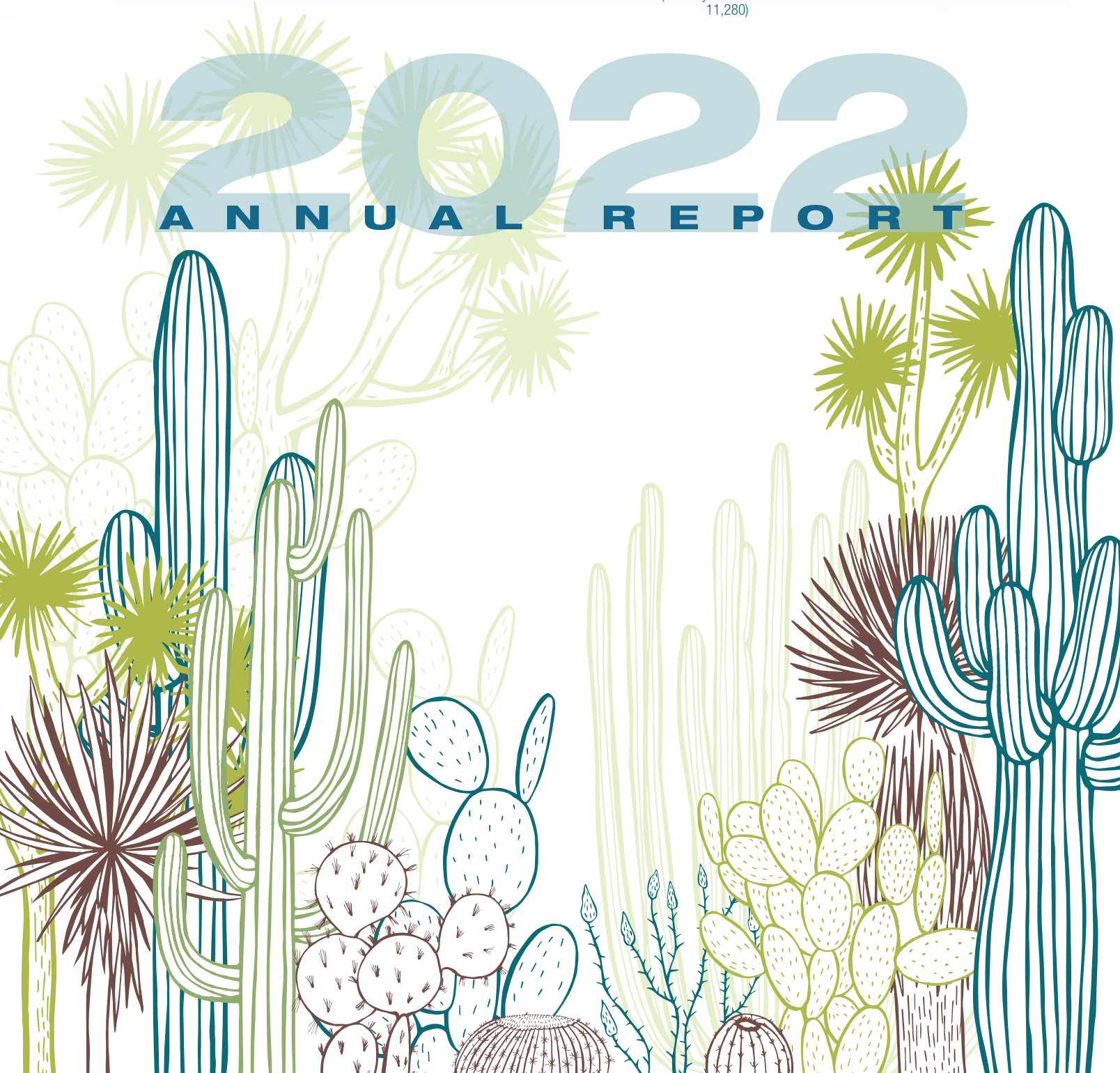


TOTAL MEMBERS including judicial, retired, inactive and in-house counsel 25,483	TOTAL ACTIVE MEMBERSHIP 19,171	CALLS handled by PHOENIX RESOURCE CENTER 15,489	ATTENDANCE AT CLE SEMINARS including OnDemand programs 23,733	OUT-OF-STATE ACTIVE MEMBERS 3,522
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(live-only attendance was 11,280)

2022

ANNUAL REPORT



**STATE BAR
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GOVERNORS**

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State Bar of Arizona Annual Report 2022

Dear Members:

In what felt like our first year back to the ordinary, the Bar remains ever extraordinary. Its mission – to ensure the competency, ethics, and professionalism of its members and to promote access to justice fueled each action, initiative and program.

The Bar held numerous, top quality CLEs and helped members with almost any issue they might face practicing law. Practice 2.0 provided consultations and resources on practice management. The Member Assistance Program connected those struggling with mental health or substance-abuse issues with volunteer peer counselors. The ethics and trust account hotlines fielded members' questions and concerns. The Bar engaged nearly 7,000 of its members to serve on committees, sections, and task forces and the Bar Leadership Institute launched the next generation of leaders. 2023 also saw a concerted effort to increase communication with local, county, affinity, and tribal bars throughout Arizona, and to support and bolster Diversity Equity and Inclusion efforts across the organization and legal profession.

Access to justice held a high priority. The Bar supports, promotes and endorses various pro bono programs through a valued partnership with the Arizona Bar Foundation. With the help of our generous members, the Bar assisted veterans, tenants, employees, and many others, who needed legal assistance through virtual and in-person legal clinics. Another partnership with ABC15 Arizona's Let Joe Know has helped hundreds of people connect with legal advice through a live phone bank. The Bar also took on new and innovative ways to reach out to the public on newscasts, social media and on Arizona movie theater screens.

Thank you to all the staff, volunteers, and members for making this such a great year! It was an honor and privilege to serve as the president and to lead such an amazing organization.

Jessica Sanchez
State Bar of Arizona President



Access to Justice Programs and Statistics

- The Public Service Center (PSC) handled approximately 1,600 calls from the public seeking help for hiring a lawyer or direction to legal resources.
- The PSC coordinated a variety of free legal help events. In all, 159 volunteer attorneys provided 890.5 hours benefiting 831 members of the public.
- A movie theater advertising campaign to raise awareness of the State Bar of Arizona and the PSC resulted in 1,339,676 people seeing the video ad. It played on a total of 144 screens at eight theaters statewide between October and December.
- A digital advertising campaign with ABC15 Arizona resulted in 1,303,262 people seeing our ad online and 11,191 click throughs to the State Bar website. The campaign targeted people in Arizona who had recently searched for legal assistance.
- The Bar made cash and in-kind contributions to the Foundation for pro bono legal services, their Mock Trial Competition, among other programs and services. The total contribution for 2022 was \$123,849.

Competency

- Practice 2.0, the Bar's free, confidential practice management advice program, provided in-depth virtual consultations to 44 members, provided advice on practice management, legal technology and best practices through 953 advice-line calls, and provided advice on trust accounting and related issues through 312 calls to the trusts account hotline, as well as providing rich resource materials, guides and forms on the Practice 2.0 website.
- The State Bar's Continuing Legal Education Department continued to lead the way in education and training with 146 new live seminars.
- AZCLE® partnered with the Technology Working Group and Practice 2.0 to offer a seven-part series on technology and law office management with over 300 practitioners attending the series.
- The State Bar's 2022 CLE catalog offered 380 hours of live seminars, including 153 hours of ethics training.
- AZCLE® partnered with organizations including The American College of Trial Advocacy, AZ Chapter of the American Academy of Matrimonial Lawyers, Tribal In-House Counsel Association, Native American Bar Association, American Planning Association, Rocky Mountain Land Use Institute, Arizona State University's First Amendment Clinic, and Arizona State University Sandra Day O'Connor College of Law.
- 628 professionals volunteered to act as faculty and share their expertise for the various CLE programs the Bar has to offer.
- The State Bar's Publication department issued updated editions of two treatises; Arizona Attorneys' Fees Manual and the Arizona Probate Code Practice Manual with extensive forms.

Ethics

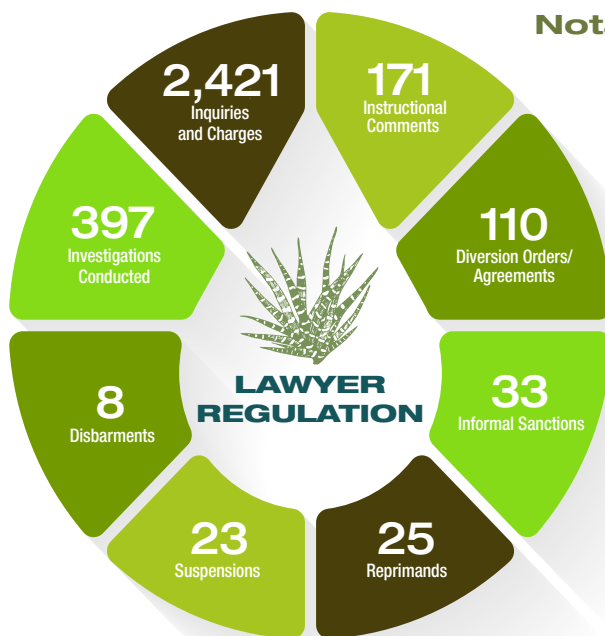
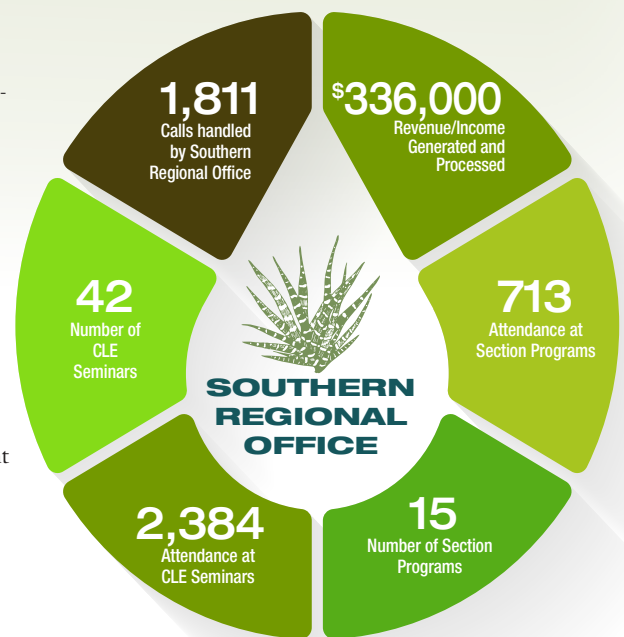
- The Ethics Hotline is accessible to members every day, free of charge — an invaluable resource to lawyers needing outside ethics advice, including solo and small-firm practitioners. In 2022 the Ethics Hotline received 1,794 calls; 597 were routed to Practice 2.0 or the Trust Account Hotline (a concerted effort was made to help members calling the hotline by providing better screening and optimal use of other hotlines) and 1,197 calls were handled by the Ethics Hotline. Trending topics included confidentiality, terminating representation and conflicts.
- In-house attorneys provided the ethics component in more than 15 CLE seminars, providing ample CLE options for members to comply with MCLE requirements.
- Providing greater accessibility, the Ethics Advisory Group continues publishing its Best Practices series on azbar.org.

Professionalism

- The State Bar's Member Assistance program staff and peer support volunteers provided support and resources to members struggling with substance use disorder, mental health challenges, stress, depression and anxiety.

Professionalism (continued)

- AZCLE® offered several courses focused on attorney wellbeing, including Stress Management through Mindfulness Meditation, Mindfulness: Retrain Your Brain and The Neuro and Behavioral Science of Trauma: How to Work with It in Your Life and Clients' Cases. These courses provide tips and tools to help attorneys deal with the stress of working in the legal profession. 291 people attended these programs.
- The Bar Leadership Institute helps develop future leaders in the legal community. The 2022 class of 16 graduates completed two community service projects designed to support the Bar's mission to serve and protect the public. Graduates continue to serve through participation in the Board of Governors, judiciary, legislature and other community organizations.
- Engaged over 6,900 members by supporting 30 Sections, organized around substantive practice areas, the Young Lawyers Division which has approximately 3,986 members, and the Senior Lawyers Division, with approximately 5,963 members. State Bar Sections produce hundreds of hours of continuing education, provide networking and engagement opportunities and provide a forum for the ongoing discussion of law.
- The Arizona Supreme Court requires the State Bar to ensure that all members have met their mandatory continuing legal education requirement. In 2022, Bar staff processed 18,371 affidavits, with more than 98% of members filing on time—avoiding late fees.



Notable Highlights

- Surveyed active members to learn more about Arizona attorneys' experiences and perceptions concerning diversity and inclusion in the workplace.
- AZCLE® offered a free seminar "Progressing beyond Bias" to every member of the Bar.
- After a two-year hiatus, AZCLE® began holding in-person seminars this year including the annual Advanced Probate and Estate Planning, the annual Land Use Law Update partnered with the AZ Planning Association, the Annual Workers' Compensation CLE program, Advanced Family Law, Bench and Bar, Ethical Morning at the Movies and CLE by the Sea.
- AZCLE® provided 8 hours of free CLE to lawyers who work for legal aid organizations in Arizona.
- AZCLE® offered 6 virtual Professionalism courses and 533 members attended.
- The Senior Lawyers Division continues to focus its attention on keeping retired lawyers engaged with the Bar and assisting lawyers transitioning out of the active practice of law. The Division continues to hold virtual drop-in sessions on a variety of "life after law" topics including succession planning, the impact of dementia and developing new hobbies and avocations. In 2022, the Board of Governors, in response to a request from the Division, implemented reduced annual fees for members in retired status who have been Bar members for 35 years or more.
- The Client Protection Fund put money back into the hands of consumers who lost funds because of dishonest lawyers. In 2022, 63 clients received a total of \$362,376.

State Bar Annual Award Recipients

AWARD OF APPRECIATION	<i>Raising Special Kids</i>
AWARD OF SPECIAL MERIT.....	<i>Know Your Rights Committee (a collaboration between the Maricopa County Public Defender's Office and the Maricopa County Public Library District)</i>
DIVERSITY AND INCLUSION LEADERSHIP AWARD.....	<i>Hon. Frankie Y. Jones, Phoenix Municipal Court</i>
HON. JOHN R. STICHT EXCELLENCE IN DISABILITIES ACCESSIBILITY AWARD	<i>Donna Powers, Arizona Center for Disability Law</i>
JAMES A. WALSH OUTSTANDING JURIST AWARD.....	<i>Hon. Kyle A. Bryson, Pima County Superior Court</i>
MARK I. HARRISON EXCELLENCE IN MENTORSHIP AWARD	<i>Cynthia L. Choate, Law Office of Choate and Wood</i>
MEMBER OF THE YEAR AWARD.....	<i>David D. Dodge, David D. Dodge PLC</i>
MICHAEL C. CUDAHY CRIMINAL JUSTICE AWARD	<i>Elizabeth Burton Ortiz, Arizona Prosecuting Attorneys' Advisory Counsel</i>
OUTSTANDING IN-HOUSE COUNSEL OF THE YEAR AWARD	<i>Mona M. Stone, Goodwill of Central and Northern Arizona and Goodwill Industries of Monocacy Valley Inc.</i>
SHARON A. FULLMER LEGAL AID ATTORNEY OF THE YEAR AWARD.....	<i>Nina R. Targovnik, Community Legal Services</i>
TOM KARAS CRIMINAL JUSTICE AWARD	<i>Lori L. Voepel, Beus Gilbert McGroder PLLC</i>
PRESIDENT'S AWARD	<i>Samuel Saks, Guidant Law PLC</i>

Financial Information

How the State Bar serves the public on your behalf...

The Conservatorship Program

The State Bar maintains the Conservatorship Program to protect clients of attorneys who have died, been disbarred or abandoned their practice without an adequate succession plan. The program takes possession of client files for safekeeping and return, and it assumes responsibility of IOLTA funds to ensure proper disbursement. In 2022, the program wound down eight law practices, returned \$39,547.54 in IOLTA funds, and properly safeguarded 1,444 client files. It cost the State Bar \$261,113 or an average of \$180.83 per client to operate, including storage fees, contract labor for moving/retrieval services, and other overhead expenses.

The Fee Arbitration Program

The State Bar of Arizona's Fee Arbitration Program is a proven valuable resource for attorneys and consumers. This is a free and voluntary service that allows Bar members and their clients to reach an agreement when fees over \$1,000 are the primary issue. The program is staffed by one fulltime employee and a 70-member volunteer group, with each member working independently on a specific case. The program received 136 petitions in 2022. The total cost of the Fee Arbitration Program, including overhead, was \$196,133.

What does it cost the State Bar to...?

Publish ARIZONA ATTORNEY MAGAZINE?

Arizona Attorney magazine is published 11 times per year by the State Bar of Arizona. It has long been considered one of the Bar's most valuable member benefits with its award-winning legal content and appealing design. In 2022, it cost \$858,019 to produce the magazine—including overhead. Advertising revenue totaled \$1,333,786, resulting in \$478,767 in revenue for the Bar.

Bar's Income in 2022

\$18,691,494*

Bar's expenses in 2022

\$16,899,682*

*The Bar has a reserve policy which requires that at the end of each year, any surpluses shall be added to reserve accounts to pay for capital improvements, avoid increases to annual member fees in a future year(s), and provide needed cash resources for unexpected emergency needs.

For a complete report of the Bar's finances, go to:
<https://www.azbar.org/about-us/financial-statements/>



2022 ANNUAL REPORT