31%** ethnic minority

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 bar year 2015 there were a total of **283** benefit providers featured 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 USI Affinity and TLIE.

Visits to SBOT member benefits Web pages: **157,083**

Visits to Texas Bar Private Insurance Exchange website:

14,951 unique page views

Number of members enrolled in one or more insurance products: **10,184**

Number of members enrolled in major medical insurance: **4,366**

Number of members enrolled in other insurance products: **10,660**

Number of attorneys, law firms, and legal departments attending and participating in the Texas Minority Attorney Program: **149**

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

449 attorneys attended, **36** corporations participated, and **56** sponsoring law firms participated

The Texas Lawyers' Assistance Program assisted **624** lawyers, judges, and law students and made **124** presentations at local bar associations, conferences, CLE events, and law schools.

Number who voted in 2015 SBOT elections (officers & directors):

24,346 (**25%** of eligible voters); **69%** voted online, **31%** voted by paper ballot

PROTECTION OF THE PUBLIC

Contacts the Client-Attorney Assistance Program received:

21,875 contacts (**15,138** live calls, **5,674** mail requests, and **1,063** email requests)

Dispute resolutions conducted by CAAP:

1,095 with an **84%** closure rate

BAR YEAR 2014-2015

	Total Sanctions	Total Complaints Resolved
Disbarments	28	48
Resignations	19	54
Suspensions	111	146
Public Reprimands	32	34
Private Reprimands	65	71
GRP	63	63
Total	318	416

Eligible applications considered by the Client Security Fund: **138**

Eligible applications approved by the Client Security Fund: **102**

Total amount of grants paid by the Client Security Fund:

\$639,581.09

A Client Security Fund newsletter is published bi-annually (the next one will be published January 2016) on the bar's website and is sent to district attorneys' offices, victims assistance offices, board members, grievance committee chairs, Supreme Court justices, Grievance Oversight Committee members, and co-relevant funds in the other **49** states and the provinces of Canada. A brochure about the fund is also published on the website. In addition, an application is available online and may be filed electronically.

The Ethics Helpline handled more than **6,200** calls.

Number of ethics publications by TexasBarBooks: **17** books and **2** DVDs

ACCESS TO JUSTICE

Legal aid referrals made by SBOT to members of the public and to inmates: **3,977**

Legal aid and pro bono attorneys using the free legal research: **350** attorneys, **90** paralegals

Legal aid and pro bono attorneys using the free malpractice insurance: **59**

Legal aid and pro bono attorneys who received scholarships to TexasBarCLE events in conjunction with the Legal Access Division: **205**

Legal Access Division DVD CLE requests: **17**

Legal aid attorneys who received help through the Student Loan Repayment Assistance Program: **125**

Attendees at Legal Access Division annual seminars: **279** attended the Poverty Law Conference, **57** attended the Pro Bono Coordinators Retreat, and **30** attended the Pre-Trial Academy

Texas Lawyers for Texas Veterans: Since 2010, more than **5,000** attorneys have assisted more than **18,000** veterans through local bar associations and other attorney volunteer organizations

Number of sections that have pro bono initiatives (including grants,

CLE scholarships, and internships): **24**

Hours attributed to specific section pro bono initiatives: **32,634** pro bono hours and **15,338** reduced-fee hours

Total amounts funded to legal assistance to the poor: **\$30.9 million** (federal Legal Services Corporation funding) and **\$8.78 million** (state funding)

SOUND ADMINISTRATION AND RESOURCES

Trainings provided to staff: all staff members attended Myers-Briggs Type Indicator workshops; all new employees received mandatory EEO training; 3 full staff meetings were held

Ethnic and gender diversity of SBOT staff: **66 (23%)** male and **220 (77%)** female; **187 (65%)** Caucasian, **22 (8%)** African-American, **73 (26%)** Hispanic, **2 (.7%)** Asian, and **2 (.7%)** American Indian

FINANCIAL MANAGEMENT

Financial audit: The result of the most recent financial audit (FY 2014) was an unqualified opinion, also referred to as a "clean" opinion; the FY 2015 financial audit began August 3, 2015

Amount SBOT has set aside in reserves: **\$9,119,228**



STATE BAR of TEXAS

THE TEXAS LAWYER'S CREED

A lawyer owes to the administration of justice personal dignity, integrity, and independence. A lawyer should always adhere to the highest principles of professionalism.

- 1. I am passionately proud of my profession. Therefore, "My word is my bond."*
- 2. I am responsible to assure that all persons have access to competent representation regardless of wealth or position in life.*
- 3. I commit myself to an adequate and effective pro bono program.*
- 4. I am obligated to educate my clients, the public, and other lawyers regarding the spirit and letter of this Creed.*
- 5. I will always be conscious of my duty to the judicial system.*

—The Texas Lawyer's Creed, Article I

To request a copy of the complete Texas Lawyer's Creed, go to texasbar.com/ethics.

STATE BAR *of* TEXAS
texasbar.com