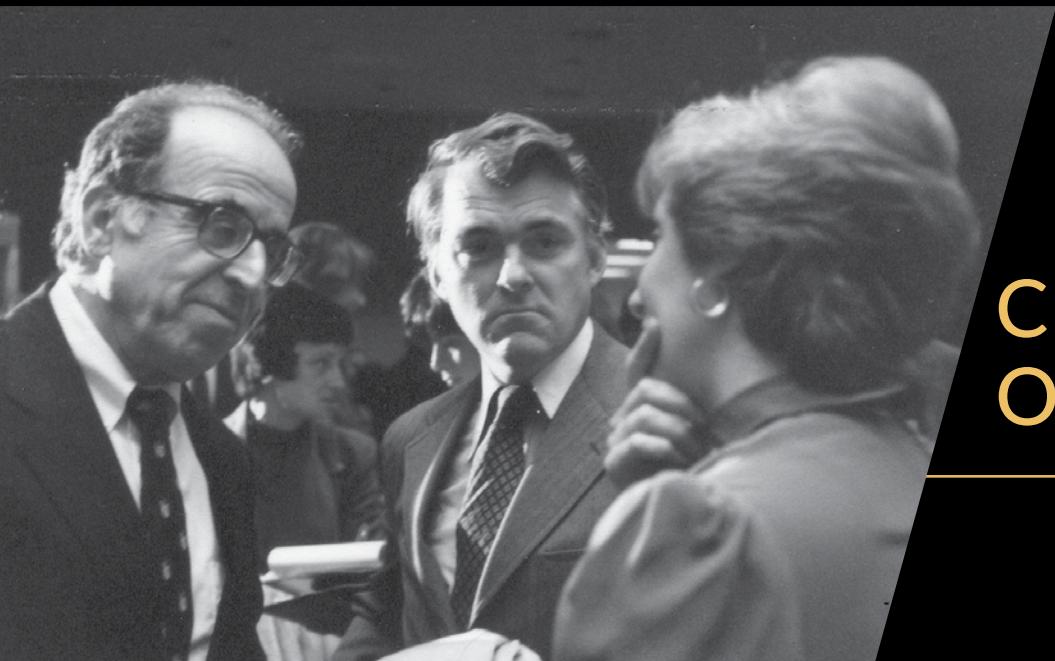


DISTRICT OF COLUMBIA BAR
ANNUAL REPORT 2021-2022



CELEBRATING
OUR PAST

ENVISIONING
OUR FUTURE



Charting Our Next 50 Years

In January 1973 — when many of the communication tools we enjoy today were still in their infancy — E. Barrett Prettyman Jr., the D.C. Bar's first president, pondered the question of how to provide ample notice of meetings to 15,000 Bar members spread throughout the country.

Since then, our Bar has grown considerably in size, with more than 113,000 members in the United States and around the world, and with more technologies that allow us to reach our members instantaneously. Now, the challenge of a global bar such as ours is how to stay connected and meaningfully engaged in a fast-changing, information-driven legal world.

The COVID-19 crisis put to the test our ability to adjust, adapt, and overcome, all while ensuring our members continue to have access to the resources they need to excel and lead. As you browse the pages of this annual report, you will find that not only did we prove to be a success story in resilience, but also that we never lost sight of why the Bar was founded. Today, as then, enhancing access to justice, improving the legal system, and empowering lawyers to achieve excellence remain at the heart of what we do.

In fiscal year 2021–2022, as the pandemic persisted in upending our lives, the D.C. Bar focused on delivering high-quality virtual programming to further deepen our members' knowledge of the law and legal practice. We took advantage of new technologies to facilitate

learning and connections among our members. Through our Lawyer Assistance Program, we broadened the conversation around attorney burnout and wellness as the pandemic began to take its toll on our personal and professional lives.

We continued to be a leading voice in increasing diversity, equity, and inclusion in the legal profession, as well as in enhancing access to justice for our most vulnerable neighbors. We affirmed our commitment to promoting the rule of law and protecting the independence of the judiciary. We collaborated and innovated with the D.C. Courts to meet the critical legal needs of District residents facing the threat of eviction and economic instability.

All this was made possible because of you. Your consistent engagement with the Bar propelled us forward when all else looked bleak. An organization is only as strong as its members, and together this past fiscal year we showed that we are united behind the Bar's mission despite having to confront some of the greatest health, social, and economic crises of our time.

This year, as we commemorate our 50 years of excellence in leadership and service and celebrate our trailblazing accomplishments, we invite you to envision how we can raise the bar over the next 50 years. Our Bar may keep growing in membership, services provided, and sophistication, but what that really looks like is up to all of us. We are confident that, with your help, we will continue to set the gold standard in the legal profession and stay true to our core values: professional integrity, commitment to access to justice, and service.

We look forward to charting our Bar's future with you.



The signature of Chad Sarchio, which appears to be "Chad Sarchio".

Chad Sarchio
President

The signature of Robert J. Spagnoletti, which appears to be "Robert J. Spagnoletti".

Robert J. Spagnoletti
CEO

Leadership & Resilience in Action

Against the backdrop of a continuing public health crisis, the District of Columbia Bar proved its ability to adapt to a changed world and respond to the unprecedented challenges and stresses in the practice of law in the age of COVID.

The Bar's success in ensuring seamless delivery of member services during the pandemic is a testament to its resilience built through five decades of work to promote access to justice, empower lawyers to achieve excellence, and improve the administration of justice.

As it prepared to celebrate its 50th anniversary, the D.C. Bar took the opportunity to look back on its history, reflect on its legacy, and envision its future. At the heart of its story is its membership and enduring commitment to setting the gold standard in the ethical practice of law, leadership, service to the community, and pro bono advocacy. In close collaboration with the D.C. Courts and the larger legal community, the Bar will continue to raise the bar in legal excellence for decades to come, no matter the setting — virtual, hybrid, or in person.



D.C. Courts judges and D.C. Bar leaders gathered at the Bar's headquarters on April 26 for the 2022 Judicial Leadership Luncheon to celebrate their successes despite the challenges presented by the COVID-19 crisis. D.C. Court of Appeals Chief Judge Anna Blackburne-Rigsby talked about the court's efforts to combat racial injustice and promote access to justice initiatives, while D.C. Superior Court Chief Judge Anita Josey-Herring commended the "cohesion between the courts and the Bar" to meet the legal needs of the District's most vulnerable residents. Reporting on the Bar's accomplishments, President Chad Sarchio talked about how Bar staff leveraged various technologies to continue to serve members during the pandemic. (Photos courtesy of Margot Schulman)

Professional Growth Opportunities

In fiscal year 2021–2022, the D.C. Bar admitted more than 3,000 new members and achieved a 97 percent renewal rate. Through the Bar’s partnership with more than 30 affinity companies, members can now access thousands of dollars in savings and benefits in areas such as practice resources, legal research, internet design and marketing, cybersecurity, and wellness.

Facilitated by the Bar’s effective management of remote operations, the Continuing Legal Education (CLE) Program and Communities continued to engage members and provide opportunities to enrich their careers through robust training curricula and timely programming.

The CLE Program conducted 203 courses in more than 22 practice areas using Zoom and other virtual platforms. Of those, 59 were new, comprising 30 percent of the CLE catalog. The CLE Program also offered more than 130 on-demand courses, giving attorneys greater flexibility in fulfilling their CLE requirements. Several classes addressed important legal issues shaped by the COVID-19 crisis, including litigation in the virtual world, the ethics of remote work, and speech in the age of social media.



To develop even broader courses for members, the CLE Program partnered with several organizations, including the TEGE Exempt Organizations Council, the National Association of Attorneys General, the Government Blockchain Association, and the American College of Legal Medicine, as well as collaborated with several D.C. Bar Communities and the Practice Management Advisory Service to offer CLE credit for additional programs.

Despite the pandemic, the D.C. Bar Communities presented nearly 200 programs remotely and connected with more than 18,000 members across 21 practice areas, made possible by the work of more than 600 volunteer planners and speakers. Communities also welcomed 1,000 premium members, launched its own newsletter, and converted two new programs — the Spring Wellness Fair and the Diversity, Equity, and Inclusion Summit — into annual events.

In May 2022 the District of Columbia Affairs Community teamed up with the Anacostia Coordinating Council to host the D.C. Attorney General Candidate Debate, moderated by *Washington Post* reporter Keith Alexander and WJLA-TV journalist Sam Ford. The candidates discussed juvenile justice, civil enforcement, and other topics that affect the administration of justice in the District.

The Law Student Community continued to host virtually the Leadership Fellowship (renamed in honor of legal trailblazer Karen Hastie Williams) and the Judicial Clerkship Bootcamp. It also produced the third season of its *Let's Brief It* podcast, alongside *Brief Encounters* and *The Tea on International Arbitration*.

“ The biggest strength of the D.C. Bar is its diversity — not only in terms of people, but also diversity of opinions, thoughts, and ideas.

— A. J. Dhaliwal
Sheppard, Mullin, Richter & Hampton LLP

Courtesy of Buckley LLP

 <p>190+ events</p>	 <p>6,900+ registrants</p>	 <p>200+ leadership/committee meetings</p>
 <p>120+ webinars/on-demand programs</p>		 <p>600+ volunteer attorney planners and speakers</p>



JOHN PAYTON
LEADERSHIP ACADEMY

Twenty-four attorneys graduated from the Bar's 2022 John Payton Leadership Academy, an intensive training program to mold future Bar leaders and put them on the path to success through goal setting, effective communication, and collaboration.

Over four virtual meetings and one in-person session, the participants explored a variety of leadership skills

such as inspiring others, creating a vision, defining success, setting goals, building trust, communicating effectively, strengthening relationships, and working with others to bring out the best in people and organizations. They heard from inspiring community and Bar leaders and also engaged in brainstorming and strategy sessions to determine and hone their leadership techniques.



Jati Lindsay Photography

Practice Resources & Ethics Guidance

The D.C. Bar Practice Management Advisory Service (PMAS) rose to the challenge of providing members with the tools they need to start or grow their practice in a legal landscape changed by the pandemic. As of March 31, 2022, PMAS had presented 55 programs that drew more than 700 members. Its seventh annual Practice 360° | A Day for Lawyers and Law Firms, held virtually for the second time in 2021, was attended by more than 400 participants.

The Bar's Legal Ethics Program fielded more than 2,500 calls to the Legal Ethics Helpline, published two new legal ethics opinions, and participated in 25 ethics trainings and panel presentations. The Rules Review Committee's "Final Report and Recommendations on Proposed Changes to the D.C. Rules of Professional Conduct to Address Issues Raised by Outside Counsel Guidelines" was approved by the Board of Governors and sent to the D.C. Court of Appeals for consideration.

During 2021–2022, the Global Legal Practice Committee approved two proposals from its two working groups addressing the issue of alternative delivery of legal services to both organizational and individual clients.

Shifting to fully remote operations, the Attorney/Client Arbitration Board (ACAB) concluded 24 cases in the first three quarters of the fiscal year, issuing 17 arbitration awards for a total of \$1,467,938 in disputed legal fees. In April, the Board of Governors approved an interim rule submitted by the ACAB to address how the decision to hold remote/hybrid hearings would be decided, amending the ACAB's Fee Arbitration Service Rules of Procedure.

As of the fourth quarter of the fiscal year, the Clients' Security Fund had reviewed and decided 29 claims for reimbursement. The fund received \$5,340 in attorney restitution for reimbursements made to claimants.

The Lawyer Assistance Program (LAP) complemented its regular column in *Washington Lawyer* magazine with a podcast, *Toward Well-Being*, focusing on mental health in the legal profession. The LAP also expanded its support group meetings to include a weekly women's group and a law student bar prep group. As of March 31, 2022, the LAP had opened 83 new clinical cases and conducted 871 teletherapy sessions, 147 consultations, and 86 educational presentations.

“ I joined the D.C. Bar to expand my resources and access. Ultimately, I wanted to become a part of a bar association that would afford me access to mentorship, ongoing education, and a lifetime network inside the legal community.

— Amber Cleaver
KPM Law



Courtesy of KPM Law

Commitment to Access to Justice

The D.C. Bar Pro Bono Center continued to lead the legal services community in providing critical legal help to thousands of District residents living on low incomes as well as nonprofit organizations and small businesses serving neighborhoods heavily impacted by the pandemic.

Anticipating a surge in evictions and increased demand for legal assistance, the Pro Bono Center hired additional staff housing attorneys to assist 3,500 tenants and small landlords seeking help through the Landlord Tenant Legal Assistance Network, a collaboration launched in 2020 with five other legal services providers. The Center launched Nonprofit Office Hours, a new service offering 20- to 30-minute consultations with a Pro Bono Center attorney to discuss fiscal sponsorship, organizational viability, intellectual property, and insurance liability issues. Nonprofit Office Hours assisted 225 nonprofit executives and start-up organizations, creating a stronger and better-informed local nonprofit community.

The Pro Bono Center's Advocacy & Justice Clinic placed more than 300 clients with pro bono counsel to litigate their housing, family law, public benefits, and consumer law matters. Volunteer attorneys also helped clients seal 250 prior eviction records after a new statute was enacted. The Bankruptcy Clinic supported attorney volunteers in a new effort to preserve public housing tenancies of individuals filing for bankruptcy in the District.

The Pro Bono Center also collaborated with the Family Law Assistance Network and the DC Bar Foundation to survey litigants receiving family law legal services about their experiences with remote court hearings. The resulting report, "Litigant Perspectives on Remote Family Law Cases," revealed that most D.C. Superior Court Family Court litigants preferred remote hearings to in-person hearings, particularly when they're brief and do not involve evidentiary issues.

The Pro Bono Center's training program set new registration highs — 1,684 registrants in 33 live training events. New training courses covered topics beyond substantive law to include skills focused on cultural competency, bias, conducting intake interviews, and negotiation. Attorneys can access these classes anytime through the Pro Bono Center's extensive library of on-demand training videos.

A record number of nonprofit executives and board members enrolled in the Center's flagship training course, "Board Basics A to Z," a collaboration with the Center for Nonprofit Advancement that trains attendees on risk management, strategic leadership, fiscal management, and CEO evaluation and compensation. More than 250 leaders also signed up for new advanced board trainings on more complex topics.

Pro Bono Center at a Glance

REPRESENTATION	<i>Advocacy & Justice Clinic</i> 161 cases placed for full representation	<i>Bankruptcy Clinic</i> 13 cases placed for representation	<i>Family Law Assistance Network</i> 356 clients served	<i>Housing Attorney of the Day</i> 161 clients served
NONPROFIT & SMALL BUSINESS ASSISTANCE	52 nonprofits matched with counsel	584 business owners connected with lawyers	1,736 nonprofits and small businesses trained	274 nonprofits received advice through clinics/office hours
CLINICS/CENTERS/ NETWORKS	<i>Consumer Law Resource Center</i> 381 customers served	<i>Advice & Referral Clinic</i> 168 people served	<i>Immigration Legal Advice & Referral Clinics</i> 155 people served	<i>Landlord Tenant Legal Assistance Network</i> 1,527 tenants and 785 landlords helped
RESOURCES/TRAININGS	<i>Help Line</i> 12,559 calls fielded	<i>LawHelp.org/DC</i> 83,809 page views	<i>Pro Bono Training</i> 1,548 attorneys and paralegals	 DC BAR Pro Bono Center

Figures from July 1, 2020, through June 30, 2021

Member Experience & Engagement

To set up the framework for continued success, the D.C. Bar's executive team completed projects in support of the organization's 2025 strategic plan and, in conjunction with the Bar's Regulations/Rules/Board Procedures Committee, performed a comprehensive review of the D.C. Court of Appeals Rules Governing the Bar and the D.C. Bar Bylaws.

This year, the Nominations Committee recruited a record number of highly qualified and diverse candidates for the Board of Governors and the ABA House of Delegates for the 2022 elections. Members of the executive team and then President-Elect Ellen Jakovic represented the D.C. Bar nationally and provided valuable leadership to the ABA Division for Bar Services.

Underpinning the Bar's successful delivery of services and active engagement with members during the pandemic was the transformative work of its Information Technology Department. In fiscal year 2021–2022, in collaboration with Membership, Communities, Regulation Counsel, the Executive Office, and the Pro Bono Center, IT rolled out a new association

management software (AMS) to manage more efficiently license renewal, member records, and pro bono donations. The new AMS allows Bar members to access their records in a simplified, mobile-friendly interface. IT also replaced the case management system at the Board on Professional Responsibility with cloud-based software to improve processes and operations.

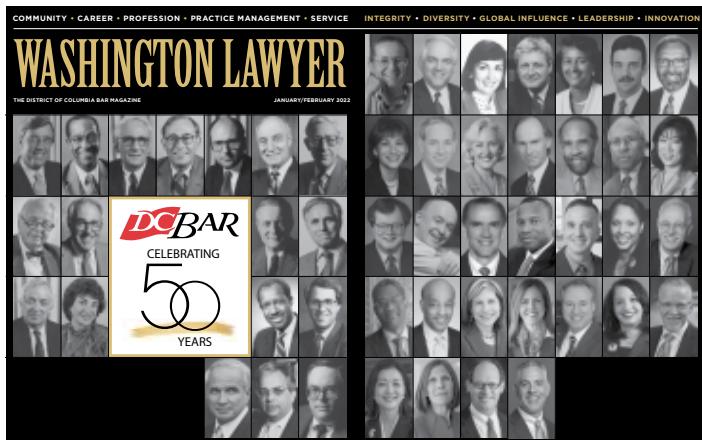
Through its Marketing and Communications Department, the Bar continued to strengthen its dialogue with members and drive engagement by keeping them informed of Bar happenings, training and programming, and professional development and networking opportunities.

In January 2022, the Marketing and Communications Department and Programs Division launched the Bar's 50th anniversary campaign, starting with the rollout of 50years.dcbar.org, featuring a timeline of the Bar's rich history, anniversary-related programs and events, and reflections from members on what the Bar has meant to them through the years and where they see the organization in the future.

The screenshot shows the D.C. Bar website's main page. At the top, a large collage of various photos of people in professional settings, such as offices and courtroom scenes. Overlaid on this collage is the text "Setting the Gold Standard for 50 Years". Below this, a banner for the "D.C. Bar 2022 Conference" is visible, with a "REGISTER" button. Further down, there is a section titled "Explore Our History" which features a timeline of historical moments from 1871 to 1973, each with a small image and a brief description. The overall theme is the Bar's 50th anniversary.

The Marketing and Communications team also launched a new email marketing strategy in spring 2022 with the introduction of a new platform to improve member experience. Marketing automation and audience segmentation will enable the Bar to get the right information to the right members at the right time, reducing email volume and focusing on targeted messaging.

Washington Lawyer magazine continued to receive industry recognition for its in-depth coverage of important developments in the legal profession.



In October 2021, the magazine won its second Luminary Award for Excellence in Regular Publications among large bars from the National Association of Bar Executives. The same year, the publication won two Dateline Awards from the Washington, D.C., chapter of the Society of Professional Journalists for its compelling stories on qualified immunity and the unprecedented shift to remote work by law firms and lawyers at the start of the pandemic. *Washington Lawyer* was nominated again in 2022 for its story about attorneys helping Afghan immigrants.

In January 2022, the Bar launched its blog, *Duly Noted*, featuring easily digestible and shareable content to help enhance attorneys' practice. The blog provides sneak peeks into upcoming CLE courses, practice pointers, wellness tips, and professional advancement opportunities. It also features inspiring profiles of Bar members about their professional journeys as well as passions outside of law.

The Journey Ahead

In early 2022, as the world began to move toward normalcy, the D.C. Bar prepared to welcome its members safely into its headquarters and resume hosting in-person events. Although the Bar is excited about this prospect, the organization remains committed to optimizing members' experience and meeting them where they are — whether that means in-person, hybrid, or remote programming — so they can better serve their clients and their community. ■

Aisha Cassis of the Board on Professional Responsibility (second from right) is joined by (from left) D.C. Bar Regulation Counsel's Carla Freudenburg, Erika Stillabower, and Hope Todd at the 2022 Judicial Leadership Luncheon. (Photo courtesy of Margot Schulman)



The District of Columbia Bar

Statements of Activities and Financial Position

Years Ended June 2021 and 2020

REVENUE	2021	2020
Membership License Fees	\$31,842,518	\$30,487,695
Communities Dues	1,463,605	1,370,104
In-Kind Contributions	1,889,435	2,118,477
Contributions		2,500
Admission and Registration	580,211	827,687
Investment Income	3,469,860	675,185
Other Fees and Services	3,449,294	2,822,148
Cost Center Transfers		(12,000)
Total Revenue	\$42,694,923	\$38,291,796
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EXPENSES		
Program Services		
Board on Professional Responsibility	\$9,797,967	\$9,483,509
Regulation Counsel	3,882,318	3,725,341
Continuing Legal Education	1,537,076	2,076,932
Communications	2,387,434	2,625,992
Communities	1,554,105	1,726,617
Annual Meeting and Judicial Reception	366,274	19,728
Clients' Security Fund Activities	281,385	149,828
Total Program Services	\$19,806,559	\$19,807,947
Supporting Services		
Administration and Finance	\$14,561,246	\$14,432,484
Executive Office	1,809,207	1,700,529
Total Supporting Services	16,370,453	16,133,013
Total Expenses	\$36,177,012	\$35,940,960
Change in Net Assets Before Other Activity	6,517,911	2,350,836
Gain (Loss) on Lease	323,388	117,596
Net Gain (Loss) on Fair Value of Interest Rate Swap Agreements	4,171,951	(6,095,420)
CHANGE IN NET ASSETS	\$11,013,250	\$3,626,988
Net Assets—Beginning of Year	10,338,153	13,965,141
Net Assets—End of Year	\$21,351,403	\$10,338,153

ASSETS	2021	2020
Cash and Cash Equivalents	\$14,924,495	\$15,027,219
Restricted Cash—Building Escrow	1,947,750	2,021,660
Restricted Cash—Clients' Security Fund	1,069,857	1,101,242
Investments	16,866,173	13,372,709
Other Assets	2,797,469	2,330,853
Property and Equipment	73,571,643	75,131,712
Total Assets	\$111,177,387	\$108,985,395
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LIABILITIES AND NET ASSETS		
Liabilities		
Accounts Payable and Accrued Expense	\$7,915,771	\$6,926,376
Amount Due to Affiliate	1,946,303	878,000
Deferred Revenue	21,205,478	22,201,943
Accrued Loss on Lease		3,402,834
Interest Rate Swap	6,454,983	10,626,934
Loans Payable	52,303,449	54,611,155
Total Liabilities	\$89,825,984	\$98,647,242
Net Assets		
Undesignated	\$2,838,597	\$2,069,221
Board Designated		
Mandatory License Fee Purpose	14,538,475	4,867,251
Communities	1,837,278	1,413,331
Clients' Security Trust Fund	1,069,857	1,101,242
Continuing Legal Education	1,067,196	887,108
Total Net Assets	\$21,351,403	\$10,338,153
Total Liabilities and Net Assets	\$111,177,387	\$108,985,395

D.C. Bar Board of Governors 2021–2022

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Chad Sarchio
Federal Law Enforcement Agency

President-Elect

Ellen M. Jakovic
Kirkland & Ellis LLP

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Roger Lu Phillips
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Lawyer Assistance

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Michelle Bercovici, *Vice Chair*

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George R. Clark, *Vice Chair*

Nominations

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Pension

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Mark Salzberg, *Chair*

Rules of Professional Conduct Review

Yaida O. Ford, *Chair*
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Screening

Jessica E. Adler, *Chair*

D.C. Bar Communities

Administrative Law and Agency Practice

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David Kully, *Co-Chair*
Erin Brianne McNamee, *Co-Chair*

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Denen Norfleet Boyce, *Vice Chair*

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Chair (*vacant*)
Vice Chair (*vacant*)

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Lucy Pittman, *Vice Chair*

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Elizabeth Quinn, *Chair*
Brian Wolfman, *Vice Chair*

District of Columbia Bar Foundation

Kelly V. Darnell, *President*
John Relman, *Vice President*



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