

# Our Way Forward

DISTRICT OF COLUMBIA BAR ANNUAL REPORT 2022-2023



# **Letter to Our Members**

fter living under a cloud of uncertainty during the pandemic, the past year may seem like a blur of activity. This annual report is a reminder of all that we accomplished together — indeed, we came out stronger and ready for the challenges that lie ahead for our growing organization.

As the COVID-19 crisis waned, we worked our way back to the familiar. We reconnected, we networked, and, for some of us, we returned to our pre-pandemic work routines. Despite being a profession bound by tradition, we embraced technological advances, adapted to work-place transitions, and transformed the way we serve our members and our community. Perhaps there is no going back to the kind of normal we knew before we shifted our work lives online, but perhaps that is the point — that we look ahead instead of back, that we build on the resilience and agility we cultivated during the pandemic instead of returning to what we were comfortable with.

In fiscal year 2022–2023, we continued to meet our members where they were, delivering resources and professional development opportunities, including more than 200 CLEs and an estimated 130 Communities programs, both in person and online. More than 350 D.C. Bar members gathered at our headquarters and virtually for the 2023 tax conference in January, and approximately 600 attended the highly successful Judicial & Bar Conference at the Ronald Reagan Building and International Trade Center in April.

We focused on strengthening our collaborations with voluntary bar associations to help them grow, thrive, and engage with our Bar; launched the Early Career Lawyers Community to provide space for new practitioners to enhance their skills and expand their professional networks; and appointed a Diversity, Equity, Inclusion, and Accessibility (DEIA) Task Force to develop strategies for

supporting and promoting DEIA within the Bar and the broader legal community. Through our Lawyer Assistance Program, we continue to dedicate robust, confidential, and free resources to support the health and well-being of our members, especially at a time when stress, feelings of isolation, and overcommitment to work are putting many of us under immense and increasing pressure.

This past fiscal year we also reaffirmed our commitment to access to justice and service to the community, guiding tenets since our founding. The D.C. Bar Pro Bono Center remains tireless in its mission to make justice not just a promise but a reality for all. Behind its work are the hundreds of Bar members who answer our call for pro bono help year after year, as well as the generous donations of hundreds more. Your time and financial support are life-changing.

Working with the D.C. Courts, the D.C. Access to Justice Commission, and area legal services providers, we advocated for increased funding for civil legal services in the District, where the need remains high. As leaders in the District's legal community, we recognize that access to justice tightens the fabric of our community and strengthens our democracy.

The pandemic has unleashed transformative changes that may have permanently altered our legal landscape. With more than 115,000 members nationwide and around the world, the D.C. Bar is at the forefront of these important conversations on where the practice of law is headed. Through five decades we have built a truly extraordinary bar that has weathered disruptions and embraced innovation without losing sight of our history and legacy. Today, as in the past, we will lead the way.

We look forward to starting this exciting new chapter with you.





Ellen M. Jakovic

President

Robert J. Spagholetti

### **Welcome Back**

he pandemic has reshaped the way we work, live, and do business, and there is no one-size-fits-all template on what a return to normal should look like.

At the District of Columbia Bar, the past fiscal year saw the resumption of a significant number of in-person events and the continued availability of the robust virtual programming the Bar developed during the COVID-19 crisis. In-person networking and career development opportunities such as the Tax Legislative and Regulatory Update, the Judicial & Bar Conference, the D.C. Bar Pro Bono Center's Advice & Referral Clinic, and numerous continuing legal education programs brought our members together to reconnect, form new relationships, and grow professionally while making a difference in their communities.

Furthering its commitment to improving processes and providing members a positive customer experience, the D.C. Bar successfully implemented a new association management software (AMS) during the 2022–2023 license renewal period, clearing a backlog of more than 1,200 admission applications within 60 days and facilitating the admission of more than 3,700 new members since July 1, 2022. The new AMS also provided the Bar better insight into members' demographic data, guiding the delivery of its programs and services, such as a reinstatement campaign that resulted in 111 additional license renewals.

The D.C. Bar advanced its partnership with more than 30 affinity partners, providing members access to thousands of dollars' worth in savings and benefits in areas such as practice resources, legal research, internet design and marketing, cybersecurity, wellness, and — new this year — digital marketing and wealth management.







Approximately 600 members and leaders of the D.C. legal community turned out for the 2023 Judicial & Bar Conference in April that featured a conversation among the District of Columbia's former and current attorneys general and corporation counsel.

### Ease of Access to Quality CLEs

In fiscal year 2022–2023, the Continuing Legal Education (CLE) Program provided a wide range of virtual programming while also increasing its in-person offerings, accommodating the needs of attorneys from jurisdictions that have reinstated in-person CLE requirements or who prefer a live experience. Overall, the majority of the CLE Program's 209 courses covering 22 practice areas were conducted on Zoom, demonstrating that many lawyers still prefer to fulfill their continuing legal education obligations remotely.

The CLE Program also offered more than 140 fully accredited on-demand courses to accommodate attorneys' work schedules and hybrid work environments. A third of the CLE courses available (more than 70 classes) were completely new, providing members fresh curriculum that reflects the ever-changing legal landscape.

The CLE Program collaborated with several organizations to offer accredited programs addressing recent developments in the law. In September 2022, it partnered with vaccine law experts and George Mason University's Antonin Scalia Law School to present the two-day National Vaccine Law Conference, and, in February 2023, with the American College of Legal Medicine during its annual conference on advancing legal medicine in an era of change. The CLE Program also cosponsored the Federal Bar Association Capitol Hill Chapter's Seventh Annual International Conference on Legislation and Law Reform.

Recognizing the quality of the CLE Program's offerings, several government agencies, including the U.S. Department of Health and Human Services, the Consumer Product Safety Commission, and the District's Board of Ethics and Government Accountability, requested special in-house training for their attorneys in the past year.

In April, the CLE Program also launched a three-month training program for paralegals and legal assistants aimed at improving their skills in legal research and writing, discovery, litigation assistance, negotiations, and legal ethics.



The D.C. Bar offers CLEs that have exposed me to advanced training in my field, as well as provides opportunities for me to give back by taking on leadership positions in its Communities programs . . . I also see the D.C. Bar as a way to connect with lawyers in other firms and corporate or regulatory environments to improve my practice.

Brian Malkin McDermott Will & Emery LLP

### Members Leading the Way

The D.C. Bar Communities, representing 21 practice areas and interests, presented 134 educational programs and events focused on enhancing the careers and professional networks of their 11,000-plus members.

In September 2022, just as COVID-19 restrictions loosened and members expressed a desire for more in-person programming, Communities rolled out a new electronic planning portal that enables volunteer leaders to propose and coordinate educational programs more easily and efficiently.

No Communities event demonstrated members' desire to return to normalcy more than the 2023 Tax Legislative and Regulatory Update in January. While virtual attendance was an option, 353 of the 685 registrants attended some or all of the conference's sessions in person at the Bar. The Communities Office also brought back in person two of its signature annual events, the D.C. Cup Moot Court Competition and the Melvin R. Wright Youth Law Fair, held in February and March, respectively. The Youth Law Fair, presented in collaboration with D.C. Superior Court at the H. Carl Moultrie Courthouse, drew more than 100 local middle school and high school students who toured courtrooms, met judges, and participated in mock trials, gaining a realistic perspective on court proceedings.

The Communities Office experienced several staffing transitions this fiscal year, including the arrival of its new director, Pamela Robinson, formerly the director of outreach to state, local, and specialty bars at the American Bar Association. Communities also welcomed Christopher Kelley, a staff attorney who will be responsible for growing the Bar's new Early Career Lawyers Community and for managing Communities' governance-related matters.

Approved in fall 2022 by the D.C. Bar Board of Governors and developed this spring by a small working group, the Early Career Lawyers Community will comprise lawyers with 10 or fewer years of practice and will provide programs on career enhancement, opportunities for engagement in law-related and community-based voluntary efforts, leadership development, and networking.





In 2023 two of the D.C. Bar Communities' signature events, the D.C. Cup Moot Court Competition and the Melvin R. Wright Youth Law Fair, were held in person for the first time since the pandemic.

### Ethics, Practice Management & Well-Being

Continuing its mission to help members launch or grow their own firms, the D.C. Bar Practice Management Advisory Service (PMAS) held its eighth annual Practice 360° | A Day for Lawyers & Law Firms virtually in September, presenting 11 prerecorded sessions and five live programs, including two CLE courses, for close to 200 attendees. By the end of March 2023, PMAS had presented an additional 39 educational programs attended by nearly 600 Bar members.

The Bar's Legal Ethics Program responded to more than 2,500 calls to its Legal Ethics Helpline, published two new legal ethics opinions, and participated in 20 ethics-related trainings and panel presentations.

At the Judicial & Bar Conference in April, the Attorney/ Client Arbitration Board (ACAB) presented a CLE class on avoiding a malpractice countersuit and resolving a fee dispute with ACAB. Meanwhile, the Rules of Professional Conduct Review Committee completed its "Final Report and Recommendations on Rule 1.15(e) and

Comments" for consideration by the Board of Governors. The committee's proposed changes would amend D.C. Rule 1.15 (Safekeeping Property) consistent with the D.C. Court of Appeals' holdings in *In re Mance* and *In* re Ponds.

The Lawyer Assistance Program (LAP) played a key role in the ABA Commission on Lawyer Assistance Programs' national conference in Washington, D.C., in September. D.C. Bar President Ellen M. Jakovic provided opening remarks while Denise Perme, LAP associate director, cochaired the event's planning committee and served as a seminar panelist.

As of March 31, 2023, LAP had opened 51 new clinical cases and conducted 710 client sessions, 137 telephone consultations, and 122 education/outreach/group sessions. LAP sponsored five "honest conversations" on topics ranging from boundary setting to loss, and produced six Toward Well-Being podcasts about inclusivity, the healing power of community, self-care, and more.

### Snapshot: Attorney/Client Relations Program

concluded cases

arbitration awards resolving

4,075,827

in disputed legal fees



in attorney restitution received by the Clients' Security Fund for past awards



claims decided for reimbursement



### Access to Justice in Action

The D.C. Bar Pro Bono Center, led by newly appointed Executive Director Kelli Neptune, provided legal representation, advice, and information to thousands of District residents living on low incomes as well as to nonprofit organizations and small businesses that serve this vulnerable population. Although many services were provided remotely, the Pro Bono Center's resource centers serving family law and housing litigants reopened onsite at D.C. Superior Court. The center's advice clinics also have returned to the District's Anacostia and Columbia Heights neighborhoods three years after going virtual during the pandemic shutdown.

As thousands of District residents faced the threat of eviction, the Pro Bono Center fielded calls from approximately 2,500 tenants and small landlords seeking help through the Landlord Tenant Legal Assistance Network (LTLAN), a collaboration launched in 2020 with five other legal services providers. With support from the D.C. Council and the DC Bar Foundation, the Pro Bono Center developed and opened an improved call center and intake and referral platform for LTLAN. The new system automates referrals, enables more effective communication among participating organizations and law firms, and improves the client experience.

Through a new tenant program designed to provide more holistic services, the Pro Bono Center assisted D.C. residents seeking to recertify housing vouchers, apply for affordable housing, access Emergency Rental Assistance, and seek additional critical services from District agencies. In addition, the Pro Bono Center's Advocacy & Justice Clinic placed 225 clients with pro bono counsel to litigate their housing, family law, public benefits, and consumer law matters.

The Pro Bono Center's Small Business Brief Advice Legal Clinics remained a reliable and vital support for the District's small business owners. Although most clinics were held remotely to provide flexibility for volunteers and clients, this service has also returned to in-person operation. More than 500 small business owners met with attorney volunteers during the year.

Nonprofit Office Hours, a service started in 2020, enabled more than 225 nonprofit executives and startup organizations to meet with an attorney to discuss fiscal sponsorship, organizational viability, intellectual property, and insurance liability issues. Since its inception, Nonprofit Office Hours has served more than 600 clients, creating a stronger and better informed local nonprofit community.

#### Pro Bono Center at a Glance

REPRESENTATION	Advocacy & Justice Clinic  225 cases placed for full representation	Bankruptcy Clinic  9 cases placed for representation	Family Law Assistance Network 229 clients served	Housing Attorney of the Day 171 clients served	
NONPROFIT & SMALL BUSINESS ASSISTANCE	37 nonprofits matched with counsel	564 business owners connected with lawyers	3,497 organizations and small businesses trained	328 nonprofits advised through clinics/office hours	
CLINICS/CENTERS/ NETWORKS	Consumer Law Resource Center 174 customers served	Advice & Referral Clinic 128 people served	Immigration Legal Advice & Referral Clinics 102 people served	Landlord Tenant Legal Assistance Network 2,169 tenants and 740 landlords helped	
RESOURCES/TRAININGS	Help Line 15,337 calls fielded	LawHelp.org/DC  1.36 million page views	Pro Bono Training  1,269 attorneys and paralegals trained	Pro Bono Center	

Figures from July 1, 2021, through June 30, 2022

### Connected & Engaged

The D.C. Bar's Information Technology (IT) Department continued to play a critical role in connecting our members with services and facilitating remote participation in a variety of activities. After launching the Bar's new AMS in June 2022, the IT Department continued refining its configuration over the past fiscal year.

To improve efficiency when working remotely, IT launched a new cloud-based phone system for the D.C. Bar, the Pro Bono Center, the Office of Disciplinary Counsel, and the Board on Professional Responsibility. This update is particularly important for the Bar's Continuity of Operations Plan, allowing staff to provide phone support to members without having to connect to the Bar's network.

member outreach, demonstrate the Bar's value, and increase engagement. Through a strategic research plan, the Marketing and Communications team is defining the Bar's value proposition, assessing our members' needs, and working to align the Bar's offerings and communications accordingly. The research phase will conclude in the summer of 2023. Washington Lawyer magazine continues to produce

award-winning content. In May 2023, its articles on LGBTQ rights after the fall of Roe v. Wade, crowdsourcing digital war crimes evidence, and the future of the Establishment Clause were named finalists for the 2023 Dateline Awards of the Washington, D.C., chapter of the Society of Professional Journalists. In September 2022, the publication also won its third consecutive Luminary Award for Excellence in Regular Publications among large bars from the National Association of Bar Executives' Communications Section and a Best Authored Article award for its story on legal deserts.

The Marketing and Communications Department devel-

oped an integrated, member-centric strategy to expand

Materials and content produced by the Marketing and Communications team, including a microsite featuring a timeline of the Bar's history and members' reflections, were key components of the Bar's 50th anniversary campaign that won the 2023 Frederick B. Abramson Award.

The D.C. Bar has insightful educational resources and professional networks that help to sharpen my legal skills. I enjoy the writing workshops and employment law update courses.

Shanita Asante Law Office of Shanita Asante













### Leading the Way in Diversity

As the Bar looks ahead, it is reaffirming its commitment to diversity, equity, inclusion, and accessibility (DEIA) so that all members enjoy an environment of opportunity, respect, and fairness.

In fall 2022, the Board of Governors approved the creation of a DEIA Task Force to provide thought leadership and recommendations on Bar-wide projects and initiatives designed to advance DEIA in the Bar community and the legal profession generally. The task force is chaired by former Bar president Esther H. Lim and former Board of Governors member Benjamin F. Wilson.

At the D.C. Bar Communities' DEI Summit Follow-Up Discussion in October, Bar members gained insight into practical ways that legal departments and individuals can foster inclusivity and recruit and retain diverse talent. One resource is the Lawyers' Toolkit for Diversity and Inclusion, released by the D.C. Bar Communities in June 2022 after extensive work by the Best Practices Subcommittee of the Diversity and Inclusion Working Group led by President-Elect Charles R. Lowery Jr.

In November, the Arts, Entertainment, Media and Sports Law Community partnered with the Women's Bar Association of the District of Columbia to present a program discussing the 50 years of progress made since the passage of Title IX and the obstacles that remain.

Although we have made significant strides in advancing diversity, much work still needs to be done. The D.C. Bar continues to be a powerful voice in addressing issues of inequality and creating spaces for everyone to thrive and succeed.

### The District of Columbia Bar

#### **Statements of Activities and Financial Position**

Years Ended June 2022 and 2021

REVENUE	2022	2021	ASSETS	2022	2021
Membership License Fees	\$31,883,533	\$31,842,518	Cash and Cash Equivalents	\$10,694,665	\$14,924,495
Communities Dues	1,514,336	1,463,605	Restricted Cash-Building Escrow	1,530,109	1,947,750
In-Kind Contributions	2,134,087	1,889,435	Restricted Cash–Clients' Security	1,213,013	1,069,857
Admission and Registration	512,519	580,211	Fund		
Investment Income	(2,302,149)	3,469,860	Investments	14,587,260	16,866,173
Other Fees and Services	4,270,761	3,449,294	Other Assets	4,750,827	2,797,469
Total Revenue	\$38,013,087	\$42,694,923	Interest Rate Swap	125,998	
			Property and Equipment	72,697,559	73,571,643
EXPENSE			Total Assets	\$105,599,431	\$111,177,387
Program Services					
Board on Professional \$9,950,122 \$9,797,967		LIABILITIES AND NET ASSETS			
Responsibility	,,	, . ,	Liabilities		
Regulation Counsel	3,998,864	3,882,318	Accounts Payable and Accrued	\$6,747,396	\$7,915,771
Continuing Legal Education	1,895,685	1,537,076	Expense		
Communications	2,443,655	2,387,434	Amount Due to Affiliate	3,000,206	1,946,303
Communities	1,590,681	1,554,105	Deferred Revenue	17,500,925	21,205,478
Annual Meeting and	516,983	366,274	Interest Rate Swap		6,454,983
Judicial Reception			Loans Payable	49,897,053	52,303,449
Clients' Security Fund Activities	104,610	281,385	Total Liabilities	\$77,145,580	\$89,825,984
Total Program Services	\$20,500,600	\$19,806,559			
			Net Assets		
Supporting Services			Undesignated	\$3,179,771	\$2,838,597
Administration and Finance	\$15,147,525	\$14,561,246	Board Designated		
Executive Office	1,843,495	1,809,207	Mandatory License Fee Purpose	e 21,373,587	14,538,475
<b>Total Supporting Services</b>	16,991,020	16,370,453	Communities	1,697,622	1,837,278
Total Expense	\$37,491,620	\$36,177,012	Clients' Security Trust Fund	1,213,013	1,069,857
Change in Net Assets			Continuing Legal Education	989,858	1,067,196
Before Other Activity	521,467	6,517,911	Total Net Assets	\$28,453,851	\$21,351,403
Gain (Loss) on Lease		323,388	Total Liabilities and Net Assets	\$105,599,431	\$111,177,387
Net Gain (Loss) on Fair Value of Interest Rate Swap Agreements	6,580,981	4,171,951		,,	, , , , ,
CHANGE IN NET ASSETS	\$7,102,448	\$11,013,250			
Net Assets-Beginning of Year	21,351,403	10,338,153			
Net Assets-End of Year	\$28,453,851	\$21,351,403			

# D.C. Bar Board of Governors 2022–2023

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Vice Chair (vacant)

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John P. Relman, *President*Danielle M. Reyes, *Vice President* 



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