

The Future of the Practice of Law

DISTRICT OF COLUMBIA BAR ANNUAL REPORT



2023

2024

LETTER TO OUR MEMBERS

The era of artificial intelligence is here, with machinelearning technology slowly integrating itself into various aspects of our lives and reshaping the way we work and do business. While the legal profession is often not the first to embrace digital transformations, it is clear from the past year alone that attorneys are not immune to these newest advances in technology.

In 2023 we saw the deployment of several AI tools that automate and simplify some of the most time-consuming parts of lawyering, including document review and drafting, legal research and analysis, and case management. Law firms are also testing the waters of AI to take their business processes — from client intake to sales and marketing — to the future. And we are only seeing the tip of the iceberg.

Unsurprisingly, there is a lot of excitement and apprehension about the practical and ethical use of AI in the legal profession. The D.C. Bar recognizes that to effectively support its members, it must engage in ongoing conversations on how lawyers are harnessing AI and proactively lead discussions on future challenges, risks, and best practices surrounding this technology.

We have begun taking steps to meet members' needs by hosting an AI summit in 2023, followed by a series of programs on ChatGPT in 2024. Both offered deep dives into the latest in generative AI and why it's important for lawyers to stay abreast of emerging technology. In the coming year, our Continuing Legal Education Program, Communities, and Legal Ethics Program will continue to help demystify the world of AI as it relates to the ethical practice of law.

The D.C. Bar itself is embracing the potential of AI, launching this past May our own AI-driven Lawyer Referral Service that uses natural language processing technology to match members' expertise with prospective clients' needs. By leveraging technology and providing the public with direct access to qualified attorneys, the D.C. Bar is delivering on its mission to serve its members so they can serve the community.

While the D.C. Bar is setting its sights on the future practice of law, it remains grounded in its core organizational values of service, integrity, leadership, and inclusion. In the past year, we delivered top-notch programs and trainings to enhance our members' professional development, empowering them to achieve excellence. Our Legal Ethics Program has been an invaluable resource for members seeking guidance on the D.C. Rules of Professional Conduct, fielding more than 2,300 calls to the Legal Ethics Helpline and presenting dozens of ethicsrelated trainings.

We are committed to supporting lawyer well-being through our Lawyer Assistance Program's support groups, including a new group for lawyers with ADHD; free, confidential services such as clinical assessments and short-term counseling; and education and outreach to legal employers. And the D.C. Bar Pro Bono Center continues to be a critical legal lifeline to underserved communities in the District of Columbia, serving tens of thousands of individuals and small businesses year after year. The center's immersive family law videos for pro se litigants demonstrate our commitment to using technology to help the public navigate the courts and expand access to justice.

This annual report not only reflects another productive year for the D.C. Bar, but it also shows our strength as an organization that adapts to changes and anticipates the needs and challenges of our members.

We thank you for trusting the Bar's leadership in charting our future in a legal landscape undergoing unprecedented, transformative shifts, and we encourage you to continue engaging with our Bar and actively investing in its success.



Charle, K. Joney, Gr. Charles R. Lowery Jr. President



Robert J. frepretti Robert J. Spagnoletti CEO

LEADERSHIP IN THE AGE OF DISRUPTION

A rtificial intelligence has been predicted to reshape the legal profession, and in the past year, accelerating technology has borne out some of the prognostications about AI revolutionizing legal work and the way it is performed.

Not too long ago, prompted by the pandemic, legal professionals were forced onto virtual meeting platforms; today they are beginning to unlock the possibilities of Al and understand the risks of unchecked reliance on automated decision making.

It is clear that the practice of law in the future will be driven by sophisticated technology requiring new sets of skills from lawyers, and the District of Columbia Bar is at the forefront of efforts to help members navigate this new legal environment through education, training, and thought leadership. From its AI summit to its new AI-powered Lawyer Referral Service (LRS), the D.C. Bar has embraced innovation and facilitated conversations around game-changing tech and its impact on lawyers and the law.

Developed by the Bar's Executive Office and Information Technology Department in collaboration with cloud computing solutions expert Aptaria, Inc., LRS leverages next-generation AI and natural language processing technology to match Bar members subscribed to the service with clients seeking their particular expertise. D.C. Bar CEO Robert Spagnoletti describes LRS as "a significant step toward creating a modernized lawyer referral service. ... [It] embodies the Bar's mission to serve its members so they can serve the community — and has the added feature of empowering individuals with direct access to qualified attorneys." Positioning the Bar as a leader in understanding the limits and possibilities of generative AI, the D.C. Bar presented practical trainings and programming on AI and its ethical implications in legal practice. Attended by more than 100 legal professionals, the Bar's Artificial Intelligence & Chatbot Summit in September 2023 brought together a wide array of legal tech and ethics experts to explore current AI tools and what lawyers need to do to both adopt and adapt in a fast-changing legal landscape. The summit was followed by a three-part series in January and February 2024 providing attendees knowledge, direction, and hands-on experience on the basics of AI and ChatGPT.

Throughout the year, the D.C. Bar demonstrated that instead of waiting in the sidelines to see how generative AI will shake up the legal industry, it was going to empower lawyers to learn how to leverage new technologies to secure their place in the future practice of law.





The D.C. Bar delved into legal technology this fiscal year, hosting the Artificial Intelligence & Chatbot Summit featuring keynote speaker William Eskridge, launching its AI-powered Lawyer Referral Service, and using AI-generated witness statements for the Youth Law Fair.

A STRONGER FOUNDATION

As the D.C. Bar assessed how technology will disrupt and transform law and legal practice, Bar leaders also looked inward to determine how they can further strengthen the organization as it continues to grow and develop.

A three-year effort to modernize the Bar's founding documents culminated in January 2024 with the adoption of the revised D.C. Court of Appeals Rules Governing the District of Columbia Bar. Approval of the amendments marked the first time that the Rules have been comprehensively reviewed and updated since the Court of Appeals established the Bar more than 50 years ago.

With the revised Rules and updated Bylaws, "the Bar stands on an even stronger foundation to better serve its members," says D.C. Bar President Charles Lowery Jr. These governing documents will "clearly define our organization's functions, facilitate ease of administration of the Bar's policies and procedures, and conform to industry best practices for effective governance."

D.C. Bar leadership also revised the D.C. Bar Membership Manual to clarify how the Bar handles license-related communications with members, updated the Bar's procurement and contracting policy to align it more closely with current organizational needs and best practices, and developed new charters for 12 committees to reflect their work and governance more accurately. throughout the case management process and better online experience for Regulation Counsel staff, attorneys, and clients.

EXPERIENCE, ACCESS, AND VALUE

With more than 118,000 members, the Bar continues to look for ways to innovate, improve member experience, and increase member value. In fiscal year 2023–2024, the Member Services Department streamlined the Bar's admittance process, making it easier and faster for new members to receive their Bar numbers and access member benefits.

The department also introduced an online reinstatement process that expedites members' ability to submit and receive decisions on reinstatement requests compared to previous forms. A more seamless firm billing program translated to 22 new firms enrolled in the past fiscal year. Overall, the firm billing program facilitated renewals for thousands of members affiliated with 146 law firms.

The Member Services Department responded to more than 27,300 email inquiries, handling 90 percent of them with a single response and earning a 94.6 percent satisfaction rate. Staff received 22,700 calls with a less than 3 percent abandon call rate.

To make it easier for members to access all their benefits in one place, the department added a My Member Benefits section to their Personal Snapshot online as well

Using the latest technology, the D.C. Bar also continued to simplify services, including transitioning to a new event management system for an improved registration process, user-friendly interfaces, robust reporting capabilities, and overall smoother experience for participants and organizers.

The IT Department actively collaborated with Regulation Counsel to implement a revamped case management system for the Clients' Security Fund and the Attorney/Client Arbitration Board, providing enhanced efficiency and communication



Attorneys took advantage of more in-person programming at the Bar's headquarters.

as a single sign-on to Fastcase. Members now have more access to exclusive discounts on a wide range of products and services through the Bar's expanded affinity program — 38 partners to date, including new additions such as Lawmatics, TimeSolv, Flagship Insurance, and others.

In the past year, the Bar also added two new categories of member benefits: Home (with new affinity partner GE) and Publications (with new affinity partner ABA Books for Bars).

BUILDING KNOWLEDGE

Membership with the D.C. Bar means access to the latest information and to experts on emerging issues in the law, and the Bar's CLE Program remains a leading source of knowledge on changing laws, ethics rules, and practice tools.

In fiscal year 2023–2024, the CLE Program offered more than 140 nationally accredited courses, both virtual and in-person, in more than 25 practice areas. Of these programs, 25 percent were new, and approximately 5,000 attorneys attended the live sessions. The CLE Program continues to provide flexible learning opportunities for Bar members, offering more than 120 accredited on-demand courses they can attend on their own schedule.

In addition to classes on AI and ChatGPT, notable new CLE programs included "Learn by Doing: An Hour of Legal Writing Exercises," "Scientific Evidence in Litigation," "Proposed Overhaul of Bank Regulatory Capital Requirements," "Nonprofit Corporate Governance Disputes in the District of Columbia," and "Starting a Law Practice: Ethical and Practical Considerations."

The CLE Program continues to build on its robust collaborations with other organizations and government agencies, including with the TEGE Exempt Organizations Council, whose annual event in November 2023 on the latest regulations and court decisions registered 600 online attendees. The CLE Program also partnered with the National Trust for Historic Preservation for its preservation law conference in October 2023, attracting 159 remote and in-person attendees, and with the U.S. Department of Homeland Security to develop the two-day Legislative Counsel Summit in May 2024.

The CLE Program secured accreditation for its successful CLE Abroad, with 35 members participating in a weeklong trip to Scotland in October 2023 and another 25 traveling to Portugal in April 2024.

Exceeding initial expectations, more than 2,800 Bar members signed up for CLE Passport in the past fiscal year. Launched during the 2023 license renewal season, the 15-credit-hour CLE Passport allows Bar members to fulfill their CLE requirements in all their jurisdictions through the D.C. Bar for a special offer of \$150.



D.C. Bar members enjoyed the CLE Abroad program in Portugal in April 2024.

A WEALTH OF CONNECTIONS

The strength of the D.C. Bar is reflected in its Communities, which over the past year welcomed nearly 5,800 new members, an increase of 56 percent. The notable jump in membership is due in part to its implementation of a single fee for unlimited memberships across 22 Communities. Among the fastest-growing Communities is the Early Career Lawyers Community, launched in June 2023 and boasting approximately 800 members.

Last year, Communities offered 82 live webinars and 35 in-person events. The D.C. Bar Tax Conference, sponsored by the Taxation Community, remains Communities' largest event, attracting more than 400 attendees and speakers, among them Internal Revenue Service Commissioner Danny Werfel. Held in January 2024, the Tax Conference offered 7 plenary and 29 breakout sessions.

In 2024 Communities modified the format of its popular D.C. Cup Moot Court Competition, adding an additional round of arguments so no team was eliminated after one round. The goal was to increase the sense of accomplishment and learning experience for participating law students.

Communities also marked the 25th anniversary of its Melvin R. Wright Youth Law Fair, a partnership with D.C. Superior Court that introduces middle and high school students to the justice system, court procedures, and law-related careers. New in 2024, Communities developed an Al-generated video of the fact pattern to support learning and retention capabilities of a broader spectrum of students.

Communities continues to produce several engaging and substantive podcasts, including *The Tea on International Arbitration* (sponsored by the International Law Community), *Let's Brief It* (sponsored by the Law Student Community), and *Brief Encounters* (sponsored by various Communities).





Top: D.C. Superior Court Judge Melvin Wright helping a student put on his robe to play the role of judge at the Youth Law Fair. Bottom: The Tax Conference attracted more than 400 attendees for updates on tax law and regulation.

RESOURCES FOR SUCCESS

The D.C. Bar Practice Management Advisory Service (PMAS), Legal Ethics Program, and Lawyer Assistance Program (LAP) are committed to helping members uphold their professional integrity and conduct by providing them with the tools and resources for the ethical practice of law.

Dedicated to helping solo attorneys and small firms stay current with best practices and tech tools, PMAS hosted its annual Practice 360° in person for the first time since the pandemic, drawing more than 130 attendees in October 2023.

Over the fiscal year, PMAS advisors also facilitated numerous law firm launches through the Bar's Successful Small Firm Practice Course and provided in-depth consulting services to attorneys seeking guidance on starting, growing, and managing their law firms. For its innovative and effective Managing Money course, PMAS won its third E. Smythe Gambrell Professionalism Award from the American Bar Association's Standing Committee on Professionalism in July 2023.

PRACTICE ADVISORS WITHIN REACH

- Conducted 126 practice assessments
- Presented or produced 30 educational or outreach programs
- Engaged with members through 1,584 emails and phone calls

LAP produced and presented 55 programs on lawyer well-being for CLE classes, conferences, legal organizations, law schools, and voluntary bar leaders, reaching more than 2,000 individuals. LAP also developed and planned a new six-week group psycho-education series on Zoom for lawyers with ADHD, drawing almost 90 registrants. The value of the series was summed up by one participant commenting, "Finding this program has been so rewarding and life changing." In addition, LAP presented three "Honest Conversation" programs on Zoom, contributed to the D.C. Bar blog and *Washington Lawyer* magazine, and produced four *Toward Well-Being* podcasts and two *LAP Dispatch* newsletters.

CULTIVATING HEALTHY LAWYERS

- 700 individual client sessions
- 185 consultations
- 80 new client intakes
- **47** weekly wellness support groups
- 22 bimonthly women's wellness support groups
- 8 biannual bar prep support groups

Meanwhile, the Legal Ethics Program responded to more than 2,300 calls to the Legal Ethics Helpline, published three new legal ethics opinions, authored six "Speaking of Ethics" columns in *Washington Lawyer*, and participated in 37 ethics-related trainings and panel presentations.



41 cases opened, 29 concluded

17 arbitration awards resolving \$1,237,038 in disputed legal fees

CLIENTS' SECURITY FUND

7 claims decided, with **5** approved for reimbursement

\$20,780 in attorney restitution received for past claims paid

AWARENESS AND ENGAGEMENT

This past fiscal year the Marketing and Communications Department focused on developing integrated and member-centric strategies, including a comprehensive member engagement campaign last spring to build enthusiasm and awareness for the Bar's annual awards, Celebration of Leadership, and elections. With the department's marketing efforts, voter turnout in the 2023 elections increased by nearly 40 percent, from 5,550 to 7,770 votes cast.

The department conducted a survey in summer 2023 that showed the vast majority of Bar members are satisfied with their benefits, getting the most value from practice resources, CLE, and *Washington Lawyer* magazine. The results of the survey will guide Bar staff, led by the Marketing and Communications Department, to improve strategies for prioritization, delivery, and communication of high-priority Bar benefits.

For excellence in bar association communications and marketing, the National Association of Bar Executives' Communications Section presented the D.C. Bar with two Luminary Awards in 2023. *Washington Lawyer*'s feature article on AI and machine learning technology earned a Luminary Award in the authored article category, while the 2023 District of Columbia Judicial & Bar Conference also won a Luminary Award for its marketing creativity and impact in helping exceed registration goals for the conference. *Washington Lawyer* also earned two finalist nominations for the 2024 Dateline Awards by the Society of Professional Journalists, DC Chapter, for excellence in journalism.

SERVICE TO THE COMMUNITY

As the largest provider of pro bono help in the District of Columbia, the D.C. Bar Pro Bono Center transforms the lives of thousands of District residents year after year through legal representation, advice and referral, and information.

Following a thorough review of resources last year by staff and volunteer leaders, the Pro Bono Center created several new staff positions to increase support for pro bono attorneys who represent clients in housing and Social Security Disability cases and to expand technology initiatives.

The Pro Bono Center fielded calls from more than 3,500 tenants and small landlords through the Landlord Tenant Legal Assistance Network, where tenant support specialists helped residents recertify housing vouchers, apply for affordable housing, access the Emergency Rental Assistance Program, and obtain additional services from District agencies.

REPRESENTATION	Advocacy & Justice Clinic 225 cases placed for full representation	Bankruptcy Clinic 6 cases placed for representation	Family Law Assistance Network 243 clients served	<i>Housing Attorney of the Day</i> 156 clients served
NONPROFIT & SMALL BUSINESS ASSISTANCE	48 nonprofits matched with counsel	584 business owners connected with lawyers	5,587 organizations and small businesses trained	393 nonprofits advised through clinics/office hours
CLINICS/CENTERS/ NETWORKS	Consumer Law Resource Center reopened at D.C. Superior Court	Advice & Referral Clinic 191 people served	Immigration Legal Advice & Referral Clinic 265 people served	Landlord Tenant Legal Assistance Network 3,385 intakes, 2,328 referrals, and 1,057 tenants/small landlords served
RESOURCES/TRAININGS	Help Line 17,407 calls fielded	LawHelp.org/DC 1.36 million page views	Pro Bono Training 1,151 attorneys and paralegals trained	Pro Bono Center

PRO BONO CENTER AT A GLANCE

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Figures from July 1, 2022 through June 30, 2023

With support from D.C. Council and the DC Bar Foundation, the Pro Bono Center launched the Future Planning & Probate Program to assist District residents with wills and other estate-planning documents as well as with navigating the probate process at D.C. Superior Court. These new services are envisioned to increase racial equity by helping D.C. families preserve family assets and build intergenerational wealth.

The Advocacy & Justice Clinic increased placement of clients with pro bono counsel by 12.5 percent over last year, and the quarterly Immigration Legal Advice & Referral Clinic assisted 50 percent more people compared to last year, thanks to more than 100 volunteer attorneys, interpreters, D.C. Bar staff, and law students.

The Family Law Assistance Network (FLAN), a partnership with two other area legal services providers, reached a new milestone — more than 3,500 referrals since its launch in March 2020. In 2024 FLAN created a first-of-itskind series of AI family law videos to help pro se litigants understand family law proceedings.

To support pro se personal bankruptcy filers and the U.S. Bankruptcy Court, the Pro Bono Center launched a new virtual Bankruptcy Resource Center in partnership with the National Bar Association Bankruptcy Section. Volunteer attorneys help individuals correct their deficient Chapter 7 filings so their cases can proceed without

risking dismissal by the court.

The Pro Bono Center also assists nonprofit organizations delivering critical services as well as small businesses in neighborhoods throughout the District. The center's Small Business Brief Advice Legal Clinic, held in person and remotely to provide flexibility for volunteers and clients, offers support for a variety of transactional and corporate legal issues. To provide Ward 8 residents better access to this important resource, the Pro Bono Center added a new site for the clinic in Congress Heights.

More than 300 nonprofits and startup organizations benefited from phone consultations with an attorney through the Pro Bono Center's weekly Nonprofit Office Hours, where callers discuss fiscal sponsorship, organizational viability, intellectual property, insurance liability, and other important legal issues. Since its inception in 2020, the Nonprofit Office Hours program has served more than 800 clients, creating a stronger and better informed local nonprofit community.

LEADERSHIP IN ACTION

In fiscal year 2023–2024, the D.C. Bar was a key player in fostering collaborations within the local legal community through several events, including Constitution in the Classroom, conversations with D.C. law school deans, the Judicial Leadership Luncheon, the Lawyers Have Heart race, and the DMV Bar Presidents' Panel.

The Bar also remains committed to moving the legal profession toward walking the talk on greater diversity, equity, inclusion, and accessibility. Its DEIA Task Force held approximately 30 discussions with more than 45 law firm leaders, members of the judiciary, government officials, experts in DEIA, and others to learn about challenges and best practices. The task force is refining its recommendations for improvement and aims to submit an interim report to the D.C. Bar Board of Governors in June 2024.



From left, D.C. Bar President-Elect Shaun Snyder, Immediate Past President Ellen Jakovic, and President Charles Lowery at the Judicial Leadership Luncheon in April 2024.

The District of Columbia Bar

Statements of Activities and Financial Position

Years Ended June 2023 and 2022

REVENUE	2023	2022
Membership License Fees	\$33,123,908	\$31,883,533
Communities Dues	1,174,921	1,514,336
In-Kind Contributions	2,222,691	2,134,087
Admission and Registration	609,395	512,519
Investment Income	1,571,635	(2,302,149)
Other Fees and Services	4,705,323	4,270,761
Total Revenue	\$43,407,873	\$38,013,087
EXPENSE		
Program Services		
Board on Professional Responsibility	\$10,559,259	\$9,950,122
Regulation Counsel	4,369,529	3,998,864
Continuing Legal Education	2,045,747	1,895,685
Communications	2,930,518	2,443,655
Communities	1,486,318	1,590,681
Annual Meeting and Judicial Reception	716,375	516,983
Clients' Security Fund Activities	117,766	104,610
Total Program Services	\$22,225,512	\$20,500,600
Supporting Services		
Administration and Finance	\$17,065,061	\$15,147,525
Executive Office	1,871,136	1,843,495
Total Supporting Services	18,936,197	16,991,020
Total Expense	\$41,161,709	\$37,491,620
Change in Net Assets Before Other Activity	2,246,164	521,467
Net Gain (Loss) on Fair Value of Interest Rate Swap Agreements	2,595,481	6,580,981
CHANGE IN NET ASSETS	\$4,841,645	\$7,102,448
Net Assets-Beginning of Year	28,453,851	21,351,403
Net Assets-End of Year	\$33,295,496	\$28,453,851

ASSETS	2023	2022		
Cash and Cash Equivalents	\$19,651,390	\$10,694,665		
Restricted Cash-Building Escrow		1,530,109		
Restricted Cash–Clients' Security Fund	1,250,000	1,213,013		
Investments	16,169,930	14,587,260		
Other Assets	5,351,397	4,750,827		
Interest Rate Swap	2,721,479	125,998		
Property and Equipment	70,879,765	72,697,559		
Total Assets	\$116,023,961	\$105,599,431		
LIABILITIES AND NET ASSETS				
Liabilities				
Accounts Payable and Accrued Expense	\$5,917,410	\$6,747,396		
Amount Due to Affiliate	3,549,627	3,000,206		
Deferred Revenue	23,998,928	17,500,925		
Loans Payable	49,262,500	49,897,053		
Total Liabilities	\$82,728,465	\$77,145,580		
Net Assets				
Undesignated	\$4,083,159	\$3,179,771		
Board Designated				
Mandatory License Fee Purpos	e 25,030,162	21,373,587		
Communities	1,784,551	1,697,622		
Clients' Security Trust Fund	1,250,000	1,213,013		
Continuing Legal Education	1,147,624	989,858		
Total Net Assets	\$33,295,496	\$28,453,851		
Total Liabilities and Net Assets	\$116,023,961	\$105,599,431		

D.C. Bar Board of Governors 2023–2024

President Charles R. Lowery Jr. *National Housing Conference*

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Corporation, Finance and Securities Law Leila Bham, Co-Chair William Nelson, Co-Chair

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District of Columbia Bar Foundation Danielle M. Reyes, President Benjamin F. Wilson, Vice President

Images in this report courtesy of Patrice Gilbert Photography and D.C. Bar members and staff.



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