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

96.3% 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

<table>
<thead>
<tr>
<th>REVENUE</th>
<th>2019</th>
<th>2018</th>
</tr>
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<tbody>
<tr>
<td>Membership License Fees</td>
<td>$30,354,371</td>
<td>$28,781,446</td>
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<tr>
<td>Communities Dues</td>
<td>1,448,791</td>
<td>1,502,703</td>
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<tr>
<td>In-Kind Contributions</td>
<td>3,774,011</td>
<td>3,123,183</td>
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<tr>
<td>Contributions</td>
<td>4,500</td>
<td>7,850</td>
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<tr>
<td>Admission and Registration</td>
<td>1,758,300</td>
<td>1,730,950</td>
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<tr>
<td>Investment Income</td>
<td>738,069</td>
<td>960,274</td>
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<tr>
<td>Other Fees and Services</td>
<td>1,663,868</td>
<td>1,018,590</td>
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<tr>
<td>Cost Center Transfers</td>
<td>(15,000)</td>
<td>(19,000)</td>
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<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>$39,726,910</strong></td>
<td><strong>$37,105,996</strong></td>
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<table>
<thead>
<tr>
<th>EXPENSES</th>
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</thead>
<tbody>
<tr>
<td><strong>Program Services</strong></td>
</tr>
<tr>
<td>Board on Professional Responsibility</td>
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<tr>
<td>Regulation Counsel</td>
</tr>
<tr>
<td>Continuing Legal Education</td>
</tr>
<tr>
<td>Communications</td>
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<tr>
<td>Communities</td>
</tr>
<tr>
<td>Annual Meeting and Judicial Reception</td>
</tr>
<tr>
<td>Clients’ Security Fund Activities</td>
</tr>
<tr>
<td><strong>Total Program Services</strong></td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Supporting Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration and Finance</td>
</tr>
<tr>
<td>Executive Office</td>
</tr>
<tr>
<td><strong>Total Supporting Services</strong></td>
</tr>
</tbody>
</table>

| **Total Expenses**    | **36,765,062** | **35,403,937** |
| Change in Net Assets  | 2,961,848    | 1,702,059  |
| Loss on Lease         | (96,849)     | (10,534,733)  |
| Net Gain (Loss) on Fair Value of Interest Rate Swap Agreements | (4,589,370) | 57,856 |
| **Change in Net Assets** | **(1,724,371)** | **(8,774,818)** |
| Net Assets - Beginning of Year | 15,689,512 | 24,464,330 |
| **Net Assets – End of Year** | **$13,965,141** | **$15,689,512** |

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Cash Equivalents</td>
<td>$15,220,546</td>
<td>$18,772,224</td>
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<tr>
<td>Restricted Cash – Building Escrow</td>
<td>3,144,045</td>
<td>4,002,879</td>
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<tr>
<td>Restricted Cash – Clients’ Security Fund</td>
<td>1,046,212</td>
<td>997,065</td>
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<tr>
<td>Investments</td>
<td>12,700,728</td>
<td>12,008,638</td>
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<tr>
<td>Other Assets</td>
<td>1,448,118</td>
<td>560,242</td>
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<tr>
<td>Interest Rate Swap Agreements</td>
<td>57,856</td>
<td></td>
</tr>
<tr>
<td>Property and Equipment</td>
<td>76,115,230</td>
<td>76,194,066</td>
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<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$109,674,879</strong></td>
<td><strong>$112,592,970</strong></td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
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</thead>
<tbody>
<tr>
<td><strong>Liabilities</strong></td>
</tr>
<tr>
<td>Accounts Payable and Accrued Expense</td>
</tr>
<tr>
<td>Amount Due to Affiliate</td>
</tr>
<tr>
<td>Deferred Revenue</td>
</tr>
<tr>
<td>Accrued Loss on Lease</td>
</tr>
<tr>
<td>Interest Rate Swap</td>
</tr>
<tr>
<td>Loans Payable</td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Net Assets</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Undesignated</td>
</tr>
<tr>
<td>Board Designated</td>
</tr>
<tr>
<td>Mandatory License Fee Purpose</td>
</tr>
<tr>
<td>Communities</td>
</tr>
<tr>
<td>Clients’ Security Trust Fund</td>
</tr>
<tr>
<td>Continuing Legal Education</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
</tr>
</tbody>
</table>

| Total Liabilities and Net Assets | **$109,674,879** | **$112,592,970** |
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