



# ANNUAL REPORT 2019-2020



*Serving our members so they can serve the community*

# Resiliency in a Time of Crisis

The D.C. Bar wrapped up its ambitious five-year strategic plan in fiscal year 2019–2020, which also saw the organization weather an unprecedented global health crisis and prove its resiliency and ability to support its members through challenging times. With its strong leadership and dedicated staff, the Bar delivered on its five key priorities: leading within the legal profession, empowering individuals, enhancing member value, providing public service and professional excellence, and fostering community and connections.

The Bar swiftly responded to the coronavirus pandemic by transitioning fully to remote work, maintaining continuity of operations while ensuring the safety of its staff, members, and volunteers. The Lawyer Assistance Program, Legal Ethics Program, and Practice Management Advisory Service sprang into action to ensure members have the support they need to cope with the pandemic by curating a list of resources on financial aid options, addressing issues surrounding mental health and wellness, providing best practices for working remotely, and advising members on their ethical obligations. The Attorney/Client Arbitration Board worked quickly to transition to virtual hearings within weeks of the Bar's office closure.

In March 2020, the Board of Governors approved and subsequently submitted the Rules of Professional Conduct Review Committee's proposed amendments to selected rules to the D.C. Court of Appeals for its consideration. The report proposes amendments to Rules 1.1 (Competence), 1.6 (Confidentiality), 3.8 (Special Duties of a Prosecutor), 4.4 (Rights of Third Parties), and 5.3 (Responsibilities Regarding Nonlawyer Assistants).

During this fiscal year, the Bar leveraged the latest technologies to increase efficiency of service. Member Services launched an online portal for firm billing administrators, created an online Certificate of Good Standing order and fulfillment process, and moved to online invoicing for license renewal. It also added 10 member benefits partners to its affinity program.

Similarly, the D.C. Bar Communities, which support more than 31,500 memberships across 21 practice areas, increased member value by presenting more than 350 programs, made possible through the efforts of 1,000-plus volunteer planners and speakers. The new Law Student Community premiered its "Let's Brief It" podcast, the inaugural series of the D.C. Bar Communities Podcast Network. This year Communities

achieved other firsts, such as making the *D.C. Practice Manual* available to members in electronic format and hosting its 21st Annual Youth Law Fair virtually.

Demonstrating the Bar's commitment to quality programming that empowers attorneys, the Continuing Legal Education Program conducted more than 200 courses, 70 of which were new offerings. More than 150 of these classes were offered simultaneously as webinars. Several courses addressed topics related to the coronavirus pandemic such as the CARES Act and teleworking. The CLE Program also successfully converted the Mandatory Course on the District of Columbia Rules of Professional Conduct and D.C. Practice into an on-demand program.

Recognizing the evolving challenges in the business of law, the Global Legal Practice Committee continued its study of alternative business structures and multidisciplinary practice, requesting public comment and conducting a member survey on these topics. It also continued to examine alternative methods of delivering legal services to individuals.

None of the Bar's successes would have been possible without support from its IT Department. By implementing its Risk Registry and Business Continuity Plan, Bar staff were prepared for remote work. Even before making virtual operations possible, the department had already established Board of Governors and committee portals, streamlining access to meeting and background materials; improved the D.C. Bar election user platform; and created a portal for law firm administrators.

The D.C. Bar Pro Bono Center, which is supported entirely by voluntary contributions, continues to transform lives and serve more than 20,000 individuals, nonprofits, and small businesses annually. The center also helped a record-breaking 1,559 people at its monthly Advice & Referral Clinics and another 194 individuals at its quarterly Immigration Legal Advice & Referral Clinic. As the pandemic hit, the center adapted quickly to serving clients remotely, setting up dedicated phone lines for its resource centers and clinics, developing COVID-19-specific content for LawHelp.org/DC, and helping nonprofits and small businesses to apply for federal funds.

Looking forward, the Bar continued its 2020–2025 strategic planning process, forming a Strategic Planning Committee, disseminating a membership survey, and facilitating more than 30 focus groups.

# The D.C. Bar at Work: A Year in Review

## COMMUNITIES

350+ events

8,250+ registrants

280+ webinar/on-demand programs

1,000+ volunteer attorney planners and speakers



## D.C. BAR PRO BONO CENTER



20,000+

individuals, nonprofits & small businesses served

### Nonprofit & Small Business Legal Assistance Programs

- Matched 67 nonprofits with pro bono counsel
- Connected 445 small business owners with volunteer lawyers
- Trained 452 small businesses & 1,164 nonprofits

**Housing Attorney of the Day Program** — Represented 378 clients

**Landlord Tenant Resource Center and Consumer Law Resource Center** — Served 4,400 pro se litigants in D.C. Superior Court

**Advocacy & Justice Clinic** — Placed 252 cases for full representation

**Advice & Referral Clinics in Shaw & Anacostia** — Served a record 1,559 people

**Bankruptcy Clinic** — Provided counsel in 41 cases

**Immigration Legal Advice & Referral Clinic** — Helped a record 194 individuals

**Legal Information Help Line** — Fielded 13,032 calls

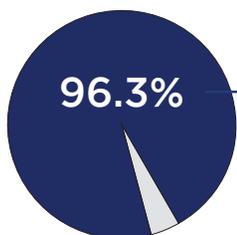
**LawHelp.org/DC** — Viewed 116,175 times per month on average

*(Figures based on the Center's 2018-2019 annual report)*

## MEMBER SERVICES

3,700+ new members over fiscal year

35,764 member inquiries handled



satisfaction rating for contact center

## COMMUNICATIONS

- 2019 Luminary Award from the National Association of Bar Executives for *Washington Lawyer* magazine
- Member Spotlight video series
- Increased social media engagement (LinkedIn by 17%, Twitter by 7%)



# REGULATION COUNSEL

## Attorney/Client Arbitration Board

- Concluded **25** cases in the first three quarters; issued **16** arbitration awards, resolving a total of \$2,067,330.21 in disputed legal fees
- Formed the Awareness and Accessibility Subcommittee to promote awareness of the board's fee arbitration service and to provide information to assist parties involved in the arbitration process

## Legal Ethics Program

**2,133** inquiries through the Legal Ethics Helpline in first three quarters of fiscal year, up from 2,090 calls at the same time last year

## Clients' Security Fund

- Received **\$71,443** through the third quarter in attorney restitution for past awards
- Increased accessibility by producing a Spanish translation of the CSF Application for Reimbursement and Rules of Procedure



## Practice Management Advisory Service

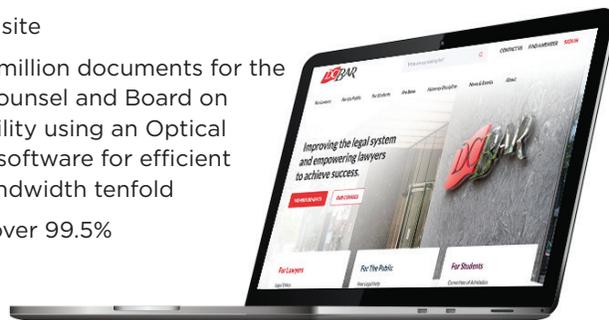
- Made Practice 360° programs available on demand post-event for the first time
- Switched Basic Training & Beyond program to virtual classroom during the pandemic
- Increased the number of Lunch and Learn programs from 25 to **37**
- Conducted **75+** education/outreach programs

## Lawyer Assistance Program

- Selected to host the 2021 ABA Commission on Lawyer Assistance Programs conference
- Performed extensive update to LAP clinical intake forms to collect demographic data according to current industry best practices
- By March 31, had opened 99 new cases and conducted **1,038** client sessions

# IT

- Completed 9-month redesign of the Bar's website
- Supported operation of the Bar as a 100% virtual organization during COVID-19 emergency
- Prioritized multipronged approach to cybersecurity — staff training, new software, safer document transfer
- Improved members' experience — online processing of Certificates of Good Standing, faster onsite registration, streamlined page on communications preferences, search-friendly events and course catalog
- Launched new intranet site
- Processed more than 1 million documents for the Office of Disciplinary Counsel and Board on Professional Responsibility using an Optical Character Recognition software for efficient indexing, increasing bandwidth tenfold
- Consistently achieved over 99.5% satisfaction rating



## CLE PROGRAM

**200+** courses (70+ new)

**150+** webinars

**6,500+** attendees

**100+** on-demand courses

# The District of Columbia Bar

## Statements of Activities and Financial Position Years Ended June 2019 and 2018

<b>REVENUE</b>	<b>2019</b>	<b>2018</b>	<b>ASSETS</b>	<b>2019</b>	<b>2018</b>
Membership License Fees	\$30,354,371	\$28,781,446	Cash and Cash Equivalents	\$15,220,546	\$18,772,224
Communities Dues	1,448,791	1,502,703	Restricted Cash - Building Escrow	3,144,045	4,002,879
In-Kind Contributions	3,774,011	3,123,183	Restricted Cash - Clients' Security Fund	1,046,212	997,065
Contributions	4,500	7,850	Investments	12,700,728	12,008,638
Admission and Registration	1,758,300	1,730,950	Other Assets	1,448,118	560,242
Investment Income	738,069	960,274	Interest Rate Swap Agreements		57,856
Other Fees and Services	1,663,868	1,018,590	Property and Equipment	76,115,230	76,194,066
Cost Center Transfers	(15,000)	(19,000)	<b>Total Assets</b>	<b>\$109,674,879</b>	<b>\$112,592,970</b>
<b>Total Revenue</b>	<b>\$39,726,910</b>	<b>\$37,105,996</b>			
<b>EXPENSES</b>			<b>LIABILITIES AND NET ASSETS</b>		
<b>Program Services</b>			<b>Liabilities</b>		
Board on Professional Responsibility	\$8,988,447	\$8,543,781	Accounts Payable and Accrued Expense	\$6,159,786	\$5,919,494
Regulation Counsel	3,416,596	3,255,537	Amount Due to Affiliate	906,086	256,756
Continuing Legal Education	2,882,919	3,242,940	Deferred Revenue	20,370,441	21,403,419
Communications	2,610,371	2,679,169	Accrued Loss on Lease	6,928,854	10,398,649
Communities	1,537,011	1,812,267	Interest Rate Swap	4,531,514	
Annual Meeting and Judicial Reception	335,888	146,773	Loans Payable	56,813,057	58,925,140
Clients' Security Fund Activities	245,995	97,572	<b>Total Liabilities</b>	<b>\$95,709,738</b>	<b>\$96,903,458</b>
<b>Total Program Services</b>	<b>\$20,017,227</b>	<b>\$19,778,039</b>	<b>Net Assets</b>		
<b>Supporting Services</b>			Undesignated	\$1,954,395	\$1,898,032
Administration and Finance	\$13,722,013	\$12,661,427	Board Designated		
Executive Office	3,025,822	2,964,471	Mandatory License Fee Purpose	8,661,545	10,572,365
<b>Total Supporting Services</b>	<b>16,747,835</b>	<b>15,625,898</b>	Communities	1,518,216	1,428,625
<b>Total Expenses</b>	<b>36,765,062</b>	<b>35,403,937</b>	Clients' Security Trust Fund	1,001,070	997,065
Change in Net Assets Before Other Activity	2,961,848	1,702,059	Continuing Legal Education	829,915	793,425
Loss on Lease	(96,849)	(10,534,733)	<b>Total Net Assets</b>	<b>\$13,965,141</b>	<b>\$15,689,512</b>
Net Gain (Loss) on Fair Value of Interest Rate Swap Agreements	(4,589,370)	57,856	<b>Total Liabilities and Net Assets</b>	<b>\$109,674,879</b>	<b>\$112,592,970</b>
<b>Change in Net Assets</b>	<b>(1,724,371)</b>	<b>(8,774,818)</b>			
Net Assets - Beginning of Year	15,689,512	24,464,330			
<b>Net Assets - End of Year</b>	<b>\$13,965,141</b>	<b>\$15,689,512</b>			

## **D.C. BAR BOARD OF GOVERNORS 2019-2020**

### **President**

Susan M. Hoffman  
*Crowell & Moring LLP*

### **President-Elect**

Geoffrey M. Klineberg  
*Kellogg, Hansen, Todd, Figel & Frederick, P.L.L.C.*

### **Secretary**

Courtney L. Weiner  
*Law Office of Courtney Weiner PLLC*

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*Office of the Attorney General for the District of Columbia*

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*The Law Office of Jessica E. Adler*

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*U.S. House of Representatives, Committee on Ethics*

Catherine D. Bertram  
*Bertram Law Group PLLC*

Elizabeth R. Dewey  
*DLA Piper*

A. J. S. Dhaliwal  
*Weiner Brodsky Kider PC*

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*Office of the Attorney General for the District of Columbia (retired)*

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*Wiley Rein LLP*

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*Holland & Knight LLP*

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*Bread for the City*

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*June Kress Consulting, LLC*

Megan Lacchini  
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*Whitman-Walker Health*

Peggy Lansbach O'More  
*U.S. Department of Health & Human Services*

Bridget M. Rowan  
*American University Washington College of Law*

Saleema Snow  
*UDC David A. Clarke School of Law*

Keiko K. Takagi  
*Sughrue Mion, PLLC*

## **D.C. BAR COMMITTEES AND TASK FORCES**

### **Attorney/Client Arbitration Board**

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Dr. Jessica Horewitz, *Vice Chair*

### **Audit**

Esther H. Lim, *Chair*

### **Budget**

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### **Communities**

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Kimberly Eney, *Vice Chair*

### **Continuing Legal Education**

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### **Executive**

Susan M. Hoffman, *Chair*

### **Finance**

Esther H. Lim, *Chair*

### **Global Legal Practice**

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Thomas Gilbertson, *Vice Chair*

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Lauren A. Greenberg, *Vice Chair*

### **Nominations**

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### **Pension**

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### **Pro Bono Committee**

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Matthew Haws, *Vice Chair*

### **Pro Bono Task Force**

Ronald S. Flagg, *Chair*

### **Regulations/Rules/ Board Procedures**

Mark Salzberg, *Chair*

### **Rules of Professional Conduct Review**

Thomas B. Mason, *Chair*  
Stacy M. Ludwig, *Vice Chair*

### **Screening**

Paul S. Lee, *Chair*

## **D.C. BAR COMMUNITIES**

### **Administrative Law and Agency Practice**

Timothy Brown, *Co-Chair*  
Thomas Lorenzen, *Co-Chair*

### **Antitrust and Consumer Law**

Anna Haac, *Co-Chair*  
John Ingrassia, *Co-Chair*

### **Arts, Entertainment, Media and Sports Law**

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Katielynn Boyd Townsend,  
*Co-Chair*

### **Corporation, Finance and Securities Law**

Leila Bham, *Chair*  
Peter Malyshev, *Vice Chair*

### **Criminal Law and Individual Rights**

Fabio Leonardi, *Chair*  
Sellano Simmons, *Vice Chair*

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Nicholas Majett, *Co-Chair*

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Peter Whitfield, *Co-Chair*

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Cecelia Steiner-Smith, *Co-Chair*

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Jamie Sparano, *Co-Chair*

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*Co-Chair*  
Erica Jo Radcliffe Geibel,  
*Co-Chair*

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Timothy MB Farrell, *Co-Chair*

### **Intellectual Property Law**

Brian Malkin, *Co-Chair*  
Belinda Scrimenti, *Co-Chair*

### **International Law**

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Dante Figueroa, *Co-Chair*

### **Labor and Employment Law**

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Jeremiah Carlyle Fugit, *Co-Chair*

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Roya Vasseghi, *Co-Chair*

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Matthew Worth Edwards,  
*Vice Chair*

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Amber Harding, *Co-Chair*

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David Brodsky, *Co-Chair*

### **Taxation**

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Elizabeth Young, *Vice Chair*

### **Tort Law**

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## **AFFILIATED PROGRAMS**

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Lucy Pittman, *Vice Chair*

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Nathalie P. Gilfoyle,  
*Vice President*