



State Bar
of Georgia

BOG BOARD BOOK

**2021 Annual Meeting
Isle of Palms, S.C.**

This book serves as the agenda and materials for the State Bar of Georgia's 2021 Annual Meeting.



State Bar of Georgia

287th BOARD OF GOVERNORS MEETING

Friday, June 11, 2021

9:00 a.m. – 12:00 p.m.

Wild Dunes Resort

Isle of Palms, South Carolina

Zoom Webinar

(Link will be provided by email)

Dress: Camera-Ready Business Casual

AGENDA

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
1) ADMINISTRATION		
a) Welcome and Call to Order	Dawn M. Jones.....	1-16
	President, 2020-2021	
b) Pledge of Allegiance.....	Shiriki C. Jones	
	BOG Member	
c) Invocation	Francys Johnson	
	BOG Member	
d) Recognition of Past Presidents, Judges and Special Guests.....	Dawn M. Jones	
e) Recognition of Retiring Executive Committee Members and Retiring Board Members	Dawn M. Jones.....	17
<ul style="list-style-type: none"> ● Darrell Lee Sutton, Immediate Past President ● William Thomas Davis, Immediate YLD Past President ● Amy Howell, Executive Committee, 6 years including YLD leadership (<i>remaining on the BOG</i>) ● Larry Michael Johnson, Alapaha Circuit, Post 1 – 5 years on the Board ● Sam G. Nicholson, Augusta Circuit, Post 1 – 9 years on the Board 		

Topics

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- James L. Roberts IV, Brunswick Circuit, Post 1 – 4 years on the Board
- Gregory A. Futch, Flint Circuit, Post 1 – 24 years on the Board
- Ira L. Foster, Member-at-Large, Post 1 – 3 years on the Board
- Francys Johnson Jr., Member-at-Large, Post 2 – 3 years on the Board
- Thomas Alexander Peterson IV, Middle Circuit, Post 2 – 5 years on the Board
- Walter James Gordon Sr., Northern Circuit, Post 1 – 10 years on the Board
- Philip Augustine, Out-of-State, Post 1 – 3 years on the Board
- Dennis C. Sanders, Toombs Circuit – 18 years on the Board

f) Roll Call.....Tony DelCampo..... 18-24
Secretary, 2020-2021

g) Future Meetings ScheduleElizabeth L. Fite..... 25-26

2) ACTION

a) Minutes of the 286th Meeting of the Board of Governors on March 20, 2021.....Tony DelCampo..... 27-31

b) Inactive SectionsDawn M. Jones..... 32-37

3) MEMBERS’ MEETING ACTION ITEMS

All active State Bar of Georgia members are invited to attend and vote in the Members’ Meeting.

a) Minutes of the Members’ MeetingDawn M. Jones..... 38
on January 9, 2021

Adjourn Members’ Meeting and reconvene Board of Governors Meeting

4) AWARDS AND PRESENTATIONS

a) Marshall Tuttle Award (2019/2020)Dawn M. Jones/Jay Elmore

b) Judge Willie Lovett Jr. Advancing the Field of Juvenile Law Award (2020/2021)Dawn M. Jones/Hon. David Nahmias

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
c) Chief Justice Harris Hines Outstanding Advocacy for Children in Dependency Award (2020/2021)	Dawn M. Jones/Hon. David Nahmias	
d) Chief Justice Thomas O. Marshall Professionalism Awards (2020/2021)	Darrell Sutton/Dawn M. Jones Immediate Past President	
e) Georgia Legal Services Program Check Presentation.....	Dawn M. Jones	
f) Presentation of Other Awards	Dawn M. Jones <i>(Awards and recipients are listed in Annual Meeting Brochure.)</i>	

5) PRESIDENT’S ADDRESS

a) State Bar of Georgia President’s Address.....	Dawn M. Jones.....	39-40
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6) SPECIAL REPORTS

a) Supreme Court of Georgia	Hon. Harold Melton Chief Justice Supreme Court of Georgia	
b) Court of Appeals of Georgia.....	Hon. Christopher McFadden Chief Judge Court of Appeals of Georgia	
c) Office of the Attorney General.....	Christopher Carr Attorney General	
d) Office of Governor Brian Kemp.....	David Dove Executive Counsel	

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
e) Georgia General Assembly		
(1) House Judiciary Committee	Rep. Chuck Efration Chairman	
(2) Senate Special Judiciary Committee	Jennifer Jordan Chairwoman	

7) INFORMATIONAL REPORTS

- | | | |
|--------------------------------|--------------------------|-------|
| a) Memorials..... | Dawn M. Jones | |
| b) Young Lawyers Division..... | Bert D. Hummel | 41-48 |
| | YLD President, 2020-2021 | |

8) ADJOURNMENT

The Board of Governors will meet again at 9:00 a.m. on Saturday, June 12, 2021.



State Bar of Georgia

Saturday, June 12, 2021

9:00 a.m. – 12:30 p.m.

Wild Dunes Resort

Isle of Palms, South Carolina

Zoom Webinar

(Link will be provided by email)

Dress: Camera-Ready Business Casual

AGENDA

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
1) ADMINISTRATION		
a) Welcome and Call to Order	Elizabeth L. Fite	1-16
	President, 2021-2022	
b) Pledge of Allegiance.....	Hon. Carla Wong McMillian	
c) Invocation	C. Sutton Connelly	
d) Recognition of Past Presidents, Judges and Special Guests.....	Elizabeth L. Fite	
e) Welcome to New Officers & Board Members	Elizabeth L. Fite	17

New Officers

Elizabeth L. Fite, President

Sally Akins, President-Elect

Tony DelCampo, Treasurer

Ivy Cadle, Secretary

Dawn M. Jones, Immediate Past President

Elissa B. Haynes, YLD President

Ron Daniels, YLD President-Elect

Bert Hummel, YLD Past President

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New Board Members

- Daniel Jackson Connell III, Alapaha Circuit, Post 1
- Amanda Nichole Heath, Augusta Circuit, Post 1
- Stephen Elliott Tillman, Brunswick Circuit, Post 1
- Danny L. Durham, Columbia Circuit
- Amanda Renee Flora, Flint Circuit, Post 1
- Rebecca Holmes Liles Grist, Macon Circuit, Post 3
- William T. Davis, Member-at-Large, Post 1
- R. Chinny Law, Member-at-Large, Post 2
- Jerry Neal Cadle, Middle Circuit, Post 2
- Kimberly Wilkerson Higginbotham, Northern Circuit, Post 1
- Scott R. McMillen, Out-of-State, Post 1
- Thomas B. "Britt" Hammond, Toombs Circuit

f) Roll CallIvy Cadle 18-24
Secretary, 2021-2022

g) Future Meetings ScheduleElizabeth L. Fite 25-26

2) PRESIDENT’S REPORT.....Elizabeth L. Fite

- a) Approval of the Members of the State Disciplinary Boards (action)
- (1) State Disciplinary Board & State Disciplinary Review Board
 - (2) Formal Advisory Opinion Board
- b) Approval of ICLE Board (action)
- c) Approval of 2021-2022 Committees (action)
- (1) Standing Committees
 - (2) Special Committees
 - (3) Program Committees and Boards
- d) President’s Remarks:
2021-2022 Proposed Program of Activities

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3) ACTION

a) Nominations to the Judicial Qualifications Commission (action).....Elizabeth L. Fite..... 49

b) Treasurer’s Report (information)Tony DelCampo..... 50-66
Treasurer, 2021-2022

c) 2021-2022 State Bar Budgets (action).....Tony DelCampo..... 67-113
(Operating Budget and Bar Center Budget) Elizabeth L. Fite
(ICLE Budget) Elena Kaplan, Finance Chair

d) Financial Resolutions (action).....Tony DelCampo

- Authorization for president to secure blanket position bonds for officers and staff.
- Designation of depositories for general operations of the State Bar of Georgia.
- Employment of independent auditing firm to audit the financial records of the State Bar for the fiscal year 2021-2022.

e) Executive Director Election (action).....Elizabeth L. Fite

f) Election Schedule 2021-2022 (action)Elizabeth L. Fite..... 114

g) Elections Committee Recommendation (action).....Elizabeth L. Fite..... 115

h) Executive Committee Election (action)Elizabeth L. Fite
(Please keep nominations to under 5 minutes. Please keep seconds to under 2 minutes.)

One-Year Unexpired Term 2021-2022

(1) Unexpired term of Ivy Cadle

Two-Year Term 2021-2023

- (1) Expired term of R. Javoynne Hicks
- (2) Expired term of Amy V. Howell
- (3) Expired term of David L. Lipscomb

i) Georgia Legal Services Program Appointments (action)

- (1) William Gregory II, Vienna (appointment for 2-year term)
- (2) Tennell Lockett, Atlanta (appointment for 2-year term)
- (3) Darrell Sutton, Marietta (appointment for 2-year term)
- (4) Suzanne Werner, Atlanta (appointment for 2-year term)

j) Chief Justice’s Commission on Professionalism Appointments (action)

- (1) Christopher J. Chan (appointment for 3-year term)

4) INFORMATIONAL REPORTS

- a) Young Lawyers DivisionElissa B. Haynes
YLD President, 2021-2022
- b) Executive DirectorDamon Elmore
Executive Director
- c) Clients’ Security Fund Rules.....Ivy Cadle 116-122
- d) Chief Justice’s Commission on Professionalism.....Karlise Y. Grier 123-129
Executive Director
- e) Georgia Bar FoundationLen Horton
Executive Director
- f) Legislative ReportChristine Butcher Hayes/
Kyle Williams
- g) Georgia State-wide Business CourtHon. Walter W. Davis

5) WRITTEN REPORTS

a) State Bar of Georgia Audit Report for Year End 2020
and Related Auditor’s Letter Regarding Governance..... 130-155

b) Executive Committee Minutes 156-168
 (1) February 26, 2021
 (2) March 16, 2021
 (2) April 16, 2021

c) Office of the General Counsel 169

d) Insurance Committee..... 170-171

e) Fee Arbitration Program 172-175

f) Law Practice Management 176-180

g) Sections’ Annual Reports 181-225
 (1) Administrative Law Section
 (2) Animal Law Section
 (3) Antitrust Law Section
 (4) Child Protection and Advocacy Section
 (5) Construction Law Section
 (6) Creditors’ Rights Section
 (7) Employee Benefits Law Section
 (8) Equine Law Section
 (9) Family Law Section
 (10) Fiduciary Law Section
 (11) General Practice & Trial Law Section
 (12) Nonprofit Law Section
 (13) Professional Liability Section

h) Unlicensed Practice of Law 226-227

i) Media Report..... 228-229

j) Wellness Newsletter 230-235

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6) CLOSING

- a) Old Business.....Elizabeth L. Fite
- b) New Business.....Elizabeth L. Fite
- c) Executive SessionElizabeth L. Fite
- d) Remarks / Q&A / Comments / Suggestions
- e) Adjournment

f) Pictures (Very Important)

Immediately following the meeting, photos will be made of:

- (1) All new Board of Governors Members
- (2) All Returning Board of Governors Members who want updated photos
- (3) 2021-2022 Officers and Executive Committee



2021 STATE BAR OF GEORGIA

ANNUAL MEETING

ISLE OF PALMS, SOUTH CAROLINA

HYBRID MEETING

June 10-13 | Wild Dunes Resort, Isle of Palms, SC
Hotel Cut-off Date | May 14
Final Cut-off Date | May 28



State Bar
of Georgia

Register at www.gabar.org.

FROM THE PRESIDENT



Dear Friends and Colleagues,
On behalf of the Board of Governors and Executive Committee, I would like to invite you to attend the 2021 Annual Meeting of the State Bar of Georgia to be held June 10-13, at the Wild Dunes Resort, Isle of Palms, South Carolina. We are pleased to be offering this meeting as a hybrid event, allowing people to attend in person or virtually as their comfort level dictates. Rest assured that we will take every safety precaution to decrease the spread of COVID-19 and appreciate your compliance with all safety protocols.

I hope you and your family will make plans to join me as we debut the hybrid format during this, our largest meeting of the Bar year. While there will be some changes to how things look and feel, know that traditional elements of our yearly Annual Meeting will remain, including opportunities to recognize and celebrate the work of individuals and groups over this last year. Celebrating past accomplishments is an important part of shaping and strengthening the mission and focus of the State Bar for the years ahead.

The Wild Dunes Resort is well-equipped to meet our every need for a productive and safe meeting. To that end, please know that the well-being of our members, their families and guests, along with our State Bar staff, is of utmost importance. We will be implementing strict safety protocols for all attendees of State Bar of Georgia events throughout the resort property, including: 1) requiring the use of properly worn face masks at all indoor and outdoor events; 2) requiring attendees, guests and State Bar staff to implement and maintain social distancing measures; and 3) requiring attendees, guests and State Bar staff to implement regular, 20 seconds

hand washing and/or use of hand sanitizers at all indoor and outdoor events.

I encourage you to take advantage of the CLE offerings, including "Institutional Bias in the Justice System," a productive dialogue regarding institutional bias and enduring effects of racism. And as in previous years, you will have the opportunity to take part in one or more section events, business meetings, alumni receptions and other social functions. The festivities will begin with Thursday evening's Opening Night event and culminate with Saturday night's Presidential Gala, where Elizabeth L. Fite will be sworn in as the 2021-22 Bar president.

There will be ample opportunity for you and your family to take a deep breath and relax with a number of recreational and wellness opportunities offered at Wild Dunes Resort—including golf, tennis, biking, the spa, enjoying the beach or pool, or simply relaxing with your family and friends. The State Bar has arranged for discounted rates for a number of activities and services. You can find that information on page 11 of this brochure.

In closing, I have been honored to serve as your 58th State Bar president during this very memorable year, defined by a number of professional and personal challenges and loss. Together we have navigated our way through incredibly important issues that will continue to shape our work and our profession as we move forward. Thank you for your dedication and service, and thank you for the opportunity you have given me to serve.

I am excited about this hybrid meeting and hope you will consider joining us in either format. Until then, be well and stay safe.

Warm Regards,

A handwritten signature in black ink, appearing to read "Dawn M. Jones".

DAWN M. JONES
President, State Bar of Georgia



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- 14 Resort Map
- 15 Registration Form
- 16 Sponsors

PHOTO BY WILD DUNES RESORT

OPENING NIGHT FESTIVAL

THURSDAY, JUNE 10 | 6:30 – 9:30 P.M.

The weekend begins with a Superhero Soiree at the Sweetgrass Inn, featuring appearances by costumed superheroes. Join your colleagues, their families and guests for a fun-filled evening dedicated to good food, great music from Live Exchange Party Band, and a chance to catch up with old friends and make new ones. Festival activities include ladder golf, disc throwing, a photo booth and a superhero color-by-number wall. Join our amazing superheroes for an evening of discovering the superhero within!

For Your Safety

Festival activities will be held both indoors and outdoors with safety protocols in place, including social distancing, wearing masks and the use of hand sanitizer, as well as maintaining a safe distance between individuals outside your family group when possible. We ask that all guests be mindful of these measures to keep everyone safe and healthy during the event.

A Word of Gratitude

Many thanks to the State Bar's Sections and other organizations whose continuous support ensures the success of the Opening Night festivities. (See list of contributing organizations on back page.)



CLOCKWISE FROM TOP LEFT: PHOTO BY WILD DUNES RESORT; PHOTO BY WILD DUNES RESORT; PHOTO BY LIVE EXCHANGE PARTY BAND

PRESIDENTIAL INAUGURAL GALA

SATURDAY, JUNE 12 | 6 – 11:30 P.M.

The evening will begin with a reception honoring the Supreme Court of Georgia justices and the Court of Appeals of Georgia judges, followed by the Awards and Inauguration Ceremony. The Distinguished Service and Employee of the Year awards will be presented, and Elizabeth L. Fite will be sworn in as the 2021-22 State Bar President. Dinner will then be served buffet style, after which you are invited to spend the remainder of the evening celebrating inside, outside, or both.

An Indoor Dance-Pod Party

Safely dance with The Band Be Easy! With a signature sound that is widely versatile yet steeped in soul, The Band

Be Easy boasts a dynamic repertoire that spans both genre and decade. The dance floor will be subdivided into sections or "pods" so that you can feel safe and free to let loose.

Immersed in Music

Venture outside away from the dance party and relax in a chalet while still enjoying the sounds of a live band on the Atmosphere 4K visual entertainment system. This immersive set of four plasma screens allows you to experience more than 5,000 music videos in all categories. Take a moment, catch your breath and mingle with colleagues as you enjoy the warm, inviting South Carolina evening.



CLOCKWISE FROM LEFT: PHOTO BY THE BAND BE EASY; PHOTO BY WILD DUNES RESORT; PHOTO BY WILD DUNES RESORT

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SCHEDULE OF EVENTS

THURSDAY, JUNE 10

7 a.m. – 8 p.m.

Registration Open

9 a.m. – 12:20 p.m.

CLE—Institutional Bias in the Justice System

9 a.m. – 5 p.m.

Serenity Suite Open

11 a.m. – 1 p.m.

Clients' Security Fund
(Virtual Only)

12 – 2 p.m.

Criminal Law Section Lunch

1 – 2 p.m.

Bench & Bar Committee

1 – 3 p.m.

Judicial Section Lunch

2 – 5:15 p.m.

CLE—War Stories and Georgia Evidence Update

3 – 4 p.m.

Budget Hearing

4 – 5 p.m.

SOLACE Committee
(Virtual Only)

6:30 – 9:30 p.m.

Opening Night Festival

FRIDAY, JUNE 11

6 a.m. – 8 p.m.

Registration Open

7 – 8 a.m.

YLD/Pro Bono 5K Fun Run

7 – 9 a.m.

Tradition of Excellence Breakfast
(General Practice & Trial Law Section)

7 a.m. – 5 p.m.

Serenity Suite Open

9 a.m. – 12 p.m.

Plenary Session: Awards Presentations, Annual Members Meeting and the 2020-21

Board of Governors Meeting

12 – 2 p.m.

Commission on Continuing Lawyer Competency

12 – 2 p.m.

ICLE Board Meeting
(Virtual Only)

1 – 2 p.m.

YLD Leadership Academy CLE
(2020 Leadership Class Only)

2 – 4 p.m.

Law Practice Management Advisory Committee
(Virtual Only)

2 – 5:30 p.m.

CLE—In Session ... Lawyers as Legislators

2:30 – 3:30 p.m.

Elections Committee
(Virtual Only)

2:30 – 4:30 p.m.

Disciplinary Rules and Procedures Committee

2:30 – 4:30 p.m.

YLD Pool Party and Meet the Candidates Reception

4 – 6 p.m.

Member Benefits Committee
(Virtual Only)

5:30 – 6:30 p.m.

Construction Law Section Reception

5:30 – 6:30 p.m.

Mercer University School of Law Alumni Reception

5:30 – 6:30 p.m.

University of Georgia School of Law Alumni Reception

5:30 – 7 p.m.

Tradition of Excellence Reception
(General Practice & Trial Law Section)

6:30 – 9:30 p.m.

YLD Dinner and Swearing-In Ceremony

SATURDAY, JUNE 12

6:30 a.m. – 1 p.m.

Registration Open

7:30 – 8:30 a.m.

New Board Members Breakfast with the President

7:30 a.m. – 1 p.m.

Serenity Suite Open

9 a.m. – 12:30 p.m.

Board of Governors Meeting

12:30 – 1:30 p.m.

Diversity of Bars/A2J Annual Meeting

6 – 11:30 p.m.

Reception Honoring the Supreme Court Justices and Court of Appeals Judges, Presidential Inaugural Gala:

Installation of Elizabeth L. Fite:

Dinner, Entertainment: The Band Be Easy

MEETING INFORMATION

HYBRID MEETING PLATFORM

The State Bar of Georgia has partnered with Bizzabo to utilize an online hybrid meeting platform to accommodate attendees who join both in person and virtually. We are working to create a unified and engaging experience that will bring our members together and make this event more rewarding and accessible for everyone involved.

Soon, you will be introduced to the event app that will meld the new complexities of bridging the gap, while keeping both in-person and virtual attendees steadily engaged. About a week prior to the start of the meeting, you will receive information from us with your dedicated link that will provide you with access to

the events you have registered for as well as the virtual platform. For those members attending virtually, the event app will be the main source of engagement. Because so much of the event content will exist within the app, attendees should plan on taking full advantage of this resource and utilizing all of its features to maximize your event experience.

If you have any questions about the virtual format or event app, please contact the Meetings department at meetings@gabar.org.

In-person attendees can also stop by the State Bar's Registration Desk for assistance during the meeting.

LIABILITY WAIVER

All State Bar of Georgia Annual Meeting attendees will be required to sign a waiver before being allowed to participate in any in-person State Bar of Georgia event (including partial or full attendance). This applies to Bar members and guests alike, with parents signing the waiver on behalf of children under age 18.

Please view and sign the waiver at www.gabar.org/AM21, or complete the waiver included with this brochure and email to meetings@gabar.org prior to your arrival at the meeting.

Under Georgia law, there is no liability for an injury or death of an individual entering State Bar of Georgia premises, or premises occupied or leased by the State Bar of Georgia if such injury or death results from the inherent risks of contracting COVID-19. Attendees and guests are assuming this risk by entering such premises. Any person entering the premises waives all civil liability against the State Bar of Georgia for any injuries caused by the inherent risk associated with contracting COVID-19 at public gatherings, except for gross negligence, willful and wanton misconduct, reckless infliction of harm or intentional infliction of harm, by the State Bar of Georgia.

SAFETY PROTOCOLS

4W'S

WELL-BEING CHECK

No known exposure to or symptoms of COVID-19 in the past 14 days.

WATCH YOUR DISTANCE

Please stay 6 feet apart.

WEAR A MASK

Wear over your nose, mouth and chin.

WASH YOUR HANDS

Wash hands for at least 20 seconds/use hand sanitizer.

PHOTO BY WILD DUNES RESORT

CONTINUING LEGAL EDUCATION

INSTITUTIONAL BIAS IN THE JUSTICE SYSTEM

THURSDAY, JUNE 10 | 9 A.M. – 12:20 P.M. | \$165

Credit: 3 CLE hours, including 1 trial practice

Take this opportunity to join the dialogue regarding institutional bias and enduring effects of racism. This nation's turbulent times demand study, examination, reflection, open minds and open hearts as we work towards becoming a part of the solution. We invite you to a seat at the table for this important and timely topic. Register for your seat at www.gabar.org/Institutional-Bias.

PRESIDING

Michael W. Tyler, *Partner, Kilpatrick Townsend & Stockton LLP, Atlanta*; and James A. Yancey Jr., *James A. Yancey Jr. Attorney at Law PC, Brunswick*

SPEAKERS

Anita Wallace Thomas, *Chairperson, Seeking Equal Justice and Addressing Racism & Racial Bias Committee; Partner, Nelson Mullins Riley & Scarborough LLP, Atlanta*; Terrica Redfield Ganzy, *Deputy Director, Southern Center for Human Rights,*

Atlanta; Tiffany Williams Roberts, *Community Engagement & Movement Building Counsel, Southern Center for Human Rights*; *Adjunct Professor of Law, Georgia State University College of Law, Atlanta*; Erica Hashimoto, *Professor, Georgetown Law, Washington, D.C.*; Tricia "CK" Hoffer, *The CK Hoffer Firm, Atlanta*; L. Christopher Stewart, *Stewart Miller Simmons Trial Attorneys, Atlanta*; Francys Johnson, *Davis Bozeman Johnson Law, Statesboro*; Mawuli M. Malcolm Davis, *Davis Bozeman Law, Decatur*; Adjoa A. Aiyetoro, *Professor Emerita, William H. Bowen School of Law, Little Rock, AR*; Natsu Taylor Saito, *Professor, Georgia State University College of Law, Atlanta*; and Robert St. Martin Westley, *Professor, Tulane Law School, New Orleans, LA*

SUPPORTER

State Bar of Georgia Seeking Equal Justice and Addressing Racism & Racial Bias Committee

WAR STORIES AND GEORGIA EVIDENCE UPDATE

THURSDAY, JUNE 10 | 2 – 5:15 P.M. | \$165

Credit: 3 CLE hours, including 1 ethics, 1 professionalism and 1 trial practice

Litigation, like life, is challenging. Hone your Georgia evidence skills to tackle those challenges with the *Georgia Evidence Update*. Learn from the challenges faced by practitioners and judges as told in their "war stories" of skirmishes, battles, wounds and victories experienced personally or witnessed in the lives of clients and litigants. The age-old stories remain relevant over time, surrounding the practice of law and the ethical and professional considerations that are incumbent upon being a successful lawyer. You may register at www.gabar.org/WarStories.

PRESIDING

Hon. Robert W. Chasteen Jr., *Chief Judge, Superior Court, Cordele Judicial Circuit, Co-Chair, State Bar of Georgia Bench and Bar Committee, Fitzgerald*; David B. Bell, *David Bell Law Firm,*

Co-Chair, State Bar of Georgia Bench and Bar Committee, Augusta

SPEAKERS

William V. "Bill" Custer IV, *Bryan Cave Leighton Paisner LLP, Atlanta*; David B. Bell; John C. Bell Jr., *Bell & Brigham, Augusta*; Chris Clark, *Clark, Smith & Sizemore LLC, Macon*; Amy Lee Copeland, *Rouse + Copeland LLC, Savannah*; Hon. John J. Ellington, *Justice, Supreme Court of Georgia, Soperton*; Hon. Robert W. Chasteen Jr.; Hon. Mary Staley Clark, *Judge, Superior Court, Cobb Judicial Circuit, Marietta*; Hon. LaTisha Dear Jackson, *Judge, Superior Court, Stone Mountain Judicial Circuit, Decatur*; and Hon. C. Michael Johnson, *Judge, Superior Court, Oconee Judicial Circuit, Eastman*

SUPPORTER

State Bar of Georgia Bench and Bar Committee

PLEASE NOTE:

- *As a courtesy to speakers and other attendees in this educational setting, we do not allow children at continuing legal education seminars. Thank you!*
- *The information presented is solely for educational purposes. The opinions expressed by the faculty in their materials and presentations are their own and do not necessarily reflect the opinions of the State Bar of Georgia, its officers, directors and/or employees. The faculty is not engaged in rendering legal or other professional advice and these presentations and publications are not a substitute for the advice of an attorney. All publications and presentations were created to serve the continuing legal education needs of practicing attorneys.*

IN SESSION ... LAWYERS AS LEGISLATORS**FRIDAY, JUNE 11 | 2 – 5:30 P.M. | \$165**

Credit: 3 CLE hours, including 1 professionalism

Those who write laws are often, but not always, lawyers. Have you ever wondered what is involved in serving as a lawmaker? This CLE explores what motivates a lawyer to serve as a lawmaker, what that service means to ensuring and protecting freedom, democracy and the rule of law, and how lawyers can interact with other legislators and the greater community to fashion laws that affect the legal profession. Join us *In Session* to delve into the significance of lawyers as legislators. Register at www.gabar.org/Lawyers-as-Legislators.

PRESIDING

Elicia N. Hargrove, *Attorney at Law, McDonough*; Avarita L. Hanson, *Attorney at Law, Atlanta*

SPEAKERS

Tiffany Williams Roberts, *Community Engagement & Movement Building Counsel, Southern Center for Human Rights*; Adjunct Professor of Law, *Georgia State University College of Law, Atlanta*; Sen. William S. Cowsert, *Georgia Senate, 46th District, Athens*; Lisa N. Cupid, *Chair, Cobb County*

Board of Commissioners, Austell; Rep. Dar'shun N. Kendrick, *Georgia House of Representatives, 93rd District, Lithonia*; Rep. Zulma P. Lopez, *Georgia House of Representatives, 86th District, Atlanta*; Sen. Jennifer A. Jordan, *Georgia Senate, 6th District, Atlanta*; Russell N. Sewell Jr., *Capitol Partners Public Affairs Group, Atlanta*; Raymond Kyle Williams, *Williams Teusink, Decatur*; Hon. Keisha Lance Bottoms, *Mayor, City of Atlanta, Atlanta*; Christopher E. Bruce, *Political Director, ACLU of Georgia*; *The Bruce Firm, LLC, Atlanta*; Marissa McCall Dodson, *Public Policy Director, Southern Center for Human Rights, Atlanta*; and Sen. John F. Kennedy, *Georgia Senate, 18th District, Macon*

SUPPORTERS

State Bar of Georgia Committee to Promote Inclusion in the Profession, Gate City Bar Association, Georgia Association of Black Women Attorneys, State Bar of Georgia YLD Committee to Promote Inclusion in the Profession, Georgia Association for Women Lawyers, Georgia Hispanic Bar Association

SOCIAL & SPECIAL EVENTS

OPENING NIGHT FESTIVAL

THURSDAY, JUNE 10 | 6:30 – 9:30 P.M.

Don't miss the Opening Night Festival! See page 4 for a description of the events.

YLD/PRO BONO 5K FUN RUN

FRIDAY, JUNE 11 | 7 – 8 A.M.

Sponsored by Capitol Partners Public Affairs Group, Pro Bono Resource Center and the YLD, this complimentary run on the beach is guaranteed fun! There will be T-shirts for all finishers—don't forget to sign up!

YOUNG LAWYERS DIVISION (YLD) DINNER AND SWEARING-IN CEREMONY

FRIDAY, JUNE 11 | 6:30 – 9:30 P.M.

Please join the YLD for its annual dinner and swearing-in ceremony to be held in the Palms Ballroom. Following dinner, the YLD will present

its outgoing officers and directors with gifts commemorating their service. The awards ceremony will recognize the graduates of the 2020 YLD Leadership Academy and will highlight the service of the YLD's many outstanding members as President Bert Hummel presents the awards of achievement, as well as the Ethics and Professionalism Award, the Distinguished Judicial Service Award and the Ross Adams Award. The evening will be capped off by the swearing-in of the officers for the 2021-22 Bar year. Incoming YLD President Elissa Haynes will then highlight her plans for the YLD during the upcoming Bar year. This is an event open to all lawyers—members of the YLD and otherwise.

PRESIDENTIAL INAUGURAL GALA

SATURDAY, JUNE 12 | 6 – 11:30 P.M.

Be sure to register for the Presidential Inaugural Gala. See page 5 for a description of the events.



PHOTOS BY WILD DUNES RESORT

RECREATION & WELLNESS

FAMILY FUN ACTIVITIES

Wild Dunes Resort offers guests a wide variety of recreation options to choose from, including golf, tennis, biking or relaxing at the pool or spa. Please visit www.destinationhotels.com/wild-dunes/things-to-do for more information. We recommend calling ahead and signing up early for any activities that interest you, as most amenities are in high demand during the summer.

SERENITY SUITE

Visit the Serenity Suite located in the Residences at Sweetgrass Pavilion Sea Oats Room. Sit back, relax and let soft music take you away. Stay for a few minutes or as long as you need to be refreshed (while taking into consideration others that may need to drop in). While you're there, review resources provided by the Attorney Wellness Committee, which include tips on dealing with many topics that may be causing you stress. Remember to take time for yourself and breathe, and make sure to utilize your six free counseling sessions through the Lawyer Assistance Program (www.gabar.org/lap).

SPECIAL DISCOUNTS

The State Bar has secured discounts for the following activities:

Beach Rentals

20% discount

Golf

20% off greens fees

Spa Services

10% discount

WELLNESS

The Spa at Sweetgrass is a world-class spa with locally inspired, truly authentic experiences to de-stress from life on the go, restore physical and emotional balance, detoxify while increasing energy, improve sleep and boost vitality and immunity.

Enjoy a 10% discount off the full-priced spa menu. Visit www.destinationhotels.com/wild-dunes/spa/spa-at-sweetgrass to make your reservations early.

RESORT CHILDCARE OPTIONS

Simply Southern Sitters, LLC, is a local babysitting agency in Charleston. All sitters are over 21 with at least three years of experience, have CPR training and reliable transportation, and have undergone extensive screenings and personal face-to-face interviews.

When making a request, note that sitters may be confirmed up to 48 hours prior to the desired time; after 48 hours, sitters may not be confirmed.

W: www.simplysouthernsitters.com
E: info@simplysouthernsitters.com
P: 843-534-5311 / 412-260-5241

Business hours:

Monday – Friday, 9 a.m. – 5 p.m.
Saturday, 9 a.m. – 12 p.m.

Cancellation Policy:

There will be no refunds or credits for cancellations of placement fees. If the cancellation occurs within less than 24 hours, you will also be charged a three hour sitter fee. Agency fees must be paid prior to sitter's arrival to be guaranteed a sitter.

HOTEL INFORMATION

HOTEL ACCOMMODATIONS

Wild Dunes Resort
200 Grand Pavilion Blvd
Isle of Palms, SC 29451
1-866-359-5593

Cut-off date is Friday, May 14

The Wild Dunes Resort will be the Bar's host hotel, offering discounted room rates. A block of rooms has been reserved for the meeting. The room rates range from \$245-455 S/D plus a 16% resort fee and applicable sales tax. To make reservations, please call the hotel directly at 866-359-5593 and mention you are with the State Bar of Georgia to receive the special rate, or visit <https://bit.ly/3rUKF4Q>.

Reservations must be made by Friday, May 14, as rooms will be on a space and rate availability basis after this date.

Check-in time is 4 p.m.
Check-out time is 11 a.m.

DIRECTIONS

Visit www.destinationhotels.com/wild-dunes/charleston-sc-resorts/isle-of-palms-resort for driving directions.

ISLAND TRANSPORTATION

Due to the unique configuration of this meeting, resort shuttles are provided throughout the property (no social distancing), but the State Bar of Georgia will provide limited dedicated golf cart transportation (with social distancing) to and from each of the meeting areas.

ADDITIONAL INFORMATION

What to Pack:

Opening Night Festival:
Casual summer attire and sunscreen

Daytime meetings and events:
Casual attire

Young Lawyers Division Dinner:
Business casual

Supreme Court Reception &
Inaugural Dinner: Resort cocktail

RESORT MAP

Please refer to the map on page 14 as you make your accommodation selections.



PHOTO BY WILD DUNES RESORT

ACCOMMODATION OPTIONS

The Wild Dunes Resort is a unique property, allowing you to customize your stay by choosing accommodations that best suit your needs. All options are within a short distance of the meeting space. To accommodate our members and their families during the meeting, we have secured room blocks at four locations within Wild Dunes Resort at discounted room rates. Based upon availability, you may choose lodging at the Boardwalk Inn, the Sweetgrass Inn, the Residences at

Sweetgrass Inn or the Condos. See below for information about each option and refer to the resort map on page 14 before making your reservation.

**Please note: There is a resort services fee of 16%, plus applicable taxes, added to each accommodation rate (subject to change). This includes the following amenities: Wi-Fi hot spots, intra-resort transportation, access to the business center 24-hours a day and resort security services 24/7.*

THE BOARDWALK INN

Comfortable rooms and a meticulous service staff combine to deliver a one-of-a-kind Four Diamond experience.

Room Types

Boardwalk King
\$245 per night*

Boardwalk Queen/Queen
\$245 per night*

THE SWEETGRASS INN

A 153-room new contemporary hotel that balances beachy aesthetics with historic Charleston charm.

Room Types

Sweetgrass King
\$259 per night*

Sweetgrass Queen/Queen
\$259 per night*

THE RESIDENCES AT SWEETGRASS INN

The Residences is a collection of studios and one- and two-bedroom suites at the center of all activities and a short walk from the beach.

Room Types

Residences Studio (King)
\$255 per night*

Residences Guestroom
(Two Queens)
\$255 per night*

Residences Suite (One Bedroom)
\$279 per night*

Residences Suite (Two Bedroom)
\$423 per night*

THE CONDOS

The condos are located around the resort core area within walking distance of amenities and the beach (Lagoon Villas, Racquet Club Villas and Seagrove Condos).

Room Types

Two Bedroom Condo
\$323 per night*

Three Bedroom Condo
\$455 per night*



WILD DUNES RESORT MAP

1 THE SWEETGRASS PAVILION (SGP) AND CONFERENCE CENTER

- Meeting Spaces:
- Palms Ballroom
 - Tides Ballroom
 - Sea Oats Office

2 PALMETTO HALL

Stand-alone Meeting Space (natural lighting and pool view)

3 THE GRAND PAVILION

- Amenities:
- Pools (2)
 - Dining Outlet: Beachside Burgers & Bar

4 THE SWEETGRASS INN (SGI)

- Accommodations
- Meeting Spaces:
- Osprey Ballroom
 - Avocet Boardroom
 - Indigo Room & Rooftop
- Amenities:
- Pools (2)
 - Destination Spa
 - Dining Outlets: The Jetty, The Oystercatcher

5 THE RESIDENCES AT SWEETGRASS INN

- Accommodations
- Amenities:
- Dining Outlet: Hudson's (Grab & Go Outlet)

6 THE BOARDWALK INN

- Accommodations
- Meeting Spaces:
- Boardwalk Inn Club Room
 - Boardwalk Inn Boardroom
- Amenities:
- Adult-Only Pool
 - Dining Outlet: Coastal Provisions

7 THE CONDOS

- Accommodations available at Lagoon Villas, Racquet Club Villas and Seagrove Condos



State Bar of Georgia

REGISTRATION FORM

Please use this form to register by checking events you plan to attend either virtually or in person. Registration is required for all events, including "no charge" functions. Registrations are due May 28. "No charge" functions are limited to two tickets per attendee. One form per registrant. **You may also register online at www.gabar.org.**

ATTENDEE INFORMATION

(Please print or type and use one form per attendee.)

BAR NUMBER _____

NAME _____

NICKNAME _____

EMAIL _____

GUEST 1 NAME (IF ATTENDING IN PERSON) _____ OVER 18?

GUEST 1 EMAIL ADDRESS (REQUIRED IF OVER 18) _____ OVER 18?

GUEST 2 NAME (IF ATTENDING IN PERSON) _____ OVER 18?

GUEST 2 EMAIL ADDRESS (REQUIRED IF OVER 18) _____ OVER 18?

GUEST 3 NAME (IF ATTENDING IN PERSON) _____ OVER 18?

GUEST 3 EMAIL ADDRESS (REQUIRED IF OVER 18) _____

PHONE/FAX _____

SPECIAL NEEDS/DIETARY RESTRICTIONS (IN PERSON ONLY)

ADA: If you qualify for assistance under the Americans with Disabilities Act, please email johns@gabar.org for assistance.

REGISTRATION OPTIONS

Registrations are processed on a first-come, first-served basis. Checks and credit cards (VISA/MC/AMEX) are accepted. Make checks payable to the State Bar of Georgia and mail to: State Bar of Georgia Annual Meeting, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303. Registrations are due May 28.

REFUND/CANCELLATION POLICY

Cancellation of registration must be received in writing no later than May 28. Cancellations will receive a full refund, less a \$25 administrative charge. Absolutely no refunds will be made after May 28. Requests should be mailed to the State Bar of Georgia, Attn: Michelle Garner, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303; faxed to 404-527-8747; or emailed to meetings@gabar.org.

PACKAGES

Package for Two (registrant and spouse/guest)

Lawyer.....NA \$640

Full-Time Judge.....NA \$520

Package includes: two Opening Night Festival tickets, two Supreme Court/ Court of Appeals Reception tickets, two Inaugural Gala tickets

Individual Package (registrant)

Lawyer.....NA \$325

Full-Time Judge.....NA \$265

Package includes: one Opening Night Festival ticket, one Supreme Court/ Court of Appeals Reception ticket, one Inaugural Gala ticket

A LA CARTE EVENTS

Plenary Session/Board of Governors Meeting (Fri.).....NC NC

Board of Governors Meeting (Sat.).....NC NC

Opening Night Festival (Lawyer).....NA \$139

Opening Night Festival (Judge).....NA \$109

Opening Night Festival (ages 5 and under).....NA NC

Opening Night Festival (ages 6-20).....NA \$59

Please specify age(s) _____

Installation of 2021 President & Officers.....NC NC

Supreme Court/Court of Appeals Reception/Inaugural Gala (Lawyer).....NA \$219

NA-Option "Not Available" for this meeting/event

NC-"No Charge" for this meeting/event

A LA CARTE EVENTS (CONT.)

VIRTUAL OPTION Qty. IN PERSON OPTION Qty.

Supreme Court/Court of Appeals Reception/Inaugural Gala (Judge).....NA \$189

Supreme Court/Court of Appeals Reception/Inaugural Gala (*YLD rate).....NA \$129

(*YLD rate applies only to Bar members who are 36 years of age or younger or within their first five years of practice.)

ALUMNI FUNCTIONS

Mercer University School of Law Alumni Reception.....NA NC

University of Georgia School of Law Alumni Reception.....NA NC

COMMITTEE MEETINGS

Bench & Bar.....NC NC

Budget Hearing.....NC NC

Commission on Continuing Lawyer Competency.....NA NC

Disciplinary Rules and Procedures.....NC NC

Elections.....NC NA

ICLE Board.....NC NA

Law Practice Management Advisory.....NC NA

Member Benefits.....NC NA

SOLACE.....NC NA

CLE SEMINARS

In Session - Lawyers as Legislators

Register for this CLE at www.gabar.org/Lawyers-as-Legislators.

Institutional Bias in the Justice System

Register for this CLE at www.gabar.org/Institutional-Bias.

War Stories and Georgia Evidence Update

Register for this CLE at www.gabar.org/WarStories.

SECTION FUNCTIONS

Construction Law Reception.....NA NC

Criminal Law Section Lunch.....NC \$40

General Practice & Trial Law Breakfast.....NA \$74

General Practice & Trial Law Reception (member).....NA \$15

General Practice & Trial Law Reception (non-member).....NA \$30

Judicial Section Lunch.....NC \$85

YLD EVENTS

YLD Dinner and Swearing-In Ceremony.....NC \$100

YLD Pool Party and Meet the Candidates Reception.....NA \$35

OTHER

Diversity of Bars/A23 Annual Meeting.....NC NC

YLD/Pro Bono 5K Fun Run.....NA NC

GEORGIA LEGAL SERVICES PROGRAM CONTRIBUTION

Please add to my registration payment a voluntary donation to the Georgia Legal Services Program* to support its important work ensuring access to justice for all.....(+) \$ _____

PAYMENT INFORMATION

I enclose a check \$ _____

Please bill my VISA MC AMEX \$ _____

Account Number _____

Exp. Date _____

Name (as it appears on card) _____

Signature _____

Credit card and "no charge" registrations may be faxed to 404-527-8747. Return with payment to: State Bar of Georgia Annual Meeting, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303-2743, or register online at www.gabar.org.



State Bar of Georgia

2021 ANNUAL MEETING

104 Marietta St. NW, Suite 100
Atlanta, GA 30303-2743

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Atlanta, GA

SPECIAL THANKS

Thank you to our corporate sponsor for their support of the State Bar of Georgia.

5-GAVEL

MB | MemberBenefits



PHOTO BY WILD DUNES RESORT

Thank you to the following organizations for their sponsorship contributions:

SUPERHERO COLOR-BY-NUMBER WALL
Georgia State University College of Law

SUPERHERO WING WALL
Southern First

PRESIDENTIAL GALA GREEN SCREEN
Emory University School of Law

PRESIDENTIAL GALA CHALET
Pravati Capital

PLENARY SESSION/BOG BREAKFAST
The University of Georgia School of Law

COVID-19 FLOOR MARKERS
LawPay
Rimkus Consulting Group, Inc.
Veritext Legal Solutions

Thank you to our State Bar Sections who have contributed to the success of the 2021 Annual Meeting.

SUPERHERO STAGE
Product Liability Law

SUPERHERO PHOTO OPPORTUNITY
Criminal Law

COVID-19 FLOOR MARKERS
Appellate Practice
Constitutional Law
Family Law
Fiduciary Law
Intellectual Property Law

OTHER
Animal Law
Antitrust Law
Child Protection & Advocacy
Creditors' Rights
Judicial

REMEMBER: LIABILITY WAIVER

Please view and sign the waiver at www.gabar.org/AM21, or complete the waiver included with this brochure and email to meetings@gabar.org prior to your arrival. Learn about this requirement on p. 7.

Retiring Executive Committee Members (term ends June 11, 2021)

Darrell Lee Sutton

William Thomas Davis

Retiring Board of Governors Members (term ends June 11, 2021)

Alapaha Circuit, Post 1	Larry Michael Johnson	Nashville
Augusta Circuit, Post 1	Sam G. Nicholson	Augusta
Brunswick Circuit, Post 1	James L. Roberts IV	Saint Simons Island
Flint Circuit, Post 1	Gregory A. Futch	Jackson
Member-at-Large, Post 1	Ira L. Foster	Atlanta
Member-at-Large, Post 2	Francys Johnson Jr.	Statesboro
Middle Circuit, Post 2	Thomas Alexander Peterson IV	Vidalia
Northern Circuit, Post 1	Walter James Gordon Sr.	Hartwell
Out-of-State, Post 1	Philip Augustine	Lake Mary, FL
Toombs Circuit	Dennis C. Sanders	Thomson

2021-2022 Officers (term begins June 12, 2021)

President	Elizabeth L. Fite	Atlanta
President-elect	Sarah Brown "Sally" Akins	Savannah
Immediate Past President	Dawn M. Jones	Atlanta
Secretary	Ivy Neal Cadle	Macon
Treasurer	J. Antonio "Tony" DelCampo	Atlanta
YLD President	Elissa Blache Haynes	Atlanta
YLD President-elect	Ronald Edward Daniels	Eastman
YLD Immediate Past President	Norbert Daniel Hummel IV	Atlanta

2021-2022 New Board of Governors Members (term begins June 12, 2021)

Alapaha Circuit, Post 1	Daniel Jackson Connell III	Adel
Augusta Circuit, Post 1	Amanda Nichole Heath	Augusta
Brunswick Circuit, Post 1	Stephen Elliott Tillman	Baxley
Columbia Circuit	Danny L. Durham	Evans
Flint Circuit, Post 1	Amanda Renee Flora	McDonough
Macon Circuit, Post 3	Rebecca Holmes Liles Grist	Macon
Member-at-Large, Post 1	William T. Davis	Newnan
Member-at-Large, Post 2	Rosten Dara Diya "Chinny" Law	Atlanta
Middle Circuit, Post 2	Jerry Neal Cadle	Swainsboro
Northern Circuit, Post 1	Kimberly Wilkerson Higginbotham	Hartwell
Out-of-State, Post 1	Scott R. McMillen	Winter Park, FL
Toombs Circuit	Thomas B. "Britt" Hammond	Warrenton

Board of Governors Attendance Record

	6-19	10-19	1-20	4-20	6-20	10-20	1-21	3-21
	Sat.	Savannah	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar
	Orlando							
Sarah Brown Akins	•	•	•	•	•	•	•	•
Mark W. Alexander	•	•	•	•	•	•	•	•
Kent Edward Altom	•	e	•	•	•	•	•	•
Anthony B. Askew	•	u	•	•	•	•	•	•
Philip Augustine	•	•	e	•	e	e	•	•
JaDawnya Cintelle Baker	•	e	e	•	•	•	•	•
Nina M. Baker	•	•	•	•	•	u	•	•
Eric A. Ballinger	•	•	•	•	•	•	•	•
Donna G. Barwick	u	u	•	•	•	•	•	•
Tracee R. Benzo	e	•	•	•	•	•	•	•
James D. Blich IV	e	•	•	•	u	•	•	e
Joshua I. Bosin	n/a	n/a	n/a	n/a	•	•	•	•
Sherry Boston	•	•	•	•	•	•	•	•
Ashley Mackin Brodie	•	e	•	•	•	•	•	u
Thomas R. Burnside	•	•	u	•	u	•	u	u
Stephanie D. Burton	•	•	•	•	•	•	•	•
Ivy Neal Cadle	•	•	•	•	•	•	•	•
Richard D. Campbell	u	•	•	•	•	•	•	e
David L. Cannon	•	•	u	•	•	u	•	u
Carl S. Cansino	•	•	•	•	•	e	•	•
Chris M. Carr	u	u	•	•	•	•	•	•
Carol V. Clark	e	•	•	•	•	•	•	•
Edward R. Collier	u	e	•	•	•	u	•	•
Christopher S. Connelly	•	e	e	e	•	•	•	u
Martin L. Cowen III	•	•	•	•	•	•	•	•
Susan W. Cox	•	•	e	•	•	•	u	•

To request an excused absence, please email Secretary Ivy Cadle (icadle@bakerdonelson.com)

Board of Governors Attendance Record

	6-19	10-19	1-20	4-20	6-20	10-20	1-21	3-21
	Sat.	Savannah	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar
	Orlando							
Kenneth B. Crawford	n/a	n/a	n/a	n	•	•	•	•
Terrence Lee Croft	u	e	•	•	•	•	•	e
Gerald Davidson Jr.	•	•	•	•	•	•	•	•
C. Lee Davis	n/a	n/a	•	•	•	•	•	e
J. Anderson Davis	•	e	•	•	•	e	•	•
Randall H. Davis	•	•	•	•	•	•	•	e
William T. Davis	•	•	•	•	•	•	•	•
J. Antonio Delcampo	•	•	•	•	•	•	•	•
Scott Dewitt Delius	•	•	•	e	•	•	•	•
Joseph W. Dent	•	•	•	•	•	•	•	u
Foy R. Devine	•	u	•	u	•	u	u	•
Daniel S. Digby	•	e	•	•	•	•	•	u
Danny L. Durham	n/a	n/a	n/a	n/a	•	•	•	u
Susan E. Edlein	•	e	•	•	•	•	•	u
Christopher Edwards	e	•	•	•	•	•	•	u
Archibald A. Farrar	•	•	•	•	•	•	•	•
Elizabeth L. Fite	•	•	•	•	•	•	•	•
Ira L. Foster	•	u	•	•	•	•	•	•
Harold Eugene Franklin Jr.	•	•	•	•	•	•	•	•
Gregory A. Futch	•	u	•	•	•	•	u	u
Keigh E. Gammage	•	•	•	•	u	•	•	•
William C. Gentry	•	•	•	•	•	•	•	•
Michael G. Geoffroy	•	u	•	•	•	•	•	•
Walter J. Gordon Sr.	e	•	•	•	•	•	•	•
Patricia A. Gorham	•	e	•	•	•	•	•	•
John Haubenreich	•	•	•	•	•	•	•	•

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Board of Governors Attendance Record

	6-19	10-19	1-20	4-20	6-20	10-20	1-21	3-21
	Sat.							
	Orlando	Savannah	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar
Elissa B. Haynes	n/a	n/a	n/a	n	•	•	•	•
Patrick H. Head	•	•	•	e	•	•	•	•
Lawton C. Heard, Jr.	•	e	•	•	•	u	•	•
Render M. Heard Jr.	u	•	•	•	e	•	•	u
Matthew J. Hennessy	n/a	n/a	n/a	n	•	•	•	•
Thomas W. Herman	•	e	e	•	•	u	•	•
R. Javoyne Hicks	•	•	•	•	•	•	•	•
Donna S. Hix	e	•	•	•	•	•	•	•
Michael D. Hobbs	u	u	•	•	•	•	•	u
Amy V. Howell	•	•	•	•	•	•	•	•
Bert Hummel IV	•	•	•	•	•	•	•	•
James W. Hurt	•	e	•	u	u	u	u	u
Christopher Huskins	•	u	•	u	u	•	•	u
Stacey K. Hydrick	•	•	e	•	•	•	•	u
James T. Irvin	•	•	•	•	•	•	•	•
William Dixon James	•	•	•	•	•	•	•	•
Curtis S. Jenkins	u	u	u	•	•	u	•	•
Francys Johnson Jr.	•	•	•	•	•	•	•	•
Charles Michael Johnson	n/a	•	•	•	•	•	•	u
Larry Michael Johnson	u	•	e	•	u	•	•	u
Lester B. Johnson, III	•	•	•	•	•	•	•	•
Shiriki L. Cavitt Jones	•	•	•	•	•	•	•	•
Dawn M. Jones	•	•	•	•	•	•	•	•
Austin O. Jones	n/a	n/a	n/a	n	•	u	•	•
Jennifer A. Jordan	u	•	•	u	•	u	u	u
Zahra S. Karinshak	e	e	•	•	•	•	•	•

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Board of Governors Attendance Record

	6-19	10-19	1-20	4-20	6-20	10-20	1-21	3-21
	Sat.							
	Oriando	Savannah	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar
John F. Kennedy	•	•	•	•	u	u	•	•
Barry E. King	•	u	•	•	•	•	•	•
Judy C. King	•	•	•	•	•	•	•	•
Seth Kirschenbaum	•	•	•	•	•	•	•	•
Catherine Koura	•	e	•	u	•	•	•	•
Edward B. Krugman	e	•	e	•	•	•	•	•
Jeffrey R. Kuester	•	e	•	•	•	•	•	•
Allegra Lawrence-Hardy	e	•	•	•	•	•	•	•
Nicole C. Leet	•	•	•	•	•	•	•	•
Katie K. Leonard	•	e	•	•	•	•	•	u
Dawn Renee Levine	•	•	•	•	•	•	•	•
Joyce Gist Lewis	•	•	•	•	•	•	•	•
Lisa Katsuko Liang	•	•	u	•	•	•	•	•
David S. Lipscomb	•	•	•	•	•	•	•	•
John R. B. Long	•	•	•	•	•	•	•	•
Dax Eric Lopez	•	e	•	•	•	•	•	•
Ronald A. Lowry	u	u	•	u	u	u	•	•
John Bell Manly	•	e	•	e	•	u	•	•
Hugh J. McCullough	n/a	n/a	n/a	n	•	•	u	•
Graham Elliott McDonald	n/a	n/a	n/a	•	•	•	•	•
Letitia A. McDonald	•	e	•	•	•	•	•	•
Brad J. McFall	u	e	•	•	•	•	•	•
Michael D. McRae	e	e	•	•	•	•	•	•
Terry L. Miller	•	•	•	•	•	•	u	•
William J. Monahan	•	•	•	•	•	•	•	•
Shondeana Crews Morris	n/a	n/a	n/a	n/a	•	•	•	u

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Board of Governors Attendance Record

	6-19	10-19	1-20	4-20	6-20	10-20	1-21	3-21
	Sat.							
	Orlando	Savannah	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar
John T. Mroczko	u	u	u	u	u	u	u	u
Laura J. Murphree	•	e	•	•	•	•	•	u
Sam G. Nicholson	e	•	•	•	e	•	•	•
Paul Wain Painter III	u	•	•	•	•	•	•	•
Amanda Rourk Clark Palmer	•	u	•	•	•	•	•	•
Jonathan B. Pannell	•	•	•	•	•	•	•	•
Joy Renea Parks	•	•	•	•	•	•	•	•
Tabitha Edwina Payne	e	•	•	•	•	•	u	•
Brandon Lee Peak	e	•	e	•	•	•	•	•
Thomas A. Peterson, IV	u	u	•	u	u	•	•	u
Will H. Pickett, Jr.	u	e	u	u	u	•	u	u
Robert Allen Plumb Jr.	•	•	•	•	•	•	•	•
Kathryn Lauranne Powers	n/a	n/a	•	•	•	•	•	•
Jill Pryor	e	•	e	•	•	•	•	•
William M. Ragland	•	e	•	•	•	•	•	•
James L. Roberts, IV	u	e	•	•	•	•	u	u
Tina S. Roddenbery	•	•	•	•	•	•	•	•
Joseph Roseborough	•	•	•	•	•	•	u	u
Wesley Charles Ross	•	•	•	•	•	•	•	•
Claudia S. Saari	•	e	•	•	•	•	•	•
Dennis C. Sanders	•	e	•	•	•	•	•	•
Alex Musole Shalishali	n/a	n/a	n/a	n/a	•	•	u	•
H. Burke Sherwood	•	•	•	•	•	•	•	u
Mitchell McKinley Shook	n/a	n/a	n/a	n/a	•	•	•	•
Robert H. Smalley, III	•	u	•	•	•	•	•	•
Philip C. Smith	•	•	•	•	•	•	•	•

To request an excused absence, please email Secretary Ivy Cadle (icadle@bakerdonelson.com)

Board of Governors Attendance Record

	6-19	10-19	1-20	4-20	6-20	10-20	1-21	3-21
	Sat.	Savannah	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar
	Orlando							
R. Rucker Smith	•	•	•	•	•	•	•	•
Daniel B. Snipes	e	u	•	•	u	•	•	u
R. Gary Spencer	•	•	•	•	•	•	•	•
H. Craig Stafford	u	•	•	•	•	•	•	•
Lawton E. Stephens	•	e	u	•	•	•	•	•
Donna Coleman Stribling	•	•	•	•	•	•	•	•
C. Deen Strickland	•	•	u	•	•	•	•	•
Frank B. Strickland	•	e	•	•	•	•	•	•
Joseph C. Sumner, Jr.	•	•	•	u	•	•	•	•
Darrell L. Sutton	•	•	•	•	•	•	•	•
Jason W. Swindle	u	•	•	•	u	•	•	u
Michael B. Terry	•	•	•	•	•	•	•	•
Anita W. Thomas	•	u	•	u	u	•	•	•
Edward D. Tolley	u	e	•	•	u	u	•	•
Clayton Tomlinson	•	•	u	•	e	•	•	•
Chris P. Twyman	•	•	•	•	•	•	•	•
William Underwood III	•	•	•	•	•	•	u	u
Martin E. Valbuena	•	•	•	•	•	•	•	•
Nicki N. Vaughan	•	•	e	•	•	•	•	•
Carl A. Veline, Jr.	u	•	•	•	•	•	•	•
J. Henry Walker	•	u	•	•	•	•	•	•
Janice M. Wallace	•	•	•	•	•	•	•	•
Amy Carol Walters	e	•	•	•	•	•	•	•
Harold B. Watts	•	u	•	•	•	•	•	•
John P. Webb	•	•	•	•	•	•	•	•
Christopher F. West	•	u	u	u	u	u	u	u

To request an excused absence, please email Secretary Ivy Cadle (icadle@bakerdonelson.com)

Board of Governors Attendance Record

	6-19	10-19	1-20	4-20	6-20	10-20	1-21	3-21
	Sat. Orlando	Savannah	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar
Nancy J. Whaley	•	•	•	•	•	•	•	•
Paige Reese Whitaker	•	•	•	•	•	•	•	•
Martha Wilson Williams	•	•	•	•	•	•	•	•
Douglas Woodruff	e	e	•	•	•	•	u	•
• - attended meeting								

Future Meetings Schedule

(5/20/2021)



State Bar of Georgia

Executive Committee

July 9, 2021	Zoom, all virtual – 1 p.m.
August 20-22, 2021	Executive Committee Extended Meeting Barnsley Resort Adairsville, GA (contract pending)
Sept. 10, 2021	Bar Center, hybrid – 12 p.m.
Oct. 8, 2021	Zoom, all virtual – 1 p.m.
Nov. 5, 2021	Bar Center, hybrid – 12 p.m.
Dec. 10, 2021	Bar Center, hybrid – 12 p.m.
Jan. 14, 2022	Location TBD, hybrid – 12 p.m.
Feb. 18, 2022	Zoom, all virtual – 1 p.m.
March 11, 2022	Zoom, all virtual – 1 p.m.
April 15, 2022	Zoom, all virtual – 1 p.m.
May 13, 2022	Location TBD, hybrid – 12 p.m.

Board of Governors

Fall 2021	Oct. 22-24, 2021	Westin Savannah & Westin Savannah Trade Center, Savannah, GA (Joint with YLD)
Midyear 2022	Jan. 6-8, 2022	Westin Buckhead Atlanta, GA

Spring 2022	April 1-3, 2022	Hyatt Place Athens/Classic Center Athens, GA (contract pending)
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Annual 2022	June 2-5, 2022	Omni Amelia Island Resort Amelia Island, FL
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Young Lawyers Division

August 2021	Aug. 12-15, 2021	Officer and Directors Meeting TBA
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Fall 2021	Oct. 22-24, 2021	Westin Savannah & Westin Savannah Trade Center, Savannah, GA (Joint with BOG)
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Midyear 2022	Jan. 6-8, 2022	Westin Buckhead Atlanta, GA
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Annual 2022	June 2-5, 2022	Omni Amelia Island Resort Amelia Island, FL
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American Bar Association Meetings

Annual 2021	Aug. 4-10, 2021	Toronto, ONT
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*some portions of the meeting will be hybrid with remainder being virtual

Savannah Boat Ride

September 24, 2021 (tentative)	Savannah, GA
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Southern Conference Meetings

2021	Oct. 20-24, 2021	Grand Floridian Resort Orlando, FL
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2022	Oct. 27-30, 2022	Omni Resorts, Barton Creek Austin, TX
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2023	Oct. 19-22, 2023	The Greenbrier Hotel White Sulphur Springs, WV
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D-R-A-F-T
STATE BAR OF GEORGIA
BOARD OF GOVERNORS
MEETING MINUTES
Saturday, March 20, 2021, 9:00 a.m.
Zoom

The 286th meeting of the Board of Governors of the State Bar of Georgia was held at the date and location shown above. President Dawn M. Jones presided and called the meeting to order at 9:05 a.m. and began the meeting with a moment of silence to acknowledge the hardships and challenges everyone has had to endure during the ongoing pandemic and those who have been have lost.

Pledge of Allegiance

Board of Governors Member Judge Joy Parks, Enotah Circuit, led those in attendance in the Pledge of Allegiance.

Invocation

YLD Board of Directors Member Pamela Peynado gave an invocation.

Special Recognition

YLD Member Jared Parrish recognized the members of the judiciary, the past presidents of the State Bar and other special guests in attendance.

Roll Call

Secretary Tony DelCampo circulated the roll for signature. The list of those in attendance is attached as Exhibit A.

Future Meetings Schedule

President Dawn M. Jones reviewed the Future Meetings Schedule and let everyone know that we will discuss the Annual Meeting during the executive director's report.

Minutes of the 285th Meeting of the Board of Governors

The minutes of the Board of Governors meeting held January 9, 2021, via Zoom, were approved by unanimous vote.

Proposed Rules Changes

Following a report by General Counsel Paula Frederick, Gary Spencer (Board member and vice chair of the Disciplinary Rules and Procedures Committee) and Sherry Boston (Board member and representative of the district attorneys' association), and a lengthy discussion with questions also being answered by representatives of the U.S. attorneys' offices, the Board of Governors, by majority poll vote, approved proposed rules changes to Georgia Rule of Professional Conduct 3.8 Special Responsibilities of a Prosecutor (Exhibit B).

Treasurer's Report

Treasurer Sally Akins reported on the Bar's finances and that the Bar is looking for new tenants to mitigate the loss of revenue due to COVID-19. She thanked those in attendance for their continued support of GLSP and the legislative fund.

The Board of Governors received copies of the Consolidated (Operational and Bar Center) Revenues and Expenditures Report as of December 31, 2020; Income Statement YTD-Operations for the current period

ending December 31, 2020; Status and Use of Cash and Investments as of December 31, 2020; Board-Designated and Donor Temporarily Restricted Net Assets for the current period ending December 31, 2020; Summary of Members and Voluntary Legislative Contributions with contributions paid through December 31, 2020; Summary of Members and Voluntary Contributions to Georgia Legal Services Program (GLSP) with contributions paid through December 31, 2020; Legislative Activity Report from July 1, 2020 thru December 31, 2020; Summary of Clients' Security Fund Activity for the current period ending December 31, 2020; and the budget timetable for the 2021-2022 State Bar budget.

Dues 2021-2022

After a report from Finance Committee Chair Elena Kaplan, the Board of Governors, by majority poll vote, approved Active Dues at \$254 (no increase from fiscal year 2020-2021) and Inactive Dues at \$127 for fiscal year 2021-2022.

Approval of Other Dues Items

The Board of Governors, by majority poll vote, approved the following other dues items:

- 1) Section Dues (\$10 to \$40).
- 2) Clients' Security Fund (\$100 @ \$25/year for new members per Bar Rule 1-506).
- 3) Professionalism Fee (\$11/year).
- 4) Legislative and Public Education Fund Contribution (\$100 optional contribution).
- 5) Georgia Legal Services Program (\$400 suggested individual contribution/\$100 suggested contribution for young lawyers).

Elections Committee Recommendation

Elections Committee Chair Allegra J. Lawrence reported that the Elections Committee had reviewed participation and historical voter data for the previous five election cycles and found that participation has been between 8-17% of eligible voters. A majority of votes cast, 78-81%, were electronic. The committee's recommendation is to change the election format to opt-in to paper ballots rather than opting out, for a cost savings of \$17,000 to \$18,000. The committee would like to use the savings in the 2022-2023 election cycle for a PR campaign to ensure Bar members are aware of the changes and also use the opportunity to encourage more participation in Bar elections. After discussion, it was moved and seconded that the Board of Governors accept the Election Committee's recommendation, which passed by majority poll vote.

President's Report

President Dawn M. Jones thanked those in attendance for allowing her to continue to lead the Bar and thanked everyone for their support. She said she continues to speak at local bar associations and other events, like the ABA Techshow and the Chief Justice's Commission on Professionalism's CLE "The Necessity of Unparalleled Unity." She reported that she has been an active member of the National Conference of Bar Presidents and remarked how useful that organization is and how helpful it is to be able to talk to other bar presidents. She reported that she meets with senior staff, Executive Director Damon Elmore, General Counsel Paula Frederick and Chief Operating Officer Sarah Coole, twice a week to ensure all Bar needs are handled, including discussions about building safety and our Bar offices, how to support our committees and sections, looking at COVID-19 protocols, etc. She reminded everyone that Board of Governors minutes and Executive Committee minutes can be found on the website at www.gabar.org.

Executive Director's Report

Executive Director Damon Elmore reported that he has been discussing with department heads the Bar's strategic direction for operations related to efficiencies and obsolete processes. He reported that he and other Bar staff will be working with President-Elect Elizabeth L. Fite to give Bar members a refresher on

all the programs the Bar offers, along with general information about what the Bar does. Executive Director Elmore said that he feels employee morale is good, and he continues to work to provide more information and transparency to the staff as a whole. Right now there is a goal of July 6 to begin bringing staff back into the building, pending any changes to the COVID-19 climate. Other items he shared included: continuing to focus on expenses and the planning we can do to utilize 104 Marietta Street to its fullest; keeping a close eye on the legislative session with the help of the legislative team; ensuring safety of our staff; and producing quality programming through ICLE.

Executive Director Elmore shared with everyone that the plan as of now is to have a hybrid Annual Meeting, with both in-person and virtual options for those who would like to attend. He said that safety is the top priority and that masks will be required for all indoor and outdoor Bar events taking place at the Annual Meeting. The Board of Governors members were asked the following questions via poll:

- 1) How will you attend the 2021 Annual Meeting, currently planned in a hybrid format?
69 in person, 18 virtually, 26 undecided
- 2) If attending in person, do you plan to stay on property at Wild Dunes Resort?
69 yes, 1 no, 11 undecided
- 3) Will you adhere to all required safety measures, including wearing a mask (indoors and outdoors) and physically distancing from others, regardless of an individual attendee's vaccination status?
86 yes, 8 no
- 4) If attending in person, do you plan to bring family and/or guests?
67 yes, 16 no, 12 undecided

Young Lawyers Division

YLD President Bert Hummel reported that the YLD has had a busy year supporting young lawyers around the state both professionally and personally. He pointed out that so many have stood up and found flexible ways of continuing to serve the profession, despite the COVID-19 pandemic, including: the YLD poll worker program, several wills clinics to help those on the frontlines (healthcare workers, educators, first responders), a YLD speakers' bureau bringing together young lawyers to share their experiences of surviving and living during a pandemic, a YLD implicit bias in judicial proceedings CLE, and the 10th annual Legal Food Frenzy beginning April 19-30. YLD President Hummel extended his thanks to President Jones and Chief Justice Harold Melton for their leadership during this difficult year.

Georgia Legal Services Program

Executive Director Rick Rufalo reported on the status of GLSP and shared the joint statement of GLSP and Atlanta Legal Aid Society condemning the recent murders and racism against the Asian American community. He discussed the need for contributions to make a difference in communities with domestic violence and housing issues. He said that the pandemic has made the domestic violence crisis even bigger. He said there was \$432,000 in total contributions in the State Bar campaign (from dues notice, etc.) to date this year, and only about 3,400 members are contributing out of 48,000 paying members. He asked those in attendance to contribute and to encourage others to do so as well on the license fee statement coming out in May.

Seeking Equal Justice and Addressing Racism and Racial Bias Committee

Vice Chair Gary Spencer reported that the Seeking Equal Justice Committee has been busy this year. In February, the committee will host the next Courageous Conversation on Blue and Black Lives Matter, and

then the next topic will be White Fragility later in April. President Jones read the statement she emailed to all Bar member regarding the recent shootings in Atlanta targeting the Asian American community. She expressed her thanks to the committee for continuing their important work.

Suicide Awareness Program

Board Member Hon. Shondeana Morris reported on behalf of the Suicide Awareness Program. She encouraged everyone to attend the upcoming program on April 30 specific to the topic of suicide awareness, which includes one hour of professionalism CLE credit. The program will be moderated by Sally Yates and will include experts speaking on topics ranging from suicide prevention to warning signs and prevention methods.

Attorney Wellness Committee

Attorney Wellness Committee Chair Javoyné Hicks thanked the Board of Governors and everyone else for their support of the Wellness Committee. She reported that the committee had launched their first quarterly newsletter, which initially went to all Bar members, but members must opt-in to receive further issues of the newsletter. She said that the committee has continued their “monthly touches” to connect with Bar members, and those replays can be found on the Bar’s YouTube page. She reported that the Attorney Wellness Committee and the Lawyer Assistance Program Committee continue to work closely together to ensure information about each program is easily available to all Bar members.

Legislative Update

Governmental Affairs Director Christine Butcher Hayes provided an update on the current legislative session. She said that there were 10 legislative days remaining, with the last day being March 31. The three bills in the Bar’s legislative package include the Uniform Mediation Act bill, which she reported was voted favorably out of the House Judiciary Committee this week and which should receive a floor vote in the next 10 days; the Remote Online Notary bill, which has passed the House and awaits a hearing in the Senate; and the Advanced Psychiatric Directive bill, which did not get filed this year but will continue next year. She said that the legislative team continues to monitor other bills of interest to the Bar along with the State’s budget.

Special Presentation

President Dawn M. Jones presented Jeff Davis, executive director of the State Bar from 2014-2020, with a resolution thanking him for his service to the Bar for more than six years as executive director. Remarks from Jeff Davis were presented via video to those in attendance.

Executive Committee Minutes

The Board of Governors received copies of the minutes of the Executive Committee meetings held on December 4, 2020, December 17, 2020, and January 29, 2021.

Law Practice Management Program

The Board of Governors received a written report on the activities of the Law Practice Management Program.

Communications Update

The Board of Governors received a media report from the Communications Department.

Chief Justice’s Commission on Professionalism Report

The Board of Governors received a written report on the activities of the Chief Justice’s Commission on Professionalism.

Georgia Diversity Program Report

The Board of Governors received a written report on the activities of the Georgia Diversity Program.

Old Business

There was no old business.

New Business

There was no new business.

Executive Session

There was no executive session.

Remarks / Q&A / Comments / Suggestions

There were no remarks, Q&A, comments or suggestions.

Adjournment

There being no additional business, the meeting was adjourned at 12:30 p.m.

Tony DelCampo, Secretary

Approved:

Dawn M. Jones, President



To: Board of Governors Members
From: Mary Jo Sullivan | Sections Director
Date: May 19, 2021
Re: Dormant Sections

The two dormant sections that have been discussed are as follows:

Individual Rights Law: current member count of 90 and balance of \$18,609.56.

Law and Economics: current member count of 46 and a balance of \$6,606.46.

The last time either of these sections actually responded to me was in August 2020. Regarding the Individual Rights Law Section, I spoke to the immediate past chairs Eric Cochling and Jeff Shaw. This group has been inactive since approximately 2014. Eric and Jeff both said members were not being proactive with no response within the section of anyone stepping up to reactivate.

Regarding the Law and Economics Section, I spoke with past chairs Charles Kuck and Glenn Lyon. This section hasn't been active since I've been with the department, approximately five years, and no one was interested in stepping up to try to resurrect it.

Note: during my time within the sections department, I have never received a call from any of these members complaining about inactivity within either section.

Please find attached the year-to-date budgets for the Individual Rights Law and Law and Economics sections.

HEADQUARTERS

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Fax 229-382-7435

INDIVIDUAL SECTIONS INCOME & EXPENDITURE **Individual Rights Law Section**

	Current Month Actual	Year to Date Actual
Beginning Fund Balance	18,602.06	17,830.92
Income		
Section Fees	7.50	1,312.50
Interest Income	0.00	68.60
Total Income	7.50	1,381.10
Expenses		
Sections Assessment	0.00	518.28
Total Expenses	0.00	518.28
Ending Fund Balance	18,609.56	18,609.56

EXPENDITURE STATEMENT - OPERATIONS

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Operating Expenses							
Bond Premium Amortization	0	0.00 %	53	0.00 %	0	(53)	49
Investment Service Fees	0	0.00 %	31	0.00 %	0	(31)	39
Sections Assessment	0	0.00 %	518	0.00 %	0	(518)	466
Total Operating Expenses	0	0.00 %	602	0.00 %	0	(602)	554
Total Expenses	\$0	0.00 %	\$602	0.00 %	\$0	\$(602)	\$554

INDIVIDUAL SECTIONS INCOME & EXPENDITURE **Legal Economics Law Section**

	Current Month Actual	Year to Date Actual
Beginning Fund Balance	6,606.46	6,424.83
Income		
Section Fees	0.00	455.00
Interest Income	0.00	24.49
Total Income	0.00	479.49
Expenses		
Sections Assessment	0.00	267.88
Total Expenses	0.00	267.88
Ending Fund Balance	6,606.46	6,606.46

EXPENDITURE STATEMENT - OPERATIONS

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Operating Expenses							
Bond Premium Amortization	0	0.00 %	19	0.00 %	0	(19)	18
Investment Service Fees	0	0.00 %	11	0.00 %	0	(11)	14
Sections Assessment	0	0.00 %	268	0.00 %	0	(268)	284
Total Operating Expenses	0	0.00 %	298	0.00 %	0	(298)	316
Total Expenses	\$0	0.00 %	\$298	0.00 %	\$0	\$(298)	\$316



State Bar of Georgia

Section 5. Abolition of Sections.

(a) Upon notice to a section established under this Article, the Board of Governors, by a majority vote, may abolish a section.

(b) Notice to the section shall be to the last known leadership and members of the section either by mail or email and by posting a notice of intent to abolish a section on the official website of the State Bar of Georgia.

(c) A section may be abolished if:

(1) the section has been inactive for three or more years;

(2) the section has repeatedly failed to follow its bylaws or the bylaws of the State Bar of Georgia; or

(3) the section engages in actions and activities or promotes positions that are not germane to the scope and purpose of the State Bar of Georgia.

(d) Upon the Board of Governors voting to abolish a section, any remaining funds collected by the State Bar of Georgia on behalf of the section shall be moved from the section account into the general operating account of the State Bar of Georgia.

Notice of Intent to Abolish

Pursuant to Article IX, Section 5 of the State Bar of Georgia Bylaws, this serves as notice of the intent to abolish the Individual Rights Law Section.

The Bylaws require notice to the Section by mail or email to the last-known leadership and members of the Section, and by posting a notice of intent to abolish the Section on the official website of the State Bar of Georgia. On May 21, 2021, the State Bar of Georgia notified the Immediate Past Chair of the Section of the Intent to Abolish. The Notice of Intent will be published on the Bar's website on May 21, 2021.

The Bylaws provide that a section may be abolished if it has been inactive for three or more years. The State Bar of Georgia is not aware of any activity by the Individual Rights Law Section since 2014.

The Board will vote whether to abolish the Section at the Annual Meeting on June 11, 2021. Upon an affirmative vote the Section will be abolished immediately.

If you object to abolition of the Section, contact Sections Director Mary Jo Sullivan at maryjos@gabar.org.

May 21, 2021

Notice of Intent to Abolish

Pursuant to Article IX, Section 5 of the State Bar of Georgia Bylaws, this serves as notice of the intent to abolish the Law and Economics Section.

The Bylaws require notice to the Section by mail or email to the last-known leadership and members of the Section, and by posting a notice of intent to abolish the Section on the official website of the State Bar of Georgia. On May 21, 2021, the State Bar of Georgia notified the Immediate Past Chair of the Section of the Intent to Abolish. The Notice of Intent will be published on the Bar's website on May 21, 2021.

The Bylaws provide that a section may be abolished if it has been inactive for three or more years. The State Bar of Georgia is not aware of any activity by the Law and Economics Section since 2016.

The Board will vote whether to abolish the Section at the Annual Meeting on June 11, 2021. Upon an affirmative vote the Section will be abolished immediately.

If you object to abolition of the Section, contact Sections Director Mary Jo Sullivan at maryjos@gabar.org.

May 21, 2021

DRAFT
STATE BAR OF GEORGIA
MEMBERS' MEETING MINUTES
Saturday, January 9, 2021, 9:00 a.m.
Zoom

The Midyear Members' Meeting of the State Bar of Georgia was held virtually at the date and time shown above. President Dawn M. Jones presided and called the meeting to order at 9:10 a.m. President Jones welcomed all Bar members in attendance.

Midyear Members' Meeting Action Items: Bylaws Changes

Following a report by Deputy General Counsel Bill NeSmith, active members of the State Bar of Georgia, approved proposed bylaws changes to (Exhibit A):

1. Article I Members. Section 4. Failure to Register, passed unanimously.
2. Article I Members. Section 9. Retired Member, passed by majority.
3. Article II Meeting of Members. Section 1. Annual Meeting, passed by majority.
4. Article III Board of Governors. Section 11. Meetings, passed by majority, with changes.
5. Article IX Sections. Section 3. Other Sections – Purposes; Article IX Sections. Section 4. Establishment of Sections; Article IX Sections. Section 5. Abolition of Sections, passed as a slate by majority.

Adjournment

The Midyear Members' Meeting was adjourned, and the 285th meeting of the Board of Governors of the State Bar of Georgia was called to order.

Tony DelCampo, Secretary

Approved:

Dawn M. Jones, President

STATE BAR OF GEORGIA PRESIDENT'S REPORT

May 19, 2021

by Dawn M. Jones, Esq.

A BRIEF OVERVIEW OF OUR EFFORTS IN *SUSTAINING A SOUND BAR* IN 2020-2021

Since my installation as president on Saturday, June 13, 2020, to date I have:

Scheduled, planned and chaired/held:

- Four Board of Governors (“BOG”) virtual meetings, starting with my virtual installation last June and including a record-setting 6+ hours BOG meeting last January
- 15 Executive Committee (“EC”) virtual meetings
- Two-day annual Joint Meeting virtually with the Supreme Court of Georgia
- More than one dozen virtual speaking engagements involving local, state and ABA meetings and events

Established committees:

- Standing committee = Seeking Equal Justice and Addressing Racism and Racial Bias Committee
<https://www.gabar.org/committeesprogramssections/committees/committeemembers.cfm?committeename=SEEKEQUALJUSTIC>
- Special committee = COVID-19 Virtual Planning Committee
<https://www.gabar.org/committeesprogramssections/committees/committeemembers.cfm?committeename=COVIDVIRTUAL>

Served on (among others):

- Judicial Council, with regular emergency sessions
- Chief Justice’s Commission on Professionalism
- Personnel Committee
- Seeking Equal Justice and Addressing Racism & Racial Bias Committee
- Senior Staff Search Committee
- Institute for Continuing Judicial Education

Implemented:

- Virtual meeting practices and protocols for EC and BOG Zoom meetings
- Weekly “huddles” with Senior Bar staff through December of 2020; twice a week “huddles” with Senior Bar Staff since January 2021

- Monthly “Touches” and *Wellness* Newsletter via the Attorney Wellness Committee leadership
- *Courageous Conversations* via the Seeking Equal Justice & Addressing Racism and Racial Bias Committee leadership
- Regular committee updates via EC and Staff committee liaisons leadership
- Social/Networking events during virtual BOG meetings via Virtual Planning Meeting Committee leadership
- Anti-Bias/Team Building session for EC members and Senior Bar Staff
- Robert’s Rules of Order instruction and training for EC members via Office of General Counsel leadership
- Regular BOG updates by Georgia Legal Services, Seeking Equal Justice & Addressing Racism and Racial Bias Committee, and Bar Legislative Affairs Director
- Oral review last winter of Bar Staff functions, capacity and needs during remote working

Conducted and/or supported:

- Executive Director Search via Senior Staff Search Committee leadership and subsequent transition
- Chief Operating Officer transition

Attended and actively participated in:

- National Conference of Bar Presidents meetings
- Southern Conference of Bar Presidents meetings
- American Bar Association meetings

Welcomed:

- Regular collaboration with Senior Staff and certain committees on various pandemic-related issues, including staff-related remote working, meetings-related policies and practices, challenges of leasing tenants, etc., etc., etc.
- Bar Provisional Membership following online Bar examinations
- CLE requirements changes due to the pandemic
- Opportunities to communicate and work directly with Supreme Court of Georgia liaisons—Justices Blackwell, Peterson and Warren
- A significant number of Rules and Bylaws amendments proposed to and considered by the EC and BOG
- Critique, feedback and/or support by members of the bench and the bar



May 4, 2021

Board of Governors,

I am pleased to give you an update on what we have accomplished in the last quarter of the 2020-21 Bar year—also known as the Year of Bert. Throughout the past year, the YLD has been on the forefront of change to adapt to the new environment, needs and demands of our members. The YLD is committed to continually promoting the mission of the State Bar of Georgia through its younger members, who number nearly 10,000. My main goals over the past year were to increase engagement with our communities, increase our service activities for the betterment of the public and to engage members across the state who otherwise may not have the means to attend in-person activities.

Our commitment to service continues under the social media hashtag—#PurposeThroughService—and was able to recruit hundreds of attorneys once again for the Deputy Registrar and Poll Worker Program during the Runoff Election on Jan. 5, 2021. These attorneys and Georgia Bar members risked their own health to ensure our democratic process was able to continue during a pandemic and when numbers were rising to levels not seen before. This program has garnered praise from numerous groups and leaders in our state and across the country. We hope to build on the success of this program in future years to continue to assist our communities.

The Public Interest Internship Program (PIIP) committee solicited applications for the summer 2021 PIIP grant from Georgia law students and recent graduates. This year, PIIP was able to award four grants, an increase over prior years due to the impact of the YLD Poll Worker Program. The additional grant will ensure that young lawyers or law students who dedicate their time to public service will earn a grant for their time and dedication.

The YLD Community Service Projects Committee encouraged YLD members to be a “Secret Santa” for some of the 8,000 children and youth in foster care in Georgia through the Georgia Division of Family & Children Services’ toy drive. Volunteers had the opportunity to give money online or purchase specific toys via a virtual shopping website. The Leadership Academy Alumni Committee hosted a virtual trivia and reunion on March 17, 2021, wherein attendees donated to No Kids Hungry Georgia in an effort to ensure Georgia children receive meals and nutrition during this pandemic.

On March 11, the new YLD Speakers Bureau presented “Persevering the Pandemic: Young Lawyers’ Experiences with Life During COVID-19.” Multiple attorneys—who are also members of the YLD Board of Directors—discussed their personal experiences during the past year related to COVID-19, the election, social and racial injustice, and quarantine followed by small group break out rooms to foster further discussion. Participants had the option to listen to the experiences of their fellow young lawyers, but were encouraged to share their own experiences to join in on the cathartic feeling of expressing themselves and discussing their own challenges.

On March 19, 2021, Dr. Ansley Booker from Mercer University conducted a CLE on Bias in Judicial Proceedings. All officers, directors, representatives, and affiliate leaders within the YLD were asked to attend to benefit from the implicit bias training and to enhance their consciousness of bias in judicial proceedings in an effort to better serve clients, communities, and profession. The CLE was attended by

several hundred young lawyers. After the CLE, the YLD Inclusion in the Profession Committee hosted breakout sessions that built upon the lessons from Dr. Booker's presentation. Several leaders from the YLD served as breakout room leaders to help foster positive and constructive conversations. The committee is also working on establishing a network of mentors for their members who can assist in their professional development.

The 10th Annual Legal Food Frenzy ran April 19-30 and was completely virtual again this year. The online fundraising total was \$804,328.86, according to the leaderboard at galegalfoodfrenzy.org. Final results will be made public in late May after all mail-in donations have been counted. Food banks can turn \$1 into four meals. That translates into at least 3 million meals for the 1.7 million Georgians that are food insecure. More teams than ever competed this year and the competition proved once again that the Georgia legal community is committed to helping the public all across our state.

On April 1, in preparation for the YLD April Virtual Wills Clinic with Atlanta Legal Aid, Women in the Profession Committee sponsored a training for all volunteers with Atlanta Legal Aid for 3 hours of CLE credit. Cari King of Atlanta Legal Aid taught us how to draft wills, advance directives and powers of attorney. The virtual wills clinic for seniors lasted the entire month of April. Participants contacted their client to discuss their needs, draft the legal documents and assist their clients with executing the documents. We are proud of our continued partnership with Atlanta Legal Aid.

Furthermore, the YLD Community Service Projects Committee is exploring hosting a virtual resume builder workshop with the Gateway Center. The YLD has assisted individuals facing homelessness through the Gateway Center's in-person resume workshops in previous years and we hope to find a way to volunteer again despite the challenges of COVID-19. Multiple committees are also preparing to work with pro bono services organizations across the state to help our most vulnerable citizens in handling the wave of evictions that are likely coming once the moratorium on same is lifted.

The YLD continues to promote wellness at each of our general sessions and committee meetings. Not only have we encouraged participation in physical activities, the YLD has had various speakers present on topics of wellness at a number of our meetings. Our programming is designed to remove the stigma associated with discussing mental health issues and to encourage participation in State Bar programs such as the #UseYourSix campaign, the Attorney Wellness Committee and other resources within the Lawyers Living Well program. Each meeting we have a dedicated speaker to wellness activities and we will continue this into the remainder of the 2020-21 Bar year. Additionally, our programming offers monthly opportunities for wellness activities and *The YLD Review* has at least one article dedicated to wellness.

The YLD has always benefited from the impactful work of our committees, please find a deep dive into our committees' recent events, programs, and upcoming opportunities.

YLD COMMITTEES

The YLD has more than 25 committees working to support our motto of service to the community and profession. Each committee works diligently to provide substantive programming in their respective focus areas. Below are some of the accomplishments of our YLD committees this year:

YLD Advocates for Students with Disabilities Committee

Sydney Ford and Jack Grote, Co-Chairs

The YLD Advocates for Students with Disabilities Committee hosted a panel on Oct. 20 that focused on how student evaluations are conducted and implemented during COVID.

The committee held a CLE on March 31 that focused on what parents can do if the summer school plan is implemented to help them assist their child over the summer with school work.

YLD Community Service Projects Committee

DeVondrel Banks, Andy Navratil and Kayla Winters Strozier, Co-Chairs

In February and March 2021, members of the YLD Community Service Projects Committee volunteered as judges with the YLD's Georgia High School Mock Trial Competition. The committee also helped recruit additional volunteer judges.

Looking ahead, the Community Service Projects Committee is exploring hosting a virtual resume builder workshop with the Gateway Center. The YLD has assisted homeless individuals facing homelessness through the Gateway Center's in-person resume workshops in previous years and we hope to find a way to volunteer again despite the challenges of COVID-19.

YLD Corporate Counsel Committee

Raquel Crump and Tanesha Steward, Co-Chairs

On Tuesday, Feb. 16, the YLD Corporate Counsel Committee met to discuss planning for upcoming events.

YLD Family Law Committee

Sam Lennon and Amy Saul, Co-Chairs

On Sept. 24, the committee joined DeKalb Volunteer Lawyers Foundation (DVLF) for a TPO Bootcamp, a virtual CLE to train volunteers for DVLF's TPO program. The CLE was a huge success, with more than 20 participants.

The YLD Family Law Committee held a meeting on Jan. 28. Due to the coronavirus, we decided to hold off on planning our signature event, Supreme Cork, until the fall. We posted an announcement to the Family Law Attorney Network asking for members of the Family Law Bar to support DVLF and AVLF.

We are planning a Zoom lunch and learn series with panels of new judges from various superior courts.

YLD Inclusion in the Profession Committee

Chanel Chauvet, Alexis Hamilton and Mishael Najm, Co-Chairs

The committee hosted a virtual book club to discuss Sunny Hostin's book *I am These Truths* on March 25 with the goal of making a "Book of the Month" discussion group a recurring event. The next book club meeting was held on April 29 where we discussed *The Memo: What Women of Color Need to Know to Secure a Seat at the Table* by Miranda Harts. A member survey and additional ideas for engaging YLD membership, including possible mentorship opportunities, are also in development.

The goal of the YLD Inclusion in the Profession Committee is to be a resource for young lawyers from all backgrounds, and the committee welcomes opportunities to work in partnership with other committees and groups within the State Bar as well as other professional associations. Anyone wishing to contact the YLD Inclusion in the Profession Committee can email the co-chairs at inclusionlpa@gmail.com.

YLD Intrastate Moot Court Competition Committee

J.D. Fichtner and Allison White, Co-Chairs

The 2021 State Bar of Georgia YLD Intrastate Moot Court Competition was a great success. This year's competition took place on March 26-27 virtually via Zoom. We would like to thank our multiple

committee members, judges, the University of Georgia School of Law for hosting us virtually and the remaining multitude of practicing attorneys and judges who graciously took time from their busy schedules to ensure the success and continuity of the Georgia Intrastate Moot Court Competition.

I would also like to thank the schools and students who competed and did an excellent job competing this year, especially given the current environment and virtual format. The competition this year was top notch all around and the competitors deserve commendation.

Finally, I would like to extend a special thank you to our final round panel who graciously volunteered their expertise and time: Hon. Stephen A. Dillard, Court of Appeals of Georgia; Hon. Emily Richardson, Fulton County Superior Court; and YLD President Bert Hummel, partner, Lewis, Brisbois, Bisgaard & Smith, LLP.

Without further ado, the results of the 2021 competition are as follows:

Best Oralist: Doug Comin (Mercer)

Best Brief: Melissa Davies, Matthew Cato and Baker Swain (GSU)

Semifinalist: Melissa Davies, Matthew Cato and Baker Swain (GSU)

Cameron Kemp, Cole Harper and Destiny Burch (UGA)

Doug Comin, Ashley Ferguson and Akash Patel (Mercer)

Julia Martin and Kacey Baine (Emory)

Runner-Up: Melissa Davies, Matthew Cato and Baker Swain (GSU)

Best Overall: Cameron Kemp, Cole Harper and Destiny Burch* (UGA)

**Destiny is a second generation Intrastate champion, her father, Jarrod Burch, was a member of the championship team in 2002.*

YLD Leadership Academy

Sara Fish, Taylor Hanks and Nicole McArthur, Co-Chairs

After holding a virtual informational session to raise awareness about the program and application in mid-November, the Leadership Academy co-chairs reviewed our pool of applicants and selected a class of 20 participants for next year's Leadership Academy. The class members were notified of their acceptance on Nov. 30. All 20 participants accepted.

We held our first session in January, which coincided with the Bar's Midyear virtual meeting on Jan. 8. Due to the fact that the majority of alumni rank the in-person networking aspect of Leadership Academy as the most important, the decision was made to cancel the remainder of the 2021 Leadership Academy—as most of the next five sessions would almost certainly have been required to be virtual. Everyone in the 2021 class that would like to participate in 2022 has been guaranteed a spot.

YLD Leadership Academy Alumni Committee

Christopher Collier and Kerry Nicholson, Co-Chairs

The YLD Leadership Academy Alumni Committee planned an evening of networking and fun on March 17, in conjunction with the YLD Spring Meeting. Alumni reunited with members of their class and competed in a game of virtual trivia with prizes for the winners. Donations to No Kid Hungry Georgia were encouraged.

YLD Legal Food Frenzy Committee

Morgan Lyndall and Veronica Rogusky, Co-Chairs

The 10th Annual Legal Food Frenzy ran April 19-30 and was completely virtual again this year. The online fundraising total was \$804,328.86, according to the leaderboard at galegalfoodfrenzy.org. Final results will be made public in late May after all mail-in donations have been counted. Food banks can turn \$1 into four meals. That translates into at least 3 million meals for the 1.7 million Georgians that are food insecure.

YLD Litigation Committee

Carlos Fernández and Kate Reddy, Co-Chairs

The Virtual Interview Series continued with an interview of Law & Moran's Peter A. Law on Feb. 25. Mr. Law discussed his career as a plaintiff's attorney, his experiences, and shared some advice for new attorneys. Scott Wilkerson, executive vice president and chief legal officer for the Atlanta Hawks, joined YLD Litigation Committee Co-Chair Carlos Fernández on March 24 to discuss his career, share legal stories and give advice to younger attorneys looking to excel in their careers.

YLD Public Interest Internship Program Committee

Andy Navratil and Jamie Rush, Co-Chairs

The PIIP committee solicited applications for the summer 2021 PIIP grant from Georgia law students and recent graduates, and is assembling a team of YLD volunteers to review applicants and select the grant recipients. The PIIP committee was able to award four grants this year—instead of just three—because of the success of the YLD Poll Worker Program.

YLD Solo Practice/Small Firm Committee

Hermise Pierre and Chelsea Wilkerson, Co-Chairs

The Solo/Small Firm Committee will host two events and a mentoring program. The committee understands the financial impact small businesses encountered during this COVID-19 pandemic. Our goal is to host two CLEs and/or events on marketing and financial empowerment. The committee will also spearhead The Donald Lee Hollowell School to Law Pipeline and Mentoring Program at a local high in the metro-Atlanta area.

YLD Real Estate Law Committee

Gabrielle Espy, Richard Sarrell and Katie Sayne, Co-Chairs

The YLD Real Estate Law Committee observed Landlord-Tenant Law Week by hosting two virtual events on Nov. 10 and Nov. 12. Erin Willoughby of Atlanta Legal Aid and Michael Dunham of Dunham Legal spoke about landlord-tenant law, landlord and tenant representation and the continuance of evictions in Georgia after the CDC's order.

On Feb. 16, 2021, the committee offered The 101s of Bankruptcy Law for the Real Estate Attorney with Matthew Brooks of Troutman Pepper and Robert Unell of Ankura. Brooks and Unell spoke about basic bankruptcy law situations that the real estate lawyer may encounter.

And on Feb. 19, the committee offered Home Buying 101s featuring Tyler Stanley, real estate agent; and Jessica Jakulski Bernstein, mortgage banker. This seminar discussed the 101s and tips for first time home buyers. Attendees learned strategies for saving a down payment, applying for a mortgage, shopping for a house and more.

YLD Women in the Profession Committee

Jena Emory and Lindsey Macon, Co-Chairs

March

On Friday, March 5, the committee hosted a virtual lunch with Judge Verda Colvin of the Court of Appeals of Georgia. She discussed her wide-ranging career both on and off the bench, what it has been like to join the Court of Appeals in the midst of a pandemic and her experience as a trailblazer for African-American women in the law. We are so thankful that Judge Colvin was able to join us and share her experiences. The event was a huge success and was featured in *The Daily Report* with an article by Cedra Mayfield.

April

On April 1, in preparation for the YLD April Virtual Wills Clinic with Atlanta Legal Aid, the committee sponsored a training for all volunteers with Atlanta Legal Aid for 3 hours of CLE credit. Cari King of Atlanta Legal Aid taught us how to draft wills, advance directives and powers of attorney. The virtual wills clinic for seniors lasted the entire month of April. Participants contacted their client to discuss their needs, draft the legal documents and assist their clients with executing the documents. We are proud of our continued partnership with Atlanta Legal Aid.

June

The YLD Women in the Profession Committee is planning an in-person event at an Atlanta Braves game.

YLD Workers' Compensation Committee

Oliver Ladd and Elizabeth Phrampus, Co-Chairs

The YLD Workers' Compensation Committee held a general introductory meeting on Oct. 17, 2020, to discuss event plans for the remainder of the year, via Zoom. On Dec. 3, 2020, the committee co-hosted a virtual lunch and learn CLE event on the use of mediation in workers' compensation and personal injury law, along with the Women in the Profession Committee.

The committee, in conjunction with the YLD Litigation Committee, held a virtual mindfulness workshop on March 26 hosted by Jeena Cho, author of *The Anxious Lawyer*. The event featured an interactive, hour-long workshop where Jeena provided tips and advice on handling the stress and anxiety that often comes with law practice. The event also functioned as a community service project by requiring attendees to make a donation of any amount to Atlanta Legal Aid's Disability Integration Project to raise awareness regarding the hard work the project does advocating for those in need. The event raised \$435 in donations.

The committee is hosting a lunch and learn on May 20 featuring Judge David Imahara of the State Board of Workers' Compensation.

YLD AFFILIATES

Augusta YLD

The Augusta YLD is presently dormant with everything going on. We have plans to resume leadership meetings 2021 to plan a kickoff event, but are waiting and watching COVID closely as not to waste any of our limited resources until we can meet with full participation.

Houston County YLD

This year, while many of our events have been canceled, we had the opportunity to contribute to paying off the student lunch debt in Houston County by donating funds that would have been used for this year's events. In 2021, we plan to have cocktails and conversations, our annual Barbecue and our Christmas Party. We always give to Toys for Tots during the holidays and will continue to do this as well.

Savannah YLD

Taking appropriate social-distancing precautions in response to the pandemic, the Savannah Bar Association's Young Lawyers Division has continued to provide networking and service opportunities for its members. On Dec. 18, 2020, members celebrated the holidays with a tacky sweater party at a dock on the Vernon River, courtesy of Savannah YLD President Sam Mikell. On Jan. 15, 2021, the group organized the swearing-in of five new attorneys by Judge Ben Karpf of the Superior Court of Chatham County. A monthly happy hour was held at the microbrewery Hop Atomica on Jan. 28, 2021. Members have also participated as evaluators in the virtual Georgia High School Mock Trial Competition in January and February of 2021. A Mardi Gras event was held on Feb. 16, and a trivia competition on March 25.

Additionally, the Savannah YLD plans to donate to the local guardian ad litem program and to participate in a pro bono recruitment drive for Georgia Legal Services Program. Follow the Savannah YLD's activities in the SBA's monthly newsletter, *The Citation*, accessible at www.savannahbar.org.

MEETINGS

Summer Meeting | Sept. 26 | Zoom and Facebook Live

The YLD Summer General Session was held on Saturday, Sept. 26, via Zoom and Facebook Live. More than 80 people registered for this virtual webinar. More than 30 of the registrants were first-time attendees.

Fall Meeting | Nov. 13-14 | Zoom and Facebook Live

On Friday, Nov. 13, the YLD held a virtual happy hour and trivia event on Zoom. The General Session took place on Saturday, Nov. 14.

Midyear Meeting | Jan. 7-8 | Zoom and Facebook Live

On Friday, Jan. 8, the YLD held the first (and only) session of the 2021 Leadership Academy; an Ethics CLE led by State Bar of Georgia Deputy General Counsel Jenny Mittelman entitled "Social Media and Client Communications"; a meeting of the YLD Nominating Committee; and the Midyear General Session.

Spring Meeting | March 17-19 | Zoom and Facebook Live

The YLD planned lots of great events for our Spring Meeting: a YLD Leadership Academy alumni reunion; a nutritious cooking demonstration with registered dietitian Allison Sykora as part of our wellness initiative; networking with a comedy angle via Stand-Up Socials; a CLE on Bias in Judicial Proceedings led by Mercer University's Dr. Ansley Booker with breakout sessions facilitated by the YLD Inclusion in the Profession Committee; and the Spring General Session.

Annual Meeting | June 10-13 | Isle of Palms, South Carolina

The YLD Annual Meeting will be held in conjunction with the State Bar's Annual Meeting at Wild Dunes Resort—currently scheduled to be a hybrid virtual/in-person format. The YLD is planning the annual YLD/Pro Bono 5K Fun Run, a Leadership Academy CLE and the YLD Dinner and Swearing-In Ceremony, among other events.

It has been an immense pleasure to serve as the 74th president of the YLD. I am proud of the work of our committees, our Board of Directors and our officers in putting together meaningful, impactful programs

for our members, our communities and our profession. This past year proved that the leaders in the YLD are dedicated, creative and up to the challenge to serve no matter the circumstances. I am filled with admiration and encouraged for the future of our profession with such remarkable leaders who answered the call to action this past year despite the pressures, challenges and obstacles presented by COVID-19 and a virtual world.

As a final call, I would encourage all Board of Governors members to continue to act as mentors to young attorneys across our state, be kind, and remember that we serve as leaders in our communities by virtue of the profession we find ourselves in. I appreciate the support over the past year and look forward to serving on the Executive Committee as immediate past president of the YLD in 2021-22.

Sincerely,

A handwritten signature in blue ink that reads "Bert Hummel". The signature is written in a cursive, flowing style.

Bert Hummel
2020-21 YLD President



**From the State Bar's
Judicial Qualifications Commission Nominating Committee**

Recommended Nominee List to the Board of Governors

For Consideration June 12, 2021

- Mr. Robert O. Bozeman (Decatur, GA)
Hon. M. Gino Brogdon Sr. (Atlanta, GA)
Ms. Caren Cloud (Atlanta, GA)
Mr. J. Anderson "Andy" Davis (Rome, GA)
Mr. Jeffrey Reese Davis (Atlanta, GA)
Mr. Keith Elliot Gammage (Atlanta, GA)
Mr. W. Pope Langdale (Valdosta, GA)
Ms. Tiffany Darcel Williams Roberts (Atlanta, GA)
Ms. Toronda "Tori" Michelle Silas (Atlanta, GA)
Mr. R. Gary Spencer (Atlanta, GA)

HEADQUARTERS

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State Bar of Georgia

To: Bar Officers
Finance Committee

From: Ron Turner *RT*

Date: April 30, 2021

Re: March 2021 Financial Statements-Bar Operations and Bar Center

Attached please find the March 2021 financial statements. These financial statements are presented at a summary level for clarity and to convey overall trends. Full departmental detail is attached at year-end (6/30) and upon request.

Line item variance explanations follow. Department managers are expected to specify savings elsewhere in their budgets when exceeding a line item, unless there was a budgeting error. Line item variances < \$100 are not explained to conserve your time.

New and revised items are highlighted in bold.

Computer Hardware – In most cases computer hardware has exceeded the budget for the year for every department. This overage is primarily due to the following reasons associated with COVID-19: (1) additional hardware was purchased for many staff. It has been the policy of the Bar to rotate computer hardware every three years. However, due to COVID-19 and with Bar staff working 100% remotely from home, a decision was made to rotate the computers for half of the Bar in 2020-2021 and the remaining one-half of the Bar in 2021-2022. (2) it was determined that the most efficient means of working remotely would be to use laptops and related equipment (i.e. docking stations, etc.) rather than desktop computers. When Bar staff returns to work from the office, these laptops will be used in the office as well. The budget comprehended the three-year rotation policy along with the purchase of desktop computers rather than laptops.

Subscriptions and Books – In many cases, subscriptions and books have exceeded the budget due to the renewal of the Zoom subscription services. When the 2020 – 2021 budget was originally established, Zoom costs were not known and the pandemic was in its initial stages.

Unless specifically noted in a comment related to each department, it is anticipated that savings will be realized in other line items within the department so that the department, in total, will not be over budget.

Savings will be realized in each department to offset these overages.

Administration

Bank fees exceeded the budget by **\$5,294** primarily due to the decrease in interest rates on compensating balances that the Bar has on deposit with the financial institution. The Bar receives a credit against charges for amounts held at the financial institution. This credit offsets the amount of balance based charges from the financial institution. Due to the decrease in interest rates the amount of the credit decreased, and thus the amount of bank fees increased.

Office of General Counsel and Client Assistance Program

Telephone is over budget by **\$301** due to a telephone allowance provided to one of the employees. When the budget was developed, this employee was not receiving a telephone allowance.

Communications

Computer software was budgeted at \$1,600 but the actual costs were \$1,816. They were over budget as this account was under-budgeted based upon the prior year's costs.

The supplemental directory budget was \$6,000, however, actual costs were \$6,674. This item exceeded the budget primarily due to the following: (1) a better quality of paper was used in the current year and (2) a different vendor was used last year as compared to the current year.

Law Practice Management

Seminars and training is over budget by \$676 primarily due to the way that certain seminar registration expenses were categorized in the budget compared to the way the actual expenses were coded. Historically, these registration expenses would have been charged to staff travel since they were part of the travel. However, due to COVID-19, these seminars were expensed to seminars and training as there was no travel involved. In the future, these amounts will be separated between the actual cost of the seminar or training and the actual travel cost.

Law Related Education

Subscriptions and books exceeded the budget by **\$1,076** primarily due to the renewal of a domain name for the law museum for five years along with a subscription for Zoom, neither of which were included in the original budget.

Other

The budget for Fastcase is \$244,000 while the actual expense is \$253,597. This overage is primarily due to the following: (1) the number of attorneys for which we are paying a charge per attorney and (2) an increase in the charge per attorney from the prior year. Both of these were greater than the amount originally anticipated.

Other-Continued

First Floor Office Furniture Project – This account exceeded the budget by \$1,037 primarily due to the disposal fees associated with the removal of the old furniture.

Bond Premium Amortization - Bond premium amortization has exceeded the budget and, in all likelihood, will continue to do so for the rest of the fiscal year. The account has exceeded the budget primarily due to bond prices and interest yields as a result of the economy and the pandemic. Bonds are being purchased at an amount higher than the face amount and this excess premium is being amortized over the life of the bond to the ultimate maturity amount.

Conference Center

Furniture and equipment exceeded the budget by \$853. This occurred due to the purchase of additional storage and overhead bins that exceeded the amount originally anticipated.

Other Bar Center Operations

Audio Video, Furniture and Equipment has exceeded the budget by \$317 primarily due to additional repairs. These repairs were not originally budgeted for.

Rehabilitation costs exceeded the budget by \$70,623 primarily due to following: (1) costs of \$47,527 associated with the installation of a new video and security system for the Bar building and related elevators. This was a continuing project from the prior fiscal year. The Executive Committee approved the security system and video cameras as a necessary upgrade even though it was not anticipated in the budget. (2) costs of \$23,096 for repairs and replacements to the sprinkler system in the building as required for renewal of the insurance on the building.

Rental Operations

Repairs and maintenance costs for life safety have exceeded the budget by **\$26,916** primarily due to an additional server **and other costs** required that **were** associated with the command center upgrade, which **were** not anticipated.

Repairs and maintenance costs for the elevators has exceeded the budget by **\$33,781** due to costs of approximately \$38,320 associated with the command center upgrade. At time of budget preparation, this upgrade was not originally contemplated.

Shared Office Overhead

Shared office allocations exceed actual shared office expense by approximately **\$40,100**. This is a positive variance. This number will fluctuate throughout the year.

Please give me a call at (404) 527-8748 or my cell number at 678-761-5889 if you have any questions regarding the attached financial statements.

cc: Damon Elmore
Cassie Hallstrom
Paula Frederick

4/29/2021

**State Bar of Georgia
Consolidated Revenues and Expenditures
Operations and Bar Center Combined
For the Current Period Ending March 31, 2021**

Category	Year Ending	Year To Date	% of Budget	Year Ending
	6/30/2020 Actual	3/31/2021 Actual		6/30/2021 Annual Budget
Membership Numbers				
Active Members	39,892	40,555	100.88 %	40,200
Inactive Members	8,713	8,341	96.43 %	8,650
Provisional Members	15	30	12.00 %	250
Foreign Legal Consultants	16	16	100.00 %	16
Students	362	333	83.25 %	400
Former Members	3,727	3,727	100.00 %	3,727
Total Membership Numbers	52,833	52,833	100.91 %	52,970
Revenue				
Dues Incls	\$ 10,067,680	\$ 10,295,641	100.15 %	\$ 10,210,890
Dues Inactive	1,127,391	1,106,471	100.72 %	1,098,550
Dues Provisional	2,159	29,083	91.60 %	31,750
Dues Associates	1,550	1,300	92.88 %	1,400
Dues Foreign Legal Consultant	16	16	100.00 %	16
Dues Late Fees	248,175	55,650	25.30 %	220,000
Dues NSF Check Fee	140	180	60.00 %	300
Dues Prior Years	6,615	4,571	66.18 %	6,000
Total License & Dues	\$ 11,436,384	\$ 11,424,168	98.174 %	\$ 11,576,924
CLE Contribution to SBG	\$ 0	\$ 0	0.00 %	\$ 300,000
Section Expense Reimbursement	\$ 190,644	\$ 187,835	100.00 %	\$ 187,835
CSF Expense Reimbursement	\$ 73,000	\$ 54,750	75.00 %	\$ 73,000
Advertising and Sales	\$ 49,895	\$ 36,450	80.64 %	\$ 45,200
Membership Income	\$ 129,012	\$ 122,268	101.05 %	\$ 121,000
Interest Income	\$ 462,171	\$ 128,661	75.68 %	\$ 170,000
Miscellaneous Revenues	\$ 30,976	\$ 325	5.51 %	\$ 5,900
Total Bar Revenue	\$ 12,421,092	\$ 11,954,455	95.84 %	\$ 12,473,259
Total Bar Expenses	\$ 12,183,113	\$ 9,451,605	65.98 %	\$ 12,809,340
SBG Net Gain (Loss)	\$ 237,979	\$ 3,502,850	(1,042.26) %	\$ (336,081)
Total Bar Center Operations Revenue	\$ 3,241,522	\$ 1,576,867	48.80 %	\$ 3,231,138
Total Bar Center Operations Expenses	\$ 2,689,261	\$ 1,697,975	63.34 %	\$ 2,680,546
Total Bar Center Operations Net Gain (Loss)	\$ 652,261	\$ (121,108)	(22.00) %	\$ 550,592
Combined Revenue	\$ 15,662,614	\$ 13,531,322	86.16 %	\$ 15,704,397
Combined Expenses	\$ 14,772,374	\$ 10,149,890	65.92 %	\$ 15,489,896
Total Combined Net Income (Loss)	\$ 890,240	\$ 3,381,432	1,576.49 %	\$ 214,511

Legend

- Bar Operations
- Bar Center
- Combined Bar Operations and Bar Center

Note: Non-Cash depreciation expense and operations of ICLE are excluded from this schedule.

4/29/2021

**State Bar of Georgia
Total Bar Center Operations
Revenues and Expenditures - Executive Summary
For the Current Period Ending March 31, 2021**

Category	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Bar Center Income and Cash Receipts							
Bar Center Assessments	\$0	0.00 %	\$100	10.00 %	\$1,000	\$900	\$1,150
Conference Center Copier	0	0.00 %	0	0.00 %	850	850	506
Gain/Loss Investments Interest Allocation	(34,610)	0.00 %	(44,071)	0.00 %	0	44,071	96,937
CLE Contributions to Bar Center	0	0.00 %	500,000	37.74 %	1,325,000	825,000	1,322,797
Interest Income	24,113	37.68 %	71,504	111.73 %	64,000	(7,504)	92,296
Bar Center Income and Cash Receipts	\$ (10,497)	(0.75) %	\$ 527,533	37.93 %	\$ 1,390,850	\$ 863,317	\$ 1,513,686
Bar Center Expenses and Cash Disbursements							
Bond Premium Amortization	7,503	62.53 %	20,973	174.78 %	12,000	(8,973)	16,918
Investment Service Fees	4,155	34.63 %	12,042	100.35 %	12,000	(42)	13,312
Parking Deck Construction	0	0.00 %	0	0.00 %	0	0	2,510
Conference Center Contingency	0	0.00 %	0	0.00 %	0	0	37
Conference Center Renovations	0	0.00 %	36,792	67.63 %	54,400	17,608	29,299
Audio Video, Furniture and Equipment	0	0.00 %	16,318	101.99 %	16,000	(318)	0
Rehabilitation	0	0.00 %	70,623	0.00 %	0	(70,623)	350,650
President's Boardroom	0	0.00 %	0	0.00 %	5,000	5,000	610
Bar Center Expenses and Cash Disbursements	11,658	11.73 %	156,748	157.69 %	99,400	(57,348)	413,336
Bar Center Combined Net Cash Flow	\$ (22,155)	(1.72) %	\$ 370,785	28.71 %	\$ 1,291,450	\$ 820,665	\$ 1,100,350
Conference Center Income and Expenses							
Room Rentals and Various Charges	0	0.00 %	0	0.00 %	15,800	15,800	12,284
Conference Center Operating Expenses	37,556	8.37 %	292,205	65.15 %	448,526	156,321	428,618
Conference Center Combined Net Cash Flow	\$ (37,556)	8.68 %	\$ (292,205)	67.53 %	\$ (432,726)	\$ (140,521)	\$ (416,334)
Rental Income and Expenses							
Rental Income	81,049	5.60 %	1,040,329	71.87 %	1,447,488	407,159	1,422,142
Building Operating Expenses	137,201	7.80 %	1,151,132	63.76 %	1,805,430	654,298	1,477,412
Rental Combined Net Cash Flow	\$ (56,152)	15.69 %	\$ (110,803)	30.96 %	\$ (357,942)	\$ (247,139)	\$ (55,270)
Parking Income and Expenses							
Parking Income	479	0.13 %	9,006	2.39 %	377,000	367,994	293,411
Parking Deck Operating Expenses	11,388	3.48 %	97,893	29.92 %	327,190	229,297	269,894
Parking Combined Net Cash Flow	\$ (10,909)	(21.90) %	\$ (88,887)	(178.45) %	\$ 49,810	\$ 138,697	\$ 23,517
Total Bar Center Operations Net Gain (Loss)	\$ (126,772)	(23.02) %	\$ (121,110)	(22.00) %	\$ 560,592	\$ 671,703	\$ 652,263

Note: Non-Cash depreciation expense and gain/loss on disposal of fixed assets are excluded from this schedule.

4/29/2021

State Bar of Georgia
Income Statement YTD - Operations
For the Current Period Ending March 31, 2021

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Revenues				
Dues - Active	\$ 10,225,641	\$ 10,210,800	100.15 %	\$ 10,097,880
Dues - Inactive	1,106,471	1,098,550	100.72 %	1,127,351
Dues - Provisional	29,083	31,750	91.60 %	2,159
Dues - Misc. Types	2,570	2,924	87.89 %	3,074
Dues - Late Fees	60,401	226,300	26.69 %	254,930
Total Dues & Licenses	11,424,166	11,570,324	98.74 %	11,485,394
CLE Contributions to SBG	0	300,000	0.00 %	0
Section Expense Reimbursement	187,835	187,835	100.00 %	190,644
CSF Expense Reimbursement	54,750	73,000	75.00 %	73,000
Advertising and Sales	36,450	45,200	80.64 %	49,895
Membership Income	51,418	71,000	72.42 %	73,711
Pro Hac Vice	336,250	290,000	115.95 %	310,501
Pro Hac Vice Contra	(265,400)	(240,000)	110.58 %	(255,200)
Interest Income	128,661	170,000	75.68 %	462,171
Miscellaneous Revenues	325	5,900	5.51 %	30,976
Total Revenues	11,954,455	12,473,259	95.84 %	12,421,092
Expenses				
Administration	1,791,580	2,502,712	71.59 %	2,455,429
General Counsel	2,991,760	4,338,494	68.96 %	4,230,188
Communications	527,766	885,005	59.63 %	912,876
Lawyer's Assistance Program	63,750	85,000	75.00 %	63,712
Fee Arbitration	411,837	559,460	73.61 %	526,262
Law Practice Management	332,327	438,714	75.75 %	428,555
Sections	139,714	187,834	74.38 %	186,025
Savannah Office	193,104	258,120	74.81 %	251,416
Tifton Office	100,016	140,558	71.16 %	163,851
Young Lawyers	192,873	457,434	42.16 %	334,875
Unauthorized Practice of Law	620,526	842,308	73.67 %	845,741
Law Related Education	214,686	385,461	55.70 %	369,794
High School Mock Trial	80,151	159,730	50.18 %	127,920
MLAP	0	0	0.00 %	120,663
Pro Bono	159,162	212,216	75.00 %	212,216
Fastcase	253,597	244,000	103.93 %	240,436
Officers' Expenses	786	112,677	0.70 %	34,461
BASICS Program Contribution	37,500	37,500	100.00 %	150,000
Resource Center Contribution	110,332	110,332	100.00 %	110,332
Other Expenses	270,239	851,785	31.73 %	527,919
Unallocated Services	(40,101)	0	0.00 %	(109,558)
Total Expenses	8,451,605	12,809,340	65.98 %	12,183,113
Net Income	\$ 3,502,850	\$ (336,081)	(1,042.26) %	\$ 237,979

4/29/2021

State Bar of Georgia
Income Statement YTD - Operations
For the Current Period Ending March 31, 2021

	<u>YTD Actual</u>	<u>Annual Budget</u>	<u>YTD % of Budget</u>	<u>Prior Year</u>
Other Expenses				
BOG and Member Meetings	20,473	380,000	5.39 %	99,990
Supreme Court Meetings	0	45,000	0.00 %	33,553
Executive Committee Meetings	4,204	60,000	7.01 %	43,333
Southern Conference	0	0	0.00 %	50,359
State Disciplinary Board Lawyers	9,925	20,000	49.63 %	30,000
Elections	25,692	39,685	64.74 %	34,082
Dues Notice	1,257	40,000	3.14 %	34,724
Letters of Good Standing	1,518	2,900	52.34 %	2,526
Bar Membership Cards	6,677	11,100	60.15 %	9,355
50 Year Certificates	2,049	2,000	102.45 %	2,075
Membership Database Project	0	13,000	0.00 %	0
Recruitment Costs	74,934	100,000	74.93 %	0
State Bar Committees	1,230	29,000	4.24 %	27,113
Strategic Plan	0	0	0.00 %	40,000
Georgia Diversity Program	20,000	20,000	100.00 %	20,000
Conference Sponsorship	0	0	0.00 %	4,000
ABA Delegate Breakfast	0	2,500	0.00 %	2,591
1st Floor Office Furniture Project	15,137	14,100	107.35 %	0
Commitment to Equality Awards	2,500	2,500	100.00 %	2,500
Bond Premium Amortization	53,731	34,000	158.03 %	45,882
Investment Service Fees	30,912	36,000	85.87 %	35,836
Access to Justice/Pro Bono	0	0	0.00 %	10,000
Other Expenses	<u>270,239</u>	<u>851,785</u>	<u>31.73 %</u>	<u>527,919</u>

State Bar of Georgia
Status and Use of Cash and Investments as of March 31, 2021

Cash and Investments - March 31, 2021 - Bar **26,866,333**

Less:

Georgia Bar Foundation Cash Included in Above Amount (19,182)
CCLC Cash Included in Above Amount (5,686,523)

Net Cash Available for State Bar **21,160,628**

Use of Cash:

Less:

Board Designated - See Separate Schedule Attached (8,536,254)
Temporarily Restricted - See Separate Schedule Attached (2,193,126)

Total Board Designated and Temporarily Restricted **(10,729,380)**

Other - Cash Allocated:

Collection of Outstanding Accounts Receivable 135,642
Payment of Accounts Payable (103,459)
Payment of Accrued Vacation (604,138)
Deferred Income 0
Payment of Credit Card Bill (61,498)
Payment of Accrued Salary (356,981)
Payment of Accrued Taxes (27,309)
Other Accrued Expenses (primarily pension) (482,795)
Payment to Client Security Fund (1,894,960)
Operational Expenses for Remaining Bar Year (4,037,502)
Additional Revenue for Bar Operations (Excluding Bar Center) 218,804
Net Amount to be paid to Related Entities (265,272)

Total Other - Cash Allocated **(7,479,467)**

Estimated Cash and Investments - June 30, 2021 - Bar **2,951,782**

Cash and Investments - March 31, 2021 - Bar Center **134,452**

Other Cash Allocated - Bar Center:

Collection of Outstanding Accounts Receivable 0
Payment of Accounts Payable (9,307)
Deferred Income (19,329)
Other Accrued Expenses (115,700)
Receipt of Contribution from CCLC (to Bar Center) 671,700

Total Other - Cash Allocated - Bar Center **527,364**

Estimated Cash and Investments - June 30, 2021 - Bar Center **661,816**

Total Estimated Cash Balance at June 30, 2021 **3,613,598**

Note: The above schedule reflects the status of cash and investments as of the month end indicated above. There are no other State Bar funds or investments held in any institution that are not included on this schedule.

Also included in the above are the following assumptions: (1) Actual expenses for 2020 - 2021 would be 97.5% of budget. This is for Bar operations only and not Bar Center. (2) Additional revenue for Bar operations is based upon the assumption of achieving additional revenue through June 30, 2021 to equal 100% of the total budgeted revenue. (3) Bar Center would contribute additional cash flow through June 30, 2021 to equal their budget.

State Bar of Georgia
Board-Designated and Donor Temporarily Restricted Net Assets
For the Current Period Ending March 31, 2021

	2018 June 30	2019 June 30	2020 June 30	2021 March 31
Board Designated				
General Operations - Bar	2,750,000	2,750,000	2,750,000	2,750,000
General Operations - Bar Center	2,000,000	2,000,000	2,000,000	2,000,000
Litigation	300,000	300,000	300,000	123,614
Cornerstones of Freedom	600,000	0	0	0
Sections	2,660,285	2,793,143	3,097,034	3,528,269
YLD Meetings	33,481	29,716	87,819	134,371
Total Board-Designated excludes ICLE	8,343,766	7,872,859	8,234,853	8,536,254
Donor Temporarily Restricted				
Legislative	1,257,657	1,285,674	1,094,092	1,496,998
Law Related Education/Marshall fund	312,580	316,570	233,708	231,025
High School Mock Trial	9,018	14,095	15,486	15,473
National Mock Trial	20,161	0	0	0
Basics Program	65,414	67,032	69,517	119,391
Younger Lawyers	154,216	125,032	170,213	150,891
Lawyers Assistance	30,454	32,553	34,698	34,630
Georgia Diversity Program	17,588	18,957	13,596	53,684
Bar Media Conference	21,247	18,697	20,839	21,821
Justice Hunstein's Portrait	0	7,813	15,152	15,140
Law Day	6,276	6,356	6,517	6,512
Access to Justice	1,437	1,456	1,493	1,491
iCivics Program	(245)	603	868	867
Promote Inclusion	10,235	11,120	14,211	13,278
State Bar of Georgia Foundation	1,280	0	100	17,127
Military Vet Pro Bono	13,680	13,854	14,711	14,798
Unauthorized Practice of Law	100,518	0	0	0
Total Donor Temporarily Restricted	2,021,516	1,919,812	1,705,201	2,193,126
Net Board Designated and Donor Temporarily Restricted	10,365,282	9,792,671	9,940,054	10,729,380

State Bar of Georgia
Summary of Members and Voluntary Legislative Contributions
With Contributions Paid Through March 31, 2021

Dues	2020-21 Dues Season	2019-20 Dues Season	2018-19 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	48,538	47,964	47,029
Active - Number Paid	40,970	40,379	36,888
Inactive - Number Paid	8,743	8,929	8,123
Total Number of Members With Dues Paid	49,713	49,308	45,011
Percent of Total Members With Dues Paid	102.4%	102.8%	95.7%
Number of Members Who Made A Contribution	8,315	3,704	5,339
Percent of Members Who Made A Contribution	16.7%	7.5%	11.9%
Total Contribution Amount	\$ 765,223	\$ 322,708	\$ 494,906
Average Amount Paid	\$ 92	\$ 87	\$ 93

Legislative Contribution Amounts by Dues Year

2020 - 2021	\$ 765,223
2019 - 2020	\$ 322,708
2018 - 2019	\$ 494,906
2017 - 2018	\$ 546,905
2016 - 2017	\$ 557,991
2015 - 2016	\$ 565,004
2014 - 2015	\$ 640,505
2013 - 2014	\$ 691,736
2012 - 2013	\$ 685,283
2011 - 2012	\$ 656,254

Purpose: The purpose of the above schedule is to reflect donations to the Legislative Fund for each period shown. The information reflects the total number of members who have made a contribution along with applicable percentages.

The number of members shown above is not the same as the number of members at the end of the month. The number of members above reflect the members who paid during the dues season indicated above. The dues season does not correspond to the fiscal year but starts in advance of the fiscal year. In addition, if members change status (active, inactive, emeritus, etc), this change will be reflected in the membership counts at month end but will not be reflected in the above schedule.

State Bar of Georgia
Summary of Members and Voluntary Contributions to Georgia Legal Services Program (GLSP)
With Contributions Paid Through March 31, 2021

Dues	2020-21 Dues Season	2019-20 Dues Season	2018-19 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	48,538	47,964	47,029
Active - Number Paid	40,970	40,379	36,888
Inactive - Number Paid	8,743	8,929	8,123
Total Number of Members With Dues Paid	49,713	49,308	45,011
Percent of Total Members With Dues Paid	102.4%	102.8%	95.7%
Number of Members Who Made A Contribution	3,505	3,001	3,197
Percent of Members Who Made A Contribution	7.1%	6.1%	7.1%
Total Contribution Amount	\$ 436,620	\$ 366,674	\$ 295,454
Average Contribution Amount	\$ 125	\$ 122	\$ 92

GLSP Contribution Amounts by Dues Year

2020 - 2021	\$ 436,620
2019 - 2020	\$ 366,674
2018 - 2019	\$ 295,454
2017 - 2018	\$ 312,251
2016 - 2017	\$ 276,487
2015 - 2016	\$ 264,492
2014 - 2015	\$ 255,713
2013 - 2014	\$ 241,362
2012 - 2013	\$ 244,707
2011 - 2012	\$ 240,678

Purpose: The purpose of the above schedule is to reflect donations to the Georgia Legal Services Program for each period shown. The information reflects the total number of members who have made a contribution along with applicable percentages.

The number of members shown above is not the same as the number of members at the end of the month. The number of members above reflect the members who paid during the dues season indicated above. The dues season does not correspond to the fiscal year but starts in advance of the fiscal year. In addition, if members change status (active, inactive, emeritus, etc), this change will be reflected in the membership counts at month end but will not be reflected in the above schedule.

State Bar of Georgia
Legislative Activity Report
From July 1, 2020 Thru March 31, 2021

July 1, 2020 Beginning Balance **\$ 1,094,092**

Income:

Interest Income	15,290
Gain/Loss on Investments	(9,565)
Contributions	768,272

Total Income **773,997**

Expenditures:

Staff and Contract Lobbyists	347,035
Travel	54
Shared Office Allocation	11,640
Computer Hardware	1,414
Miscellaneous	10,948

Total Expenditures **371,091**

Net Donor Temporarily Restricted Balance at March 31, 2021 **\$ 1,496,998**

Client Security Fund
Summary of Client Security Fund Activity
For the Current Period Ending March 31, 2021

	2017 June 30	2018 June 30	2019 June 30	2020 June 30	2021 March 31
Fund Balance, Beginning of Year	2,035,238	1,836,994	1,450,249	1,031,012	1,009,586
Income:					
Interest Income	8,007	8,028	11,922	13,214	11,033
Gain/Loss Investment Interest Allocation	(142)	0	4,544	13,064	(8,043)
Client Security Fund Assessments	153,863	144,628	102,884	85,896	75,554
Restitution Income	5,386	25,250	30,451	30,027	9,806
Total Income:	167,114	177,906	149,801	142,201	88,350
Transfer from Others:					
Transfer from State Bar of Georgia	0	0	0	0	0
Transfer from Commission on Continuing Lawyer Competency	0	0	0	388,000	0
Transfer from Institute of Continuing Legal Education	0	0	0	0	1,000,000
Total Transfer from Others:	0	0	0	388,000	1,000,000
Expenses:					
Restricted Expenses	(73,000)	(73,032)	(73,000)	(73,000)	(54,750)
Client Security Fund Claims Payments	(292,358)	(491,619)	(496,038)	(474,387)	(143,100)
Bond Premium Amortization	0	0	0	(2,341)	(3,262)
Investment Service Fees	(355,358)	(564,651)	(569,038)	(1,899)	(1,864)
Total Expenses:	(620,716)	(1,129,300)	(1,138,076)	(551,627)	(202,976)
Net Income	(453,602)	(351,394)	(419,237)	(21,426)	85,374
Fund Balance, End of Period	1,836,994	1,450,249	1,031,012	1,009,586	1,894,960



***INSTITUTE OF CONTINUING LEGAL EDUCATION
OF THE STATE BAR OF GEORGIA, LLC (ICLE)***

Note: The State Bar of Georgia financial statements does not include the operations of ICLE.

Institute of Continuing Legal Education

**State Bar of Georgia
Income Statement
For the Current Period Ending March 31, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Program Revenue							
Registration Revenue	417,940	7.60 %	2,553,995	46.44 %	5,500,000	2,946,005	5,803,994
Sponsorship	0	0.00 %	0	0.00 %	30,000	30,000	30,078
Program Discounts	(175)	0.00 %	(11,846)	0.00 %	0	11,846	0
Affiliate Contribution	0	0.00 %	0	0.00 %	0	0	18,249
Other	0	0.00 %	0	0.00 %	0	0	2,776
Exhibitor	0	0.00 %	0	0.00 %	0	0	500
Total Program Revenue	417,765	7.55 %	2,542,149	45.97 %	5,530,000	2,987,851	5,855,597
Total Program Expenditures	39,876	2.42 %	295,277	17.90 %	1,650,000	1,354,723	1,615,256
Net Margin on Programs	377,889	9.74 %	2,246,872	57.91 %	3,880,000	1,633,128	4,240,341
Personnel Services							
Salaries Full Time	85,317	6.57 %	683,281	52.62 %	1,298,606	615,325	1,035,099
Salaries Part Time	0	0.00 %	0	0.00 %	33,600	33,600	33,477
Temporary Part Time	0	0.00 %	0	0.00 %	30,000	30,000	0
Overtime Pay	0	0.00 %	0	0.00 %	20,000	20,000	21,167
Taxes and Benefits	33,296	6.69 %	233,732	46.95 %	497,833	264,101	358,029
Pension	6,516	8.33 %	58,647	75.00 %	78,197	19,550	63,990
Total Personnel Services	125,129	6.39 %	975,660	49.82 %	1,958,236	982,576	1,511,762
Operating Expenses							
Shared Office Allocation	26,514	8.33 %	238,625	75.00 %	318,166	79,542	303,673
Boards and Committee Meetings	0	0.00 %	0	0.00 %	4,000	4,000	873
Dues and Memberships	0	0.00 %	1,015	25.38 %	4,000	2,985	1,175
Licenses and Certification	0	0.00 %	245	12.25 %	2,000	1,755	894
Seminars and Training	450	2.05 %	2,424	11.02 %	22,000	19,576	5,006
Attorney and Staff Travel	0	0.00 %	0	0.00 %	15,000	15,000	10,177
Supplies	17	0.11 %	2,637	17.58 %	15,000	12,362	11,308
Printing	0	0.00 %	4	0.23 %	2,000	1,996	567
Subscriptions and Books	0	0.00 %	360	36.00 %	1,000	640	943

Note: Non-Cash depreciation expense and gain/loss on disposal of fixed assets are excluded from this schedule.

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Institute of Continuing Legal Education

**State Bar of Georgia
Income Statement
For the Current Period Ending March 31, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Postage and Freight	0	0.00 %	258	17.17 %	1,500	1,242	714
Telephone	375	4.41 %	3,375	39.71 %	8,500	5,125	5,164
Internet Services	159	2.67 %	1,702	28.38 %	6,000	4,298	2,222
Computer Software	2,548	2.55 %	27,954	27.95 %	100,000	72,046	48,366
Contract Programming	0	0.00 %	16,972	16.97 %	100,000	83,028	39,845
Computer Hardware	149	0.25 %	17,198	28.66 %	60,000	42,802	6,701
Miscellaneous	0	0.00 %	118	2.36 %	5,000	4,882	2,601
Professional Fees	0	0.00 %	0	0.00 %	15,000	15,000	6,810
Equipment Maintenance and Rental	0	0.00 %	308	3.85 %	8,000	7,692	3,773
Other Business Insurance (Not Group)	2,128	6.65 %	19,145	59.83 %	32,000	12,855	30,050
Credit Card Discount and Fees	9,216	6.06 %	63,947	42.07 %	152,000	88,053	157,477
Banking Fees	251	251.50 %	533	533.24 %	100	(433)	14
Lunches	0	0.00 %	0	0.00 %	2,000	2,000	754
Recruitment	0	0.00 %	0	0.00 %	6,500	6,500	0
Contract Labor	0	0.00 %	0	0.00 %	3,500	3,500	7,931
Total Operating Expenses	41,807	4.73 %	396,820	44.93 %	883,266	486,446	647,038
Furniture and Equipment	0	0.00 %	0	0.00 %	10,000	10,000	21,451
Total Expenses	166,936	5.85 %	1,372,481	48.13 %	2,851,502	1,479,022	2,180,251
Net Income Before Other Inc and Exp	210,953	20.51 %	874,391	85.02 %	1,028,498	154,106	2,060,089
Other Income and Expenses							
Interest Income	1,235	1.90 %	32,970	50.72 %	65,000	32,030	92,060
Miscellaneous Revenues	0	0.00 %	0	0.00 %	0	0	902
Bond Premium Amortization	(270)	0.00 %	(8,747)	0.00 %	0	8,747	(10,092)
Investment Service Fees	(770)	7.70 %	(6,916)	69.16 %	(10,000)	(3,084)	(9,200)
Total Other Income and Expenses	195	0.35 %	17,307	31.47 %	55,000	37,693	73,670
Net Income	\$ 211,147	19.49 %	\$ 891,698	82.30 %	\$ 1,083,498	\$ 191,800	\$ 2,133,759

Note: Non-Cash depreciation expense and gain/loss on disposal of fixed assets are excluded from this schedule.

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STATE BAR OF GEORGIA

***BUDGET REPORT PACKAGE FOR THE
BOARD OF GOVERNORS MEETING***

FOR THE BAR YEAR 2021 - 2022

State Bar of Georgia

2021-2022 Budget Assumptions

1. Dues at \$254. Number of dues members were estimated based upon December 31, 2020 members and estimated additional members based upon the historical passing rate of the Bar exams along with estimated dates of joining the Bar.
2. In the prior year, CCLC offered to provide up to \$300,000 of a grant to cover Bar operational expenses. No such grant is included in the 2021-2022 assumptions.
3. Investment (interest) income, bond amortization premium and investment expenses are based upon the annualization of actual results through December 31, 2020. Since investments are not sold but are held until maturity, no gains or losses are budgeted. However, accounting rules dictate that all gains and losses whether realized or not must be recorded.
4. Inflation has been at 1.0% based on Annual CPI—BLS South Region. No salary increases are included.
5. Vendor quotes or actual contracted amounts used whenever information was available.
6. The Bar does not pay rent to any independent company or organization for the Bar Center in Atlanta. In the fiscal year 2018-2019, the Bar charged itself rent. Rent expense was recognized by the Bar, and rental income was recognized by the Bar Center. This imputed rent transfer from State Bar to Bar Center has been eliminated in all years subsequent to 2018-2019.
7. For building rental income, assumed all tenants in building as of February 1, 2021 will continue to be in building for the 2021-2022 year and that the amount of spaced leased would be the same.
8. Due to the effects of the pandemic, the parking deck has not been substantially used since March 2020. Assumed that effective January 1, 2022 parking revenues and expense would be the same as how they were prior to the pandemic. Assumed no parking income from July 1, 2021 through December 31, 2021 and that expenses for those six months will be similar to the expenses from July 1, 2020 through December 31, 2020.
9. Excludes any income associated with previous Bar Facility assessments. Those Bar facility assessments previously contributed \$260,000 per year (\$50 per year per affected attorney) to the budget.
10. Includes the effects of items recommended by the Programs Committee.
11. Includes estimated income of a \$3.00 per transaction credit card convenience fee associated with the payment of the annual dues. This fee is only charged if the member pays by the use of a credit card.
12. Includes officer reimbursement for projected officer slate, including out-of-Atlanta, if needed.

**State Bar of Georgia
2021 - 2022 Proposed State Bar of Georgia Consolidated Budget - with Bar Center
(Active dues \$254 and inactive dues \$127 in 2021-2022)
For the Fiscal Year 2021-2022**

Category	Fiscal Year Actual 2017-2018	Fiscal Year Actual 2018-2019	Fiscal Year Actual 2019-2020	Fiscal Year to Date 2020-2021	Budget 2019-2020	Budget 2020-2021	Budget 2021-2022
Membership Numbers							
Active Members	38,802	39,193	39,892	40,437	39,400	40,200	40,600
Associate Members	5,963	6,151	6,322	6,521	6,950	6,900	7,000
Provisional Members	15	13	17	14	14	12	200
Associates/Affiliates	207	216	362	6	6	6	6
Foreign Legal Consultants	2,274	2,745	3,127	3,349	2,750	400	300
Emeritus	50,320	51,069	52,152	52,459	50,895	52,470	53,258
Total Membership Numbers							
Revenue							
Dues Active	\$ 9,717,063	\$ 9,896,539	\$ 10,087,880	\$ 10,201,226	\$ 10,007,600	\$ 10,210,800	\$ 10,363,200
Dues Associate	1,128,695	1,144,659	1,172,650	1,198,650	1,136,650	1,098,750	1,098,600
Dues Provisional	0	0	2,150	24,320	0	31	290
Dues Associates/Affiliates	1,300	1,400	1,550	1,300	1,400	1,400	1,400
Dues Foreign Legal Consultant	1,500	1,550	1,524	1,300	1,200	1,400	1,200
Dues NSF	247,440	197,730	248,740	248,740	186,250	220,300	67,000
Dues NSF Check Fee	0	320	140	180	250	300	200
Dues Prior Years	8,424	5,550	3,940	3,940	2,500	6,000	5,000
Total License & Dues	\$ 11,104,867	\$ 11,246,189	\$ 11,485,994	\$ 11,381,672	\$ 11,136,674	\$ 11,670,324	\$ 11,663,184
CLE Contributions to SBG	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 300,000	\$ 0
Program Registration Income	\$ 5,216,025	\$ 6,360,881	\$ 5,852,321	\$ 2,124,384	\$ 5,300,000	\$ 5,530,000	\$ 3,782,656
Section Expense Reimbursement	\$ 196,015	\$ 191,195	\$ 190,644	\$ 187,835	\$ 190,644	\$ 187,835	\$ 186,676
CSF Expense Reimbursement	\$ 73,000	\$ 73,000	\$ 73,000	\$ 48,667	\$ 73,000	\$ 73,000	\$ 73,000
Advertising and Sales	\$ 100,301	\$ 36,716	\$ 49,895	\$ 29,995	\$ 45,200	\$ 45,200	\$ 59,400
Membership Income	\$ 146,603	\$ 158,266	\$ 129,012	\$ 105,336	\$ 119,500	\$ 121,000	\$ 140,050
Credit Card Convenience Fees	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 90,000
Interest Income	\$ 76,326	\$ 225,618	\$ 554,231	\$ 143,636	\$ 100,000	\$ 235,000	\$ 293,166
Miscellaneous Revenues	\$ 3,204	\$ 35,234	\$ 303	\$ 4,500	\$ 4,500	\$ 5,900	\$ 8,000
Total Bar Revenue	\$ 16,916,040	\$ 18,356,100	\$ 19,369,681	\$ 14,921,653	\$ 17,169,616	\$ 18,066,269	\$ 16,186,324
Total Bar Expenses	\$ 18,696,036	\$ 18,656,690	\$ 18,997,912	\$ 9,912,135	\$ 18,639,902	\$ 17,320,842	\$ 16,376,606
SBG Net Gain (Loss)	\$ (1,673,996)	\$ (295,480)	\$ (2,371,739)	\$ (5,009,483)	\$ (1,470,314)	\$ 747,417	\$ (1,877,182)
Total Bar Center Operations Revenue	\$ 3,943,792	\$ 4,042,903	\$ 3,241,922	\$ 1,905,836	\$ 3,185,888	\$ 3,231,138	\$ 2,929,300
Total Bar Center Operations Expenses	\$ 2,636,026	\$ 2,600,171	\$ 2,689,261	\$ 1,600,171	\$ 2,636,385	\$ 2,680,548	\$ 2,309,152
Total Bar Center Operations Net Gain (Loss)	\$ 1,307,766	\$ 1,442,831	\$ 682,261	\$ 100,978	\$ 549,503	\$ 650,992	\$ 220,148
Combined Revenue	\$ 20,859,832	\$ 22,393,003	\$ 21,611,173	\$ 15,927,404	\$ 20,355,406	\$ 21,299,397	\$ 18,717,624
Combined Expenses	\$ 21,226,062	\$ 19,587,173	\$ 21,611,173	\$ 10,912,308	\$ 21,276,287	\$ 20,001,388	\$ 18,684,658
Total Combined Net Income (Loss)	\$ (366,230)	\$ 1,337,261	\$ 3,924,000	\$ 5,015,188	\$ (920,881)	\$ 1,288,009	\$ 32,966

Legend
█ Bar Operations
█ Bar Center
█ Combined Bar Operations and Bar Center
 Non-Cash depreciation expense and gain/loss on disposal of fixed assets are excluded from this schedule.

DRAFT #3
4/12/2021

**State Bar of Georgia
2021-2022 Proposed Total Bar Center Operations Budget
For the Fiscal Year 2021-2022**

Category	Fiscal Year Actual 2017-2018	Fiscal Year Actual 2018-2019	Fiscal Year Actual 2019-2020	Fiscal Year to Date February 2021 2020-2021	Budget 2019-2020	Budget 2020-2021	Budget 2021-2022
Bar Center Income and Cash Receipts							
Bar Center Assessments	289,900	206,173	1,150	100	0	1,000	0
Conference Center Copier	1,067	738	506	0	1,000	850	500
Bar Center Contributions	1,310,643	23,330	0	0	0	0	0
CLE Contributions to Bar Center	1,339,650	1,339,650	1,322,787	500,000	1,315,000	1,325,000	1,275,000
Transfer from Operations	616,188	628,512	0	0	0	0	0
Interest Income	21,197	51,941	92,296	47,390	42,000	64	94,000
Gain/Loss Investment Interest Allocation	0	0	0	(9,460)	0	0	0
Bar Center Income and Cash Receipts	\$ 2,239,015	\$ 2,250,134	\$ 1,513,686	\$ 638,030	\$ 1,359,000	\$ 1,390,850	\$ 1,369,500
Bar Center Expenses and Cash Disbursements							
Boardroom Renovation	0	0	18,918	19,471	0	12,000	27,000
Government Service Fee	0	0	13,312	7,865	0	12,000	16,000
Parking Deck Construction	13,350	0	2,510	0	20,000	0	0
Subbasement Build out	1,900	0	0	0	0	0	0
Conference Center Contingency	10,048	5,780	37	36,792	10,000	54,400	18,000
Conference Center Renovations	0	93,304	29,299	0	26,475	0	3,000
Museum and 1st Floor Exhibit	0	0	0	0	2,500	0	0
Audio Video, Furniture and Equipment	107,664	71,666	0	16,317	2,000	16,000	0
Renovation/Improvements	267,486	84,504	350,660	70,823	100,000	0	0
Travel	59,486	0	0	0	0	0	0
2nd Floor Build out	37,190	0	0	0	0	0	0
President's Boardroom	0	2,848	0	0	5,000	5,000	0
Bar Center Expenses and Cash Disbursements	495,124	258,102	413,336	145,085	165,975	99,400	64,000
Bar Center Combined Net Cash Flow	\$ 1,740,891	\$ 1,992,032	\$ 1,100,350	\$ 392,942	\$ 1,192,025	\$ 1,291,450	\$ 1,305,500
Conference Center Income and Expenses							
Room Rentals and various Charges	20,297	16,113	12,284	0	19,400	15,800	11,600
Conf Center Operating Expenses	414,262	439,191	426,618	254,648	445,866	448,526	435,223
Conference Center Combined Net Cash Flow	\$ (393,965)	\$ (413,078)	\$ (416,334)	\$ (254,648)	\$ (426,466)	\$ (432,726)	\$ (423,723)
Rental Income and Expenses							
Rental Income	1,331,368	1,365,050	1,422,142	959,279	1,447,488	1,447,488	959,800
Building Operating Expenses	1,429,681	1,493,785	1,477,412	1,019,331	1,694,355	1,805,438	1,579,359
Rental Combined Net Cash Flow	\$ (98,323)	\$ (128,735)	\$ (65,270)	\$ (64,052)	\$ (246,867)	\$ (357,942)	\$ (619,559)
Parking Income and Expenses							
Parking Income	353,123	411,606	293,411	8,627	381,000	377,000	188,500
Parking Deck Operating Expenses	293,959	318,992	269,894	8,205	327,190	327,190	330,570
Parking Combined Net Cash Flow	\$ 59,164	\$ 92,613	\$ 23,517	\$ (7,978)	\$ 33,810	\$ 49,810	\$ (42,070)
Total Bar Center Operations Net Gain (Loss)	\$ 1,307,764	\$ 1,542,833	\$ 652,263	\$ 5,665	\$ 549,603	\$ 550,592	\$ 220,148

Note: Non-Cash depreciation expense and gain/loss on disposal of fixed assets are excluded from this schedule.

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018	2018-2019	2019-2020	Year To Date	2019-2020	2020-2021	2021-2022
	Actual	Actual	Actual	February 28, 2021	Annual Budget	Annual Budget	Annual Budget
Revenues							
Dues - Active	\$ 9,717,063	\$ 9,896,539	\$ 10,097,880	\$ 10,201,226	\$ 10,007,600	\$ 10,210,800	\$ 10,363,200
Dues - Inactive	1,128,875	1,144,650	1,127,351	1,099,660	1,136,650	1,098,550	1,089,660
Dues - Provisional	0	0	2,159	28,321	0	31,750	25,400
Dues - Misc. Types	2,800	1,400	3,074	2,570	2,924	2,924	2,724
Dues - Late Fees	255,829	203,600	254,930	49,795	189,500	226,300	72,200
Total Dues & Licenses	11,104,567	11,246,189	11,485,394	11,381,572	11,336,674	11,570,324	11,553,184
CLE Contributions to SBG	0	0	0	0	0	300,000	0
Program Registration Income	5,216,025	6,380,881	5,852,321	2,124,384	5,300,000	5,530,000	3,782,858
Section Expense Reimbursement	196,015	191,196	190,644	187,835	190,644	187,835	188,676
CSF Expense Reimbursement	73,000	73,000	73,000	48,667	73,000	73,000	73,000
Advertising and Sales	100,300	36,716	49,895	29,995	45,200	45,200	59,400
Membership Income	78,303	79,241	73,711	44,086	69,500	71,000	68,250
Pro Hac Vice	348,700	390,701	310,501	310,250	290,000	290,000	313,000
Pro Hac Vice Contra	(280,400)	(311,676)	(255,200)	(249,000)	(240,000)	(240,000)	(241,200)
Credit Card Convenience Fees	0	0	0	0	0	0	90,000
Interest Income	76,325	228,618	554,231	143,536	100,000	235,000	293,156
Miscellaneous Revenues	3,203	35,234	35,154	303	4,500	5,900	8,000
Total Revenues	16,916,038	18,350,100	18,369,651	14,021,628	17,169,518	18,068,259	16,188,324
Expenses							
Administration	2,277,278	2,379,493	2,455,429	1,596,377	2,497,233	2,502,712	2,511,998
Management Info Systems	544,635	647,022	0	0	0	0	0
General Counsel	3,487,779	3,584,216	4,230,188	2,646,010	4,517,450	4,338,494	4,277,317
Client Assistance Pgm.	549,639	575,632			0	0	0
Communications	805,697	805,924	912,876	455,187	1,013,429	885,005	854,097
Lawyer's Assistance Program	56,832	64,582	63,712	63,750	62,500	85,000	85,000
Fee Arbitration	504,993	533,450	526,262	363,831	593,394	559,460	579,905
Law Practice Management	429,307	429,777	428,555	295,286	492,168	438,714	472,299
Sections	179,044	185,181	186,026	122,640	190,644	187,834	188,676
Savannah Office	238,589	250,564	251,415	170,961	270,047	258,120	268,805
Tifton Office	173,369	178,298	163,852	88,137	192,401	140,558	140,777
Young Lawyers	502,478	480,636	334,875	171,980	494,049	457,434	410,304
Unauthorized Practice of Law	790,019	812,092	845,741	548,820	855,067	842,308	867,115
Law Related Education	347,025	363,659	369,794	189,652	387,705	385,461	372,417
ICLE	5,483,408	5,279,482	3,814,799	1,638,146	5,173,618	4,511,502	3,802,496
High School Mock Trial	127,571	150,683	127,919	68,820	154,192	159,730	164,409
MLAP	3,762	117,500	120,663	0	129,974	0	0
Pro Bono	212,216	212,216	212,216	141,477	212,216	212,216	212,216
Fastcase	216,417	228,522	240,436	253,598	244,000	244,000	265,000
Officers' Expenses	56,634	116,633	34,461	669	129,442	112,677	101,809
BASICS Program Contribution	140,000	150,000	150,000	37,500	150,000	37,500	0
Resource Center Contribution	110,332	110,332	110,332	110,332	110,332	110,332	55,166
Other Expenses	1,413,168	1,054,863	527,919	258,027	770,041	851,785	745,700
Unallocated Services	(60,156)	(155,077)	(109,558)	(46,488)	0	(0)	0
Total Expenses	18,590,036	18,555,680	15,997,912	9,174,712	18,639,902	17,320,842	16,375,506
Net Income	\$(1,673,998)	\$(205,580)	\$ 2,371,739	\$ 4,846,916	\$(1,470,384)	\$ 747,417	\$(187,182)

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018	2018-2019	2019-2020	Year To Date	2019-2020	2020-2021	2021-2022
	Actual	Actual	Actual	February 28, 2021	Annual Budget	Annual Budget	Annual Budget
Other Expenses							
BOG and Member Meetings	335,341	487,736	99,990	17,835	339,006	380,000	395,000
Supreme Court Meetings	64,417	42,645	33,553	0	84,000	45,000	40,000
Executive Committee Meetings	5,992	39,019	43,333	3,944	40,800	60,000	50,000
Court of Appeals Meetings	5,848	3,637	0	0	7,500	0	0
Southern Conference	0	373	50,359	0	50,000	0	0
State Disciplinary Board Lawyers	30,000	30,000	30,000	9,925	30,000	20,000	20,000
Elections	45,514	34,684	34,082	15,813	39,685	39,685	34,000
Dues Notice	36,136	36,946	34,724	1,257	44,000	40,000	34,000
Letters of Good Standing	3,093	3,250	2,526	1,120	3,200	2,900	2,500
Bar Membership Cards	8,895	9,276	9,355	4,561	11,100	11,100	10,500
50 Year Certificates	1,503	1,678	2,075	494	2,750	2,000	2,700
Membership Database Project	12,864	0	0	0	15,000	13,000	0
Website Redesign	201,334	0	0	0	0	0	0
Recruitment Costs	0	0	0	74,934	0	100,000	0
State Bar Committees	46,779	25,873	27,113	1,110	28,000	29,000	20,000
Strategic Plan	20,000	40,000	40,000	0	40,000	0	0
Georgia Diversity Program	0	20,000	20,000	20,000	20,000	20,000	10,000
Conference Sponsorship	34,500	(185)	4,000	0	0	0	0
Incubator Contribution	85,000	0	0	0	0	0	0
ABA Delegate Breakfast	1,187	2,418	2,591	0	2,500	2,500	2,500
Cubicles Project	361,511	0	0	0	0	0	0
1st Floor Office Furniture Project	0	216,567	0	15,137	0	14,100	0
1st Floor Painting	0	49,000	0	0	0	0	3,000
Commitment to Equality Awards	0	2,500	2,500	2,500	2,500	2,500	2,500
Organization of Bar Investigators	0	6,487	0	0	0	0	0
Military/Veterans Pro Bono Asst	103,254	0	0	0	0	0	0
Bond Premium Amortization	0	2,959	45,882	54,701	0	34,000	75,000
Investment Service Fees	0	0	35,836	34,696	0	36,000	44,000
Access to Justice/Pro Bono	0	0	10,000	0	10,000	0	0
Chief Justice Commission on Prof.	10,000	0	0	0	0	0	0
Other Expenses	1,413,168	1,054,863	527,919	258,027	770,041	851,785	745,700

Administration

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	1,222,956	\$ 1,219,504	\$ 1,253,756	\$ 858,001	\$	1,283,046	\$ 1,208,183
Salaries-Hourly PT	0	441	0	0	0	0	0
Overtime	6,476	7,404	5,758	0	7,100	7,200	7,200
Taxes and Benefits	316,278	342,793	349,917	222,756	362,366	353,815	363,857
Pension	91,170	75,958	94,304	65,195	98,943	97,793	89,813
Total Personnel Services	1,636,880	1,646,100	1,703,735	1,145,952	1,733,454	1,741,854	1,669,053
Operating Expenses							
Shared Office Allocation	309,905	370,460	391,579	258,672	391,579	388,008	441,480
Postage and Freight	10,215	9,052	9,105	2,649	11,500	11,000	4,800
Printing	22	375	54	59	150	150	100
Supplies	4,249	2,720	2,848	1,377	3,500	2,400	2,800
Telephone	3,600	3,600	3,600	2,325	3,600	3,600	3,600
Subscriptions and Books	732	374	725	624	850	650	1,630
Dues and Memberships	2,682	2,519	1,070	1,445	3,800	2,600	1,560
Licenses and Certifications	0	0	30	90	0	0	0
Seminars and Training	2,030	78	189	598	3,000	2,000	3,900
Miscellaneous	8,631	1,144	1,701	1,930	2,500	2,000	2,500
Attorney and Staff Travel	27,810	39,241	23,020	184	46,000	40,650	43,850
Executive Director Travel	6,452	10,990	12,917	13	14,000	12,600	9,500
Lunches	354	176	208	0	600	600	500
Bank Fees	1,561	1,833	2,449	6,299	2,000	1,900	10,800
Credit Card Discount and Fees	189,985	207,574	220,620	105,130	197,000	197,000	228,000
Computer Hardware	11,633	3,895	1,713	17,037	1,800	9,800	5,650
Computer Software	0	349	523	523	500	900	975
Membership Software License	57,412	75,242	75,242	50,828	73,300	75,300	75,300
Contract Programming	2,906	2,281	2,687	0	6,100	7,500	6,000
Total Operating Expenses	640,179	731,893	750,106	449,783	761,779	758,858	842,945
Furniture/Equipment	219	1,499	1,587	643	2,000	2,000	0
Total Expenses	\$ 2,277,278	\$ 2,379,493	\$ 2,455,429	\$ 1,596,378	\$ 2,497,233	\$ 2,502,712	\$ 2,511,998

OGC & CAP Income Statement Combined

State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	2,552,548	\$ 2,552,734	\$ 2,605,018	\$ 1,678,302	\$ 2,668,037	\$ 2,552,468	\$ 2,572,436
Salaries-Hourly PT	15,406	27,534	27,623	20,549	45,933	45,933	45,933
Overtime	2,985	4,336	1,010	0	4,300	4,300	4,300
Taxes and Benefits	585,794	646,414	735,833	440,049	690,071	707,067	729,528
Pension	175,090	171,828	180,284	124,619	201,346	186,929	186,783
Total Personnel Services	3,331,823	3,402,846	3,549,768	2,263,519	3,609,687	3,496,697	3,538,980
Operating Expenses							
Shared Office Allocation	473,013	488,333	463,501	300,059	463,501	450,089	492,420
Postage and Freight	20,339	22,588	16,835	8,617	23,250	24,000	15,000
Printing	446	863	122	0	1,750	1,000	500
Supplies	7,708	7,816	6,716	1,880	7,500	9,800	8,000
Telephone	2,103	2,330	2,530	2,252	2,100	2,100	3,600
Subscriptions and Books	20,426	12,632	14,790	12,053	21,000	22,260	16,000
Dues and Memberships	8,774	9,353	8,040	6,328	10,000	10,000	11,000
Seminars and Training	6,677	6,945	6,582	3,048	9,400	9,400	7,000
Miscellaneous	2,058	1,888	2,365	149	3,500	3,000	2,000
Recruitment Costs	0	0	2,000	0	0	0	0
Attorney and Staff Travel	57,559	51,975	28,046	0	73,312	65,849	30,000
Investigator Travel	3,438	1,300	4,745	145	6,500	5,000	2,500
Lunches	1,680	899	2,298	0	2,500	2,625	1,300
Computer Hardware	14,666	10,559	16,330	24,247	13,700	12,300	23,950
Computer Software	0	1,875	3,504	72	500	2,000	1,000
Contract Labor	0	10,384	6,938	0	2,000	4,000	4,000
Contract Programming	7,344	7,429	4,000	0	8,500	8,500	8,000
Receiverships	2,684	3,189	5,740	2,252	10,000	10,000	6,000
State Disciplinary Board Panel	33,101	67,295	27,897	319	95,000	75,000	40,000
Contract Special Master	15,505	28,413	14,390	9,047	110,000	90,000	40,000
Lexis Online	14,352	16,262	20,413	11,160	18,750	19,875	21,067
Total Operating Expenses	691,873	752,328	657,782	381,628	882,763	826,798	733,337
Furniture/Equipment	13,722	4,675	22,638	863	25,000	15,000	5,000
Total Expenses	\$ 4,037,419	\$ 4,159,849	\$ 4,230,188	\$ 2,646,010	\$ 4,517,450	\$ 4,338,495	\$ 4,277,317

**State Bar of Georgia
2021 - 2022 Proposed State Bar of Georgia Consolidated Budget - with Bar Center
(Active dues \$254 and inactive dues \$127 in 2021-2022)
For the Fiscal Year 2021-2022**

Category	Fiscal Year Actual 2017-2018	Fiscal Year Actual 2018-2019	Fiscal Year Actual 2019-2020	Fiscal Year to Date 2020-2021	Budget 2019-2020	Budget 2020-2021	Budget 2021-2022
Membership Numbers							
Active Members	38,802	39,193	39,892	40,437	39,400	40,200	40,600
Associate Members	5,963	6,151	6,322	6,521	6,950	6,950	7,000
Provisional Members	0	0	0	0	0	250	200
Associates/Affiliates	15	13	17	14	14	12	12
Foreign Legal Consultants	297	276	367	6	6	6	6
Emeritus	2,274	2,745	3,127	3,349	2,750	400	300
Total Membership Numbers	50,320	51,009	62,132	62,459	60,895	62,470	63,258
Revenue							
Dues Active	\$ 9,717,063	\$ 9,896,539	\$ 10,087,880	\$ 10,201,226	\$ 10,007,600	\$ 10,210,800	\$ 10,363,200
Dues Inactive	1,128,895	1,144,659	1,161,659	1,176,659	1,136,659	1,098,750	1,098,750
Professional Members	0	0	2,150	2,320	0	31	290
Dues Associates	1,300	1,400	1,550	1,300	1,400	1,400	1,400
Dues Foreign Legal Consultant	1,500	1,524	1,524	1,270	1,524	1,524	1,524
Dues NSF Check Fee	247,440	197,731	248,740	45,000	186,250	220,300	67,000
Dues Prior Years	8,424	5,550	3,940	3,940	2,500	6,000	200
Total License & Dues	\$ 11,104,967	\$ 11,246,189	\$ 11,485,994	\$ 11,381,672	\$ 11,336,674	\$ 11,670,324	\$ 11,663,184
CLE Contributions to SBG	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 300,000	\$ 0
Program Registration Income	\$ 5,216,025	\$ 6,360,881	\$ 5,852,321	\$ 2,124,384	\$ 5,300,000	\$ 5,530,000	\$ 3,782,656
Section Expense Reimbursement	\$ 196,015	\$ 191,195	\$ 190,644	\$ 187,835	\$ 190,644	\$ 187,835	\$ 186,676
CSF Expense Reimbursement	\$ 73,000	\$ 73,000	\$ 73,000	\$ 48,667	\$ 73,000	\$ 73,000	\$ 73,000
Advertising and Sales	\$ 100,301	\$ 36,716	\$ 49,895	\$ 29,995	\$ 45,200	\$ 45,200	\$ 59,400
Membership Income	\$ 146,603	\$ 158,266	\$ 129,012	\$ 105,336	\$ 119,500	\$ 121,000	\$ 140,050
Credit Card Convenience Fees	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 90,000
Interest Income	\$ 76,326	\$ 225,618	\$ 554,231	\$ 143,636	\$ 100,000	\$ 235,000	\$ 293,166
Miscellaneous Revenues	\$ 3,204	\$ 35,234	\$ 303	\$ 4,500	\$ 4,500	\$ 5,900	\$ 8,000
Total Bar Revenue	\$ 16,916,040	\$ 18,350,100	\$ 19,369,681	\$ 14,921,653	\$ 17,169,616	\$ 18,066,269	\$ 16,186,324
Total Bar Expenses	\$ 18,690,036	\$ 18,556,690	\$ 15,997,912	\$ 9,912,135	\$ 18,639,902	\$ 17,320,842	\$ 16,376,606
SBG Net Gain (Loss)	\$ (1,673,996)	\$ (205,480)	\$ 2,371,739	\$ 5,009,483	\$ (1,470,334)	\$ 747,417	\$ (187,182)
Total Bar Center Operations Revenue	\$ 3,943,792	\$ 4,042,903	\$ 3,241,922	\$ 1,905,836	\$ 3,185,888	\$ 3,231,138	\$ 2,929,300
Total Bar Center Operations Expenses	\$ 2,636,026	\$ 2,600,171	\$ 2,589,261	\$ 1,800,171	\$ 2,636,385	\$ 2,680,548	\$ 2,309,152
Total Bar Center Operations Net Gain (Loss)	\$ 1,307,766	\$ 1,442,831	\$ 682,261	\$ 100,978	\$ 549,503	\$ 560,992	\$ 220,148
Combined Revenue	\$ 20,859,832	\$ 22,393,003	\$ 21,851,723	\$ 15,927,404	\$ 20,355,406	\$ 21,299,397	\$ 18,717,624
Combined Expenses	\$ 21,226,062	\$ 19,587,173	\$ 21,276,287	\$ 10,912,308	\$ 20,001,388	\$ 20,001,388	\$ 18,684,658
Total Combined Net Income (Loss)	\$ (366,230)	\$ 1,337,261	\$ 3,024,000	\$ 5,015,188	\$ (920,881)	\$ 1,288,009	\$ 32,966

Legend
█ Bar Operations
█ Bar Center
█ Combined Bar Operations and Bar Center

Note: Non-Cash depreciation expense and gain/loss on disposal of fixed assets are excluded from this schedule.

**State Bar of Georgia
2021-2022 Proposed Total Bar Center Operations Budget
For the Fiscal Year 2021-2022**

Category	Fiscal Year Actual 2017-2018	Fiscal Year Actual 2018-2019	Fiscal Year Actual 2019-2020	Fiscal Year to Date February 2021 2020-2021	Budget 2019-2020	Budget 2020-2021	Budget 2021-2022
Bar Center Income and Cash Receipts							
Bar Center Assessments	289,900	206,173	1,150	100	0	1,000	0
Conference Center Copier	1,067	738	506	0	1,000	850	500
Bar Center Contributions	1,310,643	23,350	0	0	0	0	0
CLE Contributions to Bar Center	616,188	1,339,650	1,322,787	500,000	1,315,000	1,325,000	1,275,000
Transfer from Operations	21,197	628,512	0	0	0	0	0
Interest Income	51,941	51,941	92,296	47,390	42,000	64	94,000
Gain/Loss Investment Interest Allocation	0	0	0	(9,460)	0	0	0
Bar Center Income and Cash Receipts	\$ 2,239,015	\$ 2,250,134	\$ 1,513,686	\$ 638,030	\$ 1,359,000	\$ 1,390,850	\$ 1,369,500
Bar Center Expenses and Cash Disbursements							
Boardroom Allocation	0	0	18,918	19,471	0	12,000	27,000
Government Service Fee	0	0	13,312	7,865	0	12,000	16,000
Parking Deck Construction	13,350	0	2,510	0	20,000	0	0
Subbasement Build out	1,900	0	0	0	0	0	0
Conference Center Contingency	10,048	5,780	37	36,792	10,000	54,400	18,000
Conference Center Renovations	0	93,304	29,299	0	26,475	0	3,000
Museum and 1st Floor Exhibit	0	0	0	0	2,500	0	0
Audio Video, Furniture and Equipment	107,664	71,666	0	16,317	2,000	16,000	0
Renovation/Improvements	267,486	84,504	350,660	70,823	100,000	0	0
Travel	59,486	0	0	0	0	0	0
2nd Floor Build out	37,190	0	0	0	0	0	0
President's Boardroom	0	2,848	0	0	5,000	5,000	0
Bar Center Expenses and Cash Disbursements	495,124	258,102	413,336	145,085	165,975	99,400	64,000
Bar Center Combined Net Cash Flow	\$ 1,740,891	\$ 1,992,032	\$ 1,100,350	\$ 392,942	\$ 1,192,025	\$ 1,291,450	\$ 1,305,500
Conference Center Income and Expenses							
Room Rentals and various Charges	20,297	16,113	12,284	0	19,400	15,800	11,600
Conf. Center Operating Expenses	414,262	439,191	423,618	254,648	445,866	448,526	435,223
Conference Center Combined Net Cash Flow	\$ (393,965)	\$ (413,078)	\$ (416,334)	\$ (254,648)	\$ (426,466)	\$ (432,726)	\$ (423,723)
Rental Income and Expenses							
Rental Income	1,331,368	1,365,050	1,422,142	959,279	1,447,488	1,447,488	959,800
Building Operating Expenses	1,429,681	1,493,785	1,477,412	1,019,331	1,694,355	1,805,448	1,579,359
Rental Combined Net Cash Flow	\$ (98,323)	\$ (128,735)	\$ (65,270)	\$ (64,052)	\$ (246,867)	\$ (357,960)	\$ (619,559)
Parking Income and Expenses							
Parking Income	353,123	411,606	293,411	8,627	381,000	377,000	188,500
Parking Deck Operating Expenses	293,959	318,992	269,894	6,205	327,190	327,190	230,570
Parking Combined Net Cash Flow	\$ 59,164	\$ 92,613	\$ 23,517	\$ (7,978)	\$ 33,810	\$ 49,810	\$ (42,070)
Total Bar Center Operations Net Gain (Loss)	\$ 1,307,764	\$ 1,542,833	\$ 652,263	\$ 5,665	\$ 549,503	\$ 550,592	\$ 220,148

Note: Non-Cash depreciation expense and gain/loss on disposal of fixed assets are excluded from this schedule.

Administration

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	1,222,956	\$ 1,219,504	\$ 1,253,756	\$ 858,001	\$	1,283,046	\$ 1,208,183
Salaries-Hourly PT	0	441	0	0	0	0	0
Overtime	6,476	7,404	5,758	0	7,100	7,200	7,200
Taxes and Benefits	316,278	342,793	349,917	222,756	362,366	353,815	363,857
Pension	91,170	75,958	94,304	65,195	98,943	97,793	89,813
Total Personnel Services	1,636,880	1,646,100	1,703,735	1,145,952	1,733,454	1,741,854	1,669,053
Operating Expenses							
Shared Office Allocation	309,905	370,460	391,579	258,672	391,579	388,008	441,480
Postage and Freight	10,215	9,052	9,105	2,649	11,500	11,000	4,800
Printing	22	375	54	59	150	150	100
Supplies	4,249	2,720	2,848	1,377	3,500	2,400	2,800
Telephone	3,600	3,600	3,600	2,325	3,600	3,600	3,600
Subscriptions and Books	732	374	725	624	850	650	1,630
Dues and Memberships	2,682	2,519	1,070	1,445	3,800	2,600	1,560
Licenses and Certifications	0	0	30	90	0	0	0
Seminars and Training	2,030	78	189	598	3,000	2,000	3,900
Miscellaneous	8,631	1,144	1,701	1,930	2,500	2,000	2,500
Attorney and Staff Travel	27,810	39,241	23,020	184	46,000	40,650	43,850
Executive Director Travel	6,452	10,990	12,917	13	14,000	12,600	9,500
Lunches	354	176	208	0	600	600	500
Bank Fees	1,561	1,833	2,449	6,299	2,000	1,900	10,800
Credit Card Discount and Fees	189,985	207,574	220,620	105,130	197,000	197,000	228,000
Computer Hardware	11,633	3,895	1,713	17,037	1,800	9,800	5,650
Computer Software	0	349	523	523	500	900	975
Membership Software License	57,412	75,242	75,242	50,828	73,300	75,300	75,300
Contract Programming	2,906	2,281	2,687	0	6,100	7,500	6,000
Total Operating Expenses	640,179	731,893	750,106	449,783	761,779	758,858	842,945
Furniture/Equipment	219	1,499	1,587	643	2,000	2,000	0
Total Expenses	\$ 2,277,278	\$ 2,379,493	\$ 2,455,429	\$ 1,596,378	\$ 2,497,233	\$ 2,502,712	\$ 2,511,998

OGC & CAP Income Statement Combined

State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	2,552,548	\$ 2,552,734	\$ 2,605,018	\$ 1,678,302	\$ 2,668,037	\$ 2,552,468	\$ 2,572,436
Salaries-Hourly PT	15,406	27,534	27,623	20,549	45,933	45,933	45,933
Overtime	2,985	4,336	1,010	0	4,300	4,300	4,300
Taxes and Benefits	585,794	646,414	735,833	440,049	690,071	707,067	729,528
Pension	175,090	171,828	180,284	124,619	201,346	186,929	186,783
Total Personnel Services	3,331,823	3,402,846	3,549,768	2,263,519	3,609,687	3,496,697	3,538,980
Operating Expenses							
Shared Office Allocation	473,013	488,333	463,501	300,059	463,501	450,089	492,420
Postage and Freight	20,339	22,588	16,835	8,617	23,250	24,000	15,000
Printing	446	863	122	0	1,750	1,000	500
Supplies	7,708	7,816	6,716	1,880	7,500	9,800	8,000
Telephone	2,103	2,330	2,530	2,252	2,100	2,100	3,600
Subscriptions and Books	20,426	12,632	14,790	12,053	21,000	22,260	16,000
Dues and Memberships	8,774	9,353	8,040	6,328	10,000	10,000	11,000
Seminars and Training	6,677	6,945	6,582	3,048	9,400	9,400	7,000
Miscellaneous	2,058	1,888	2,365	149	3,500	3,000	2,000
Recruitment Costs	0	0	2,000	0	0	0	0
Attorney and Staff Travel	57,559	51,975	28,046	0	73,312	65,849	30,000
Investigator Travel	3,438	1,300	4,745	145	6,500	5,000	2,500
Lunches	1,680	899	2,298	0	2,500	2,625	1,300
Computer Hardware	14,666	10,559	16,330	24,247	13,700	12,300	23,950
Computer Software	0	1,875	3,504	72	500	2,000	1,000
Contract Labor	0	10,384	6,938	0	2,000	4,000	4,000
Contract Programming	7,344	7,429	4,000	0	8,500	8,500	8,000
Receiverships	2,684	3,189	5,740	2,252	10,000	10,000	6,000
State Disciplinary Board Panel	33,101	67,295	27,897	319	95,000	75,000	40,000
Contract Special Master	15,505	28,413	14,390	9,047	110,000	90,000	40,000
Lexis Online	14,352	16,262	20,413	11,160	18,750	19,875	21,067
Total Operating Expenses	691,873	752,328	657,782	381,628	882,763	826,798	733,337
Furniture/Equipment	13,722	4,675	22,638	863	25,000	15,000	5,000
Total Expenses	\$ 4,037,419	\$ 4,159,849	\$ 4,230,188	\$ 2,646,010	\$ 4,517,450	\$ 4,338,495	\$ 4,277,317

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

Communications

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	251,238	279,240	320,305	158,205	328,569	277,262	275,413
Overtime	1,545	887	51	0	1,600	1,600	1,600
Taxes and Benefits	93,342	104,224	126,056	49,678	143,449	109,061	98,271
Pension	14,383	11,853	18,295	10,580	19,172	15,871	10,728
Total Personnel Services	360,508	396,204	464,667	218,463	492,790	403,794	386,012
Expenses							
Shared Office Allocation	65,243	67,356	79,914	41,387	79,914	62,081	67,920
Postage and Freight	706	2,087	1,017	762	2,100	1,500	1,100
Supplies	344	951	519	532	1,000	1,000	1,000
Telephone	900	900	900	450	900	900	900
Subscriptions and Books	4,203	1,934	2,509	1,738	2,875	3,125	6,760
Dues and Memberships	405	320	405	405	405	405	405
Seminars and Training	1,325	1,322	2,465	390	5,200	5,200	3,500
Miscellaneous	839	1,571	1,915	77	1,650	1,650	1,300
Attorney and Staff Travel	14,033	16,714	7,950	0	17,900	17,900	6,900
Lunches	2,575	2,791	0	0	100	100	100
Computer Hardware	3,827	246	2,028	5,427	1,000	4,150	1,700
Computer Software	2,250	1,861	1,816	1,816	2,000	1,600	1,600
Media Consultants	0	0	39,263	22,125	55,000	50,000	65,000
Website Server/Redesign	9,996	28,884	32,927	20,195	29,850	29,600	29,850
Law Day	0	0	0	0	0	0	0
Local and Voluntary Bars	0	494	0	0	0	0	0
Membership Certificates	1,374	2,420	1,221	737	2,000	2,000	2,000
Subtotal	108,020	129,851	174,849	96,041	201,894	181,211	190,035
Furniture/Equipment	0	269	500	0	1,000	0	0

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

Communications

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Subtotal	468,528	526,324	640,016	314,504	695,684	585,005	576,047
Publications							
Bar Journal	281,232	273,853	267,415	134,009	303,690	291,000	269,550
Supplemental Directory	5,317	5,746	5,446	6,674	6,555	6,000	6,000
Special Publications and Printing	409	0	0	0	7,500	3,000	2,500
Directory	50,212	0	0	0	0	0	0
Total Publications	337,170	279,599	272,861	140,683	317,745	300,000	278,050
Total Communications	805,698	805,923	912,876	455,187	1,013,429	885,005	854,097

Fee Arbitration

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	252,418	264,384	261,277	179,569	272,557	272,557	270,053
Overtime	1,493	641	390	0	1,500	1,500	1,500
Taxes and Benefits	90,093	97,396	96,887	72,796	104,996	105,314	116,700
Pension	14,947	18,071	18,151	12,571	18,960	18,857	18,597
Total Personnel Services	358,951	380,492	376,705	264,936	398,013	398,228	406,850
Operating Expenses							
Shared Office Allocation	65,243	67,356	63,931	41,387	63,931	62,081	67,920
Postage and Freight	7,290	7,799	4,863	4,596	9,800	8,200	8,200
Printing	2,516	2,617	0	0	2,700	2,800	2,800
Supplies	2,255	1,537	545	394	2,300	2,200	1,900
Subscriptions and Books	349	326	327	400	550	500	1,010
Dues and Memberships	326	305	0	305	400	400	400
Seminars and Training	0	68	0	0	400	400	400
Miscellaneous	1,141	1,233	72	284	1,200	1,200	1,200
Attorney and Staff Travel	1,117	2	22	0	2,500	2,500	2,500
Luncheons	2,815	2,802	1,369	0	3,400	3,400	3,000
Computer Hardware	640	0	4,492	3,529	5,000	0	5,925
Contract Labor	61,330	68,000	72,248	48,000	100,300	75,000	75,000
Contract Programming	731	100	843	0	2,000	2,000	2,000
Total Operating Expenses	145,753	152,145	148,712	98,895	194,481	160,681	172,255
Furniture/Equipment	288	814	844	0	900	550	800
Total Expenses	\$ 504,993	\$ 533,450	\$ 526,262	\$ 363,831	\$ 593,394	\$ 559,459	\$ 579,905

Law Practice Management

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Revenues							
Consultation	\$ 3,095	\$ 1,631	\$ 913	\$ 338	\$ 2,500	\$ 1,800	\$ 750
Publications	0	534	99	0	250	150	100
In-House Training Income	0	0	0	0	500	250	0
Vendor Directory	10,900	13,650	18,900	9,250	8,500	8,500	8,000
Miscellaneous Income	575	593	1,497	577	250	3,500	250
Total Revenues	14,570	16,348	21,409	10,165	12,000	14,200	9,100
Personnel Services							
Salaries	256,557	245,895	260,074	173,064	260,095	260,095	260,095
Overtime	2,176	2,486	1,103	0	2,300	2,300	2,300
Taxes and Benefits	81,237	92,452	102,571	65,764	115,048	104,403	105,124
Pension	17,024	14,137	17,096	11,569	17,456	17,353	17,243
Total Personnel Services	356,994	354,970	380,844	250,397	394,899	384,151	384,762
Operating Expenses							
Shared Office Allocation	65,243	67,356	63,931	41,387	63,931	62,081	67,920
Postage and Freight	1,427	1,427	1,184	0	1,800	1,600	750
Printing	440	483	1,832	0	1,500	600	200
Supplies	132	573	1,160	0	750	750	450
Telephone	25	0	0	0	100	100	100
Subscriptions and Books	7,863	8,853	8,451	6,729	8,000	9,700	6,000
Dues and Memberships	1,290	725	125	485	1,850	1,500	1,000
Seminars and Training	100	149	338	1,176	1,500	500	1,300
Miscellaneous	300	(80)	(80)	0	750	350	350
Attorney and Staff Travel	15,655	8,137	3,303	0	10,000	10,000	7,850
Luncheons	127	0	0	0	200	200	150
Computer Hardware	1,194	1,588	10,216	1,442	11,000	1,000	5,175
Computer Software	770	3,344	4,363	3,834	5,388	5,382	5,392
Total Operating Expenses	94,566	92,703	94,823	55,053	106,769	93,763	96,637
Total Expenses	451,559	447,673	475,667	305,450	501,668	477,914	481,399
Furniture & Equipment	762	1,314	0	0	2,500	0	0
Solo and Small Firm	8,444	2,862	25,703	0	0	25,000	0

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Net Income	\$ (429,308)	\$ (429,777)	\$ (428,555)	(295,285)	(492,168)	(438,714)	(472,299)

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	108,438	\$ 103,115	\$ 102,164	\$ 72,067	\$ 108,308	\$ 108,308	\$ 108,308
Overtime	201	168	0	0	500	500	500
Taxes and Benefits	45,359	31,806	30,805	20,715	32,086	32,602	31,884
Pension	4,302	6,130	6,033	4,360	6,539	6,539	6,539
Total Personnel Services	158,300	141,219	139,002	97,142	147,433	147,949	147,231
Operating Expenses							
Shared Office Allocation	32,622	33,678	31,966	20,694	31,966	31,041	33,960
Supplies	1,018	993	0	0	2,000	1,400	1,000
Telephone	825	900	900	600	900	900	900
Subscriptions and Books	0	0	60	140	0	0	2,640
Dues and Memberships	0	0	135	0	0	150	150
Seminars and Training	0	874	295	0	500	300	300
Attorney and Staff Travel	6,081	9,240	5,768	0	8,430	7,055	7,000
Computer Hardware	1,031	904	0	1,414	1,000	1,000	1,700
Computer Software	0	477	363	363	600	365	365
Committee Brochures	6,825	7,435	6,263	0	7,500	7,500	7,500
President	21,268	38,689	14,683	35	32,721	27,813	25,032
President Elect	31,290	23,185	10,391	49	25,032	21,277	19,149
Immediate Past President	28,614	19,572	10,696	0	21,277	18,085	16,277
Immed. Past President Carryover	0	8,511	0	0	0	0	0
Treasurer	0	1,033	929	0	1,300	1,300	1,300
Secretary	0	1,032	499	0	1,300	1,300	1,300
Meetings	52,730	52,730	52,730	47,500	52,730	47,500	47,500
Newsletter	53,566	48,181	13,437	0	55,000	49,500	0
Total Operating Expenses	235,870	247,434	149,115	70,795	242,256	216,486	166,073
Committees Activities							
Committees Income	(9,023)	(3,910)	(9,063)	0	(10,000)	(10,000)	(6,000)
Committees Expense	117,331	95,893	55,821	4,044	114,360	103,000	103,000
Total Committees Activities	108,308	91,983	46,758	4,044	104,360	93,000	97,000
Total Expenses	\$ 502,478	\$ 480,635	\$ 334,875	\$ 171,981	\$ 494,049	\$ 457,435	\$ 410,304

**State Bar of Georgia
2021 - 2022 Proposed State Bar of Georgia Consolidated Budget - with Bar Center
(Active dues \$254 and inactive dues \$127 in 2021-2022)
For the Fiscal Year 2021-2022**

Category	Fiscal Year Actual 2017-2018	Fiscal Year Actual 2018-2019	Fiscal Year Actual 2019-2020	Fiscal Year to Date 2020-2021	Budget 2019-2020	Budget 2020-2021	Budget 2021-2022
Membership Numbers							
Active Members	38,802	39,193	39,892	40,437	39,400	40,200	40,600
Associate Members	5,963	6,151	6,322	6,392	6,950	6,950	7,000
Provisional Members	0	0	0	0	0	250	200
Associates/Affiliates	15	13	17	14	14	12	12
Foreign Legal Consultants	297	276	367	276	276	406	366
Emeritus	2,274	2,745	3,127	3,349	2,950	3,300	3,300
Total Membership Numbers	50,320	51,069	62,132	62,459	60,995	62,476	63,268
Revenue							
Dues Active	\$ 9,717,063	\$ 9,896,539	\$ 10,087,880	\$ 10,201,226	\$ 10,007,600	\$ 10,210,800	\$ 10,363,200
Dues Inactive	1,128,895	1,144,659	1,158,650	1,136,650	1,136,650	1,098,750	1,098,750
Professional Members	0	0	2,150	2,320	0	31	290
Dues Associates	1,300	1,400	1,550	1,300	1,400	1,400	1,400
Dues Foreign Legal Consultant	1,500	1,500	1,524	1,270	1,524	1,400	1,524
Dues NSF Check Fee	247,440	197,730	248,740	450,000	186,250	220,300	67,000
Dues Prior Years	8,424	5,550	3,940	3,940	2,500	6,000	200
Total License & Dues	\$ 11,104,967	\$ 11,246,189	\$ 11,485,994	\$ 11,381,672	\$ 11,336,674	\$ 11,670,324	\$ 11,663,184
CLE Contributions to SBG	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 300,000	\$ 0
Program Registration Income	\$ 5,216,025	\$ 6,360,881	\$ 5,852,321	\$ 2,124,384	\$ 5,300,000	\$ 5,530,000	\$ 3,782,656
Section Expense Reimbursement	\$ 196,015	\$ 191,195	\$ 190,644	\$ 187,835	\$ 190,644	\$ 187,835	\$ 186,676
CSF Expense Reimbursement	\$ 73,000	\$ 73,000	\$ 73,000	\$ 48,687	\$ 73,000	\$ 73,000	\$ 73,000
Advertising and Sales	\$ 100,301	\$ 36,716	\$ 49,895	\$ 29,995	\$ 45,200	\$ 45,200	\$ 59,400
Membership Income	\$ 146,603	\$ 158,266	\$ 129,012	\$ 105,336	\$ 119,500	\$ 121,000	\$ 140,050
Credit Card Convenience Fees	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Interest Income	\$ 76,326	\$ 225,618	\$ 554,231	\$ 143,636	\$ 100,000	\$ 235,000	\$ 293,166
Miscellaneous Revenues	\$ 3,204	\$ 35,234	\$ 303	\$ 4,500	\$ 4,500	\$ 5,900	\$ 8,000
Total Bar Revenue	\$ 16,916,040	\$ 18,356,100	\$ 19,369,681	\$ 14,921,653	\$ 17,169,616	\$ 18,066,269	\$ 16,186,324
Total Bar Expenses	\$ 18,696,036	\$ 18,565,690	\$ 15,997,912	\$ 9,912,135	\$ 18,639,902	\$ 17,320,842	\$ 16,376,606
SBG Net Gain (Loss)	\$ (1,673,996)	\$ (205,480)	\$ 2,371,769	\$ 5,009,483	\$ (1,470,314)	\$ 747,417	\$ (187,182)
Total Bar Center Operations Revenue	\$ 3,943,792	\$ 4,042,903	\$ 3,241,922	\$ 1,905,836	\$ 3,185,888	\$ 3,231,138	\$ 2,929,300
Total Bar Center Operations Expenses	\$ 2,636,026	\$ 2,600,171	\$ 2,589,261	\$ 1,800,171	\$ 2,636,385	\$ 2,680,548	\$ 2,309,152
Total Bar Center Operations Net Gain (Loss)	\$ 1,307,766	\$ 1,442,831	\$ 682,261	\$ 100,978	\$ 549,503	\$ 550,592	\$ 220,148
Combined Revenue	\$ 20,859,832	\$ 22,399,003	\$ 21,631,643	\$ 15,927,464	\$ 20,355,406	\$ 21,299,397	\$ 18,717,624
Combined Expenses	\$ 21,226,062	\$ 19,587,173	\$ 21,611,173	\$ 10,912,308	\$ 21,276,287	\$ 20,001,388	\$ 18,684,658
Total Combined Net Income (Loss)	\$ (366,230)	\$ 1,337,261	\$ 3,024,000	\$ 5,015,156	\$ (920,881)	\$ 1,288,009	\$ 32,966

Legend
█ Bar Operations
█ Bar Center
█ Combined Bar Operations and Bar Center

Note: Non-Cash depreciation expense and gain/loss on disposal of fixed assets are excluded from this schedule.

**State Bar of Georgia
2021-2022 Proposed Total Bar Center Operations Budget
For the Fiscal Year 2021-2022**

Category	Fiscal Year Actual 2017-2018	Fiscal Year Actual 2018-2019	Fiscal Year Actual 2019-2020	Fiscal Year to Date February 2021 Actual 2020-2021	Budget 2019-2020	Budget 2020-2021	Budget 2021-2022
Bar Center Income and Cash Receipts							
Bar Center Assessments	289,900	206,173	1,150	100	0	1,000	0
Conference Center Copier	1,067	738	506	0	1,000	850	500
Bar Center Contributions	1,310,643	23,390,650	1,322,797	500,000	1,315,000	1,325,000	1,275,000
CLE Contributions to Bar Center	616,188	628,512	0	0	0	0	0
Transfer from Operations	21,197	51,941	92,296	47,390	42,000	64	94,000
Interest Income	0	0	0	(9,460)	0	0	0
Gain/Loss Investment Interest Allocation	0	0	0	0	0	0	0
Bar Center Income and Cash Receipts	\$ 2,239,015	\$ 2,280,134	\$ 1,513,686	\$ 638,030	\$ 1,359,000	\$ 1,390,850	\$ 1,369,500
Bar Center Expenses and Cash Disbursements							
Boardroom Allocation	0	0	18,918	19,471	0	12,000	27,000
Government Services	0	0	13,312	7,865	0	12,000	16,000
Parking Deck Construction	13,350	0	2,510	0	20,000	0	0
Subbasement Build out	1,900	0	0	0	0	0	0
Subbasement Contingency	10,048	5,780	37	36,792	10,000	54,400	18,000
Conference Center Renovations	0	93,304	29,299	0	26,475	0	3,000
Museum and 1st Floor Exhibit	0	0	0	0	2,500	0	0
Audio Video, Furniture and Equipment	107,664	71,666	0	16,317	2,000	16,000	0
Renovation/Improvements	259,486	84,504	350,660	70,823	100,000	0	0
Travel	59,486	0	0	0	0	0	0
2nd Floor Build out	37,190	0	0	0	0	0	0
President's Boardroom	0	2,848	0	0	5,000	5,000	0
Bar Center Expenses and Cash Disbursements	495,124	258,102	413,336	145,085	165,975	99,400	64,000
Bar Center Combined Net Cash Flow	\$ 1,740,891	\$ 1,992,032	\$ 1,100,350	\$ 392,942	\$ 1,192,025	\$ 1,291,450	\$ 1,305,500
Conference Center Income and Expenses							
Room Rentals and various Charges	20,297	16,113	12,284	0	19,400	15,800	11,500
Conf. Center Operating Expenses	414,262	439,191	423,618	254,648	445,866	448,526	435,223
Conference Center Combined Net Cash Flow	\$ (393,965)	\$ (413,078)	\$ (416,334)	\$ (254,648)	\$ (426,466)	\$ (432,726)	\$ (423,723)
Rental Income and Expenses							
Rental Income	1,331,368	1,365,050	1,422,142	859,279	1,447,488	1,447,488	959,800
Building Operating Expenses	1,429,681	1,493,785	1,477,412	1,019,331	1,694,355	1,805,438	1,579,359
Rental Combined Net Cash Flow	\$ (98,323)	\$ (128,735)	\$ (65,270)	\$ (64,652)	\$ (246,867)	\$ (357,942)	\$ (619,559)
Parking Income and Expenses							
Parking Income	353,123	411,606	293,411	8,627	381,000	377,000	188,500
Parking Deck Operating Expenses	293,959	318,992	269,894	269,894	327,190	327,190	230,570
Parking Combined Net Cash Flow	\$ 59,164	\$ 92,613	\$ 23,517	\$ (77,978)	\$ 33,810	\$ 49,810	\$ (42,070)
Total Bar Center Operations Net Gain (Loss)	\$ 1,307,764	\$ 1,542,833	\$ 652,263	\$ 5,665	\$ 549,603	\$ 550,592	\$ 220,148

Note: Non-Cash depreciation expense and gain/loss on disposal of fixed assets are excluded from this schedule.

Administration

State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	1,222,956	\$ 1,219,504	\$ 1,253,756	\$ 858,001	\$	1,283,046	\$ 1,208,183
Salaries-Hourly PT	0	441	0	0	0	0	0
Overtime	6,476	7,404	5,758	0	7,100	7,200	7,200
Taxes and Benefits	316,278	342,793	349,917	222,756	362,366	353,815	363,857
Pension	91,170	75,958	94,304	65,195	98,943	97,793	89,813
Total Personnel Services	1,636,880	1,646,100	1,703,735	1,145,952	1,733,454	1,741,854	1,669,053
Operating Expenses							
Shared Office Allocation	309,905	370,460	391,579	258,672	391,579	388,008	441,480
Postage and Freight	10,215	9,052	9,105	2,649	11,500	11,000	4,800
Printing	22	375	54	59	150	150	100
Supplies	4,249	2,720	2,848	1,377	3,500	2,400	2,800
Telephone	3,600	3,600	3,600	2,325	3,600	3,600	3,600
Subscriptions and Books	732	374	725	624	850	650	1,630
Dues and Memberships	2,682	2,519	1,070	1,445	3,800	2,600	1,560
Licenses and Certifications	0	0	30	90	0	0	0
Seminars and Training	2,030	78	189	598	3,000	2,000	3,900
Miscellaneous	8,631	1,144	1,701	1,930	2,500	2,000	2,500
Attorney and Staff Travel	27,810	39,241	23,020	184	46,000	40,650	43,850
Executive Director Travel	6,452	10,990	12,917	13	14,000	12,600	9,500
Lunches	354	176	208	0	600	600	500
Bank Fees	1,561	1,833	2,449	6,299	2,000	1,900	10,800
Credit Card Discount and Fees	189,985	207,574	220,620	105,130	197,000	197,000	228,000
Computer Hardware	11,633	3,895	1,713	17,037	1,800	9,800	5,650
Computer Software	0	349	523	523	500	900	975
Membership Software License	57,412	75,242	75,242	50,828	73,300	75,300	75,300
Contract Programming	2,906	2,281	2,687	0	6,100	7,500	6,000
Total Operating Expenses	640,179	731,893	750,106	449,783	761,779	758,858	842,945
Furniture/Equipment	219	1,499	1,587	643	2,000	2,000	0
Total Expenses	\$ 2,277,278	\$ 2,379,493	\$ 2,455,429	\$ 1,596,378	\$ 2,497,233	\$ 2,502,712	\$ 2,511,998

OGC & CAP Income Statement Combined

State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	2,552,548	\$ 2,552,734	\$ 2,605,018	\$ 1,678,302	\$ 2,668,037	\$ 2,552,468	\$ 2,572,436
Salaries-Hourly PT	15,406	27,534	27,623	20,549	45,933	45,933	45,933
Overtime	2,985	4,336	1,010	0	4,300	4,300	4,300
Taxes and Benefits	585,794	646,414	735,833	440,049	690,071	707,067	729,528
Pension	175,090	171,828	180,284	124,619	201,346	186,929	186,783
Total Personnel Services	3,331,823	3,402,846	3,549,768	2,263,519	3,609,687	3,496,697	3,538,980
Operating Expenses							
Shared Office Allocation	473,013	488,333	463,501	300,059	463,501	450,089	492,420
Postage and Freight	20,339	22,588	16,935	8,617	23,250	24,000	15,000
Printing	446	863	122	0	1,750	1,000	500
Supplies	7,708	7,816	6,716	1,880	7,500	9,800	8,000
Telephone	2,103	2,330	2,530	2,252	2,100	2,100	3,600
Subscriptions and Books	20,426	12,632	14,790	12,053	21,000	22,260	16,000
Dues and Memberships	8,774	9,353	8,040	6,328	10,000	10,000	11,000
Seminars and Training	6,677	6,945	6,582	3,048	9,400	9,400	7,000
Miscellaneous	2,058	1,888	2,365	149	3,500	3,000	2,000
Recruitment Costs	0	0	2,000	0	0	0	0
Attorney and Staff Travel	57,559	51,975	28,046	0	73,312	65,849	30,000
Investigator Travel	3,438	1,300	4,745	145	6,500	5,000	2,500
Lunches	1,680	899	2,298	0	2,500	2,625	1,300
Computer Hardware	14,666	10,559	16,330	24,247	13,700	12,300	23,950
Computer Software	0	1,875	3,504	72	500	2,000	1,000
Contract Labor	0	10,384	6,938	0	2,000	4,000	4,000
Contract Programming	7,344	7,429	4,000	0	8,500	8,500	8,000
Receiverships	2,684	3,189	5,740	2,252	10,000	10,000	6,000
State Disciplinary Board Panel	33,101	67,295	27,897	319	95,000	75,000	40,000
Contract Special Master	15,505	28,413	14,390	9,047	110,000	90,000	40,000
Lexis Online	14,352	16,262	20,413	11,160	18,750	19,875	21,067
Total Operating Expenses	691,873	752,328	657,782	381,628	882,763	826,798	733,337
Furniture/Equipment	13,722	4,675	22,638	863	25,000	15,000	5,000
Total Expenses	\$ 4,037,419	\$ 4,159,849	\$ 4,230,188	\$ 2,646,010	\$ 4,517,450	\$ 4,338,495	\$ 4,277,317



**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

Communications

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	251,238	279,240	320,305	158,205	328,569	277,262	275,413
Overtime	1,545	887	51	0	1,600	1,600	1,600
Taxes and Benefits	93,342	104,224	126,096	49,678	143,449	109,061	98,271
Pension	14,383	11,853	18,295	10,580	19,172	15,871	10,728
Total Personnel Services	360,508	396,204	464,667	218,463	492,790	403,794	386,012
Expenses							
Shared Office Allocation	65,243	67,356	79,914	41,387	79,914	62,081	67,920
Postage and Freight	706	2,087	1,017	762	2,100	1,500	1,100
Supplies	344	951	519	532	1,000	1,000	1,000
Telephone	900	900	900	450	900	900	900
Subscriptions and Books	4,203	1,934	2,509	1,738	2,875	3,125	6,760
Dues and Memberships	405	320	405	405	405	405	405
Seminars and Training	1,325	1,322	2,465	390	5,200	5,200	3,500
Miscellaneous	839	1,571	1,915	77	1,650	1,650	1,300
Attorney and Staff Travel	14,033	16,714	7,950	0	17,900	17,900	6,900
Lunches	2,575	2,791	0	0	100	100	100
Computer Hardware	3,827	246	2,028	5,427	1,000	4,150	1,700
Computer Software	2,250	1,861	1,816	1,816	2,000	1,600	1,600
Media Consultants	0	0	39,263	22,125	55,000	50,000	65,000
Website Server/Redesign	9,996	28,884	32,927	20,195	29,850	29,600	29,850
Law Day	0	0	0	0	0	0	0
Local and Voluntary Bars	0	494	0	0	0	0	0
Membership Certificates	1,374	2,420	1,221	737	2,000	2,000	2,000
Subtotal	108,020	129,851	174,849	96,041	201,894	181,211	190,035
Furniture/Equipment	0	269	500	0	1,000	0	0

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

Communications

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Subtotal	468,528	526,324	640,016	314,504	695,684	585,005	576,047
Publications							
Bar Journal	281,232	273,853	267,415	134,009	303,690	291,000	269,550
Supplemental Directory	5,317	5,746	5,446	6,674	6,555	6,000	6,000
Special Publications and Printing	409	0	0	0	7,500	3,000	2,500
Directory	50,212	0	0	0	0	0	0
Total Publications	337,170	279,599	272,861	140,683	317,745	300,000	278,050
Total Communications	805,698	805,923	912,876	455,187	1,013,429	885,005	854,097

Fee Arbitration

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	252,418	264,384	261,277	179,569	272,557	272,557	270,053
Overtime	1,493	641	390	0	1,500	1,500	1,500
Taxes and Benefits	90,093	97,396	96,887	72,796	104,996	105,314	116,700
Pension	14,947	18,071	18,151	12,571	18,960	18,857	18,597
Total Personnel Services	358,951	380,492	376,705	264,936	398,013	398,228	406,850
Operating Expenses							
Shared Office Allocation	65,243	67,356	63,931	41,387	63,931	62,081	67,920
Postage and Freight	7,290	7,799	4,863	4,596	9,800	8,200	8,200
Printing	2,516	2,617	0	0	2,700	2,800	2,800
Supplies	2,255	1,537	545	394	2,300	2,200	1,900
Subscriptions and Books	349	326	327	400	550	500	1,010
Dues and Memberships	326	305	0	305	400	400	400
Seminars and Training	0	68	0	0	400	400	400
Miscellaneous	1,141	1,233	72	284	1,200	1,200	1,200
Attorney and Staff Travel	1,117	2	22	0	2,500	2,500	2,500
Luncheons	2,815	2,802	1,369	0	3,400	3,400	3,000
Computer Hardware	640	0	4,492	3,529	5,000	0	5,925
Contract Labor	61,330	68,000	72,248	48,000	100,300	75,000	75,000
Contract Programming	731	100	843	0	2,000	2,000	2,000
Total Operating Expenses	145,753	152,145	148,712	98,895	194,481	160,681	172,255
Furniture/Equipment	288	814	844	0	900	550	800
Total Expenses	\$ 504,993	\$ 533,450	\$ 526,262	\$ 363,831	\$ 593,394	\$ 559,459	\$ 579,905

Law Practice Management

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Revenues							
Consultation	\$ 3,095	\$ 1,631	\$ 913	\$ 338	\$ 2,500	\$ 1,800	\$ 750
Publications	0	534	99	0	250	150	100
In-House Training Income	0	0	0	0	500	250	0
Vendor Directory	10,900	13,650	18,900	9,250	8,500	8,500	8,000
Miscellaneous Income	575	593	1,497	577	250	3,500	250
Total Revenues	14,570	16,348	21,409	10,165	12,000	14,200	9,100
Personnel Services							
Salaries	256,557	245,895	260,074	173,064	260,095	260,095	260,095
Overtime	2,176	2,486	1,103	0	2,300	2,300	2,300
Taxes and Benefits	81,237	92,452	102,571	65,764	115,048	104,403	105,124
Pension	17,024	14,137	17,096	11,569	17,456	17,353	17,243
Total Personnel Services	356,994	354,970	380,844	250,397	394,899	384,151	384,762
Operating Expenses							
Shared Office Allocation	65,243	67,356	63,931	41,387	63,931	62,081	67,920
Postage and Freight	1,427	1,427	1,184	0	1,800	1,600	750
Printing	440	483	1,832	0	1,500	600	200
Supplies	132	573	1,160	0	750	750	450
Telephone	25	0	0	0	100	100	100
Subscriptions and Books	7,863	8,853	8,451	6,729	8,000	9,700	6,000
Dues and Memberships	1,290	725	125	485	1,850	1,500	1,000
Seminars and Training	100	149	338	1,176	1,500	500	1,300
Miscellaneous	300	(80)	(80)	0	750	350	350
Attorney and Staff Travel	15,655	8,137	3,303	0	10,000	10,000	7,850
Luncheons	127	0	0	0	200	200	150
Computer Hardware	1,194	1,588	10,216	1,442	11,000	1,000	5,175
Computer Software	770	3,344	4,363	3,834	5,388	5,382	5,392
Total Operating Expenses	94,566	92,703	94,823	55,053	106,769	93,763	96,637
Total Expenses	451,559	447,673	475,667	305,450	501,668	477,914	481,399
Furniture & Equipment	762	1,314	0	0	2,500	0	0
Solo and Small Firm	8,444	2,862	25,703	0	0	25,000	0

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Net Income	\$ (429,308)	\$ (429,777)	\$ (428,555)	(295,285)	(492,168)	(438,714)	(472,299)

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	108,438	\$ 103,115	\$ 102,164	\$ 72,067	\$ 108,308	\$ 108,308	\$ 108,308
Overtime	201	168	0	0	500	500	500
Taxes and Benefits	45,359	31,806	30,805	20,715	32,086	32,602	31,884
Pension	4,302	6,130	6,033	4,360	6,539	6,539	6,539
Total Personnel Services	158,300	141,219	139,002	97,142	147,433	147,949	147,231
Operating Expenses							
Shared Office Allocation	32,622	33,678	31,966	20,694	31,966	31,041	33,960
Supplies	1,018	993	0	0	2,000	1,400	1,000
Telephone	825	900	900	600	900	900	900
Subscriptions and Books	0	0	60	140	0	0	2,640
Dues and Memberships	0	0	135	0	0	150	150
Seminars and Training	0	874	295	0	500	300	300
Attorney and Staff Travel	6,081	9,240	5,768	0	8,430	7,055	7,000
Computer Hardware	1,031	904	0	1,414	1,000	1,000	1,700
Computer Software	0	477	363	363	600	365	365
Committee Brochures	6,825	7,435	6,263	0	7,500	7,500	7,500
President	21,268	38,689	14,683	35	32,721	27,813	25,032
President Elect	31,290	23,185	10,391	49	25,032	21,277	19,149
Immediate Past President	28,614	19,572	10,696	0	21,277	18,085	16,277
Immed. Past President Carryover	0	8,511	0	0	0	0	0
Treasurer	0	1,033	929	0	1,300	1,300	1,300
Secretary	0	1,032	499	0	1,300	1,300	1,300
Meetings	52,730	52,730	52,730	47,500	52,730	47,500	47,500
Newsletter	53,566	48,181	13,437	0	55,000	49,500	0
Total Operating Expenses	235,870	247,434	149,115	70,795	242,256	216,486	166,073
Committees Activities							
Committees Income	(9,023)	(3,910)	(9,063)	0	(10,000)	(10,000)	(6,000)
Committees Expense	117,331	95,893	55,821	4,044	114,360	103,000	103,000
Total Committees Activities	108,308	91,983	46,758	4,044	104,360	93,000	97,000
Total Expenses	\$ 502,478	\$ 480,635	\$ 334,875	\$ 171,981	\$ 494,049	\$ 457,435	\$ 410,304

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	483,830	\$ 498,345	\$ 516,948	\$ 341,344	\$ 513,000	\$ 513,002	\$ 523,002
Overtime	108	153	86	0	255	255	255
Taxes and Benefits	159,030	163,617	181,707	115,486	180,438	181,159	183,336
Pension	33,769	34,710	35,855	23,804	36,222	35,706	35,778
Total Personnel Services	676,737	696,825	734,596	480,634	729,915	730,122	742,371
Operating Expenses							
Shared Office Allocation	97,865	101,034	95,897	62,081	95,897	93,122	101,880
Postage and Freight	1,731	1,107	675	345	2,500	1,700	800
Printing	0	66	0	0	160	150	100
Supplies	1,260	397	679	1,059	2,200	1,500	800
Subscriptions and Books	693	801	750	188	816	800	800
Dues and Memberships	675	775	675	350	714	714	714
Seminars and Training	0	300	300	89	1,000	500	500
Miscellaneous	1,373	1,249	1,634	0	2,200	1,500	1,100
Attorney and Staff Travel	62	251	1,240	0	1,280	1,000	800
Investigator Travel	4,689	2,310	2,610	503	7,500	5,200	3,750
Luncheons	1,802	600	0	0	3,500	2,200	1,200
Computer Hardware	0	3,125	2,634	1,413	2,800	0	8,500
Lexis Online	2,913	3,252	4,051	2,158	4,585	3,800	3,800
Total Operating Expenses	113,063	115,267	111,145	68,186	125,152	112,186	124,744
Furniture/Equipment	218	0	0	0	0	0	0
Total Expenses	\$ 790,019	\$ 812,093	\$ 845,741	\$ 548,820	\$ 855,067	\$ 842,308	\$ 867,115

Savannah Office

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	82,798	\$ 81,892	\$ 86,165	\$ 58,432	\$ 87,789	\$ 87,816	\$ 87,816
Overtime	43	179	86	0	250	250	250
Taxes and Benefits	42,068	49,441	43,755	24,457	57,843	38,800	39,276
Pension	4,952	4,859	3,323	3,528	5,292	5,293	5,293
Total Personnel Services	129,861	136,371	133,329	86,417	151,174	132,159	132,635
Operating Expenses							
Shared Office Allocation	16,311	16,839	15,983	10,347	15,983	15,520	16,980
Postage and Freight	100	50	7	22	100	100	100
Printing	0	0	0	0	100	100	100
Supplies	1,014	1,130	1,557	0	1,500	1,300	1,300
Telephone	15,487	12,087	13,727	9,395	14,000	15,700	15,000
Miscellaneous	0	28	406	56	500	500	500
Attorney and Staff Travel	0	1,782	1,249	0	2,600	2,600	2,000
Parking Savannah	4,227	3,414	2,321	1,480	4,000	4,000	3,500
Luncheons	0	29	17	0	100	100	100
Computer Hardware	1,558	905	0	2,583	0	3,750	1,700
Computer Software	80	74	74	0	90	90	90
Equipment Maintenance	1,960	7,077	3,086	897	3,700	4,000	4,000
Equipment Rental	0	0	34	0	0	100	100
Rent and Utilities	59,984	63,917	70,925	56,302	69,000	71,000	83,500
Facilities Maintenance	4,756	4,489	4,521	1,760	4,500	4,500	4,500
Building and Other Insurance (Not Group)	2,185	2,372	2,428	1,702	2,700	2,600	2,700
Total Operating Expenses	107,662	114,193	116,335	84,544	118,873	125,960	136,170
Furniture/Equipment	1,066	0	1,752	0	0	0	0
Total Expenses	\$ 238,589	\$ 250,564	\$ 251,416	\$ 170,961	\$ 270,047	\$ 258,119	\$ 268,805

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Personnel Services							
Salaries	78,832	81,197	74,230	34,600	83,586	52,000	52,000
Salaries-Hourly PT	15,801	16,662	19,090	13,297	20,408	20,408	20,408
Taxes and Benefits	19,623	18,206	12,076	4,269	20,473	6,733	6,733
Pension	6,317	6,510	4,557	818	6,987	1,227	4,352
Total Personnel Services	120,573	122,575	109,963	52,984	131,454	80,368	83,493
Operating Expenses							
Shared Office Allocation	8,155	12,629	11,987	7,760	11,987	11,640	12,734
Postage and Freight	93	236	479	22	400	300	300
Printing	0	0	65	0	0	0	100
Supplies	1,665	1,684	1,684	296	2,500	2,000	2,000
Telephone	12,230	13,218	13,655	8,756	13,300	13,300	14,000
Subscriptions and Books	104	116	127	100	100	100	100
Miscellaneous	206	0	1	54	300	300	200
Attorney and Staff Travel	3,213	2,397	1,158	298	4,500	2,400	2,000
Luncheons	12	0	74	0	60	50	50
Computer Hardware	3,003	0	776	2,828	800	2,000	0
Computer Software	178	90	100	0	200	200	200
Equipment Maintenance	1,488	1,891	1,364	897	1,700	1,700	1,700
Equipment Rental	0	0	0	0	0	100	100
Rent and Utilities	19,949	20,252	19,637	12,320	21,500	21,500	20,300
Facilities Maintenance	315	829	346	120	1,000	1,000	800
Building and Other Insurance (Not Group)	2,185	2,372	2,428	1,702	2,600	2,600	2,700
Total Operating Expenses	52,796	55,724	53,899	35,153	60,947	59,190	57,284
Furniture/Equipment	0	0	0	0	0	1,000	0
Total Expenses	\$ 173,369	\$ 178,298	\$ 163,862	\$ 88,137	\$ 192,401	\$ 140,558	\$ 140,777

Law Related Education

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Revenues							
Miscellaneous Income	\$ 702	\$ 209	\$ 162	\$ 0	\$ 0	\$ 0	\$ 0
Total Revenues	702	209	162	0	0	0	0
Personnel Services							
Salaries	189,904	195,600	201,770	106,993	201,317	201,317	191,795
Overtime	15	10	26	0	500	500	500
Taxes and Benefits	87,819	90,223	100,103	41,290	109,650	110,016	102,872
Pension	13,098	13,398	13,857	9,278	14,020	13,917	11,372
Total Personnel Services	290,836	299,231	315,756	157,561	325,487	325,750	306,539
Operating Expenses							
Shared Office Allocation	48,932	50,517	47,948	31,041	47,948	46,561	50,940
Postage and Freight	24	18	9	8	2,000	150	100
Printing	0	998	135	0	1,200	1,000	1,000
Supplies	1,346	1,385	538	62	2,000	1,800	1,500
Subscriptions and Books	76	33	5	726	100	50	390
Seminars and Training	1,780	522	0	294	1,000	1,000	1,000
Miscellaneous	476	1,270	502	0	1,500	1,400	1,000
Attorney and Staff Travel	3,783	6,732	4,135	0	5,070	7,600	3,088
Lunches	278	485	0	0	400	150	60
Computer Hardware	196	2,677	928	0	1,000	0	6,800
Total Operating Expenses	56,891	64,637	54,200	32,091	62,218	59,711	65,878
Total Expenses	347,727	363,868	369,956	189,652	387,705	385,461	372,417
Net Income	\$ (347,025)	\$ (363,659)	\$ (369,794)	\$ (189,652)	\$ (387,705)	\$ (385,461)	\$ (372,417)

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Revenues							
Miscellaneous Income	\$ 36,155	\$ 15,753	\$ 565	\$ 198	\$ 1,000	\$ 600	\$ 600
Total Revenues	36,155	15,753	565	198	1,000	600	600
Personnel Services							
Salaries	60,962	62,791	65,135	43,009	64,638	64,638	64,638
Taxes and Benefits	21,381	24,659	32,066	22,816	25,151	36,442	36,918
Pension	3,648	3,781	3,848	2,590	3,885	3,885	3,885
Total Personnel Services	85,991	91,231	101,049	68,415	93,674	104,965	105,441
Operating Expenses							
Shared Office Allocation	16,311	16,839	15,983	10,347	15,983	15,520	16,980
Postage and Freight	845	861	1,010	220	1,200	900	900
Supplies	245	482	2,753	618	500	850	500
Telephone	8	0	0	0	35	20	0
Subscriptions and Books	0	0	0	188	0	0	400
Dues and Memberships	250	250	200	0	250	200	200
Miscellaneous	296	6	37	4	500	400	400
Attorney and Staff Travel	459	644	586	0	500	500	500
Lunches	470	396	363	0	550	400	450
Computer Hardware	0	1,062	0	0	0	0	1,725
Computer Software	0	0	513	363	0	325	363
Total Operating Expenses	18,884	20,540	21,445	11,740	19,518	19,115	22,418
HSMT Events							
Law Academy	4,458	3,204	1,256	508	4,500	1,000	2,000
Regional Competition	15,960	10,107	(3,840)	(11,645)	0	(2,250)	(2,850)
State Competition	9,665	13,237	939	0	11,000	12,500	13,000
National Competition	16,108	12,814	850	0	14,000	16,000	16,000
District Competition	12,548	5,004	6,362	0	12,500	9,000	9,000
2019 NHSMTC-Athens	111	10,298	423	0	0	0	0
Total HSMT Events	58,850	54,664	5,990	(11,137)	42,000	36,250	37,150
Total Expenses	163,726	166,436	128,484	69,018	155,192	160,330	165,009
Net Income	(127,571)	(150,683)	(127,919)	(68,820)	(154,192)	(159,730)	(164,409)

State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022

2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
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State Bar of Georgia
Budget Report
For the Year 2021 - 2022

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Program Revenue							
Registration Revenue	\$ 5,216,025	\$ 6,084,772	\$ 5,803,994	\$ 2,136,055	\$ 5,300,000	\$ 5,500,000	\$ 3,775,000
Sponsorship	0	97,718	30,078	0	0	30,000	30,000
Program Discounts	0	0	0	(11,671)	0	0	(22,142)
Affiliate Contribution	0	198,391	18,249	0	0	0	0
Books	0	1,226	0	0	0	0	0
Other	0	13,235	2,776	0	0	0	0
Exhibitor	0	750	500	0	0	0	0
Total Program Revenue	5,216,025	6,396,092	5,855,597	2,124,384	5,300,000	5,530,000	3,782,858
Total Program Expenditures	3,410,844	3,275,175	1,615,256	255,401	2,843,500	1,650,000	1,165,456
Net Margin on Programs	1,805,181	3,120,917	4,240,341	1,868,983	2,456,500	3,880,000	2,617,402
Personnel Services							
Salaries Full Time	836,003	948,084	1,035,099	597,964	1,069,069	1,298,606	1,215,652
Salaries Part Time	37,851	43,674	33,477	0	33,600	33,600	30,000
Temporary Part Time	198,346	27,071	0	0	30,000	30,000	25,000
Overtime Pay	8,257	21,371	21,167	0	6,000	20,000	15,000
Taxes and Benefits	220,539	302,626	358,029	200,436	344,137	497,833	482,311
Pension	32,796	41,642	63,990	52,131	73,439	78,197	61,743
Print Shop (Non Recurring)	81,977	0	0	0	0	0	0
Total Personnel Services	1,415,769	1,384,468	1,511,762	850,531	1,556,245	1,958,236	1,829,706
Operating Expenses							
Shared Office Allocation	212,040	303,103	303,673	212,111	303,673	318,166	322,620
Non Recurring	26,617	0	0	0	0	0	0
Board and Committee Meetings	0	2,079	873	0	5,000	4,000	3,000
Dues and Memberships	2,501	2,097	1,175	1,015	5,400	4,000	2,500
Licenses and Certification	3,135	791	894	245	1,000	2,000	1,000
Seminars and Training	16,968	1,346	5,006	1,974	20,000	22,000	15,000
Attorney and Staff Travel	9,282	6,125	10,177	0	18,000	15,000	12,500
Supplies	236	11,693	11,308	2,620	15,000	15,000	15,000
Printing	1,584	3,938	567	5	2,000	2,000	5,000
Subscriptions and Books	3,569	0	943	360	1,000	1,500	1,500
Postage and Freight	15,015	1,649	714	257	2,000	1,500	1,000
Telephone		9,982	5,164	3,000	7,600	8,500	6,500

Institute of Continuing Legal Education

State Bar of Georgia
Budget Report
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	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Internet Services	1,794	0	2,222	1,543	5,400	6,000	2,500
Computer Software	25,258	61,537	48,366	25,405	65,000	100,000	95,000
Contract Programming	58,696	75,345	39,845	16,973	80,000	100,000	95,000
Computer Hardware	8,374	2,963	6,701	17,048	18,800	60,000	40,000
Miscellaneous	2,872	1,822	2,601	118	5,000	5,000	3,000
Professional Fees	65,773	0	6,810	0	15,000	15,000	50,000
Equipment Maintenance and Rental	8,227	5,017	3,773	309	10,000	8,000	5,000
Other Business Insurance (Not Group)	15,762	28,140	30,050	17,018	30,000	32,000	0
Credit Card Discount and Fees	148,259	165,434	157,477	54,730	150,000	152,000	100,000
Banking Fees	1,380	0	14	282	0	100	0
Lunches	2,386	2,445	754	0	2,000	2,000	2,000
Recruitment	5,346	0	0	0	6,500	6,500	5,000
Contract Labor	0	0	7,931	0	0	3,500	7,500
Total Operating Expenses	635,865	685,446	647,038	355,013	758,873	883,266	790,620
Furniture and Equipment							
Furniture and Equipment	2,409	0	21,451	0	5,000	10,000	7,500
Total Expenses	2,054,043	2,069,914	2,180,251	1,205,544	2,320,118	2,851,502	2,627,826
Net Income Before Other Inc and Exp	(248,862)	1,051,003	2,060,089	663,439	136,382	1,028,498	(10,424)
Other Income and Expenses							
Interest Income	18,755	114,784	92,060	31,735	0	65,000	38,156
Miscellaneous Revenues	3,365	10,305	902	0	0	0	0
Bond Premium Amortization	(11,269)	(9,296)	(10,092)	(8,478)	0	0	0
Investment Service Fees	(8,945)	(8,865)	(9,200)	(6,145)	(10,000)	(10,000)	(9,214)
Total Other Income and Expenses	1,906	106,928	73,670	17,112	(10,000)	55,000	28,942
Net Income	\$(246,956)	\$1,157,930	\$2,133,759	\$680,551	\$126,382	\$1,083,498	\$18,518

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

Other Activities and Miscellaneous

	2017-2018	2018-2019	2019-2020	Year to Date	2019-2020	2020-2021	2021-2022
	Actual	Actual	Actual	February 28, 2021	Annual Budget	Annual Budget	Annual Budget
Other Activities							
SBG President	12,379	47,455	14,622	265	57,469	48,849	43,964
SBG President Carryover	0	16,215	0	0	0	0	0
SBG President Elect	18,671	29,255	13,419	404	36,504	31,029	27,926
SBG President Elect Elect	766	697	0	0	3,500	2,000	1,800
SBG Treasurer	2,000	2,000	1,958	0	2,000	4,000	3,800
SBG Secretary	2,000	2,000	812	0	2,000	4,000	3,800
SBG Immed. Past Pres.	20,575	14,360	3,650	0	24,469	20,799	18,719
SBG Immed. Past Pres. Carryover	0	1,152	0	0	0	0	0
SBG Past Past President	243	3,499	0	0	3,500	2,000	1,800
Total Officer's Expenses	56,634	116,633	34,481	669	129,442	112,677	101,809

Miscellaneous

BOG and Member Meetings	335,341	487,736	99,990	17,835	339,006	380,000	395,000
Supreme Court Meetings	64,417	42,645	33,553	0	84,000	45,000	40,000
Executive Committee Meetings	5,992	39,019	43,333	3,944	40,800	60,000	50,000
Court of Appeals Meetings	5,848	3,637	0	0	7,500	0	0
Southern Conference	0	373	50,359	0	50,000	0	0
Lawyer's Assistance Program	56,831	64,583	63,712	63,750	62,500	85,000	85,000
Secitons	179,044	185,180	186,026	122,640	190,644	187,835	188,970
State Disciplinary Board Lawyers	30,000	30,000	30,000	9,825	30,000	20,000	20,000
Electrons	45,515	34,684	34,082	15,812	39,685	39,685	34,000
Dues Notice	36,135	36,946	34,724	1,257	44,000	40,000	34,000
Letters of Good Standing	3,093	3,250	2,526	1,119	3,200	2,900	2,500
Bar Membership Cards	8,896	9,276	9,354	4,561	11,100	11,100	10,500
50 Year Certificates	1,502	1,678	2,076	495	2,750	2,000	2,700
Fastcase	216,418	228,521	240,436	253,598	244,000	244,000	265,000
Membership Database Project	12,863	0	0	0	15,000	13,000	0

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

Other Activities and Miscellaneous

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year to Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Website Redesign	201,335	0	0	0	0	0	0
Recruitment Costs	0	0	0	74,934	0	100,000	0
State Bar Committees	46,779	25,874	27,113	1,109	28,000	29,000	20,000
Strategic Plan	20,000	40,000	40,000	0	40,000	0	0
Georgia Diversity Program	0	20,000	20,000	20,000	20,000	20,000	10,000
Conference Sponsorship	34,500	(186)	4,000	0	0	0	0
Incubator Contribution	85,000	0	0	0	0	0	0
ABA Delegate Breakfast	1,186	2,419	2,591	0	2,500	2,500	2,500
Cubicles Project	361,511	0	0	0	0	0	0
1st Floor Office Furniture Project	0	216,567	0	15,138	0	14,100	0
1st Floor Painting	0	49,000	0	0	0	0	3,000
Commitment to Equality Awards	0	2,500	2,500	2,500	2,500	2,500	2,500
Organization of Bar Investigators	0	6,487	0	0	0	0	0
Military/Veterans Pro Bono Asst	103,255	0	0	0	0	0	0
Resource Center Contribution	110,332	110,332	110,332	110,332	110,332	110,332	55,166
BASICS Program Contributed	140,000	150,000	150,000	37,500	150,000	37,500	0
Bond Premium Amortization	0	2,959	45,862	54,701	0	34,000	75,000
Investment Service Fees	0	0	35,836	34,697	0	36,000	44,000
Access to Justice/Pro Bono	0	0	10,000	0	10,000	0	0
Chief Justice Commission on Prof.	10,000	0	0	0	0	0	0
Total Miscellaneous	2,115,793	1,793,480	1,278,425	845,847	1,527,517	1,516,452	1,339,836
Pro Bono	212,216	212,216	212,216	141,477	212,216	212,216	212,216
Total Other Activities	2,384,643	2,122,329	1,525,102	987,994	1,869,175	1,841,345	1,653,567
Unallocated Services	(60,156)	(155,077)	(109,558)	(46,488)	0	(0)	0
Grand Total	13,106,634	13,276,196	12,183,114	7,536,567	13,466,264	12,809,340	12,573,010

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018	2018-2019	2019-2020	Year To Date	2019-2020	2020-2021	2021-2022
	Actual	Actual	Actual	February 28, 2021	Annual Budget	Annual Budget	Annual Budget
Shared Office Overhead							
Telephone	68,105	74,787	75,938	50,064	75,000	75,000	48,000
Computer Software	0	1,396	4,534	1,624	3,900	4,100	3,000
Equipment Rental	58,431	64,944	46,819	40,197	67,000	65,000	55,000
Kitchen	22,928	21,489	17,036	1,353	23,460	23,000	12,123
Facilities Maintenance	16,782	28,775	16,100	20,209	28,000	34,000	18,000
Transfer to Bar Center	616,188	628,512	0	0	0	0	0
Payroll Service	20,844	22,897	17,938	9,549	24,000	16,000	15,000
Actuary-Pension Plan	0	0	0	0	2,000	0	0
Audit	24,667	25,438	23,722	21,354	24,000	26,000	27,000
Building and Other Insurance (Not Group)	114,720	111,645	110,590	78,047	130,000	113,000	148,000
Supplies and Printing	53,101	44,598	52,895	22,650	51,000	51,000	51,000
Subtotal	995,767	1,024,481	365,572	245,047	428,360	407,100	377,123
Other Services							
Accounting	297,649	403,236	406,840	292,194	411,284	440,410	552,472
Human Resources	161,428	185,997	197,434	128,065	200,756	200,795	248,972
Mailroom	78,206	73,650	77,045	51,590	77,316	78,538	77,179
Receptionist	145,379	136,928	141,792	95,201	163,914	152,817	153,081
Management Information System	0	0	587,105	374,943	603,716	570,631	588,543
Subtotal Other Services	682,662	799,811	1,410,216	941,993	1,456,986	1,443,191	1,620,247
Total Shared Office Overhead	1,678,429	1,824,292	1,775,788	1,187,040	1,885,346	1,850,291	1,997,370
Total Allocated Services	(1,738,585)	(1,979,371)	(1,885,346)	(1,233,527)	(1,885,346)	(1,850,291)	(1,997,370)
Unallocated Services	(60,156)	(155,079)	(109,558)	(46,487)	0	0	0

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018		2018-2019		2019-2020		Year to Date February 28, 2021		2019-2020 Annual Budget		2020-2021 Annual Budget		2021-2022 Annual Budget	
	Actual		Actual		Actual		February 28, 2021	Annual Budget	Annual Budget	Annual Budget	Annual Budget	Annual Budget	Annual Budget	
Related Organizations - Shared Office Allocations														
Georgia Bar Foundation	\$ 3,000		\$ 3,500		\$ 3,500		\$ 2,333	\$ 3,500	\$ 3,500	\$ 3,500	\$ 3,500	\$ 3,500	\$ 3,500	
Continuing Legal Education	81,554		96,223		79,914		51,735	79,914	79,914	77,602	77,602	84,900	84,900	
TILPP	32,622		38,490		47,948		31,040	47,948	46,560	46,560	46,560	33,960	33,960	
Pro Bono	28,107		40,089		36,328		36,385	36,328	36,385	36,328	36,328	54,577	58,896	
Professionalism	3,000		3,500		3,500		3,333	3,500	3,500	3,500	3,500	3,500	3,500	
Sections	32,622		33,678		31,966		20,894	31,966	31,966	31,041	31,041	33,960	33,960	
ICLE	212,040		303,103		303,673		212,111	303,673	303,673	318,166	318,166	322,620	322,620	
Subtotal	392,945		518,583		506,829		356,631	506,829	506,829	534,946	534,946	541,336	541,336	
State Bar Departments - Shared Office Allocations														
Administration	309,905		370,460		0		0	0	0	0	0	0	0	
Membership	0		0		79,914		51,734	79,914	79,914	77,602	77,602	84,900	84,900	
Meetings	0		0		31,966		20,694	31,966	31,966	31,040	31,040	33,960	33,960	
Executives	0		0		279,699		186,244	279,699	279,699	279,366	279,366	322,620	322,620	
Management Information Sys	48,932		67,356		0		0	0	0	0	0	0	0	
General Counsel	391,459		404,137		383,587		300,059	383,587	383,587	450,088	450,088	492,420	492,420	
Consumer Assistance	81,554		84,195		79,914		0	79,914	79,914	0	0	0	0	
Communications	65,243		67,356		79,914		41,387	79,914	79,914	62,081	62,081	67,920	67,920	
Fee Arbitration	65,243		67,357		63,931		41,387	63,931	63,931	62,081	62,081	67,920	67,920	
Law Practice Management	65,243		67,356		63,931		41,387	63,931	63,931	62,081	62,081	67,920	67,920	
Savannah Office	16,311		16,839		15,983		10,347	15,983	15,983	15,520	15,520	16,980	16,980	
Tifton Office	8,155		12,629		11,987		7,760	11,987	11,987	11,640	11,640	12,734	12,734	
Younger Lawyers	32,622		33,678		31,966		20,694	31,966	31,966	31,041	31,041	33,960	33,960	
Unauthorized Practice of Law	97,865		101,035		95,897		62,081	95,897	95,897	93,122	93,122	101,880	101,880	
Law Related Education	48,932		50,517		47,948		31,041	47,948	47,948	46,561	46,561	50,940	50,940	
High School Mock Trial	16,311		16,839		15,983		10,347	15,983	15,983	15,520	15,520	16,980	16,980	
Military Legal Assistance Prog	0		16,839		15,983		0	15,983	15,983	0	0	0	0	
Military Veterans Pro Bono	16,311		0		0		0	0	0	0	0	0	0	
Conference Center	65,243		67,356		63,931		41,387	63,931	63,931	62,081	62,081	67,920	67,920	
Legislative Program	16,311		16,839		15,983		10,347	15,983	15,983	15,520	15,520	16,980	16,980	
Subtotal	1,345,640		1,460,788		1,378,517		876,896	1,378,517	1,378,517	1,315,345	1,315,345	1,456,034	1,456,034	
Total Allocated Services	\$ 1,738,585		\$ 1,979,371		\$ 1,885,346		\$ 1,233,527	\$ 1,885,346	\$ 1,885,346	\$ 1,850,291	\$ 1,850,291	\$ 1,997,370	\$ 1,997,370	

**2021-2022 State Bar of Georgia Budget
Percentage of Shared Office Overhead Expense**

1/30/2021	Exec	Mtgs	Memb	MIS	OGC	CAP	COM	F.A.	LPM	TIF	SAV	YLD	HSMT	MLAP	UPL
19-20 Emp	17.5	2	5	0	24	5	5	4	4	0.75	1	2	1	1	6
%19-20 Emp.	14.08%	1.61%	4.02%	0.00%	19.32%	4.02%	4.02%	3.22%	3.22%	0.60%	0.80%	1.61%	0.80%	0.80%	4.83%
%19-20 Emp.	15.18%	1.74%	4.34%	0.00%	20.82%	4.34%	4.34%	3.47%	3.47%	0.65%	0.87%	1.74%	0.87%	0.87%	5.21%
20-21 Emp	18	2	5	0	29	0	4	4	4	0.75	1	2	1	0	6
%20-21 Emp.	14.49%	1.61%	4.02%	0.00%	23.34%	0.00%	3.22%	3.22%	3.22%	0.60%	0.80%	1.61%	0.80%	0.00%	4.83%
%20-21 Emp.	15.62%	1.74%	4.34%	0.00%	25.16%	0.00%	3.47%	3.47%	3.47%	0.65%	0.87%	1.74%	0.87%	0.00%	5.21%
21-22 Emp	19	2	5	0	29	0	4	4	4	0.75	1	2	1	0	6
%21-22 Emp.	15.48%	1.63%	4.07%	0.00%	23.63%	0.00%	3.26%	3.26%	3.26%	0.61%	0.81%	1.63%	0.81%	0.00%	4.89%
%21-22 Emp.	16.70%	1.76%	4.40%	0.00%	25.49%	0.00%	3.52%	3.52%	3.52%	0.66%	0.88%	1.76%	0.88%	0.00%	5.27%

TILPP	CONF	LRE	LEG	CLE	SEC	ICLE	GBF	PB	PROF	Total	BAR
3	4	3	1	5	2	19	3	3	3	124.3	115.3
2.41%	3.22%	2.41%	0.80%	4.02%	1.61%	15.29%	2.41%	2.41%	2.41%	100.0%	
2.60%	3.47%	2.60%	0.87%	4.34%	1.74%	16.49%				100.0%	
3	4	3	1	5	2	20.5	3	4	2	124.3	115.3
2.41%	3.22%	2.41%	0.80%	4.02%	1.61%	16.50%	2.41%	3.22%	1.61%	100.0%	
2.60%	3.47%	2.60%	0.87%	4.34%	1.74%	17.79%				100.0%	
2	4	3	1	5	2	19	3	4	2	122.8	113.8
1.63%	3.26%	2.44%	0.81%	4.07%	1.63%	15.48%	2.44%	3.26%	1.63%	100.0%	
1.76%	3.52%	2.64%	0.88%	4.40%	1.76%	16.70%				100.0%	

Conference Center

State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022

	2017-2018	2018-2019	2019-2020	Year To Date	2019-2020	2020-2021	2021-2022
	Actual	Actual	Actual	February 28, 2021	Annual Budget	Annual Budget	Annual Budget
Revenues							
Miscellaneous Income	\$ 629	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Room Rentals	2,400	500	0	0	0	0	0
Set Up Fees	800	2,765	600	0	4,800	1,600	0
After Hours Fees	10,042	8,225	7,675	0	10,000	8,000	7,000
Beverage Service	3,039	1,895	2,057	0	1,400	3,000	2,000
Cleaning Fees	3,386	1,300	1,052	0	2,000	2,000	1,500
Audio Video Support	0	1,428	900	0	1,200	1,200	1,000
Total Revenues	20,296	16,113	12,284	0	19,400	15,800	11,500
Personnel Services							
Salaries	201,708	208,261	215,877	142,543	214,226	214,226	214,226
Overtime	10,049	8,553	8,397	0	11,500	11,500	11,500
Taxes and Benefits	71,423	72,592	82,217	51,741	82,191	93,055	82,762
Pension	12,761	12,974	13,420	9,076	13,717	13,614	13,565
Total Personnel Services	295,941	302,380	319,911	203,360	321,634	332,395	322,053
Operating Expenses							
Shared Office Allocation	65,243	67,356	63,931	41,387	63,931	62,081	67,920
Postage and Freight	10	0	0	0	0	0	0
Supplies	1,828	3,384	2,470	472	4,000	3,000	3,000
Subscriptions and Books	277	362	450	2,573	300	300	5,500
Seminars and Training	0	23	0	0	200	0	0
Miscellaneous	760	726	1,140	95	1,000	850	850
Conference Center Copier	3,296	2,301	0	0	1,000	1,500	1,800
Computer Hardware	455	5,003	929	1,442	1,000	0	5,100
Computer Software	0	63	0	0	100	100	100
After Hours Security	6,226	8,737	6,467	0	7,000	8,500	7,000
Room Turn Around Costs	3,325	3,118	1,320	0	8,000	2,000	4,000
Contract Programming	188	0	125	0	1,000	800	500
Equipment Maintenance	4,542	6,076	3,699	1,681	6,000	6,000	4,000
Furniture Repairs and Maintenance	8,499	9,837	9,415	469	8,500	9,000	8,000
Kitchen	12,949	8,557	6,570	316	13,000	10,000	8,000
Audio Video	10,200	11,050	11,397	0	10,200	10,000	0
Total Operating Expenses	117,798	126,593	107,913	48,435	125,231	114,131	113,170
Total Expenses	413,739	428,973	427,825	251,795	446,865	446,526	435,223

Conference Center

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Furniture/Equipment	523	218	794	2,853	2,000	2,000	0
Net Income	\$ (393,965)	\$ (413,078)	\$ (416,335)	\$ (254,648)	\$ (429,465)	\$ (432,726)	\$ (423,723)

Other Bar Center Operations

State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Revenues							
Interest Income	\$ 21,196	\$ 51,941	\$ 92,295	\$ 47,390	\$ 42,000	\$ 64,000	\$ 94,000
Gain/Loss Investment Interest Allocation	0	23,211	96,938	(9,460)	0	0	0
Bar Center Assessments	289,900	206,173	1,150	100	0	1,000	0
Transfer from Operations	616,188	628,512	0	0	0	0	0
CCLC Contributions to Bar Center	1,310,643	1,339,560	1,322,797	500,000	1,315,000	1,325,000	1,275,000
Conference Center Copier	1,088	737	506	0	1,000	850	500
Total Revenues	2,239,015	2,250,134	1,513,686	538,030	1,358,000	1,390,850	1,369,500
Operating Expenses							
Bond Premium Amortization	0	0	16,918	13,471	0	12,000	27,000
Investment Service Fees	0	0	13,312	7,885	0	12,000	16,000
Parking Deck Construction	13,350	0	2,510	0	20,000	0	0
Subbasement Buildout	1,900	0	0	0	0	0	0
Conference Center Contingency	10,048	5,780	37	36,792	10,000	0	0
Conference Center Renovations	0	93,304	29,299	0	26,475	54,400	18,000
Museum and 1st Floor Exhibit	0	0	0	0	2,500	0	3,000
Audio Video, Furniture and Equipment	107,654	71,666	0	16,317	2,000	16,000	0
Rehabilitation	268,496	84,504	350,650	70,623	100,000	0	0
Tenant Improvements	59,486	0	0	0	0	0	0
2nd Floor Buildout	37,190	0	0	0	0	0	0
President's Boardroom	0	2,848	610	0	5,000	5,000	0
Total Operating Expenses	498,124	258,102	413,336	145,088	165,975	99,400	64,000
Total Expenses	498,124	258,102	413,336	145,088	165,975	99,400	64,000
Net Income	\$ 1,740,891	\$ 1,992,032	\$ 1,100,349	\$ 392,942	\$ 1,192,025	\$ 1,291,450	\$ 1,305,500

Rental

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Revenues							
Income Rental Operations	\$ 1,328,222	\$ 1,326,790	\$ 1,422,142	\$ 959,279	\$ 1,447,488	\$ 1,447,488	\$ 959,800
Storage Rental Operations	3,136	38,260	0	0	0	0	0
Total Revenues	1,331,358	1,365,050	1,422,142	959,279	1,447,488	1,447,488	959,800
Operating Expenses							
Personnel/Management Salary	30,412	46,518	46,771	33,388	35,000	51,000	51,000
Administrative Taxes and Benefits	6,421	3,431	4,750	3,107	11,250	7,464	7,464
Travel	0	68	61	0	630	630	700
Supplies	100	78	589	94	1,500	1,500	700
Telephone Expense	1,221	1,116	1,204	976	1,200	1,200	1,300
Management Fees	54,835	56,480	58,175	39,348	56,895	56,895	56,895
Tenant Services	0	0	0	0	1,750	1,750	0
Bank Fees	1,228	1,276	1,409	960	1,380	1,380	1,400
R&M Salaries	167,011	157,763	165,216	117,156	202,000	167,000	167,000
R&M Taxes and Benefits	61,478	61,008	54,943	38,985	65,000	63,000	63,000
R&M HVAC	60,578	39,610	30,865	63,890	101,000	183,640	63,700
R&M Plumbing	3,087	20,411	17,429	898	32,800	11,600	7,600
R&M Fire/Life Prevention	1,457	3,700	2,162	8,804	7,000	7,000	7,000
R&M Electrical/Lamps	22,534	27,379	24,411	4,085	29,000	29,000	27,000
R&M Water Treatment	9,980	10,273	9,934	6,623	12,000	12,000	11,000
R&M Life Safety Contract	11,133	7,314	5,507	10,383	9,750	9,750	11,550
R&M Tools/Radios	2,938	3,573	3,238	1,287	3,000	3,000	3,000
R&M Elevators	25,445	27,127	29,450	54,281	26,000	26,000	29,000
R&M Pest Control	2,563	2,336	2,679	2,019	4,000	4,000	3,000
R&M Rubbish Removal	9,539	10,794	10,185	9,362	10,500	14,592	14,500
R&M Other: Locks and Keys	5,892	0	0	43	1,000	1,000	800
R&M Painting	233	7,120	0	1,275	8,000	8,000	7,000
R&M Other: General Building	2,731	5,222	12,303	3,026	5,500	3,340	3,400
R&M Lobby	0	0	0	0	500	500	3,000
Uniforms	1,519	1,438	54	909	2,300	2,300	1,550
Bad Debt	6,516	0	0	0	0	0	0
Electric	386,211	419,986	412,237	218,494	460,000	460,000	420,000
Water	58,832	56,168	52,161	38,872	60,000	60,000	55,000
Gas	24,102	21,460	17,844	19,039	25,000	25,000	23,000
Security Contract	244,651	257,874	254,718	176,890	270,000	328,289	270,000
Cleaning	174,731	188,695	203,947	120,375	190,000	204,000	204,000
Grounds Supplies and Maintenance	7,551	9,193	6,230	2,733	10,000	10,200	9,000
Insurance	44,750	44,374	48,940	36,629	50,400	50,400	56,300

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Rental

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Total Operating Expenses	1,429,679	1,493,785	1,477,412	1,013,931	1,694,355	1,805,430	1,579,359
Total Expenses	1,429,679	1,493,785	1,477,412	1,013,931	1,694,355	1,805,430	1,579,359
Net Income	\$ (98,321)	\$ (128,735)	\$ (55,270)	\$ (54,651)	\$ (246,867)	\$ (357,942)	\$ (619,559)

Parking

**State Bar of Georgia
Budget Report
For the Bar Year 2021 - 2022**

	2017-2018 Actual	2018-2019 Actual	2019-2020 Actual	Year To Date February 28, 2021	2019-2020 Annual Budget	2020-2021 Annual Budget	2021-2022 Annual Budget
Revenues							
Monthly Parking Operations	\$ 179,221	\$ 195,304	\$ 145,608	\$ 6,968	\$ 187,000	\$ 189,000	\$ 94,500
Daily Parking Operations	48,053	50,866	47,006	926	49,000	53,000	26,500
Special Events Parking Operations	125,849	165,436	100,797	733	123,000	135,000	67,500
Total Revenues	353,123	411,606	293,411	8,527	361,000	377,000	188,500
Operating Expenses							
Salaries	99,226	111,925	101,448	38,276	108,000	108,000	84,250
Payroll Taxes	12,161	12,225	10,651	4,019	11,750	11,750	9,050
Workers' Compensation	9,984	10,673	9,638	3,636	10,100	10,100	7,950
Medical Ins/Benefits	16,078	15,985	14,558	5,493	18,000	18,000	13,300
Signs	255	492	0	0	900	900	450
Uniforms	211	83	261	0	240	240	120
Repairs and Maintenance	18,108	30,440	17,956	15,781	23,000	23,000	24,200
Tickets	429	0	534	0	1,000	1,000	500
Cell Phone/Beeper	7,415	4,742	4,138	3,071	8,100	8,100	5,300
Office Expenses	8,635	6,833	5,975	3,421	8,000	8,000	6,600
Invoicing Expenses	4,176	3,420	3,420	2,280	4,400	4,400	3,900
Bank Charges	2,216	1,994	2,513	1,304	2,500	2,500	2,500
Credit Card Fees	3,465	3,431	2,074	379	4,000	4,000	2,400
Garage Insurance	3,802	6,170	6,282	4,203	6,200	6,200	6,400
Business License	1,428	650	671	650	2,400	2,400	1,200
Management Fee	4,200	4,200	4,200	2,800	4,200	4,200	4,200
Security	96,340	93,626	79,818	0	102,000	102,000	51,000
Payroll Processing	1,781	2,152	2,960	1,029	1,900	1,900	1,800
Equipment and Supplies	1,370	402	1,569	163	1,000	1,000	1,700
Cleaning	0	4,365	0	0	6,400	6,400	3,200
Fire Safety	119	315	0	0	500	500	250
Incentive Management Fees	2,560	4,869	2,038	0	2,600	2,600	1,300
Total Operating Expenses	293,959	318,992	269,894	86,505	327,190	327,190	230,570
Total Expenses	293,959	318,992	269,894	86,505	327,190	327,190	230,570
Net Income	\$ 59,164	\$ 92,613	\$ 23,517	\$ (77,978)	\$ 33,810	\$ 49,810	\$ (42,070)

**State Bar of Georgia
2022 Election Schedule**

2021

- August Deadline for submission of election schedule for publication in October issue
Georgia Bar Journal
- October Official Election Notice, October Issue *Georgia Bar Journal*
- December 3 Nominating petition package mailed to incumbent Board of Governors
Members and other members who request a package

2022

- January 6-8 Nomination of Officers at Midyear Board Meeting, Westin Buckhead Atlanta,
Atlanta GA
- January 21 Deadline for receipt of nominating petitions for incumbent Board Members
including incumbent nonresident (out of state) members
- Feb 18 Deadline for receipt of nominating petitions for new Board Members
including new nonresident (out of state) members
- March 4 Deadline for write-in candidates for Officer to file a written statement (not less
than 10 days prior to mailing of ballots (Article VII, Section 1 (c))
- March 4 Deadline for write-in candidates for Board of Governors to file a written
statement (not less than 10 days prior to mailing of ballots (Article VII, Section
2 (c))
- March 18 Ballots mailed
- April 22 11:59 p.m. Deadline for ballots to be cast in order to be valid
- April 29 Election service submits results to the Elections Committee
- May 6 Election results reported and made available

Elections Committee
Recommendation to move to opt-in for paper ballots for BOG election

During the 2020-2021 bar year, the Elections Committee reviewed participation and historical voter data for the previous 5 election cycles relating to the Board of Governors election. Voter participation has been less than 17% for each election since 2015, with the lowest level occurring in 2020 at 8.65%.

The majority of the cost for conducting the BOG election is due to mailing paper ballots to voters. The committee reviewed voter data for 2018, 2019 and 2020 to determine how many votes were being cast electronically compared to the numbers cast by mail in paper ballot. The results were overwhelmingly electronic. In 2018, 5,637 total ballots were cast in the BOG election, 78% of which were voted electronically. In 2019, 5,435 total ballots were cast in the BOG election, 73% of which were voted electronically. In 2020, 3,713 total ballots were cast in the BOG election, 81% of which were voted electronically.

The State Bar currently conducts a hybrid election, with paper ballots being mailed automatically unless a member opts in to receiving an electronic ballot. The State Bar currently has around 19,000 members who have opted to receive their ballot electronically. The cost of the election is projected to be approximately \$35,000 annually using the current format for bar years 2022-2024. If the State Bar moves to an opt-in for paper ballots, that cost will be reduced by approximately \$17,000 to \$18,000 each year.

After reviewing all of the data and cost associated with running the BOG election, the committee recommends that the Bar change the election format to opt-in for paper ballots. In reviewing the election rules and bylaws with Bill NeSmith, it was determined that the current rules and bylaws allow for this approach as they provide for voting either electronically or by write-in paper ballot. To facilitate this new system, the committee recommends that all eligible voters have their ballot preference changed to reflect that they will receive an electronic ballot. An email will then be sent by Membership to all eligible voters notifying them of this and allowing them to opt-in to receive a paper ballot by responding to the email. The Membership Department is able to change voting preferences for anyone who elects to receive a paper ballot. The Committee also plans a publicity strategy to ensure members are well-informed of the changes to the process and encouraged to participate in the election.



MEMORANDUM

To: Board of Governors
From: Bill NeSmith, Deputy General Counsel
Date: June 11, 2021
Re: Clients' Security Fund

Clients' Security Fund Rule 10-103 states, "The State Bar of Georgia *shall* provide funding for the payment of claims and the costs of administering the Fund. In any year following a year in which the gross aggregate balance of the Fund falls below \$1,000,000, the State Bar of Georgia *shall* assess and collect from each dues-paying member a *pro rata* share of the difference between the actual Fund balance and \$1,000,000, provided that such assessments shall not exceed \$25 in any single year."

In the 2019-2020 Bar year, the fund dipped below the \$1,000,000 threshold, triggering an assessment. The CCLC granted the Clients' Security Fund enough funds to bring its balance to \$1,000,000 to avoid an assessment. The CCLC conditioned the payment to the Clients' Security Fund and the State Bar on finding a permanent solution to the funding issue.

This Bar year, 2020-2021, the Executive Committee transferred \$1,000,000 from the

ICLE Athens indemnification fund¹ to the Clients' Security Fund to bring it above the \$1,000,000 level, again avoiding an automatic assessment.

Because the Clients' Security Fund and the State Bar are required to find a long-term solution, the trustees met several times to discuss the best solution. The following is from the minutes of the last Clients' Security Fund meeting, held on September 1, 2020. At that meeting, the Trustees came up with the following:

A motion was made and seconded that a proposal be made to the Executive Committee of the State Bar of Georgia that Bar Rule 10-103 (a) be amended to dispense with the \$500,000 aggregate cap on yearly payments from the Fund and the automatic assessment trigger should the balance of the Fund fall below \$1,000,000. The Trustees also decided to amend Bar Rule 1-506 to provide for an annual assessment, in the amount of \$15, of all active and inactive State Bar members, including Emeritus members and attorneys practicing pro hac vice. The motion was carried by unanimous vote.

Subsequently, the Executive Committee discussed the trustee's proposed solution.

The current mandatory assessment rule leaves the Bar with two options:

1. Do nothing and pay an annual pro-rata assessment up to \$25.00 to bring the fund to \$1,000,000. Once we are that point, the fund will drop below \$1,000,000 each year, triggering an assessment. Under the current rule, the Bar will continue to bill new lawyers \$25.00 per year for four years, which does not meet the annual monetary needs of the Fund.
2. Approve the suggested changes provided by the trustees for the Clients' Security Fund.

This fix would offer a permanent solution but requires a rule change that would provide

¹ This fund was part of the transfer of ICLE Athens to ICLE State Bar of Georgia. The purpose was to indemnify the former board members of ICLE of Georgia, located in Athens, GA. The statute of limitations has largely run on all claims and the State Bar of Georgia's insurance carrier has picked up the indemnification, rendering the fund unnecessary.

a level assessment of \$15.00 per year and remove the four-year fee of \$25.00 paid by new lawyers.

1 Rule 1-506. Clients' Security Fund Assessment

- 2 (a) The State Bar of Georgia is authorized to assess each member ~~a~~ an annual fee of ~~\$100~~
3 \$15.00. ~~This \$100 fee may be paid in minimum annual installments of \$25 for a period of~~
4 four years. Each new member of the State Bar of Georgia will also be assessed a similar
5 amount upon admission to the State Bar of Georgia. This ~~fee~~ assessment shall be used
6 only to fund the Clients' Security Fund and shall be in addition to the annual license fee
7 as provided in Bar Rule 1-501 through Bar Rule 1-502.
- 8 (b) ~~For a member who joins the State Bar of Georgia after taking the Georgia Bar~~
9 Examination, the Clients' Security Fund Assessment shall be due and payable in \$25
10 installments on July 1 of each year, beginning with the second full fiscal year following
11 the year of admission, until the balance of \$100 is paid. The failure of a dues paying
12 member to pay the ~~minimum annual installments~~ assessment shall subject the member to
13 the same penalty provisions, including late fees and suspension of membership,
14 pertaining to the failure to pay the annual license fee as set forth in Bar Rules 1-501 and
15 1-501.1.
- 16 (c) ~~For a~~ member who is admitted as a Foreign Law Consultant or who joins without
17 taking the Georgia Bar Examination, ~~and who has not previously paid the Clients'~~
18 Security Fund Assessment, the full assessment shall be responsible for the annual
19 assessment due and payable prior to or upon registration with the State Bar of Georgia.
- 20 ~~(e)~~(d) Any lawyer who is admitted to practice in Georgia pro hac vice shall be responsible
21 for paying the annual assessment along with their initial application fee for admission pro
22 hac vice.
- 23
24

1 Rule 1-506. Clients' Security Fund Assessment

- 2 (a) The State Bar of Georgia is authorized to assess each member an annual fee of \$15.00.
3 This assessment shall be used only to fund the Clients' Security Fund and shall be in
4 addition to the annual license fee as provided in Bar Rule 1-501 through Bar Rule 1-502.
5 (b) The failure of a dues paying member to pay the assessment shall subject the member to
6 the same penalty provisions, including late fees and suspension of membership,
7 pertaining to the failure to pay the annual license fee as set forth in Bar Rules 1-501 and
8 1-501.1.
9 (c) A member who is admitted as a Foreign Law Consultant or who joins without taking the
10 Georgia Bar Examination shall be responsible for the annual assessment upon registration
11 with the State Bar of Georgia.
12 (d) Any lawyer who is admitted to practice in Georgia pro hac vice shall be responsible for
13 paying the annual assessment along with their initial application fee for admission pro
14 hac vice.

15

1 Rule 10-103. Funding.

- 2 (a) The State Bar of Georgia shall provide funding for the payment of claims and the costs of
3 administering the Fund. ~~In any year following a year in which the gross aggregate~~
4 ~~balance of the Fund falls below \$1,000,000, the State Bar of Georgia shall assess and~~
5 ~~collect from each dues-paying member a pro rata share of the difference between the~~
6 ~~actual Fund balance and \$1,000,000, provided that such assessments shall not exceed \$25~~
7 ~~in any single year. The aggregate amount paid to claimants from the Fund in any year~~
8 ~~shall not exceed \$500,000. Funding shall be through an annual assessment of \$15.00 per~~
9 ~~dues paying lawyer and by any lawyer seeking admission, pro hac vice. The Trustees~~
10 ~~shall not pay out claims in an amount more than received through the annual assessment~~
11 ~~in a single year.~~ The Board of Governors may from time to time adjust the Fund's
12 ~~minimum aggregate balance,~~ maximum annual payout, or maximum annual assessment
13 to advance the purposes of the Fund or to preserve the fiscal integrity of the Fund.
14 (b) All monies or other assets of the Fund shall constitute a trust and shall be held in the
15 name of the Fund, subject to the direction of the Board.
16 (c) Only the Board of Trustees may authorize the payment of money from the Fund.
17

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4 dues paying lawyer and by any lawyer seeking admission, pro hac vice. The Trustees
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6 in a single year. The Board of Governors may from time to time adjust the Fund's
7 maximum annual payout, or maximum annual assessment to advance the purposes of the
8 Fund or to preserve the fiscal integrity of the Fund.
- 9 (b) All monies or other assets of the Fund shall constitute a trust and shall be held in the
10 name of the Fund, subject to the direction of the Board.
- 11 (c) Only the Board of Trustees may authorize the payment of money from the Fund.
- 12



CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM

The Honorable Harold D. Melton (Chair)
Chief Justice, Supreme Court of Georgia
Atlanta, Georgia

Ms. LaToya Simone Bell
Houston Circuit Public Defenders Office
Warner Robins, GA

Mr. Michael Scott Boone
Atlanta's John Marshall Law School
Atlanta, Georgia

Professor Nathan S. Chapman
University of Georgia School of Law
Athens, Georgia

Professor Clark D. Cunningham
Georgia State University College of Law
Atlanta, Georgia

Mr. Gerald M. Edenfield
Edenfield, Cox, Bruce & Classens, PC
Statesboro, Georgia

The Honorable Susan E. Edlein
Fulton County State Court
Atlanta, Georgia

Ms. Elizabeth L. Fite
Rogers & Fite, LLC
Atlanta, Georgia

Ms. Rebecca Holmes Liles Grist
Bibb County Solicitor General's Office
Macon, Georgia

Mr. Norbert Daniel Hummel IV
Lewis Brisbois Bisgaard & Smith LLP
Atlanta, Georgia

Mr. Francys Johnson
Davis Bozeman Johnson Law Firm
Statesboro, GA

Ms. Dawn M. Jones
The Firm of Dawn M. Jones LLC
Atlanta, Georgia

Professor Patrick E. Longan
Mercer University School of Law
Macon, Georgia

Mrs. Maria F. Mackay
Watkinsville, Georgia

The Honorable Shondrea Crews Morris
Superior Court of DeKalb County
Decatur, Georgia

Mr. Andrew Alan Pinson
Georgia Office of the Attorney General
Atlanta, Georgia

The Honorable William M. Ray, II
U.S. District Court, Northern District of Georgia
Atlanta, Georgia

The Honorable Clyde L. Reese III
Court of Appeals of Georgia
Atlanta, Georgia

Mrs. Adwaa Charney-Tague Seymour
Cox Enterprises, Inc.
Atlanta, Georgia

Assistant Dean Rita A. Sheffey
Emory University School of Law
Atlanta, Georgia

Mrs. Nicki Noel Vaughan
Northeastern Judicial Circuit Public Defender's Office
Gainesville, Georgia

Dr. Monica Willis-Parker
Emory University School of Medicine
Atlanta, Georgia

Supreme Court of Georgia Advisor
The Honorable Sharon Ellen LaGruta
Supreme Court of Georgia
Atlanta, Georgia

Staff
Karlise V. Grier
Executive Director

TO: Board of Governors of the State Bar of Georgia

FROM: Karlise Yvette Grier
Executive Director, Chief Justice's Commission on Professionalism

DATE: June 12, 2021

RE: Chief Justice's Commission on Professionalism

The Chief Justice's Commission on Professionalism (Commission), the first body of its kind in the nation, was created in 1989 by the Supreme Court of Georgia with the primary charge to enhance professionalism among Georgia's judges and lawyers. Chief Justice Harold D. Melton serves as the current Chair of the Commission. A brief update regarding the Commission's work as of April 20, 2021, is as follows.

FINAL REPORT REGARDING COMMISSION CLE: THE NECESSITY OF UNPARALLELED UNITY

The Commission hosted a CLE entitled "*The Necessity of Unparalleled Unity*" on **March 19, 2021**, in conjunction with the State Bar of Georgia's Spring Board of Governors meeting. The Commission hosted the CLE on the Zoom Webinar platform. According to the Zoom report generated for the CLE, the CLE was attended by 1,605 "Unique Viewers." The Commission reported attendance for 1,604 attorneys to the State Bar of Georgia's Commission on Continuing Legal Education Department.

The Commission thanks the program participants who were as follows.

Program Chair: **Ms. Dawn Jones**, President of the State Bar of Georgia

Special Guest: **Chief Justice Harold D. Melton**, Supreme Court of Georgia

Moderator: **Prof. Tanya M. Washington**, Georgia State University College of Law, Center for Access to Justice

Panelists: **Honorable Carla Wong McMillian**, Justice, Supreme Court of Georgia; **Honorable Nina Markette Baker**, Judge of Superior Court Coweta Judicial Circuit; **Mr. Ashley Bell**, Partner, Dentons US LLP; **Mr. Jake Evans**, Partner, Holland & Knight LLP; **Honorable Dax E. López**, Judge, State Court of DeKalb County; and **Ms. Patrise Perkins-Hooker**, Past President, State Bar of Georgia and Administrative Partner, Johnson & Freeman, LLC.

Special Acknowledgment: **Mr. Kevin C. Wilson**, Staff Attorney, Supreme Court of Georgia, for assistance in program planning.

To view the complete materials for the CLE, please visit: <http://cjcpga.org/unity-cle/>.

COMMISSION ADVISOR AND LIAISON CHANGES

The Commission thanks the Commission members who are retiring from the Commission on June 30, 2021, after the completion of their terms of service as follows: Chief Justice Harold D. Melton; Mr. Gerald M. Edenfield; Judge Susan E. Edlein; Mr. Norbert (Bert) Daniel Hummel IV; and Ms. Dawn M. Jones. The Commission also thanks retiring Commission liaisons, Mr. Robert Arrington and Ms. Paula J. Frederick, for their years of service. Look for a more information in the June 2021 issue of the Georgia Bar Journal.

PROFESSIONALISM PAGE ARTICLES

One of the ways the Commission communicates with State Bar members is through its Professionalism Page that appears in each issue of the Georgia Bar Journal, which is published six times per year. The Professionalism Page article that appeared in the February 2021 Georgia Bar Journal discusses the Professionalism and Technology CLE that the Commission sponsored in December 2020, and is attached hereto as “Exhibit A.” You may find selected Professionalism Page articles, on the Commission’s website at <http://cjcpga.org/georgia-bar-journal-articles/>.

COMING SOON: GRANT APPLICATION AND GROUP LEADER REGISTRATION FOR LAW SCHOOL ORIENTATIONS

The Commission anticipates accepting applications for grants to promote professionalism from mid-June 2021, until July 15, 2021. In addition, the Commission will recruit volunteer Group Leaders to participate in the Law School Orientations on Professionalism during the month of June 2021. Look for information regarding the Commission’s grant application process at <http://cjcpga.org/grants/>. Look for information regarding the 2021 Law School Orientations on Professionalism at <http://cjcpga.org/law-school-orientations-on-professionalism-2021/>.

COMMISSION ASSISTANCE WITH BAR ASSOCIATION AND SECTION PROFESSIONALISM CLE PROGRAMS

The Commission’s Executive Director is available to assist members of the State Bar of Georgia in planning Professionalism CLE programming. Please contact the Commission’s Executive Director, Karlise Y. Grier, via e-mail at kygrier@cjcpga.org, if you would like assistance in planning a professionalism CLE program.

Commission Website and Social Media

The Commission enjoys communicating with judges and lawyers about professionalism on the Commission’s social media platforms and via its website. Tell us what #professionalism means to you and why it matters. Connect with us!

Professionalism 2U: <http://cjcpga.org/2u/>
Facebook: <https://www.facebook.com/CJCPGA>
Twitter: <https://twitter.com/CJCPGA>
LinkedIn: <https://www.linkedin.com/company/cjcpga/>
YouTube: <https://www.youtube.com/user/cjcpga/videos>



EXHIBIT A

www.cjcpgeorgia.org



Professionalism and Technology in Practice

The Chief Justice's Commission on Professionalism thanks all who assisted with its December CLE discussing professionalism and the use of technology, recapped in this article.

BY KARLISE Y. GRIER

On Dec. 17, 2020, the Chief Justice's Commission on Professionalism held a CLE to discuss professionalism and the use of technology. Lawyers who may have traditionally worked on opposite sides of cases worked together on the Judicial Council/Administrative Office of the Courts COVID-19 Task Force to devise solutions that can help reduce the backlog of cases caused by the COVID-19 pandemic.¹ Hon. T. Russell McClelland, chief judge, State Court of Forsyth County and vice-chair of the COVID-19 Task Force, discussed the havoc wrought in his courtroom by the pandemic. Pre-pandemic, he could fit 180-200 people into his largest courtroom. Now, following the social distancing guidelines outlined by the Centers for Disease Control and Prevention, he is limited to a maximum capacity of 23 people. Supreme Court of Georgia Chief Justice Harold D. Melton encouraged judges to conduct court proceedings remotely as much as possible.²

Throughout the CLE, lawyers, judges and other legal professionals shared their thoughts on professionalism as the legal

systems works to use technology to address some of the challenges brought about by the pandemic. Adam Malone, task force member and executive vice president of the Georgia Trial Lawyers Association, articulated one of the professionalism themes heard throughout the CLE: Lawyers, as officers of the court, need to set their adversarial swords aside and address the backlog. If the courts are backlogged, clients suffer. Additional insights and topics of discussion shared by lawyers and judges during the CLE are highlighted below.

Who Should Be in Charge of the Videoconferencing Platform?

Panelists were asked their thoughts on a district attorney's office running the videoconferencing platform during a hearing as opposed to the judge's office. One judge acknowledged that during the initial two weeks of remote proceedings, the district attorneys did run Zoom until the judges got up to speed. The judge said it was not ideal, but it allowed the court to keep the cases moving.



... Lawyers, as officers of the court, need to set their adversarial swords aside and address the backlog. If the courts are backlogged, clients suffer.



GETTYIMAGES.COM/MELPOMENEM

Hon. Shawn LaGrúa, then a member of the Fulton County Superior Court bench,³ reminded participants that in some circumstances, lawyers and judges may have to make difficult choices on a case-by-case basis. Is it most important to have the case heard although an assistant district attorney may need to run the videoconference, or is it most important to wait until the judge can learn to do it or find an individual who can? LaGrúa further reminded the audience that judges have access to varying amounts of resources throughout the state, and urged professionals to continue to work together to determine what solutions work best for each community. She said that if the parties do agree to allow one of the parties to run the videoconference, the lawyers should work together to set up parameters in advance. Hon. Robert “Rob” D. Leonard II, chief judge, Superior Court of Cobb County and chair of the Judicial COVID-19 Task Force Technology Committee, said judges have an obligation to learn to use the technology. If a judge is unable to use the technology, then

the judge should find someone on his staff or at the court to do it. He acknowledges that, ideally, you don’t want one party to have control over the Zoom session.

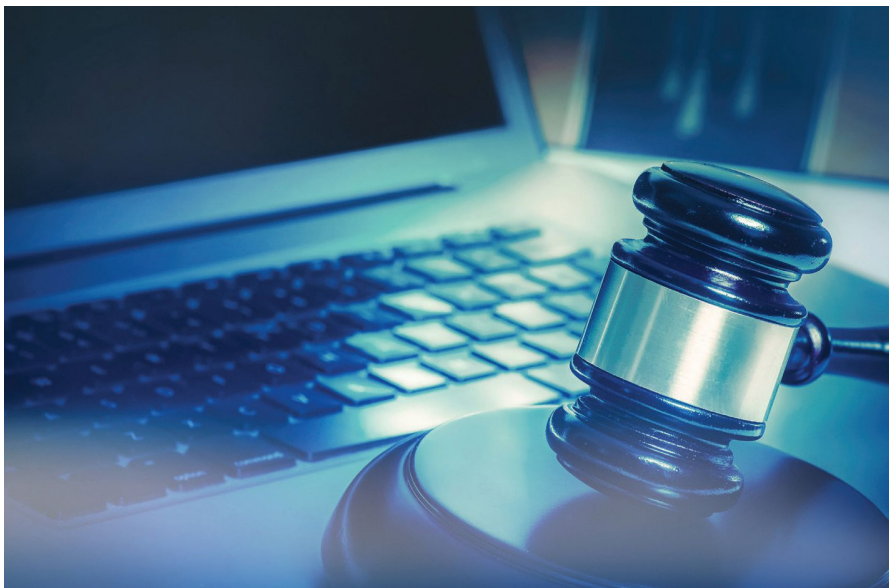
Discovery Disputes in Civil Cases

McClelland shared that the task force has developed some best practices for discovery disputes in civil cases and drafted a handout based on those practices that is currently under review. He reminded lawyers that the starting point for any discovery dispute is found in the Uniform Rules of Superior Court Rule 6.4. The rule requires lawyers to have a meaningful conversation about the dispute, not just an exchange of letters or emails. Hon. Alvin T. Wong, judge, State Court of DeKalb County, echoed the sentiment, “One of the most important tools [lawyers have] is lawyers talking to each other. Personal contact.” Don’t just write a letter or an email. At a minimum, lawyers should talk to come to an agreement about the essence of the discovery dispute. “Dur-

ing the pandemic era, it is more important than ever that you talk to each other,” said Wong.

David N. Nelson, task force member and the immediate past president of the Georgia Defense Lawyers Association, shared a story of how having a discovery dispute resolved not only the discovery dispute, but the entire case. McClelland then outlined the best practices for discovery dispute. Lawyers should submit a Notice of Discovery Dispute that is limited to one page. The one-page notice should set forth the nature of the discovery dispute, the efforts the parties have made to talk and resolve the discovery dispute and the specific relief requested. The other side would have the opportunity to submit a one-page response. The judge could then let the parties know how the court wished to proceed: with a conference call, a preliminary ruling or a hearing. McClelland said judges may decide to include the best practices in a standing pre-trial order, or lawyers may want to suggest the procedure to judges.

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Discovery Exchanges in Criminal Cases

One attendee raised questions about the exchange of discovery in criminal cases. During the ensuing discussion, the panelists used as a starting point the premise that the prosecutor does not have to provide discovery until 10 days prior to trial.⁴ Since very few trials might proceed in the near future, the question arose as to whether the lawyers in criminal cases needed to exchange discovery. Jimmonique Rodgers, task force member and former deputy director and interim executive director of the Georgia Public Defender Council, addressed the question. "We recommend the digital sharing of discovery," Rodgers said. "It is important for prosecutors and defense attorneys to work toward a resolution of cases. If lawyers wait until you have to do it under the statute, you are not operating in the spirit of let's try to resolve these cases." Exchanging discovery as soon as possible moves away from the old paradigm of the scorched-earth approach to a new para-

digm of how can we resolve cases that can and need to be resolved. "Defense counsel are willing to do that when it benefits the client," LaGrua added that the more information people have, the more likely the case will move toward resolution. If the prosecutor is in a position to do so, turning over the information as soon as possible is more likely get a case resolved. In addition, if defendants have information to provide that can help the case reach a resolution, it is in the defendant's best interest to do so. "This is not the time on either side to play hide the ball and adhere to 10 days when we know we are not going to have a trial for some time going forward. ... We all need to be working together," LaGrua said.

Mediation

Tracy Johnson, executive director of the Georgia Commission on Dispute Resolution, shared that there was a bit of regrouping when the Supreme Court first declared the judicial emergency

in March 2020. Shortly thereafter, the commission on Dispute Resolution engaged national trainers to teach Georgia mediators how to conduct remote mediations. The Commission also clarified its rules to encourage remote mediations. Johnson reported that mediators have transitioned well to the platform, noting that remote mediation has allowed courts to make mediation more accessible. For example, some circuits didn't have any mediators. Remote mediation has provided an opportunity for litigants in those areas to access mediation now. Remote mediation has also created more accessibility since mediators are no longer confined to working during the hours in which courts are operating. Depending on the availability of all parties involved, remote meditations can happen at any time. According to Johnson, the flexibility of mediation really embodies the spirit of *A Lawyers Creed and the Aspirational Statement on Professionalism*. Mediation encompasses civility, courtousness, fairness and cooperation.

... The flexibility of mediation really embodies the spirit of *A Lawyers Creed and the Aspirational Statement on Professionalism*. Mediation encompasses civility, courteousness, fairness and cooperation.

Stipulations and Admitting Evidence

The panelists also discussed practical professionalism pointers in conducting a remote hearing. LaGrua reminded attorneys that emailing documents to the judge's staff is not the same as having documents admitted into evidence; lawyers still need to ensure that the documents they wanted in evidence and as part of the record were properly admitted. Malone added that as he prepares for remote proceedings, he now assumes that the other side can authenticate documents and lay a proper foundation. As a result, he now works with opposing counsel to stipulate to authentication and foundation prior to the hearing. Additionally, he also stipulates to the admissibility of documents, when possible. Tina Shadix Roddenbery, attorney advisor to the task force, shared that during a recent bench trial, she stipulated to all of the facts and documents with the exception of two issues. She said she never would have considered doing so prior to the pandemic.

Access to Justice and Language Access

Cathy Vandenberg, a task force member and the deputy director of Atlanta Legal Aid Society, reminded the audience that not everyone has access to technology. She said that while many people in the metro-Atlanta area have smartphones, this was not necessarily the case in some parts of rural Georgia, which is served

by the Georgia Legal Services Program. As a result, some people will still need to come to court in person to have their cases resolved. She praised people for thinking creatively to solve access issues, especially for self-represented litigants. The Dougherty County Law Library and Middle Georgia Access to Justice Project are two of the organizations that are working to bridge the technology gap. Maria Mackay, certified legal interpreter and a member of the Chief Justice's Commission on Professionalism, discussed some of the challenges courts have faced regarding the language barrier as a result of the pandemic. Wong advised the audience that Zoom had a module for interpretation. He also stated that when he had cases in which the litigants spoke a language not commonly used in the court, he sometimes used the language line.⁵

Final Thoughts

McClelland and Wong encouraged judges to proactively review and conduct pre-trial conferences in their cases. Elizabeth Fite, president-elect of the State Bar of Georgia, encouraged lawyers to "give each other grace but explain to clients that we are still in court," even if it is a remote proceeding. Leonard shared, "Be patient and accommodate people." Roddenbery reminded everyone to read and take to heart *A Lawyers Creed and the Aspirational Statement on Professionalism*.

The Chief Justice's Commission on Professionalism appreciates the time and assis-

tance of everyone who participated in the CLE. A complete list of speakers and written materials are available on the Commission's website, www.cjcpga.org.⁶ ●



Karlise Y. Grier

Executive Director
*Chief Justice's Commission
on Professionalism*
kygrier@cjcpga.org

Endnotes

1. For more information on the Judicial Council/Administrative Office of the Courts Judicial COVID-19 Task Force, see <https://georgiacourts.gov/judicial-covid-19-task-force/>.
2. See also <https://www.gasupreme.us/wp-content/uploads/2021/01/10th-SJEO.pdf>.
3. After this article was written, Judge LaGrua was sworn in as a justice of the Supreme Court of Georgia.
4. See generally O.C.G.A. § 17-16-22 and O.C.G.A. § 17-16-23 (misdemeanor cases) and O.C.G.A. § 17-16-4 (felony cases).
5. For more information on interpreters, visit the website for the Georgia Commission on Interpreters <https://ocp.georgiacourts.gov/commission-on-interpreters/>. The State Bar of Georgia's Law Practice Management Department can provide information about various videoconferencing platforms. See <https://www.gabar.org/committeesprogramsections/programs/lpm/>.
6. See <http://cjcpga.org/121720-cjcp-cle/>.

**STATE BAR OF GEORGIA
COMBINED FINANCIAL REPORT
JUNE 30, 2020**

STATE BAR OF GEORGIA
COMBINED FINANCIAL REPORT
JUNE 30, 2020

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CPAs & ADVISORS

INDEPENDENT AUDITOR'S REPORT

To the Board of Governors
State Bar of Georgia
Atlanta, Georgia

We have audited the accompanying combined financial statements of the **State Bar of Georgia and related entity** (collectively the "State Bar") (a nonprofit organization), which comprise the combined statements of financial position as of June 30, 2020 and 2019, and the related combined statements of activities, functional expense, and cash flows for the years then ended, and the related notes to the combined financial statements.

Management's Responsibility for the Combined Financial Statements

Management is responsible for the preparation and fair presentation of these combined financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of combined financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these combined financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the combined financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the combined financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the combined financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the combined financial statements in order to design audit procedures that are appropriate in the circumstances but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the combined financial statements referred to above present fairly, in all material respects, the financial position of the State Bar as of June 30, 2020 and 2019, and the changes in its net assets and cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matter

Our audit was conducted for the purpose of forming an opinion on the combined financial statements as a whole. The supplemental information on pages 19 - 22 is presented for purposes of additional analysis and is not a required part of the combined financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combined financial statements. The information has been subjected to the auditing procedures applied in the audit of the combined financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the combined financial statements or to the combined financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the combined financial statements as a whole.

Mauldin & Jenkins, LLC

Atlanta, Georgia
April 13, 2021

STATE BAR OF GEORGIA
COMBINED STATEMENTS OF FINANCIAL POSITION
JUNE 30, 2020 AND 2019

	2020	2019
ASSETS		
Cash and cash equivalents	\$ 13,905,692	\$ 17,742,440
Accounts receivable, net	126,032	131,837
Receivable from related parties	1,222,128	768,071
Receivable from employees	23,814	24,906
Accrued interest receivable	127,757	75,806
Prepaid and other assets	476,407	653,805
Investments, at fair value	17,683,241	12,162,999
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	9,759,299	10,644,162
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	<u>1,286,993</u>	<u>1,328,998</u>
Total assets	<u><u>\$ 44,611,363</u></u>	<u><u>\$ 43,533,024</u></u>
LIABILITIES AND NET ASSETS		
Liabilities		
Accounts payable	\$ 1,068,050	\$ 2,209,748
Accrued salary and retirement plan expense	1,105,781	1,013,043
Payable to Client Security Fund	1,012,046	1,031,012
Payable to related parties	228,922	306,347
Accrued vacation	663,110	530,344
Deferred income - dues and sections	7,819,035	7,771,554
Other deferred income	<u>88,198</u>	<u>216,198</u>
Total liabilities	<u><u>11,985,142</u></u>	<u><u>13,078,246</u></u>
Net assets		
Without donor restrictions		
Undesignated	5,857,757	3,603,756
Board-designated	<u>25,063,508</u>	<u>24,931,210</u>
Total without donor restrictions	<u>30,921,265</u>	<u>28,534,966</u>
With donor restrictions	<u>1,704,956</u>	<u>1,919,812</u>
Total net assets	<u><u>32,626,221</u></u>	<u><u>30,454,778</u></u>
Total liabilities and net assets	<u><u>\$ 44,611,363</u></u>	<u><u>\$ 43,533,024</u></u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2020

	Without donor restrictions		With donor restrictions	Total
	Undesignated	Board-Designated		
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 11,485,394	\$ -	\$ -	\$ 11,485,394
Advertising	49,895	-	-	49,895
Membership	129,012	-	-	129,012
Total fees	<u>11,664,301</u>	<u>-</u>	<u>-</u>	<u>11,664,301</u>
ICLE				
Program revenues	5,855,600	-	-	5,855,600
Total ICLE	<u>5,855,600</u>	<u>-</u>	<u>-</u>	<u>5,855,600</u>
Other revenues				
Contributions	-	1,321,545	463,068	1,784,613
Section dues	-	821,103	-	821,103
Convention and meeting fees	-	67,800	-	67,800
Law Practice Management fees	54,535	-	-	54,535
Young Lawyers Division fees	9,063	-	-	9,063
High School Mock Trial fees	32,695	-	-	32,695
Assessment income	-	1,150	-	1,150
Investment income	475,241	242,060	53,184	770,485
Rental income	-	1,432,368	-	1,432,368
Other	88,762	446,816	-	535,578
Total other revenues	<u>660,296</u>	<u>4,332,842</u>	<u>516,252</u>	<u>5,509,390</u>
Net assets released from restrictions	-	731,108	(731,108)	-
Total revenues and other support	<u>18,180,197</u>	<u>5,063,950</u>	<u>(214,856)</u>	<u>23,029,291</u>
EXPENSES				
Program services				
Counsel	3,732,187	-	-	3,732,187
Communications	932,071	-	-	932,071
Membership	850,309	-	-	850,309
Consumer Assistance Program	584,701	-	-	584,701
Unauthorized Practice of Law	868,369	-	-	868,369
Law Practice Management	489,718	-	-	489,718
ICLE	2,610,743	6,810	-	2,617,553
Other	2,119,772	1,713,479	-	3,833,251
Total program services	<u>12,187,870</u>	<u>1,720,289</u>	<u>-</u>	<u>13,908,159</u>
Supporting services				
Management and general	3,515,503	3,434,186	-	6,949,689
Total expenses	<u>15,703,373</u>	<u>5,154,475</u>	<u>-</u>	<u>20,857,848</u>
CHANGE IN NET ASSETS	2,476,824	(90,525)	(214,856)	2,171,443
NET ASSETS, BEGINNING	<u>3,603,756</u>	<u>24,931,210</u>	<u>1,919,812</u>	<u>30,454,778</u>
TRANSFERS	<u>(222,823)</u>	<u>222,823</u>	<u>-</u>	<u>-</u>
NET ASSETS, ENDING	<u>\$ 5,857,757</u>	<u>\$ 25,063,508</u>	<u>\$ 1,704,956</u>	<u>\$ 32,626,221</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2019

	Without donor restrictions		With donor restrictions	Total
	Undesignated	Board-Designated		
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 11,246,189	\$ -	\$ -	\$ 11,246,189
Advertising	37,141	-	-	37,141
Membership	158,266	-	-	158,266
Total fees	<u>11,441,596</u>	<u>-</u>	<u>-</u>	<u>11,441,596</u>
ICLE				
Live Programming	5,034,783	-	-	5,034,783
Web Based Programming	1,360,335	-	-	1,360,335
Other	826	-	-	826
Total ICLE	<u>6,395,944</u>	<u>-</u>	<u>-</u>	<u>6,395,944</u>
Other revenues				
Contributions	-	1,339,808	905,933	2,245,741
Section dues	-	780,631	-	780,631
Convention and meeting fees	-	92,135	-	92,135
Law Practice Management fees	39,398	-	-	39,398
Young Lawyers Division fees	3,910	-	-	3,910
High School Mock Trial fees	134,552	-	-	134,552
Assessment income	-	206,173	-	206,173
Investment income	61,748	117,929	28,636	208,313
Rental income	-	1,341,008	-	1,341,008
Other	87,167	825,505	-	912,672
Total other revenues	<u>326,775</u>	<u>4,703,189</u>	<u>934,569</u>	<u>5,964,533</u>
Net assets released from restrictions	-	1,035,017	(1,035,017)	-
Total revenues and other support	<u>18,164,315</u>	<u>5,738,206</u>	<u>(100,448)</u>	<u>23,802,073</u>
EXPENSES				
Program services				
Counsel	3,545,651	-	-	3,545,651
Communications	804,504	-	-	804,504
Membership	614,637	-	-	614,637
Consumer Assistance Program	577,543	-	-	577,543
Unauthorized Practice of Law	803,203	101,802	-	905,005
Law Practice Management	469,675	-	-	469,675
ICLE	3,201,472	73,755	-	3,275,227
Other	3,016,582	2,765,656	-	5,782,238
Total program services	<u>13,033,267</u>	<u>2,941,213</u>	<u>-</u>	<u>15,974,480</u>
Supporting services				
Management and general	4,648,826	3,468,591	-	8,117,417
Total expenses	<u>17,682,093</u>	<u>6,409,804</u>	<u>-</u>	<u>24,091,897</u>
CHANGE IN NET ASSETS	482,222	(671,598)	(100,448)	(289,824)
NET ASSETS, BEGINNING	<u>3,194,269</u>	<u>25,530,073</u>	<u>2,020,260</u>	<u>30,744,602</u>
TRANSFERS	<u>(72,735)</u>	<u>72,735</u>	<u>-</u>	<u>-</u>
NET ASSETS, ENDING	<u>\$ 3,603,756</u>	<u>\$ 24,931,210</u>	<u>\$ 1,919,812</u>	<u>\$ 30,454,778</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2020

	Program services							Supporting services		Total	
	Counsel	Communica- tions	Membership	Consumer assistance program	Unauthorized practice of law	Law practice management	ICLE	Other	Total program services		Management and general
Personnel costs	\$ 2,285,635	\$ 320,356	\$ 292,472	\$ 348,016	\$ 517,034	\$ 261,177	\$ -	\$ 972,211	\$ 4,996,901	\$ 2,774,063	\$ 7,770,964
Payroll taxes	164,337	24,246	23,155	29,061	40,086	19,932	-	74,064	374,881	210,333	585,214
Employee benefits	621,330	120,064	97,276	101,387	177,476	99,737	-	339,201	1,556,471	789,369	2,345,840
Officers' expenses	-	-	-	-	-	-	-	37,199	37,199	34,462	71,661
Shared administrative office expenses	383,587	79,914	79,914	79,914	95,897	63,931	-	223,760	1,006,917	376,257	1,383,174
Rent and utilities	-	-	-	-	-	-	-	-	-	572,806	572,806
Office expenses	23,482	267,302	9,202	2,722	1,354	4,176	-	26,274	334,512	85,327	419,839
Subscriptions and books	14,790	2,509	175	-	750	8,451	-	2,270	28,945	2,069	31,014
Dues and memberships	8,040	405	-	-	675	125	-	54,027	63,272	2,650	65,922
Seminars and training	6,582	2,465	-	-	300	338	-	1,877	11,562	14,642	26,204
Travel	32,791	7,949	-	-	3,850	3,303	-	13,885	61,778	48,738	110,516
Meetings and luncheons	2,298	-	169	-	-	-	-	218,295	220,762	108,476	329,238
Professional services and contract labor	24,608	39,263	1,375	719	-	-	-	594,898	660,863	357,928	1,018,791
Program expenses	-	-	-	-	-	-	2,617,553	-	2,617,553	-	2,617,553
Contributions	-	-	-	-	-	-	-	321,582	321,582	-	321,582
Insurance	-	-	-	-	-	-	-	-	-	200,716	200,716
Other	85,035	51,000	329,973	6,284	11,029	15,269	-	910,552	1,408,142	284,100	1,693,242
Depreciation	79,672	16,598	16,598	16,598	19,918	13,279	-	43,156	205,819	1,087,753	1,293,572
	<u>\$ 3,732,167</u>	<u>\$ 932,071</u>	<u>\$ 850,309</u>	<u>\$ 584,701</u>	<u>\$ 868,369</u>	<u>\$ 489,718</u>	<u>\$ 2,617,553</u>	<u>\$ 3,833,251</u>	<u>\$ 13,908,159</u>	<u>\$ 6,949,689</u>	<u>\$ 20,857,848</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2019

	Program services							Supporting services		Total		
	Counsel	Communica-tions	Membership	Consumer assistance program			Law practice management	ICLE	Other		Total program services	Management and general
				Unauthorized practice of law								
Personnel costs	\$ 2,214,740	\$ 280,127	\$ 414,180	\$ 369,864	\$ 498,498	\$ 248,382	\$ -	\$ 1,192,103	\$ 5,217,894	\$ 2,982,362	\$ 8,200,256	
Payroll taxes	157,803	21,738	31,571	29,489	38,851	19,379	-	90,832	389,663	220,244	609,907	
Employee benefits	542,615	94,340	118,887	88,334	159,477	87,210	-	377,528	1,468,391	810,682	2,279,073	
Officers' expenses	-	-	-	-	-	-	-	92,024	92,024	115,163	207,187	
Shared administrative office expenses	389,077	67,356	-	69,453	101,034	67,356	-	235,746	930,022	770,387	1,700,409	
Rent and utilities	-	-	-	-	-	-	-	-	-	583,784	583,784	
Office expenses	31,507	275,615	-	2,090	1,569	2,483	-	70,616	384,080	98,370	482,450	
Subscriptions and books	12,631	1,934	-	-	801	8,853	-	887	25,106	852	25,958	
Dues and memberships	9,354	320	-	-	775	725	-	1,260	12,434	4,615	17,049	
Seminars and training	6,945	1,323	-	-	300	149	-	1,630	10,347	1,449	11,796	
Travel	52,168	16,714	-	1,107	2,560	8,137	-	24,139	104,625	60,599	165,424	
Meetings and luncheons	899	2,791	-	-	601	-	-	642,753	647,044	118,697	765,741	
Professional services and contract labor	46,070	-	-	156	-	-	-	565,009	611,235	419,141	1,030,376	
Live programming	-	-	-	-	-	-	3,055,793	-	3,055,793	-	3,055,793	
Web based programming	-	-	-	-	-	-	219,434	-	219,434	-	219,434	
Contributions	-	-	-	-	-	-	-	312,757	312,757	-	312,757	
Insurance	-	-	-	-	-	-	-	-	-	195,071	195,071	
Other	-	28,406	32,949	-	80,078	13,361	-	2,121,624	2,276,418	413,332	2,689,750	
Depreciation	81,842	13,640	17,050	17,050	20,461	13,640	-	44,330	208,013	1,322,669	1,530,682	
	<u>\$ 3,545,651</u>	<u>\$ 804,504</u>	<u>\$ 614,637</u>	<u>\$ 577,543</u>	<u>\$ 905,005</u>	<u>\$ 469,675</u>	<u>\$ 3,275,227</u>	<u>\$ 5,773,238</u>	<u>\$ 15,965,480</u>	<u>\$ 8,117,417</u>	<u>\$ 24,082,897</u>	

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENTS OF CASH FLOWS
FOR THE YEARS ENDED JUNE 30, 2020 AND 2019

	<u>2020</u>	<u>2019</u>
OPERATING ACTIVITIES		
Change in net assets	\$ 2,171,443	\$ (289,824)
Adjustments to reconcile change in net assets to net cash and cash equivalents provided by operating activities		
Depreciation and amortization	1,563,248	1,530,682
Net realized and unrealized (gains) on investments	(319,127)	(218,777)
Loss on disposal of fixed assets	-	7,722
Decrease (increase) in accounts receivable	5,805	(67,137)
(Increase) in receivables from related parties	(454,057)	(408,429)
Decrease in receivables from employees	1,092	2,088
(Increase) in accrued interest receivable	(51,951)	(75,806)
Decrease in prepaid and other assets	177,398	22,517
(Decrease) increase in accounts payable	(1,141,698)	763,118
Increase (decrease) in employee benefits payable	92,738	(874)
(Decrease) increase in payables to related parties	(77,425)	148,155
Increase in accrued vacation	132,766	71,302
Increase (decrease) in deferred income - dues and sections	47,481	(474,198)
(Decrease) in other deferred income	(128,000)	(64,296)
(Decrease) in payable to Client Security Fund	(18,966)	(419,237)
Total adjustments	<u>(170,696)</u>	<u>816,830</u>
Net cash and cash equivalents provided by operating activities	<u>2,000,747</u>	<u>527,006</u>
INVESTING ACTIVITIES		
Purchases of building improvements, furniture, fixtures, and equipment	(636,380)	(653,013)
Purchases of investments	(8,442,540)	(19,784,299)
Proceeds from sale and maturity of investments	<u>3,241,425</u>	<u>9,990,326</u>
Net cash and cash equivalents (used in) investing activities	<u>(5,837,495)</u>	<u>(10,446,986)</u>
Net (decrease) in cash and cash equivalents	<u>(3,836,748)</u>	<u>(9,919,980)</u>
Cash and cash equivalents, beginning	<u>17,742,440</u>	<u>27,662,420</u>
Cash and cash equivalents, ending	<u>\$ 13,905,692</u>	<u>\$ 17,742,440</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2020 and 2019

Note 1 – Summary of significant accounting policies

Description of Business – The State Bar of Georgia is a membership organization of attorneys in the state of Georgia that performs as a society and regulatory agency for its membership. The State Bar of Georgia Foundation, Inc. (“SBGF”) is a foundation that supports the charitable and educational activities of the State Bar of Georgia. Pursuant to an agreement executed on December 30, 2016, between the Institute of Continuing Legal Education in Georgia, an unincorporated Georgia nonprofit association, and the State Bar of Georgia Foundation, Inc., a Georgia nonprofit corporation, the assets of the Institute of Continuing Education in Georgia were transferred to the SBGF for the purposes of continuing to provide continuing legal education in Georgia. After receiving these assets, SBGF entered into a contract with the State Bar of Georgia to create a program to provide continuing legal education to Georgia lawyers. As a result, the Institute of Continuing Legal Education of the State Bar of Georgia (“ICLE”) was created as a program of the State Bar of Georgia, with the purpose of promoting a well-organized, properly planned, and adequately supported program of continuing legal education by which members of the legal profession may enhance their skills, keep abreast of developments in the law, ethics, and professionalism, engage in the study and research of the law, and disseminate the knowledge thus obtained. The combined financial statements include the State Bar of Georgia and the State Bar of Georgia Foundation, Inc., hereinafter collectively referred to as the “State Bar.”

Accrual Basis – The financial statements of the State Bar have been prepared on the accrual basis of accounting. Under this method of accounting, revenues are recognized when earned, and expenses are recognized when incurred.

Basis of Presentation – The State Bar’s net assets and revenue, expenses, gains, and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, net assets of the State Bar and changes therein are classified and reported as net assets without donor restriction and net assets with donor restriction.

Net Assets Without Donor Restrictions – Net assets available for use in general operations and not subject to donor (or certain grantor) restrictions. It is the policy of the board of directors to review their financial standing from time to time and to designate sums of net assets without donor restrictions for specific efforts.

Net Assets With Donor Restrictions – Net assets subject to donor (or certain grantor) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Gifts of long-lived assets and gifts of cash restricted for the acquisition of long-lived assets are recognized as revenue when the assets are placed in service. Donor-imposed restrictions are released when a restriction expires, this is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both.

Revenue is reported as increases in net assets without donor restrictions unless use of the related assets is limited by donor-imposed restrictions. Expenses are reported as decreases in net assets without donor restriction. Gains and losses on investments and other assets or liabilities are reported as increases or decreases in net assets without donor restriction unless their use is restricted by explicit donor stipulation or by law. Expirations of net assets with donor restrictions (i.e., the donor-stipulated purpose has been fulfilled and/or the stipulated time period has elapsed) are reported as reclassifications between the applicable classes of net assets.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2020 and 2019

Note 1 – Summary of significant accounting policies (Continued)

Cash and Cash Equivalents – For purposes of the combined statements of cash flows, the State Bar considers all highly liquid debt instruments with original maturities of three months or less to be cash equivalents. Cash equivalents were \$8,155,089 and \$11,242,894 at June 30, 2020 and 2019, respectively, consisting of money market funds. These funds are not insured.

At June 30, 2020 and 2019, in addition to the money market deposits above, the State Bar maintained bank deposits in excess of federally insured limits of \$5,480,509 and \$4,206,119, respectively.

Investments – All investments are reported in the combined statements of financial position at fair market value. In addition, both realized and unrealized gains and losses are included in the combined statements of activities. The State Bar has adopted an investment policy.

Fair Value of Financial Instruments – The State Bar has estimated the fair values of its financial instruments using available market information and other valuation methodologies in accordance with accounting principles generally accepted in the United States of America (“generally accepted accounting principles”). Accordingly, the estimates presented are not necessarily indicative of the amounts that the State Bar could realize in a current market exchange. Determinations of fair value are based on subjective data and significant judgment related to timing of payments and collection of the amounts to be realized. Different market assumptions and/or estimation methodologies might have a material effect on the estimated fair value amounts.

The carrying value of financial instruments such as cash and cash equivalents, other receivables, due to/from related organizations, accounts payable, and accruals approximate fair value because of the terms and relative short maturity of the financial instruments. The State Bar believes the carrying values of its financial instruments are reasonable estimates of their values, unless otherwise noted.

The fair value hierarchy for inputs used in measuring fair value maximizes the use of observable inputs and minimizes the use of unobservable inputs by requiring that the most observable inputs be used when available. Observable inputs are those that market participants would use in pricing the asset or liability based on market data obtained from sources independent of the State Bar. Unobservable inputs reflect the State Bar’s assumption about the inputs market participants would use in pricing the asset or liability developed based on the best information available in the circumstances.

The fair value hierarchy is classified in one of the following three levels based on the inputs:

Level 1: Financial instruments with unadjusted, quoted prices listed on active market exchanges.

Level 2: Financial instruments valued using inputs that include quoted prices for similar assets and liabilities in active markets, and inputs that are observable for the asset or liability, either directly or indirectly, for substantially the full term of the financial instrument.

Level 3: Financial instruments that are not actively traded on a market exchange and require using significant unobservable inputs in determining fair value.

Building, Furniture, Fixtures, and Equipment – Additions to building, furniture, fixtures, and equipment in excess of \$2,500 are capitalized. Building, furniture, fixtures, and equipment are carried at cost. Depreciation expense is computed based on the estimated useful lives of the respective assets using the straight-line method of depreciation. The estimated useful lives range from three to twenty-seven and a half years.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2020 and 2019

Note 1 – Summary of significant accounting policies (Continued)

Accounts Receivable – Accounts receivable are reported net of an allowance for doubtful accounts. As of both June 30, 2020 and 2019, the allowance for doubtful accounts was zero, respectively.

Revenue Recognition – Membership dues, annual license fees, ICLE seminar fees and Bar Center assessments are recorded as revenue in the applicable year when received. Any amounts collected prior to and including June 30 applicable to the subsequent year's membership dues, assessments, or seminars are recorded as deferred income in the statements of financial position. Annual license fee and Bar Center assessment notices for the fiscal years ending June 30, 2020 and 2019 were sent out in April 2020 and April 2019, respectively.

Functional Allocation of Expenses – The costs of providing the various programs and other activities have been summarized on a functional basis in the combined statements of functional expense. Costs directly attributable to their program are summarized by their natural classification on the statement of functional expense. The State Bar's operating costs have been allocated between program and management and general. Costs that were not directly attributable to program or management and general have been allocated based on the size of the program or time spent.

Use of Estimates by Management – The preparation of the combined financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and the disclosure of contingent assets and liabilities at the date of the combined financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Income Taxes – The State Bar was established as an instrumentality of the state of Georgia, and its income is therefore exempt from income tax under Internal Revenue Code Section 115, per the Internal Revenue Service determination letter dated May 11, 1965. Under Section 115, net income from an activity other than an essential governmental function can be subject to taxation. In management's opinion, the State Bar did not have any such net income during the years ended June 30, 2020 and 2019.

The State Bar has evaluated the effect of generally accepted accounting principles guidance for Accounting for Uncertainty in Income Taxes. Management believes that the State Bar continues to satisfy the requirements of a tax-exempt organization and therefore had no uncertain income tax positions at June 30, 2020 and 2019.

The State Bar files Forms 990 in the U.S. federal jurisdiction and the State of Georgia.

Clients' Security Fund (CSF) – The State Bar of Georgia Clients' Security Fund is a trust administered by the CSF Board of Trustees to provide monetary relief to persons who suffer reimbursable losses as a result of the dishonest conduct of a member (or members) of the State Bar of Georgia. The CSF is governed by State Bar Rules 10-101 through 10-112.

The CSF is funded by a \$100 mandatory assessment of all new members of the State Bar. The CSF can also be funded by an ad hoc assessment of up to \$25 per member per year upon the event its balance falls below \$1,000,000. In its history there has never been an ad hoc CSF assessment.

Aggregate payout from the CSF is limited to \$500,000 per year and \$25,000 per claimant.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2020 and 2019

Note 1 – Summary of significant accounting policies (Continued)

Recent Accounting Pronouncements – In June 2018, FASB issued Accounting Standards Update (ASU) 2018-08, Not-for-Profit Entities (Topic 958): Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made, which clarifies and establishes standards for characterizing grants and similar contracts with resource providers as contributions (nonreciprocal) subject to ASC Topic 958.

For the year ending June 30, 2020, the State Bar adopted ASU 2018-08 and has adjusted the presentation in these financial statements accordingly. The State Bar recognizes contribution revenue in the accompanying combined statements of activities in accordance with ASC Topic 958. The adoption of ASU 2018-08 did not have an impact on the timing of revenue recognition of contributions.

Note 2 – Liquidity and availability of financial assets

The following reflects the State Bar's financial assets as of the statements of financial position date as of June 30, 2020 and 2019, reduced by amounts not available for general use within one year of the statements of financial position date of June 30, 2020 and 2019 because of contractual or donor-imposed restrictions or internal designations.

	2020	2019
Cash and cash equivalents	\$ 13,905,692	\$ 17,742,440
Accounts receivable	1,371,974	924,814
Accrued interest receivable	127,757	75,806
Investments	17,683,241	12,162,999
	33,088,664	30,906,059
Less: Donor-imposed restricted cash and cash equivalents	(1,704,956)	(1,919,812)
Less: Board-designated cash and cash equivalents, accounts receivable, accrued interest receivable, and investments	(14,934,774)	(14,287,048)
Total financial assets without donor restriction or other restrictions available for general use within one year	\$ 16,449,035	\$ 14,699,199

The State Bar manages its liquidity by developing and adopting annual operating budgets that provide sufficient funds for general expenditures in meeting its liabilities and other obligations as they become due. Cash needs of the State Bar are expected to be met on a monthly basis from program service fees and contributions.

Note 3 – Membership

Membership in the State Bar totaled 52,132 and 51,069 at June 30, 2020 and 2019, respectively.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2020 and 2019

Note 4 – Investments

Investments are carried at fair market value. Proceeds from the sale of investments may be used in the operations of the State Bar.

As of June 30, 2020 and 2019, investments at fair value are summarized as follows:

	2020	2019
Cash equivalent	\$ 302,704	\$ 398,267
Fixed income	14,169,759	8,634,224
Government securities	3,210,778	3,130,508
Total investments	\$ 17,683,241	\$ 12,162,999

For the years ending June 30, 2020 and 2019, total investment income are summarized as follows:

	2020	2019
Interest and dividends	\$ 451,358	\$ 223,732
Net realized and unrealized gains (losses)	319,127	(15,419)
Total investment income	\$ 770,485	\$ 208,313

Note 5 – Fair value measurements

As required by FASB's fair value measurements and disclosure guidance, assets and liabilities are classified in their entirety based on the lowest level of input that is significant to the fair value measurement. The following is a summary of the levels within the fair value hierarchy for the State Bar's assets and liabilities measured at fair value as of June 30, 2020:

	Level 1	Level 2	Level 3	Total
Investments:				
Cash equivalent	\$ 302,704	\$ -	\$ -	\$ 302,704
Fixed income	14,169,759	-	-	14,169,759
Government securities	3,210,778	-	-	3,210,778
Total	\$ 17,683,241	\$ -	\$ -	\$ 17,683,241

The following is a summary of the levels within the fair value hierarchy for the State Bar's assets and liabilities measured at fair value as of June 30, 2019:

	Level 1	Level 2	Level 3	Total
Investments:				
Cash equivalent	\$ 398,267	\$ -	\$ -	\$ 398,267
Fixed income	8,634,224	-	-	8,634,224
Government securities	3,130,508	-	-	3,130,508
Total	\$ 12,162,999	\$ -	\$ -	\$ 12,162,999

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2020 and 2019

Note 6 – Building, furniture, fixtures, and equipment

The Bar Center building, furniture, fixtures, and equipment as of June 30, 2020 and 2019 are summarized as follows:

	2020	2019
Building and improvements	\$ 27,031,686	\$ 27,000,318
Furniture and office equipment	3,226,660	3,224,150
Computer and electronic equipment	1,045,801	715,306
	31,304,147	30,939,774
Less accumulated depreciation	(21,544,848)	(20,295,612)
	\$ 9,759,299	\$ 10,644,162

Land, furniture, fixtures, and equipment other than the Bar Center as of June 30, 2020 and 2019 are summarized as follows:

	2020	2019
Furniture and office equipment	\$ 1,131,030	\$ 1,089,847
Computer and electronic equipment	655,761	609,128
Leasehold and building improvements	369,928	369,928
Computer software	1,718,728	1,572,828
	3,875,447	3,641,731
Less accumulated depreciation	(2,588,454)	(2,312,733)
	\$ 1,286,993	\$ 1,328,998

Note 7 – Retirement plan

The State Bar has a money purchase pension plan that covers substantially all employees. State Bar contributions to this plan for the years ended June 30, 2020 and 2019 were \$480,020 and \$475,102, respectively.

Note 8 – Leases

Lessor – The State Bar leases office space to both related and non-related parties. Rental income totaled \$1,432,368 and \$1,341,008 in 2020 and 2019, respectively. These amounts included receipts of \$59,510 and \$58,406, respectively, from related parties. Certain of the leases have expiration dates through June 2025 and certain of the leases are renewable annually or cancelable at the request of the lessee.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2020 and 2019

Note 8 – Leases (Continued)

As of June 30, 2020, approximate future minimum annual lease payments for the leases that are not renewable annually or cancelable are as follows:

For the year ending June 30,	2021	\$	140,956
	2022		141,480
	2023		144,320
	2024		120,743
	2025		<u>88,022</u>
	Total	\$	<u>635,521</u>

Lessee – The State Bar has entered into various non-cancelable operating lease agreements for the rental of photocopiers and mailing equipment. These lease agreements expire on various dates through June 2024.

In addition, the State Bar entered into a lease on November 1, 2008 for its Coastal Georgia office space in Savannah. The lease expired on October 31, 2013 with two five-year options available to renew through 2023. The State Bar renewed the lease under its second option during 2018, with expiration on October 31, 2022.

The State Bar also renewed its lease at a satellite office in Tifton, Georgia and executed a lease agreement for expanded conference room space which expires on September 30, 2021.

As of June 30, 2020, approximate future minimum annual lease payments for these leases are as follows:

For the year ending June 30,	2021	\$	117,533
	2022		109,503
	2023		67,112
	2024		<u>39,732</u>
	Total	\$	<u>333,880</u>

Rental expense charged to operations amounted to \$149,301 and \$192,930 for the years ended June 30, 2020 and 2019, respectively.

Note 9 – Related-party transactions

The Commission on Continuing Lawyer Competency contributed \$1,322,797 and \$1,339,560 to the State Bar in 2020 and 2019, respectively. These amounts represent approximately 6% of the total amount of State Bar's revenue and other support for 2020 and 2019.

The State Bar was also reimbursed by related organizations for their share of salary and operating expenses for the years ending June 30, 2020 and 2019 as follows:

	<u>2020</u>	<u>2019</u>
Commission on Continuing Lawyer Competency	\$ 762,764	\$ 112,946
Chief Justice's Commission on Professionalism	178,085	230,100
Georgia Bar Foundation, Inc.	<u>97,477</u>	<u>96,610</u>
	<u>\$ 1,038,326</u>	<u>\$ 439,656</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2020 and 2019

Note 9 – Related-party transactions (Continued)

The following represents a summary of amounts due from related parties as of June 30, 2020 and 2019:

	<u>2020</u>	<u>2019</u>
Commission on Continuing Lawyer Competency	\$ 1,200,521	\$ 752,747
Georgia Bar Foundation, Inc.	<u>21,607</u>	<u>15,324</u>
	<u>\$ 1,222,128</u>	<u>\$ 768,071</u>

The following represents a summary of amounts due to related parties as of June 30, 2020 and 2019:

	<u>2020</u>	<u>2019</u>
Chief Justice's Commission on Professionalism	\$ 219,010	\$ 306,347
Commission on Continuing Lawyer Competency	<u>9,912</u>	<u>-</u>
	<u>\$ 228,922</u>	<u>\$ 306,347</u>

Note 10 – Board-designated net assets

The State Bar had Board-designated net assets available for the following purposes at June 30, 2020 and 2019:

	<u>2020</u>	<u>2019</u>
Bar Center	\$ 16,459,220	\$ 16,682,106
General Operations	4,750,000	4,750,000
Litigation	300,000	300,000
Sections	3,097,035	2,793,143
Conventions	87,818	29,716
Operating contingencies – ICLE	144,435	151,245
Replacement of equipment – ICLE	<u>225,000</u>	<u>225,000</u>
	<u>\$ 25,063,508</u>	<u>\$ 24,931,210</u>

Bar Center net assets primarily consist of the net depreciated cost of the Bar Center building, building improvements, and related Conference Center furniture and equipment.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2020 and 2019

Note 11 – Net assets with donor restrictions

Net assets with donor restrictions at June 30, 2020 and 2019 were available for the following purposes and are included in cash:

	<u>2020</u>	<u>2019</u>
Legislative Program	\$ 1,094,092	\$ 1,285,674
Law-Related Education/Marshall Fund	233,708	316,571
High School Mock Trial	15,486	14,095
BASICS Program	69,517	67,031
Young Lawyers Division	170,214	125,032
Lawyer Assistance Program	34,698	32,553
Georgia Diversity Program	13,596	18,957
Bar Media Conference	20,839	18,697
Law Day	6,517	6,356
iCivics Program	623	603
Promote Inclusion	14,212	11,120
Access to Justice	1,492	1,456
Military Vet Pro Bono	14,710	13,854
Justice Hunstein's Portrait	15,152	7,813
State Bar of Georgia Foundation	100	-
	<u>\$ 1,704,956</u>	<u>\$ 1,919,812</u>

Note 12 – Net assets released from restrictions

Net assets were released from donor restrictions in 2020 and 2019 by incurring expenses satisfying the restricted purposes or by occurrence of other events specified by donors as follows:

	<u>2020</u>	<u>2019</u>
Legislative Program	\$ 550,572	\$ 531,126
Young Lawyers Division	24,374	76,933
Law-Related Education/Marshall Fund	90,687	-
Georgia Diversity Program	60,545	65,841
State Bar of Georgia Foundation	-	105,147
Promote Inclusion	808	12,531
Bar Media Conference	2,461	3,300
iCivics Program	4	11,359
Lawyer Assistance Program	1,372	1,151
Unauthorized Practice of Law	-	101,802
National Mock Trial	-	121,214
High School Mock Trial	127	4,613
Other programs	158	-
	<u>\$ 731,108</u>	<u>\$ 1,035,017</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2020 and 2019

Note 13 – Contingencies

The State Bar is subject to various suits and proceedings arising in the ordinary conduct of its affairs and has been named as a defendant in several lawsuits. In the opinion of the Office of the General Counsel, all suits and actions now pending or likely to be filed will be resolved without material adverse effect on the financial position of the State Bar.

Note 14 – Effects of COVID-19 Coronavirus

As a result of the spread of the COVID-19 coronavirus, economic uncertainties have arisen which likely negatively impact the change in net assets. Other financial impacts could occur though the extent of potential impact is unknown at this time.

Note 15 – Subsequent events

The State Bar has evaluated subsequent events occurring through April 13, 2021, the date on which the combined financial statements were available to be issued.

STATE BAR OF GEORGIA

COMBINING STATEMENT OF FINANCIAL POSITION JUNE 30, 2020

	SBG and SBGF	ICLE	Elimination	Total
ASSETS				
Cash and cash equivalents	\$ 8,680,470	\$ 5,225,222	\$ -	\$ 13,905,692
Accounts receivable, net	125,032	1,000	-	126,032
Receivable from related parties	1,222,128	-	-	1,222,128
Receivable from employees	23,814	-	-	23,814
Accrued interest receivable	127,757	-	-	127,757
Prepaid and other assets	441,656	34,751	-	476,407
Investments, at fair value	15,388,295	2,294,946	-	17,683,241
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	9,759,299	-	-	9,759,299
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	1,194,916	92,077	-	1,286,993
Inter-company receivable	93,967	-	(93,967)	-
Total assets	\$ 37,057,334	\$ 7,647,996	\$ (93,967)	\$ 44,611,363
LIABILITIES AND NET ASSETS				
Liabilities				
Accounts payable	\$ 977,660	\$ 90,390	\$ -	\$ 1,068,050
Accrued salary and retirement plan expense	1,035,650	70,131	-	1,105,781
Payable to Client Security Fund	1,012,046	-	-	1,012,046
Payable to related parties	219,010	9,912	-	228,922
Accrued vacation	663,110	-	-	663,110
Deferred income - dues and sections	7,819,035	-	-	7,819,035
Other deferred income	13	88,185	-	88,198
Inter-company payable	-	93,967	(93,967)	-
Total liabilities	11,726,524	352,585	(93,967)	11,985,142
Net assets				
Without donor restrictions				
Undesignated	(1,068,219)	6,925,976	-	5,857,757
Board-designated	24,694,073	369,435	-	25,063,508
Total without donor restrictions	23,625,854	7,295,411	-	30,921,265
With donor restrictions	1,704,956	-	-	1,704,956
Total net assets	25,330,810	7,295,411	-	32,626,221
Total liabilities and net assets	\$ 37,057,334	\$ 7,647,996	\$ (93,967)	\$ 44,611,363

STATE BAR OF GEORGIA

COMBINING STATEMENT OF FINANCIAL POSITION JUNE 30, 2019

	SBG and SBF	ICLE	Elimination	Total
ASSETS				
Cash and cash equivalents	\$ 14,317,448	\$ 3,424,992	\$ -	\$ 17,742,440
Accounts receivable, net	104,424	27,413	-	131,837
Receivable from related parties	768,071	-	-	768,071
Receivable from employees	24,906	-	-	24,906
Accrued interest receivable	75,806	-	-	75,806
Prepaid and other assets	556,668	97,137	-	653,805
Investments, at fair value	9,928,478	2,234,521	-	12,162,999
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	10,644,162	-	-	10,644,162
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	1,235,461	93,537	-	1,328,998
Inter-company receivable	59,597	-	(59,597)	-
Total assets	\$ 37,715,021	\$ 5,877,600	\$ (59,597)	\$ 43,533,024
LIABILITIES AND NET ASSETS				
Liabilities				
Accounts payable	\$ 1,798,773	\$ 410,975	\$ -	\$ 2,209,748
Accrued salary and retirement plan expense	961,203	51,840	-	1,013,043
Payable to Client Security Fund	1,031,012	-	-	1,031,012
Payable to related parties	306,347	-	-	306,347
Accrued vacation	530,344	-	-	530,344
Deferred income - dues and sections	7,771,554	-	-	7,771,554
Other deferred income	24,122	192,076	-	216,198
Inter-company payable	-	59,597	(59,597)	-
Total liabilities	12,423,355	714,488	(59,597)	13,078,246
Net assets				
Without donor restrictions				
Undesignated	(1,183,111)	4,786,867	-	3,603,756
Board-designated	24,554,965	376,245	-	24,931,210
Total without donor restrictions	23,371,854	5,163,112	-	28,534,966
With donor restrictions				
Total net assets	25,291,666	5,163,112	-	30,454,778
Total liabilities and net assets	\$ 37,715,021	\$ 5,877,600	\$ (59,597)	\$ 43,533,024

STATE BAR OF GEORGIA
COMBINING STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2020

	<u>SBG and SBGF</u>	<u>ICLE</u>	<u>Eliminations</u>	<u>Total</u>
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 11,485,394	\$ -	\$ -	\$ 11,485,394
Advertising	49,895	-	-	49,895
Membership	129,012	-	-	129,012
Total fees	<u>11,664,301</u>	<u>-</u>	<u>-</u>	<u>11,664,301</u>
ICLE				
Program revenues	-	5,855,600	-	5,855,600
Total ICLE	<u>-</u>	<u>5,855,600</u>	<u>-</u>	<u>5,855,600</u>
Other revenues				
Contributions	1,784,613	-	-	1,784,613
Section dues	821,103	-	-	821,103
Convention and meeting fees	67,800	-	-	67,800
Law Practice Management fees	54,535	-	-	54,535
Young Lawyers Division fees	9,063	-	-	9,063
High School Mock Trial fees	32,695	-	-	32,695
Assessment income	1,150	-	-	1,150
Investment income	697,718	72,767	-	770,485
Rental income	1,432,368	-	-	1,432,368
Other income	534,652	926	-	535,578
Total other revenues	<u>5,435,697</u>	<u>73,693</u>	<u>-</u>	<u>5,509,390</u>
Total revenues and other support	<u>17,099,998</u>	<u>5,929,293</u>	<u>-</u>	<u>23,029,291</u>
EXPENSES				
Program services				
Counsel	3,732,187	-	-	3,732,187
Communications	932,071	-	-	932,071
Membership	850,309	-	-	850,309
Consumer Assistance Program	584,701	-	-	584,701
Unauthorized Practice of Law	868,369	-	-	868,369
Law Practice Management	489,718	-	-	489,718
ICLE - program expenses	-	2,617,553	-	2,617,553
Other	3,833,251	-	-	3,833,251
Total program services	<u>11,290,606</u>	<u>2,617,553</u>	<u>-</u>	<u>13,908,159</u>
Supporting services				
Management and general	5,770,248	1,179,441	-	6,949,689
Total expenses	<u>17,060,854</u>	<u>3,796,994</u>	<u>-</u>	<u>20,857,848</u>
CHANGE IN NET ASSETS	39,144	2,132,299	-	2,171,443
NET ASSETS, BEGINNING	25,291,666	5,163,112	-	30,454,778
NET ASSETS, ENDING	<u>\$ 25,330,810</u>	<u>\$ 7,295,411</u>	<u>\$ -</u>	<u>\$ 32,626,221</u>

STATE BAR OF GEORGIA
COMBINING STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2019

	SBG and SBGF	ICLE	Elimination	Total
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 11,246,189	\$ -	\$ -	\$ 11,246,189
Advertising	37,141	-	-	37,141
Membership	158,266	-	-	158,266
Total fees	<u>11,441,596</u>	<u>-</u>	<u>-</u>	<u>11,441,596</u>
ICLE				
Live Programming	-	5,034,783	-	5,034,783
Web Based Programming	-	1,360,335	-	1,360,335
Other	-	826	-	826
Total ICLE	<u>-</u>	<u>6,395,944</u>	<u>-</u>	<u>6,395,944</u>
Other revenues				
Contributions	2,245,741	-	-	2,245,741
Section dues	780,631	-	-	780,631
Convention and meeting fees	92,135	-	-	92,135
Law Practice Management fees	39,398	-	-	39,398
Young Lawyers Division fees	3,910	-	-	3,910
High School Mock Trial fees	134,552	-	-	134,552
Assessment income	206,173	-	-	206,173
Investment income (loss)	260,147	(51,834)	-	208,313
Rental income	1,341,008	-	-	1,341,008
Other income	907,392	5,280	-	912,672
Total other revenues	<u>6,011,087</u>	<u>(46,554)</u>	<u>-</u>	<u>5,964,533</u>
Total revenue and other support	<u>17,452,683</u>	<u>6,349,390</u>	<u>-</u>	<u>23,802,073</u>
EXPENSES				
Program services				
Counsel	3,545,651	-	-	3,545,651
Communications	804,504	-	-	804,504
Membership	614,637	-	-	614,637
Consumer Assistance Program	577,543	-	-	577,543
Unauthorized Practice of Law	905,005	-	-	905,005
Law Practice Management	469,675	-	-	469,675
ICLE - Live Programming	-	3,055,793	-	3,055,793
ICLE - Web Programming	-	219,434	-	219,434
Other	5,782,238	-	-	5,782,238
Total program expenses	<u>12,699,253</u>	<u>3,275,227</u>	<u>-</u>	<u>15,974,480</u>
Supporting services				
Management and general	6,073,491	2,043,926	-	8,117,417
Total expenses	<u>18,772,744</u>	<u>5,319,153</u>	<u>-</u>	<u>24,091,897</u>
CHANGE IN NET ASSETS	(1,320,061)	1,030,237	-	(289,824)
NET ASSETS, BEGINNING	<u>26,611,727</u>	<u>4,132,875</u>	<u>-</u>	<u>30,744,602</u>
NET ASSETS, ENDING	<u>\$ 25,291,666</u>	<u>\$ 5,163,112</u>	<u>\$ -</u>	<u>\$ 30,454,778</u>

April 13, 2021

To the Board of Governors of the
State Bar of Georgia
Atlanta, Georgia

We have audited the combined financial statements of State Bar of Georgia (the "State Bar") for the year ended June 30, 2020, and we will issue our report thereon dated April 13, 2021. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing standards, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated September 23, 2020. Professional standards also require that we communicate to you the following information related to our audit.

Significant Audit Matters

Qualitative Aspects of Accounting Practices

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by State Bar of Georgia are described in Note 1 to the combined financial statements. No new accounting policies were adopted and the application of existing policies was not changed during 2020. We noted no transactions entered into by the State Bar during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the combined financial statements in the proper period.

Accounting estimates are an integral part of the combined financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the combined financial statements and because of the possibility that future events affecting them may differ significantly from those expected. The most sensitive estimates affecting the combined financial statements were:

Management's estimate of the fair value of investments is based on various valuation methodologies and is the price that would be received to sell an asset or paid to transfer a liability. We evaluated the key factors and assumptions used to develop the estimated fair value of investments in determining that it is reasonable in relation to the combined financial statements taken as a whole.

Management's estimate of functional allocation of expenses between program and supporting services is based on a reasonable basis, such as square footage or time spent. We evaluated the key factors and assumptions used to develop the functional allocation of expenses in determining that it is reasonable in relation to the combined financial statements taken as a whole.

Management's estimate of depreciation expense is based on the estimated useful lives of the assets. We evaluated the key factors and assumptions used to develop the estimate of depreciation expense in determining that it is reasonable in relation to the combined financial statements taken as a whole.

Management's estimate of the allowance for doubtful accounts for receivables, including contributions receivables, is based on the estimate of individual collectability. We evaluated the key factors and assumptions used to develop the allowance for doubtful accounts in determining that it is reasonable in relation to the combined financial statements taken as a whole.

The financial statement disclosures are neutral, consistent, and clear.

Difficulties Encountered in Performing the Audit

We encountered no difficulties in dealing with management in performing and completing our audit.

Disagreements with Management

For purposes of this letter, a disagreement with management is a disagreement on a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the combined financial statements or the auditor's report. We are pleased to report that no such disagreements arose during the course of our audit.

Management Representations

We have requested certain representations from management that are included in the management representation letter dated April 13, 2021.

Management Consultations with Other Independent Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the State Bar's combined financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Other Audit Findings or Issues

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the State Bar's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

Recent Accounting Pronouncements

We wanted to inform you that the Financial Accounting Standards Board (FASB) has recently issued Accounting Standard Updates (ASUs) that will impact the State Bar in future years, which are:

ASU 2016-02, Leases (Topic 842) - In February 2016, FASB issued this ASU to increase transparency and comparability among organizations by recognizing lease assets and lease liabilities on the statement of financial position and disclosing key information about leasing arrangements. ASU 2016-02 is effective for financial statements issued for fiscal years beginning after December 15, 2019. In June 2020, FASB issued *ASU 2020-05, Leases (Topic 842)*, which extended the required implementation date of the new lease standard for financial statements issued for fiscal years beginning after December 15, 2021.

Other Matters

With respect to the supplemental information accompanying the combined financial statements, we made certain inquiries of management and evaluated the form, content, and methods of preparing the information to determine that the information complies with U.S. generally accepted accounting principles, the method of preparing it has not changed from the prior period, and the information is appropriate and complete in relation to our audit of the combined financial statements. We compared and reconciled the supplemental information to the underlying accounting records used to prepare the combined financial statements or to the combined financial statements themselves.

This information is intended solely for the use of management and the Board of Governors of the State Bar of Georgia and is not intended to be, and should not be, used by anyone other than these specified parties.

Mauldin & Jenkins, LLC

STATE BAR OF GEORGIA
EXECUTIVE COMMITTEE MEETING
MINUTES
Friday, February 26, 2021, 1 p.m.
Zoom Meeting

Members Participating

Dawn M. Jones, President; Elizabeth Louise Fite, President-Elect; Sally B. Akins, Treasurer; Tony DelCampo, Secretary; Darrell L. Sutton, Immediate Past President; Bert D. Hummel, IV, YLD President; Elissa B. Haynes, YLD President-Elect; William T. Davis, YLD Immediate Past President; Ivy N. Cadle; R. Javoyne Hicks; David S. Lipscomb; Martin Valbuena; and Nicki N. Vaughan.

Members Absent

Amy V. Howell

Staff Participating

Sarah Coole, Chief Operating Officer; Damon Elmore, Executive Director; Paula Frederick, General Counsel; Christine Butcher Hayes, Director of Governmental Affairs; Bill NeSmith, Deputy General Counsel; and Ron Turner, Chief Financial Officer.

Call to Order

President Dawn M. Jones called the meeting to order at 1:03 p.m. Members of the Executive Committee in attendance are indicated above.

Future Meetings Schedule

President Dawn M. Jones reviewed the Future Meetings Schedule. More information regarding future meetings will be detailed during the president's report. President-Elect Elizabeth L. Fite reported that she is continuing to work on contracting her upcoming Board of Governors meetings. For future Executive Committee meetings, President Elect Fite's plan is to preschedule future meetings regularly, for example, every second Friday of the month, and hold half in-person and half virtually on Zoom.

Executive Committee Minutes

Secretary Tony DelCampo presented for approval the minutes of the January 29, 2021, Executive Committee meeting. By unanimous vote, after revision, the Executive Committee approved the revised minutes.

Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by unanimous voice vote: Jill Levy-449607, Gail Travillian-535790, Kevin Watson-741710, Michael Youtt-783492, Louise Wells-532925, John Denis Falk-254484, Ann Novak Russell-620267, Catherine Torres-412033, Dawn Edge-McKendrick-477036, Matthew Rogers St. John-673360, Joy Grayson-013192, Gary Rutledge-621505, Mary Moore-520070, Renee F. Williams-763975, Jessica Anne Thompson-483093, Peter Reed Hill-003920.

Disability Status

Pursuant to State Bar Rule 1-202, the Executive Committee approved three requests for disabled status by unanimous vote.

Member Status Appeals

The Executive Committee, by majority vote, approved a requests by Jean Brown and Jamie Morton to waive the January late fee.

Amendments to Rules & Summary of Proposed Rule Changes

General Counsel Paula Frederick reported that the Rules Committee has been working on a proposed rule change to Rule 3.8 Special Responsibility of a Prosecutor. The changes are substantially similar to the American Bar Association's model rule, with emphasis on increasing the maximum level of discipline for violation of the rule to disbarment. The existing rule carries a maximum discipline of public reprimand. Both the District Attorneys Association and representatives from the Georgia U.S. Attorneys Offices/Department of Justice attended the Rules Committee meeting and gave their input. Afterward, the committee voted unanimously to recommend the proposed changes to the Executive Committee. After discussion, the Executive Committee, by unanimous vote, approved the recommendation of the Rules Committee as presented. This will now be on the 2021 Board of Governors Spring Meeting agenda, and the Georgia U.S. Attorneys Offices/Department of Justice will be invited to attend to answer questions.

Elections Committee Recommendation

Elections Committee Chair Allegra J. Lawrence reported that the Elections Committee had reviewed participation and historical voter data for the previous five election cycles and found that participation has been between 8-17% of eligible voters. A majority of votes cast, 78-81%, were electronic. The committee's recommendation is to change the election format to opt-in to paper ballots rather than opting out, for a cost savings of \$17,000 to \$18,000. The committee would like to use the savings in the 2022-2023 election cycle for a PR campaign to ensure Bar members are aware of the changes. After discussion, the Executive Committee, by unanimous vote, approved the recommendation of the Elections Committee as presented. This item will be added to the 2021 Board of Governors Annual Meeting agenda.

President's Report

President Dawn M. Jones thanked President-Elect Elizabeth L. Fite and Executive Director Damon Elmore for overseeing the Jan. 29 Executive Committee meeting due to an emergency in her family. President Jones reminded everyone that she is not pursuing adding the Executive Committee attendance record to the board book. She reported that she meets with senior staff, Executive Director Damon Elmore, General Counsel Paula Frederick and Chief Operating Officer Sarah Coole, twice a week to ensure all Bar needs are handled.

Director of Meetings Michelle Garner has negotiated with Wild Dunes Resort where the 2021 Annual Meeting will be held, and if we cancel, the Bar will pay no more than \$311,000, instead of it increasing incrementally the closer we get to the meeting date. At this time, there is no indication that we will cancel, but instead we are moving forward with a hybrid Annual Meeting, holding both in-person and virtual meetings. President Jones said that masks will be required at both indoor and outdoor functions, with no exceptions, and safety is of the utmost importance.

President Jones reported that the joint meeting of the Executive Committee and the Supreme Court will be held virtually, with an Executive Committee meeting on April 15 from 1-5 p.m. and a joint meeting on April 16 from 9 a.m.-12 p.m. There will likely be a joint social event held Thursday evening.

The Executive Committee, by unanimous vote, ratified the letter signed by President Dawn M. Jones that was requested by Jana Edmondson-Cooper in support of the Judicial Council of Georgia Administrative Office of the Courts' grant application regarding the Pilot Project to Supply ADA Compliant Hearing Devices to Georgia Courts.

Executive Director's Report

Executive Director Damon Elmore reported that senior staff is working closely together to examine the strategic direction and operations of the Bar, taking advantage of looking at every department and every role in regard to technology, staffing, positions, etc. He reported that another area of focus is member value, with a lot of that being concentrated around member communications. Bar staff morale amid a continuing pandemic continues to be a focal point while we begin discussions of returning to work at the Bar offices. Executive Director Elmore reported that along with discussions of getting employees back into Bar offices, he is also looking to slowly open the offices to visitors and guests, keeping safety at the forefront of all plans. He also gave special acknowledgement to the following staff for going above and beyond their duties during this time: Office Manager Mary McAfee, High School Mock Trial Director Michael Nixon and Fee Arbitration Director Rita Payne.

Treasurer's Report

Treasurer Sally Akins and Chief Financial Officer Ron Turner reported the finances of the State Bar. Chief Financial Officer Turner explained the budget process, from working closely with each department head and then progressing through the Personnel, Programs and Finance committees. He then stated the 2021-2022 budget assumptions and answered questions regarding the Bar's finances and proposed budget.

Bar Facility Assessment

Past President and Bar Center Committee Chair Hal Daniel and Board of Governors Member and Past YLD President Henry Walker attended the Executive Committee meeting to further discuss the Bar Center Committee's recommendation of reinstating the Bar Facility Assessment. They both commented on their recollection of the purpose of the assessment at the time the Bar Center was purchased. President Dawn M. Jones reported that she had spoken with Supreme Court of Georgia Justice Nels Peterson, and unanimously, the Supreme Court of Georgia justices are not in favor of reinstating the Bar Facility Assessment. General Counsel Paula Frederick pointed out that Rule 1-507 Bar Facility Assessment authorizes the State Bar to assess the Bar Facility Assessment but does not require the State Bar to do so. The Executive Committee took no further action on the Bar Center Committee's recommendation.

Clients' Security Fund

Deputy General Counsel Bill NeSmith reported that the Clients' Security Fund is once again below the \$1,000,000 threshold, triggering an assessment per Rule 10-103. Last year, the Commission on Continuing Lawyer Competency granted funds to the Clients' Security Fund to bring it to the \$1,000,000 level in order to avoid a member assessment. To prevent the fund from going below the threshold in the future, the trustees of the Clients' Security Fund recommended that Bar Rule 10-103 "be amended to dispense with the \$500,000 aggregate cap on yearly payments from the Fund and the automatic assessment trigger should the balance of the Fund fall below \$1,000,000." The Trustees also recommended amending Bar Rule 1-506 "to provide for an annual assessment, in the amount of \$15, of all active and inactive State Bar members, including Emeritus members and attorneys practicing pro hac vice."

Deputy General Counsel NeSmith advised that amending Bar Rule 1-506 would fix future issues with the fund, but for an immediate fix for the current situation, according to outside counsel and our auditors, ICLE LLC can transfer money from ICLE Athens LLC to the Clients' Security Fund.

The Executive Committee, by unanimous vote, recommended transferring \$1,000,000 from ICLE Athens LLC to the Clients' Security Fund, pending approval of the ICLE board of trustees, and as a part of the motion, also asked that within three months, Bar staff advise the Executive Committee of the appropriate rules changes to remove any triggering event of the fund, dispense with the \$500,000 aggregate cap on yearly payments from the fund, and provide for an annual assessment of members for a permanent fix.

Finance Committee Recommendations

President Dawn M. Jones reported that the Finance Committee recommended no changes to the dues amount for the 2021-2022 Bar year. GLSP has requested that their suggested contribution on the dues notice be changed from \$350 to \$400 with no change to the young lawyer contribution. After discussion, the Executive Committee, by majority vote, approved the recommendations of the Finance Committee and GLSP request as presented. These items will be added to the 2021 Board of Governors Spring Meeting agenda.

Credit Card Fees

This item will be discussed at the March Executive Committee meeting.

Board Designated Funds

Chief Financial Officer Ron Turner requested that the Executive Committee give positive acknowledgement, for auditing purposes, that ICLE restructuring fees are board designated. Deputy General Counsel Bill NeSmith reminded Executive Committee members that the ICLE LLC cash was transferred to the State Bar but earmarked for ICLE use only, and after December 31, 2020, any new ICLE funds would go into the general State Bar fund. The Executive Committee, by unanimous vote, approved the motion that the Board Designated Litigation Fund can be used to pay for those legal and other professional invoices associated with the ICLE restructuring.

Crisis Communications Consultant Update

Executive Director Damon Elmore gave an update on hiring a crisis communications consultant. Seven firms were presented to the Executive Committee. The plan and purposes are to engage and establish a relationship with an outside communications firm to advise leadership when and if needed. Executive Director Elmore will report back to the Executive Committee at the March 16 meeting with a final recommendation.

YLD Report

YLD President Bert Hummel reported that the YLD continues to host several virtual events as well as helping others in their communities. He has created a new program called the Speakers Bureau, with the purpose of bringing young lawyers together to talk about their varied experiences of COVID-19 and living as a young lawyer in a pandemic. He reported that there are multiple YLD events taking place at the Spring Meeting: a YLD Leadership Academy Alumni event, using a virtual cloud-based conference room called Wonder; a YLD Wellness event that is a nutritional cooking demonstration; a YLD stand-up social with breakout rooms for more interaction; a YLD CLE called "Bias in Judicial Proceedings" with Dr. Ansley Booker, director of diversity of inclusion initiatives at Mercer University; and a YLD general session. He invited everyone to join all events. YLD President Hummel reported High School Mock Trial was still in need of volunteers and to contact Michael Nixon to volunteer. The Legal Food Frenzy will take place April 19-30 this year, and he encouraged everyone to compete in this important initiative. The YLD is planning a virtual event to help benefit the Legal Food Frenzy as well.

Legislative Report

Director of Governmental Affairs Christine Hayes reported that day 28 of the legislative session, Crossover Day, was planned for March 8. Crossover Day serves as an important deadline during the legislative session and marks the date when a bill must pass in one chamber and "crossover" to the other in order to continue through the process this year. She will be following the Bar's legislative package closely as Crossover Day approaches. She reported that the mediation bill should be in Senate Judiciary on Monday; the remote notary bill passed out of committee on Thursday; the advanced psychiatric directive proposal will likely be delayed until next year; and HB 166 had a hearing this week where Executive Director Damon Elmore testified.

Executive Session

Following a motion, second, and unanimous voice vote, the Executive Committee met in Executive Session. Thereafter, by unanimous voice vote, the Executive Committee emerged from Executive Session.

Old Business

There was no old business.

New Business

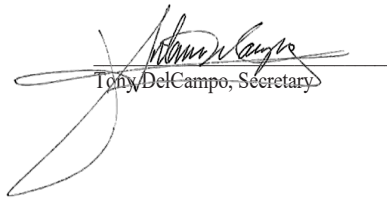
There was no new business.

Adjournment

There being no further business, the meeting was adjourned at 6:56 p.m.

Approved:


Dawn M. Jones, President


Tony DelCampo, Secretary

**STATE BAR OF GEORGIA
EXECUTIVE COMMITTEE MEETING
MINUTES
Tuesday, March 16, 2021 at 1 p.m.
Zoom Meeting**

Members Participating

Dawn M. Jones, President; Elizabeth Louise Fite, President-Elect; Tony DelCampo, Secretary; Darrell L. Sutton, Immediate Past President; Bert D. Hummel, IV, YLD President; Elissa B. Haynes, YLD President-Elect; William T. Davis, YLD Immediate Past President; Ivy N. Cadle; R. Javoyne Hicks; Amy V. Howell; David S. Lipscomb; Martin Valbuena; and Nicki N. Vaughan.

Members Absent

Sally B. Akins, Treasurer.

Staff Participating

Sarah Coole, Chief Operating Officer; Damon Elmore, Executive Director; Paula Frederick, General Counsel; Christine Butcher Hayes, Director of Governmental Affairs; Bill NeSmith, Deputy General Counsel; and Ron Turner, Chief Financial Officer.

Call to Order

President Dawn M. Jones called the meeting to order at 1:09 p.m. after establishing a quorum. Members of the Executive Committee in attendance are indicated above.

License Fee Notice Draft

General Counsel Paula Frederick provided the Executive Committee with information about the history of the legislative and public education fund opt-out on the license fee notice. Director of Governmental Affairs Christine Hayes and Immediate Past President Darrell Sutton reported that the wording on the current license fee notice was drafted carefully and revised last year so that it is clear the payment is a voluntary contribution.

Request to Support HB 272

Executive Committee Member Nicki Vaughan requested that the Executive Committee support HB 272 (raising the age of juvenile court jurisdiction from 17 to 18), pursuant to Executive Committee Standing Policy 100. Nicki reported that the Indigent Defense Committee, Child Protection and Advocacy Section, and the Children and the Courts Committee voted to support the bill. The general sentiment of the Executive Committee was that there is no emergency reason for the Executive Committee to approve support, and that it would be more appropriate for the Advisory Committee on Legislation to review it next year. The Executive Committee took the following action on HB 272:

- 1) By majority vote, found the subject matter to be within the legitimate scope and purposes of the Bar; and
- 2) By majority vote, the motion to support HB 272 failed.

President's Report

President Dawn M. Jones announced the recipient of the Distinguished Service Award and the Employee of the Year. She also reported that she meets twice a week with senior Bar staff to handle various Bar business items and plan for the first in-person meeting of the Bar year in June. In the interest of time, she

reserved the remainder of her report to occur during the discussions about the Annual Meeting plans and other items she had added to the discussion portions of the agenda to come during this very meeting.

Credit Card Fees

Chief Financial Officer Ron Turner gave a brief overview and provided information regarding credit card processing fees. Approximately 33,000 credit card payments are processed online or over the phone, and the State Bar has paid all credit card processing fees. For the 2021-2022 Bar year, the estimated cost of processing fees is \$200,000 to \$225,000. The Executive Committee, along with other Bar committees, have discussed passing on some of these processing fees to Bar members who pay their license fee by credit card.

After extensive discussion, by majority vote with one abstention, the Executive Committee approved charging a convenience fee of \$3 specific to payments of annual license fees, along with any related section and/or voluntary contributions made at the time of the annual license fee payment, to begin with the 2021-2022 Bar year going forward. (This convenience fee does not include purchasing other storefront items or joining sections separate from the license fee notice.) President Jones requested that Executive Director Damon Elmore and Chief Financial Officer Turner work on notification and messaging regarding the convenience fee to inform members as soon as possible.

Annual Meeting Update

President Jones reported that the Annual Meeting will be a hybrid event, with both in-person and virtual events, and it will be a full, typical meeting schedule. The meeting platform Bizzabo has been purchased for one year and will be the platform we use for the virtual portion of this hybrid meeting. This being our first meeting back in person since the COVID-19 pandemic began, President Jones advised that safety is of the utmost importance, for attendees and Bar staff alike, and all necessary precautions will be taken: outdoor receptions; diligently working with the hotel about sanitation and how to serve food safely, etc.; extensive signage; tables in every room with wipes and hand sanitizer; etc. Director of Meetings Michelle Garner reported that room reservation information for the meeting will be sent to the Executive Committee soon, followed by opening the room block to the general membership. President Jones said that everyone will be required to wear a mask, both at indoor and outdoor Bar events, and social distancing will be expected, regardless of vaccination status.

Executive Session

Following a motion, second, and unanimous voice vote, the Executive Committee met in executive session to discuss the litigation report and crisis communications. Thereafter, by unanimous voice vote, the Executive Committee emerged from Executive Session.

For the record, while in executive session, Executive Director Damon Elmore outlined additional safety procedures regarding the State Bar offices, including moving forward with plans to enhance a role on the Bar Building Security Committee, creating a Safety and Crisis Response Liaison. Executive Director Elmore said the thought is to add additional duties to one of the existing UPL investigator positions, starting with least senior first. All UPL investigators are former military police and familiar with safety protocols such as this.

Key (additional) duties include:

- Monday coordination with security and facilities teams to review upcoming schedule
- Friday coordination with security and facilities teams to review activity
- Coordination with meetings and COO as part of BOG and other meeting planning
- Coordination with OGC on key committee meetings/security planning
- Coordination with COO on other meetings

- Coordination with office manager and bar conference center team for calendar of events
- Review of security reports from building walk-through
- Coordination with finance and facilities management regarding command center activity
- Monthly report to Executive Director (or as requested)
- Evaluate threats from communications or OGC for credibility and potential planning
- Evaluate landscape to anticipate potential threats or challenges and plan accordingly
- Coordinate with local law-enforcement to create heightened and additional security presence
- Monitor public/available information outlets and evaluate for exposure
- Regular building walk-throughs
- Create annual or more regular training activity (active shooter, credible threats, etc.) for Bar staff
- Coordinate with building tenants to ensure similar plans and processes consistent with 104 Marietta Street expectations
- Coordinate with other mandatory, volunteer and general bar associations
- Gain membership and active presence in equivalent trade associations
- Attend and participate at BOG meetings and coordinate with onsite security and contracted security teams to review safety protocol and planning

Crisis Communications Consultant

After Executive Director Damon Elmore gave an overview of four communications firms and their submitted proposals, the Executive Committee agreed, by majority vote, to hire Castle, giving the executive director the authority of paying them up to \$50,000, as a crisis communications consultant to support the State Bar in matters above and beyond typical Bar communications efforts. The vote was 10 in favor and 1 against, with Darrell Sutton (asking to have his vote recorded) voting against.

Regulatory Innovations

President Jones reported that she attended a recent National Conference of Bar Presidents meeting, and one of the topics of discussion was how to fill the access to justice gaps and developing “sandboxes” in that regard. Wanting to share what was discussed, she asked General Counsel Paula Frederick to provide further information regarding the topic. General Counsel Frederick reported that some states are experimenting with these “sandboxes,” allowing regulated paralegals to do limited scope legal matters. President Jones said she had never heard of this and that it raised many concerns and questions for her as an attorney and Bar leader, and wanted to bring it to the attention of the Executive Committee. General Counsel Frederick will update the Executive Committee on any further information that is discussed at NABE/NCBP/ABA meetings regarding this topic.

Legislative Report

Director of Governmental Affairs Christine Hayes reported that HB166 (license fees and other monies collected by the State Bar to be paid into the general fund of the state treasury) did not cross over. She said that the Uniform Mediation Act bill and the Remote Online Notary bill crossed over. She referred the Executive Committee to the legislative email sent on March 11 for a full report on other bills of interest to the Bar. She said that right now, the Legislature is waiting for the Senate to finish and present the budget.

Committee Updates

The following committee updates were provided:

- Martin Valbuena reported that the iCivics Committee will become inactive after the current year. It is a special committee that President-Elect Fite will not reappoint since the Bar no longer funds the program. He also reported that the Local Bar Committee voted on the 2020 awards and they have a plan in place for the 2021 awards.
- Will Davis reported that the Children and the Courts Committee is almost run like a section, and they are unsure of their purpose. They do a lunch and learn each month, and they would like to

expand and will look to Bar leadership for more direction on that.

- David Lipscomb reported that the Professional Liability Insurance Committee has stopped meeting for now, and they continue to wait for an in-person meeting to present their options to the Board of Governors.
- Javoyné Hicks reported on the Wellness Committee and reminded everyone that the first wellness newsletter was sent with the Board Book. From now on, the quarterly, opt-in wellness newsletter will be included in the Board Book as information and emailed to membership. She also reported that the Committee to Promote Inclusion in the Profession has remained active and is currently soliciting nominations for the Commitment to Equality Awards.
- President Dawn M. Jones reported on the Seeking Equal Justice and said that more Courageous Conversations are being planned. She urged Executive Committee members to attend the professionalism CLE at the Spring Meeting, “The Necessity of Unparalleled Unity.”
- Nicki Vaughan, as the liaison to the Delivery of Legal Services in Response to COVID-19 Pandemic special committee, said that they committee is not sure they need to continue their work at this point, especially with the Access to Justice Committee holding clinics to clear records.
- Bert Hummel reported that the YLD is holding a CLE on implicit bias in judicial proceedings at the Spring Meeting that has been opened it up to everyone to attend.

Old Business

There was no old business.

New Business

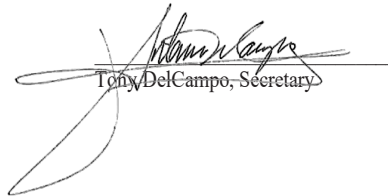
There was no new business.

Adjournment

There being no further business, the meeting was adjourned at 4:36 p.m.

Approved:


Dawn M. Jones, President


Tony DelCampo, Secretary

STATE BAR OF GEORGIA
EXECUTIVE COMMITTEE MEETING
MINUTES
Thursday, April 15, 2021, 1 p.m.
Zoom Meeting

Members Participating

Dawn M. Jones, President; Elizabeth Louise Fite, President-Elect; Sally B. Akins, Treasurer; Tony DelCampo, Secretary; Darrell L. Sutton, Immediate Past President; Bert D. Hummel, IV, YLD President; Elissa B. Haynes, YLD President-Elect; William T. Davis, YLD Immediate Past President; Ivy N. Cadle; R. Javoyne Hicks; David S. Lipscomb; Martin Valbuena; and Nicki N. Vaughan.

Members Absent

Amy V. Howell

Staff Participating

Sarah Coole, Chief Operating Officer; Damon Elmore, Executive Director; Paula Frederick, General Counsel; Christine Butcher Hayes, Director of Governmental Affairs; Bill NeSmith, Deputy General Counsel; and Ron Turner, Chief Financial Officer.

Call to Order

President Dawn M. Jones called the meeting to order at 1:01 p.m. Members of the Executive Committee in attendance are indicated above.

Future Meetings Schedule

President Dawn M. Jones reviewed the Future Meetings Schedule. She reported that the Annual Meeting schedule of events has been sent to all Bar members, along with information regarding making room reservations. Annual Meeting registration will be available by the end of the month. President Jones said that as of right now, the Executive Committee meeting on May 14 will be held in person at the Bar Center in Atlanta, with an option to attend virtually as well. All safety precautions will be taken for attendees and staff alike, and if the COVID-19 climate worsens, the meeting will be moved to virtual only. President Jones also reported on plans to also honor the 2019-2020 Bar awards recipients during the upcoming 2020-2021 Annual Meeting, which will require close management of time during the Board of Governors meeting scheduled for Friday, June 11, 2021. President-Elect Elizabeth L. Fite reported that she is working to schedule the 2021-2022 meetings. She plans to schedule the Executive Committee meetings the second Friday of the month. She also noted that the Executive Committee Extended Meeting will likely take place in August instead of September this year.

Executive Committee Minutes

Secretary Tony DelCampo presented for approval the minutes of the February 26, 2021, Executive Committee meeting. By unanimous vote, the Executive Committee approved the minutes as presented.

Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by unanimous vote: Wyatt Robinson-753634, Sara Kluberanz-311033, Cathleen Massey-654932, Paul Bleak-141895, Paul Karlen-407945, Franz Wright-449835, Frederick Whittington III-756855, David Keeton-006960, Lisa Henry-190704, Ariel Altman-618168, Sonia Fishkin-261777, William C Davis Jr-213325, Lawrence Reinhold-600475, Katherine Bissell-058908.

Member Status Appeals

The Executive Committee, by unanimous vote, approved a request by Cara Hergenroether for an extension until December 1, 2021, to complete fitness and reinstate from administrative suspension due to non-payment of fees; by unanimous vote, moved to not waive the late fees for Leslie Pfrang and denied her request to resign without the required petition; by unanimous vote, approved a request by Angela Sconyers to grant her an extension of time until December 1, 2021, to complete fitness and reinstate from administrative suspension due to non-payment of fees.

Approval of 2021-2022 Election Schedule

The Executive Committee, by unanimous vote, approved the 2021-2022 Election Schedule as presented.

Approval of 2021-2022 Proposed State Bar Budget

After a summary and explanation of the proposed 2021-2022 Budget Assumptions and 2021-2022 State Bar Budget from Chief Financial Officer Ron Turner, and discussion by the Executive Committee, there was a motion and a second to provide \$110,332 to the Georgia Resource Center for the 2021-2022 Bar year. This motion failed, 2 for and 9 against, with 1 abstention.

Following a motion, second, and unanimous vote, the Executive Committee met in Executive Session to discuss personnel budget items, including staff salaries and increase in health insurance premiums. Thereafter, by unanimous vote, the Executive Committee emerged from Executive Session.

After further discussion by the Executive Committee, the 2021-2022 State Bar Budget was approved by majority vote with revisions to the 2021-2022 Budget Assumptions page as follows:

- On the 6th budget assumption, add “for the Bar Center in Atlanta” to make the first sentence read, “The Bar does not pay rent to any independent company or organization for the Bar Center in Atlanta.”
- On the 9th budget assumption, change it to read, “Excludes any income associated with previous Bar Facility assessments. Those Bar Facility assessments previously contributed \$260,000 per year (\$50 per year per affected attorney) to the budget.”

Executive Session

Following a motion, second, and unanimous vote, the Executive Committee met in Executive Session to discuss the upcoming joint meeting with the Supreme Court. Thereafter, by unanimous vote, the Executive Committee emerged from Executive Session.

President’s Report

President Jones reported that she continues to meet with senior staff – Executive Director Damon Elmore, General Counsel Paula Frederick and Chief Operating Officer Sarah Coole – twice a week to ensure all Bar needs are handled. She also continues to receive invitations to speak at local bar events. She reported that Director of Meetings Michelle Garner is working hard on the new meeting platform, Bizzabo, for the Annual Meeting.

Executive Director’s Report

Executive Director Damon Elmore reported that with assistance from our Governmental Affairs Department, he is looking to schedule meetings with certain legislators or key legislative staff outside of the legislative session. He will keep the Executive Committee updated and make everyone aware ahead of time in order to invite others to join. He announced that the new communications director, Lauren Kane, officially started today. He reported that the Bar has three open positions currently: Georgia Diversity Program Executive Director, Executive Administrative Assistant and the Law Practice Management

Director. He said planning is underway for returning to the office, while staff currently continues to work from home.

Treasurer's Report

Treasurer Sally Akins and Chief Financial Officer Ron Turner reported the finances of the State Bar. The Audit Committee met and approved the audit report. That report will be provided to the Executive Committee as an informational item at the May meeting.

YLD Report

YLD President Bert Hummel reported that the Legal Food Frenzy will officially begin on Monday, April 19. He asked that all Executive Committee members participate in this important and meaningful event. He said that the YLD's Women in the Profession Committee is holding another wills clinic during the month of April. He reported that the Leadership Academy class of 2020 will graduate at the Annual Meeting. He is currently working to finalize a CLE, either for Leadership Academy or as the second event for the YLD Speakers' Bureau. YLD President Hummel thanked everyone for their support of the Young Lawyers Division and invited everyone to the annual YLD dinner, held Friday night during the Annual Meeting.

Office of General Counsel Report

Following a motion, second, and unanimous vote, the Executive Committee met in Executive Session to discuss the litigation report. Thereafter, by unanimous voice vote, the Executive Committee emerged from Executive Session.

Legislative Report

Director of Governmental Affairs Christine Hayes reported that this year's legislative session ended on March 31. The Uniform Mediation bill passed, but the online notary bill did not pass and will continue next year in the second year of the session. She said this year's ABA Day is being held virtually, and it will be easier for more to participate. She will be setting up meetings with Georgia's congressional delegation to discuss LSC funding, etc., within the next three weeks and will notify Executive Committee members so they can participate, particularly in meetings with their own representatives. President Jones thanked Director of Governmental Affairs Hayes, Executive Director Damon Elmore and others who worked behind the scenes to help gather and prepare the needed information for their work during the session.

Committee Updates

The following committee updates were given:

- President Dawn M. Jones reported that the Seeking Equal Justice Committee will hold a 3-hour CLE at the Annual Meeting on Thursday, June 10, at 9:00 a.m. She said that the next Courageous Conversation is planned for early May on the topic of white fragility.
- Martin Valbuena reported that the Local Bar Committee met and judged the 2020 awards and that the 2021 awards are in motion.

Old Business

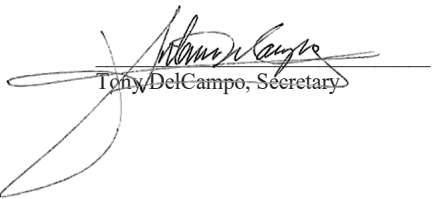
There was no old business.

New Business

There was no new business.

Adjournment

There being no further business, the meeting was adjourned at 5 p.m.



A handwritten signature in black ink, appearing to read 'Tony DelCampo', is written over a horizontal line. The signature is stylized and cursive.

~~Tony DelCampo, Secretary~~

Approved:



A handwritten signature in black ink, appearing to read 'Dawn M. Jones', is written over a horizontal line. The signature is stylized and cursive.

Dawn M. Jones, President



MEMORANDUM

To: Members, Board of Governors

From: Paula Frederick

Date: June, 2021

Re: Annual Report of the Office of the General Counsel

PAULA J. FREDERICK
General Counsel

MERCEDES G. BALL
LEIGH BURGESS
WILLIAM V. HEARNBURG, JR.
JAMES S. LEWIS
JENNY K. MITTELMAN
ANDREEA N. MORRISON
ADRIENNE D. NASH
WILLIAM D. NESMITH, III
WOLANDA R. SHELTON
JOHN J. SHIPTENKO

The 2020-2021 Annual Report of the Office of the General Counsel will be available at the following link: www.gabar.org/barrules/ethicsandprofessionalism. I invite you to take a look at your convenience; the report contains information about the operation of the disciplinary system, lists disciplinary orders entered by the Supreme Court of Georgia during the Bar year, and summarizes amendments to the Bar Rules. There are reports from the programs and committees that the Office supports, including the Client Assistance Program, the Formal Advisory Opinion Board, the Clients' Security Fund, the Pro Hac Vice Program, and the Trust Account Overdraft Notification Program.

Thank you for all that you do for the State Bar of Georgia. Please feel free to contact me with questions, comments, or suggestions for the Office. You can reach me at 404-527-8730 or paulaf@gabar.org.

pjf



Insurance Committee Annual Report for 2020-2021

May 1, 2021

Insurance Committee Mission:

The Insurance Committee (hereinafter “committee”) acts in accordance with Article VIII, Section 2 of the State Bar of Georgia (hereinafter “State Bar”) Bylaws, at the direction of the President of the State Bar. The committee shall serve as an advisory committee to the State Bar’s Executive Committee, Officers, Executive Director, and General Counsel. Subject to the purposes established for this committee by the State Bar President, this committee is expected to review the State Bar’s insurance coverage, and offer input and recommendations to the Executive Director and Executive Committee regarding best practices, coverage types, liability amounts, protection and risk management considerations, insurance broker retention, State Bar policies concerning insurance and liability, and other related matters the committee believes the State Bar should consider.

Committee Members & Staff:

Members: Charles Minor McDaniel, Jr., Chair; Christopher Paul Twyman, Vice-Chair; William H. Major, III; William Wallace Fagan, III; Joseph C. Chancey; Paul L. Groth; Travis Carlise Hargrove; William Thomas Mitchell; J. Anderson Davis; Elizabeth Louise Fite, Executive Committee Liaison.

Staff: Jeff Davis, Executive Director (July 1, 2020 – December 31, 2020) and Damon E. Elmore, Executive Director (January 1, 2021 – present); William D. NeSmith, III, Deputy General Counsel; John J. Shiptenko, Senior Assistant General Counsel.

Summary of Recommendations

Insurance Broker Evaluation

At the Insurance Committee’s October 23, 2014 meeting, it recommended that the State Bar evaluate the services provided by its insurance broker every five years beginning in 2015. According to the insurance broker evaluation time line recommended by the committee, the State

Bar would evaluate its broker, Greyling Insurance Brokerage, in 2020. Given the pandemic and the resulting difficulty of vetting and interviewing insurance brokerage firms responding to the State Bar's request for proposals, on August 25, 2020, the committee voted to recommend to the State Bar that it should not conduct an insurance broker evaluation in 2020, but should instead postpone its insurance broker evaluation until the fall of 2021. Jeff Davis, Executive Director, accepted this recommendation.

Insurance Renewal

Greyling Insurance Brokerage will present their insurance renewal proposal to the committee at its next meeting, which should take place in May or early June of 2021. The committee will review the proposal and make recommendations regarding renewal to the Executive Director.

Charles Minor McDaniel, Jr.
Chair, 2020-2021
State Bar of Georgia Insurance Committee
(404) 221-2206
cmcdaniel@carlockcopeland.com

FORTY FIRST ANNUAL REPORT TO
THE HONORABLE JUSTICES OF THE SUPREME COURT
AND THE HONORABLE MEMBERS OF THE BOARD OF
GOVERNORS
OF THE STATE BAR OF GEORGIA

BY
THE COMMITTEE ON THE ARBITRATION OF ATTORNEY FEE
DISPUTES

The Committee on the Arbitration of Attorney Fee Disputes is privileged to submit the following report concerning the Fee Arbitration Program's forty first year of operation.

1. Committee Membership.

Ms. Judy C. King, a lawyer in Lawrenceville served on the Committee as its Chairperson. Ms. Rosalind A. Rubens-Newell, a lawyer with Invest Atlanta, was re-appointed for a three-year term and Mr. Darrell Lee Sutton, a lawyer in Marietta was appointed for a three-year term. The lawyer members returning to serve on the Committee were Mr. Mark C. Bips, a lawyer in Decatur, Mr. Stanley W. Levitt, a lawyer in Atlanta, and Mr. John M. DeFoor, II, a lawyer in Atlanta. Ms. Jacquelyn C. Poole from Marietta was re-appointed as a public member for a three-year term. The public members returning to serve were Mr. Alan Granath, from Dunwoody, and Ms. Iris Rice, from Smyrna.

2. Participation.

Interest by the public and the profession continued during the Program's forty first year. Nine Hundred and Forty Four (944) parties requested and were mailed

information regarding the Fee Arbitration Program during the year. Referrals by the Client Assistance Program of the Office of the General Counsel accounted for 54% of the inquiries, while 45% of the inquiries were direct calls to the Fee Arbitration staff from the parties involved in the dispute. Referrals from the Office of General Counsel accounted for less than 1% of the inquiries. Many more telephone calls were received, and a number of fee disputes were resolved informally by the Fee Arbitration staff without the filing of a Petition. Copies of the Program's Rules and a Petition form were sent to all persons who requested further information. An informational brochure was also provided to aid them in understanding this service of the State Bar. In addition, the parties were encouraged to initiate settlement communications prior to returning the completed Petition. The staff furnished consultation time in each case to explain the Fee Arbitration process. Under the Rules, the State Bar administers the Program in a neutral, rather than representative, capacity. Therefore, no advice was rendered on the merits of the matter in issue.

3. Current Activity.

Today 300 cases are in process. Approximately 79 new disputes over attorney fees are reported to the Fee Arbitration Program each month. The Committee, its staff, and the parties are able to resolve a majority of these without the necessity of the full arbitration process. Amounts in controversy vary widely from nominal sums to fees as high as \$4,000,000, with the average case involving \$10,973. Many fields of law are involved, but the areas of family law at 32% and criminal law at 34% produce the most cases.

4. Hearings.

During the Spring of 2020, in-person Fee Arbitration hearings were suspended due to Covid-19 restrictions. Fee Arbitration hearings resumed in the Summer of 2020 by Zoom and continue to be held by Zoom across the State. The cases were heard by our Arbitrators who volunteered to be on a three person panel an entire day to hear as many as four cases for the Fee Arbitration Program. Each arbitrator who served received a lapel pin or a State Bar flash drive in appreciation and recognition of their volunteer service to the Bar through the Fee Arbitration Program. Each arbitrator also received a letter of appreciation from the Supreme Court of Georgia.

5. Rules Changes.

The Committee has worked extensively and approved recommendations for rules changes that will provide a single path for confirmation of the arbitration award in accordance with The Georgia Arbitration Code, O.C.G.A. § 9-9-1 et seq.

6. Appreciation.

The Committee wishes to take this opportunity to thank and express its appreciation to Chief Justice Harold D. Melton, as well as all the other members of the Supreme Court, for their overall support and assistance in establishing rosters of volunteer arbitrators throughout Georgia and for their dedication in acknowledging with letters of appreciation to those lawyers and public members who serve voluntarily to the Program.

Appreciation also goes to the arbitrators who volunteered, many of whom have served since the inception of the Program forty one years ago. The success of

the Program has resulted to a great extent from the dedicated efforts and sound judgment of these volunteers.

The Fee Arbitration Program is an effective system and one of the most utilized of all the public service programs operated by the State Bar in furtherance of its goal to improve the administration of justice in Georgia. It continues to serve as a model for other jurisdictions implementing similar programs.

The Committee hopes that all those who read this report will encourage other qualified attorneys and public members to volunteer as arbitrators for future cases. This important service benefits our profession and the public whom we serve. The Committee is most appreciative of your continued assistance in informing potential arbitrators of this method of illustrating the professionalism of the members of the State Bar of Georgia.

*Respectfully submitted, this
5th day of May, 2021,
Committee on the
Arbitration of Attorney Fee
Disputes*

A handwritten signature in cursive script that reads "Judy C. King".

*Judy C. King
Chairperson*

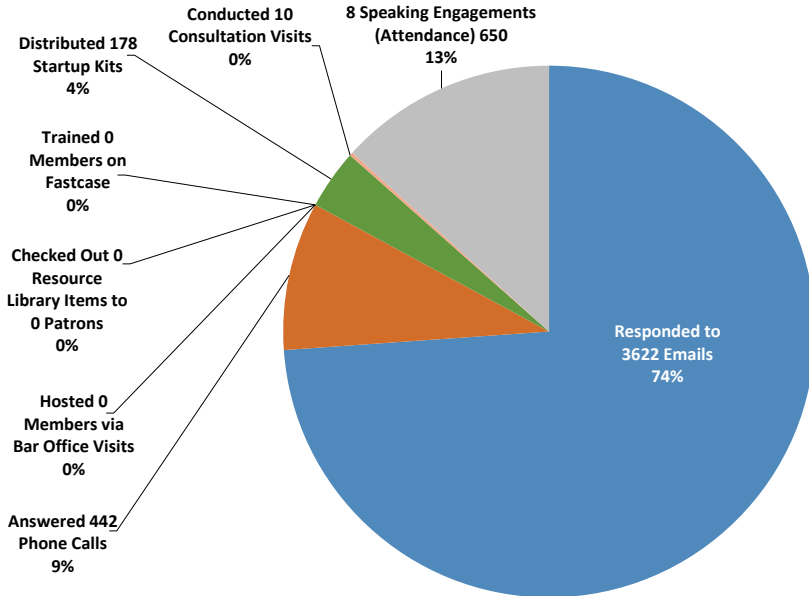
Law Practice Management Program

(Abbreviated report for the 2020-2021 Bar Year)

Members Served by LPMP

Total Number of Members Served – 4,919

July 1, 2020 – April 16, 2021



Office Visits/Phone Calls/Emails

A total of **0** members visited LPMP. There were **4** startup discussions, **0** walk-in visits, and **0** visits to the software library conducted by the Program. In addition, LPM distributed **178** *Starting Your Georgia Law Practice* booklets as requested by attorneys, as well as, answered and responded to **442** phone calls and **3,622** emails to and from members.

Consultations

There were **10** general consultation virtual visits during this period assisting members in Chatham, Clayton, Cobb, Decatur and Fulton counties. Firms assisted were in solo practice (**8** firms); 2-4 attorney firms (- firm); 5-9 attorney firms (- firms); 10+ attorney firms (**2** firms).

Resource Library

Our lending library has a grand total of **1,618** books, CDs, and DVDs for checkout to members and their staff with an option to pick up materials at the Bar Center or to be mailed. During this period, there were a total of **0** checkouts by **0** patrons.

Speaking Engagements

There were a total of **8** completed and scheduled programs during this period. The Program's staff has given **0** continuing legal education and special presentations to Georgia lawyers and other related groups. These presentations have been held in various local and national venues; and have been made directly to at least **650** Georgia Bar members. **0** programs are scheduled at a future date.

State Bar of Georgia – Private Exchange Report

April 16, 2021

WEBSITE ANALYTICS		
Total Users	53,385	Unique individual visits to the Private Exchange
Total Sessions	74,629	Website visits to the Private Exchange
Total Pageviews	207,953	Page views on the Private Exchange

INDIVIDUAL ENROLLMENTS		
Total Enrollments	4,438	Individual Product Enrollments
• Medical	1,883	Individual Major Medical, Short-Term Medical and Limited Medical Enrollments
• Medicare Supplement	21	Individual Medicare Supplement Enrollments
• Dental	662	Individual Dental Enrollments
• Vision	341	Individual Vision Enrollments
• Teladoc	470	Individual Teladoc Enrollments
• LifeLock	42	Individual LifeLock Enrollments
• Life/AD&D	735	Individual Life/AD&D Enrollments
• Disability	217	Individual Disability Enrollments
• Long-Term Care	67	Individual Long-Term Care Enrollments

EMPLOYER ENROLLMENTS		
Product Enrollments	993	Employer Product Enrollments
• Medical	561	Medical Enrollments
• Ancillary	279	Ancillary Enrollments
• Workers' Comp	14	Workers' Comp Enrollments
• Professional Liability	137	Professional Liability Enrollments
• Cyber Security	2	Cyber Security Enrollments

CloudLawyers Report

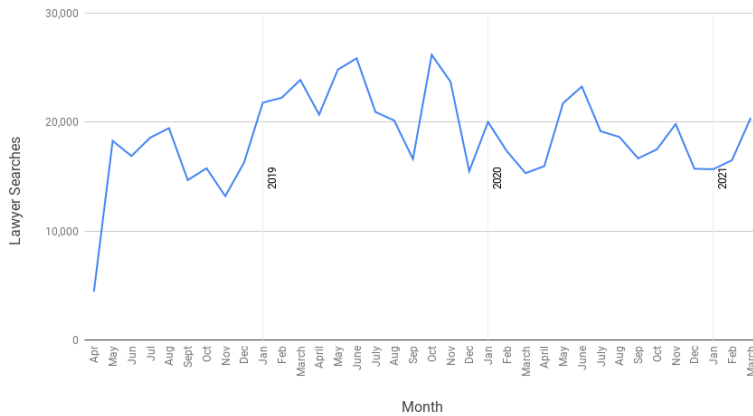
The State Bar of Georgia began its partnership with CloudLawyers.com to develop its new Find a Lawyer directory and provide members with an enhanced membership directory listing.

Over **673,311** searches have been performed to find Georgia lawyers utilizing this service. The directory is also maintaining a steady stream of page views and to date **1,278,069** pages have been viewed in the directory.

Over **363** messages were sent to Georgia lawyers through contact forms on the lawyers' profiles since January in addition to the potential clients who contact a lawyer directly from the phone number and email address on the lawyers' profile.

Since inception, and as of April 15th, 3,851 (increase of 140 members) logged into their CloudLawyers' profile.

State Bar of Georgia Searches



Fastcase Report
July 1, 2020 – April 16, 2021

Since implementation, **29,457** members have logged on at least once with an increase of **792** first time users this period: Over 50% of our members have used Fastcase since it was available as a bar member benefit.

There were a total of **64,678** logins since July 1, 2020.

Since implementation, **2,507** attorneys and **114** staff members have attended Fastcase live training. Others have taken advantage of webinar training.

Fastcase Acquires Docket Science's Legal-Research Tech Stack

San Francisco (March 15, 2021) – Fastcase has acquired the legal technology assets of Docket Science, a San Francisco-based legal research technology provider widely recognized as an innovator in the legal tech space. Docket Science's technology is designed to augment machine-backed technologies in Fastcase's legal research platform

Fastcase managers observed litigation decreasing at the onset of COVID-19 and utilization across the board went down as firms and courts temporarily closed in many parts of the country. They are starting to see a swing back up. At the same time, members taking part in webinars increased exponentially.

Fastcase Partner Usage Report

July 1, 2020 – April 16, 2021

	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Total
First Time Logins	66	65	64	55	51	56	77	59	84	577
Total Logins	11,167	12,069	11,559	11,347	9,767	9,684	10,437	11,648	12,992	100,670
Total Users Who Logged In	2,994	3,050	3,014	2,982	2,796	2,747	2,864	2,953	3,176	26,576
Searches Conducted	37,568	42,002	37,255	42,280	35,880	35,284	38,184	40,399	45,222	354,074
Documents Viewed	116,678	135,059	118,245	108,736	153,543	132,002	132,333	150,269	165,161	1,212,026
Documents Printed	10,652	11,649	9,898	39,718	32,920	29,167	24,174	29,457	34,993	222,628
Total Transactions	179,125	203,894	180,035	205,118	234,957	208,940	208,069	234,785	261,628	1,916,551

Fastcase Report

Fastcase Reported Problems	
Member Reported Issue(s)	Fastcase Response / Resolutions
<p>05/01/2020 Members Comments: Over the past year, multiple requests were made for Jury Verdict information and Pattern Jury Instructions.</p>	<p>05/01/2020 Fastcase Response: In regards to secondary sources, a purchase of a license to the data or publication would be prohibitively expensive and not justified to add to our library without an increase in cost.</p>
<p>11/09/2020 Member Comment: The authority check on the main case, gives a list of cases on the side, but I don't see a preview/blurb that shows how the main case is cited, as I used to see in Fastcase 6. So I have been clicking on each case in the authority list one-by-one, which then shows the search terms in the main screen.</p>	<p>11/09/2020 My Response: This is truly one of the big problems with FC7 and a request has been made for this issue to be corrected. In the meantime, you have to go back to FC6 to use this very helpful function. The complaint was sent to FC and a request made to urge this to be a priority fix.</p>
<p>12/15/2020 My Comment: I let Erin and Joe know that I couldn't get the search within under the alerts to work.</p>	<p>12/15/2020 Fastcase Response: They were not able to get it to work either. Will have development team check on this.</p>
<p>2/16/2021 My Comment: Search within under alerts is still not working. Sent email.</p>	<p>2/17/2021 Fastcase Response: Sent email. Hoping to have this available again soon.</p>
<p>4/1/2021 My Comment: Two calls today about FC not allowing the member to access Georgia statutes. Upon second try they could get to the statutes.</p>	<p>4/1/2021 Fastcase Response: "I suspect this is a cache issue as I have not heard anything on my end. I know my development team recently pushed an update which could have tied things up." I responded it was unlikely this happened to two of our members at the same time and it not being an issue on FC side.</p>

April 20, 2021

Mary Jo Sullivan
Sections Director
State Bar of Georgia
104 Marietta St. NW, Suite 100
Atlanta, GA 30303

RE: Administrative Law Section Annual Report 2020-2021

Dear Ms. Sullivan:

I hope this letter finds you well. This letter shall serve as the Administrative Law Section's annual report for 2020-2021.


On December 8, 2020, the Section hosted a CLE on the updated Administrative Rules of Procedure and conducting administrative proceedings by remote electronic means. Speakers included Judge Patrick Woodard of the Office of State Administrative Hearings, Allen Lightcap, Esq., and the undersigned. Attendees were eligible for 1.5 hours of CLE credit at no cost.

Prior to commencement of the December 8, 2020 CLE, the Section held elections for the offices of Chair, Vice Chair, and Secretary. The incumbent officers – Allen Lightcap, Patrick Woodard, and the undersigned – were re-elected by majority vote.

Regrettably, the Section has been unable to hold in-person events, such as the Annual Holiday Party, due to the COVID-19 pandemic. However, I hope to host another online CLE in the near future and in-person events later this year after the pandemic (hopefully) abates.

Currently, the Section has 212 members and its budget is in excellent condition.

Sincerely,



Dominic Capraro, Chair
Administrative Law Section

Annual Report by the Animal Law Section- State Bar of Georgia 2020/2021

OFFICERS: Chair- David Zagoria
Vice Chair- Megan Boyd
Secretary- Karyn "KC" Pagnotta
Treasurer- Siobhan Gilchrist

FINANCIALS:

Initial balance of 2020/2021 Section funds was reported as _____. End of year balance of Sections funds was _____. Expenditures were _____.

BUSINESS MATTERS:

The year started strong with many planned activities. Unfortunately, due to the COVID-19 pandemic and subsequent closures, no activities moved forward. The Board held a meeting in March in which we agreed to table all activities until the judicial emergency was over. We hope to have a cocktail party before the end of the year.

VOLUNTEER WORK:

All were postponed due to the pandemic.

UPCOMING 2021/2022 BOARD MEMBERS:

Megan Boyd - Chair
Karyn "KC" Pagnotta - Vice Chair
Siobhan Gilchrist- Secretary
Open/need an election- Treasurer

NOTE: Under last year's bylaw amendment, should one of these officers decide to step down in the middle of the year, the officer below that position would step up to fill the role for the remainder of the year.

ANTITRUST LAW SECTION – STATE BAR OF GEORGIA
ANNUAL REPORT AS OF APRIL 22, 2021

Section Officers:

Chair: Lindsay S. Johnson
Vice Chair: Parker Sanders
Secretary: Katie Balthrop

The above-listed officers assumed these positions in Summer 2020. Lindsay Johnson had previously held the position of Vice Chair. Parker Sanders had previously held the position of Secretary. Katie Balthrop was a new addition to the Section leadership. Bill Dillon is the Immediate Past Chair.

Membership:

Currently, the Section has 74 members. Section Officers are committed to growing the Section and increasing engagement of its membership. The Section Officers are considering a mentorship program to enhance connections among members.

Financials:

The current balance of the Section's operating account is \$14,062.76. Limited funds were expended in 2020 due to the covid-19 pandemic and restrictions on in-person gatherings.

Board Meetings:

Section Officers formally met on the below dates. Minutes for these meetings are maintained by the Secretary. Additional discussions among Section Officers occurred in connection with the September 2020 event and on an as-needed basis.

June 19, 2020 [last meeting of outgoing Section Officers]
July 21, 23, 2020 [first meetings of current Section Officers]
October 28, 2020
December 10, 2020
March 11, 2021

Section Events:

On September 30, 2020, the Section held a virtual fireside chat with esteemed antitrust professor and author Herbert Hovenkamp. Professor Hovenkamp spoke on a variety of antitrust topics and took questions from attendees. The event was well-attended.

The Section is in the process of planning a CLE and/or networking event for Spring/Summer 2020.

Philanthropic Efforts:

In December 2020, the Section made a year-end donation of \$500 to the Atlanta Community Food Bank to further its mission during this unprecedented time.

Respectfully submitted,

/s/ Lindsay S. Johnson

Lindsay S. Johnson
Chair
Antitrust Section
State Bar of Georgia

BERLON LAW, LLC

A CHILD WELFARE LAW PRACTICE

PO BOX 16932
SAVANNAH, GEORGIA 31416

jpberlon@gmail.com

TELEPHONE 912.996.6188

April 16, 2021

Ms. Dawn M. Jones
President, State Bar of Georgia
104 Marietta St, Suite 100
Atlanta, GA 30303

RE: Child Protection and Advocacy Section
2020-2021 Annual Report

SENT VIA US MAIL AND BY EMAIL

Dear President Jones:

Pursuant to Article X, Section 6 of the bylaws of the State Bar of Georgia, a report of the activities of the Section during the 2020-21 year is hereby submitted for your consideration.

The Child Protection and Advocacy Section (hereinafter "Section") is concluding its eighth year of operation. The membership of the Section represents a broad spectrum of lawyers and judges who practice in child advocacy and protection. As of April 16, 2021, the Section has grown to 520 members. The Section usually recruits new members during the annual full day CLE program however the Section could not justify a full-day ICLE seminar at the increased price of \$250 per person and the pro bono policy was incompatible with the practice for the vast majority of the membership. Due to the aforementioned reasons, the Executive Committee replaced a full-day CLE program with a professionalism lunch and learn and to develop monthly opportunities for the Section to gather and become more informed.

The Section serves as a forum for dissemination of information on aspects of juvenile law practice related to children. The Section consists of various representatives in juvenile justice: child directed representation, best interest representation, judges, prosecutors, public defenders, many agency representatives including, but not limited to, Department of Juvenile Justice, Division of Family and Children Services, Georgia Department of Education, education representatives, Georgia Legal Services, Georgia Family Connection Partnership, Georgia Appleseed, and other government and non-government organizations.

An Annual Meeting of the Section was held on January 28, 2021. The Honorable Carolyn Altman, Judge of the Juvenile Court of Paulding County, presented on

Professionalism in the Age of COVID-19. Members of the Section received notice of the Annual Meeting and voted on the next year's leadership. The following will serve the Section for fiscal year 2021-2022: John Paul Berlon, Chair; Tonya Boga, Vice-Chair; Rande Waldman, Treasurer; and Laurie Thomas, Secretary. Nicki Vaughan will continue to serve on the Executive Committee as Immediate Past Chairperson.

The Section's Executive Committee continues with the objective of diversity in the various fields of law impacting child protection and advocacy. The Section's Executive Committee also continued with the objective to bringing opportunities to all corners of the State. The Executive Committee has a representative in each of the ten Judicial Districts. The following members of the Executive Committee will focus increased outreach efforts in the following judicial circuits:

Judicial District	Name	Email Address
1	John Paul Berlon	
2	Michael Waller	
3	Ira Foster	
4	Laurie Thomas	
5	Afiyah Hinkson	
6	Anissa Patton	
7	Hon. Carolyn Altman	
8	Recently Vacant	
9	Nicki Vaughan	
10	Amanda Monaco	

During the 2020-2021 fiscal year, a district representative has completed the following: presentation on best practices during COVID, presentation on professionalism in the age of COVID, virtual social hour including Family Feud, back to school drive in rural Georgia, and a town hall conversation.

The Section contributed support to the update of the three manuals: Georgia Juvenile Defender Training Manual, Representing Students in School Tribunals in Georgia: An Attorney Training Manual, and a medicaid appeals manual.

The Section's annual holiday tradition is to support an entity or project that relates to the participants of the Section. The benefactor for this past year was Motherhood Beyond

Bars. The Section also provided financial support to the Atlanta Youth Singers specific to their RYDC choral programming.

The Section published "Kids Matter", a quarterly publication that provides highlights of the Section's activities and disseminates information such as updates in child welfare law, community initiatives, and other thought-providing issues facing practitioners of child welfare and advocacy. The newsletter is emailed to members and made available on the Section's webpage.

A priority of the Section has been to provide scholarships for members to attend training conferences and take advantage of national educational opportunities. Due to COVID, the Section has planned a lunch and learn webinars. Here's the current schedule:

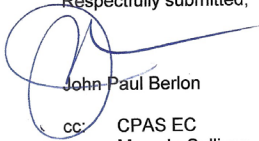
Date	Topic	Anticipated presenters
1/28/21	Professionalism in the Age of COVID19	Judge Altman
04/01/21	Advocating for your child in school tribunals	Michael Waller
05/14/21	DFCS Update	Chris Hempfling
06/24/21	Legislative Update	Tonya Boga and JP Berlon
07/09/21	Case Law Update	Randee Waldman and JP Berlon
08/13/21	Education Law (Case Law update, IDEA/504 crash course)	Stacey Suber-Drake and Beth Feingold-Morris
09/10/21	Advocating for LGBTQ in foster care and delinquency	Currey Cook. LAMBDA Legal Aid
10/08/21	Roundtable for Court Appointed Attorneys	Michelle Barclay and Jerry Bruce
11/05/21	Accountability Courts - FTC and Sex Trafficking	Judges Murray and Heath
12/03/21	Development of local juvenile court bar associations	John Toner, IV
1/27/22 ANNUAL MTG	Services for High Needs Youth	Kathleen Dumitrescu

CPAS 2020-21 Annual Report
April 16, 2021 Letter to President of State Bar

02/11/22	Best Practices for Motions/Discovery	Laurie Thomas and Ranee Waldman
03/11/22	Judicial Bypass, Emancipation, Private Dependency	Anissa Patton, Laurie Thomas, JP Berlon

If you have any questions, comments, or concerns, please feel free to contact me on my mobile at 912-996-6188.

Respectfully submitted,



John Paul Berlon

cc: CPAS EC
Mary Jo Sullivan, Sections Director
M. Lane Sosebee, Sections Coordinator

SMITH, GAMBRELL & RUSSELL, LLP

M E M O R A N D U M

TO: Mary Jo Sullivan
Lane Sosebee,
Section Liaisons State Bar of Georgia

FROM: Peter Crofton, Chair
Gregory Smith, Vice-Chair

DATE: April 20, 2021

RE: Construction Law Section of The State Bar of Georgia Annual Report 2020-2021

The Construction Law Section (the “Section”) had a great second full year, especially in light of the impact COVID-19 had on our activities. Since its formation on November 2, 2018, we have grown the Section’s membership to 388, and we have \$9,228.13 in our account with the Bar. The pandemic significantly disrupted our programming this past year because we could not conduct in-person gatherings, however, we look forward to resuming many of our scheduled activities later this year. Our significant projects this year include:

1. Oral History Project

Most members of the State Bar are unaware of the pivotal role that Georgia lawyers played in developing the broader field of construction law. The Section stands on the shoulders of these pioneers. To preserve this important history, the Section has undertaken an ongoing oral history project to capture the stories of the Georgia lawyers who were instrumental in the founding and development of construction law. This project aims to honor these members of the Bar by creating a permanent record of their contributions, while also preserving the history being made today. These videos are history told by the people who lived it, with the hope of encouraging future generations of Georgia lawyers to continue making new history.

We completed and released the first phase of our Oral History Project on September 14, 2020. The Project’s initial videos are a short introductory video, titled “Building the South,” that explains the Project and invites viewers to watch the full interview videos, as well as five full-length interview videos in which members of the Bar discuss their roles in the development of construction law. Those videos are available on the Section’s webpage at: <https://www.georgiabarconstruction.com/new-page>.

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When we resume in-person events, we plan to host a screening event to celebrate the four legends of the Bar who participated in the Oral History Project: Kent Smith, John Hinchey, Jim Groton, and Fielder Martin. We look forward to all four interviewees attending and inspiring all members.

2. Women in Construction Roundtable Discussion

In February 2021, we held our second annual Women in Construction Roundtable Discussion, an event that celebrates the role of women in the construction industry. The virtual event featured a panel discussion about the impact of women and women attorneys in the construction industry. This year's panel was comprised of four panelists from widely varied parts of the construction industry—the CEO of a major construction company, two executives and general counsels with large general contractors, and a partner in the construction practice of a large firm.

The event was attended by more than seventy people, the most in the Section's history. We look forward to future in-person events where the panel discussion is supplemented by a more intimate cocktail reception with the panel members.

This Roundtable event is also part of the Section's CLE offerings, providing attendees with an hour of professionalism CLE credit. The Section typically conducts a mixture of lunch-and-learn webinars and in-person events that allow for networking and relationship-building as well as offering CLE credit for attendance.

3. Section Newsletter

During the COVID-19 pandemic, we have been working behind the scenes to launch the Section's electronic newsletter. The newsletter will provide a way to share information with Section members, and for members to share information with each other. It will include short articles submitted by members, information about upcoming Section events and functions, and highlight the accomplishments of Section members both in and out of the legal world.

Our first edition of the newsletter will highlight the oral history project and the ongoing contributions Georgia practitioners have and continue to make to construction law. We plan to issue the first edition in the second quarter of 2021.

4. Conclusion

It has been a productive year, and our membership continues to grow as we strive to reach our goal of supporting the members in their practices. We are happy to provide additional information about the Section as may become necessary.

**ANNUAL REPORT FOR 2020-2021
CREDITORS RIGHTS SECTION**

Unfortunately our annual luncheon usually held in October was canceled due to Covid as was our annual February Seminar. We continue to utilize our website (Creditorsrights.com) as a way to communicate and help each other when we have unique questions related to our practice.

Harriet C. Isenberg
Co-Chair Creditors Rights Section
State Bar of Georgia

STATE BAR OF GEORGIA – EMPLOYEE BENEFITS SECTION

Annual Report – 2020-2021

Board Members:

Section Chair- Douglas Robinson
Vice Chair/Secretary - Clancy Mendoza
Treasurer - Robert Lewis
Immediate Past Chair - Peter Varney

Current Membership: 225 Members

Current Financials:

Balance: \$31,673.30
Net Revenue: \$4,564.91

Overview/Activity/Goals:

The Employee Benefits Section ("EBS") has historically sponsored a seminar in conjunction with ICLE that is held in March of each year. The seminar includes a variety of speakers on topics relevant to section members, including annual updates from representatives of the U.S. Department of Labor, updates on relevant tax laws and ERISA regulations, and summaries of relevant 11 Circuit decisions. The Board traditionally schedules its annual meeting for the day of this seminar. The COVID-19 crisis has had a significant impact on the EBS and its activities. The seminar set for March 2020 was cancelled due to the pandemic. Efforts were made to reschedule the seminar for March 2021 via live stream, but it was not rescheduled for March 2021 due to an ICLE moratorium on live-stream seminars.

The EBS held its last member in-person event in February 2020, which was a tea for members held at the Four Seasons hotel in Atlanta. Twenty-three members participated in the event which included a member as speaker on a topic relevant to the section members. The EBS Board held a virtual annual meeting on March 3, 2021 at which a quorum was present. The Board discussed the need for adding new Board members and has secured agreement from one section member to join the Board for 2021-2022. The Board will continue to pursue at least one more new member. On behalf of the Board, the Chairperson has been actively working with Mary Jo Sullivan to organize an abbreviated video seminar to cover updates relevant to members in 2021.

Respectfully,



Douglas M. Robinson

Chair/Employee Benefits Section

cc: Mary Jo Sullivan, Sections Coordinator



EQUINE LAW SECTION
STATE BAR OF GEORGIA
ANNUAL REPORT – 2020-2021
Section Chair – Philip Burrus

~Introduction~

I am both privileged and humbled to serve as the Chair of the Equine Law Section for the 2020-2021 calendar year. I take great pride in being involved in the Section and with providing you with this Annual Report.

As you may know, our Section was dormant for some nine plus years with members, but with no officers and no activities. Thanks in large part to the efforts of Mary Jo Sullivan, we are now back in action.

After soliciting general interest from members in the section last summer, Mary Jo scheduled an initial meeting of the members on August 24, 2020. The quorum in attendance elected officers and discussed preliminary goals for the upcoming year. Our efforts since that time have been to reboot and rejuvenate the Section.

While not practicing in the equine law field myself (I am a patent attorney), I served on the Executive Committee of the Intellectual Property Law Section for many years, serving as its Chair from 2012-2013. Being familiar with the intricacies of running a Section of the State Bar of Georgia, I volunteered to be, and was elected as, the Chair of the Equine Law Section at the August 24 meeting. During the meeting, the members also elected Natalie Henry as Vice Chair and Angela Hinton as Secretary. Lisa Blackstone volunteered to be our outreach chair, while Lindsey Vance has recently taken the oar as the Programs Chair. The efforts of each of these Executive Committee members are critical to the success and revival of the Equine Law Section.

~Activities~

Launching anew from a cold start in August of last year, the Executive Committee has been hard at work trying to bring the Section back to active status. Our guiding principle has been to reboot the Section and leave the officers and members who succeed us with the tools they need to keep the active momentum moving forward. We have been working toward this goal in many ways, notably including the following activities:

- Design of a new and updated **Logo**;
- Design and active maintenance of a new **Website**, which can be found at georgiaequinelaw.org, to provide updated news, national events, and community communication links to our members;
- Update and revision of the Section's **Bylaws**;
- Establishment of an **Annual Budget**;
- Establishment of a quarterly **Newsletter** to provide more and better communication to our members;
- Hosting two **Continued Legal Education Programs** featuring nationally renowned speakers to educate our members in the substantive areas of equine law;
- Providing members with a **Virtual Tour** of an Equine Hospital on our website;
- Hosting a virtual **Social Program** to provide more social and networking opportunities to Section members; and
- Establishment of an **Outreach Committee** charged with providing more opportunities for our Section to give back philanthropically to our community, as well as to better promote equine legal issues in Georgia;

We were fortunate enough to have a fantastic group of Committee Chairs who were eager to get to work. The Committee Chairs of our Section embraced this vision and worked incredibly hard this year to take the Section from one that had no officers, no

executive committee, no budget, no communication whatsoever with members, no networking opportunities, and no programming, to one that provides all of these and more. Please keep in mind, this transformation has occurred in a period of only ***eight months***. Consider the following comparison to the previous bar year:

<u>Activity</u>	<u>2019-2020</u>	<u>2020-2021</u>
Lunch and Learn CLE Events	0	2 <i>With a third possible</i>
Total CLE Hours Offered	0	2
Newsletters to the Section	0	2 <i>With a third planned</i>
Website	NONE	<i>GeorgiaEquineLaw.org</i>
Budget	NONE	<i>Annual Budget Prepared, both for Initial Year and Subsequent Years</i>
Legal Library	NONE	<i>Established with 3 Legal Volumes for Loan</i>
Active Committees	0	2 <i>With two more seeking chairs</i>
Virtual Educational Tours	0	1
Social Events	0	1
Bylaws	<i>Not updated in nearly a decade</i>	<i>Now on third revision, soon to be submitted to the Office of General Counsel for consideration</i>

The remainder of this report provides additional detail on the efforts listed above as well as the Section’s other accomplishments, and includes a summary of the Section’s strong financial position.

~Section Structure and Reorganization~

When I took the position of Chair in August of 2021, I quickly discovered that many attorneys did not even know that there *was* an Equine Law Section. This fact was understandable, however, because the Equine Law Section had been in a multi-year hiatus after its original formation. The Section was originally formed with the intent of bringing pari-mutuel betting to Georgia. When that effort ceased, the Section went into decline and effectively went abandoned, despite having members still enrolling each year and paying Section dues.

However, thanks in large part to the gracious efforts of Sections Director Mary Jo Sullivan and Sections Coordinator Lane Sosebee, the Section is now being revived. Mary Jo began “rattling the trees” with a series of emails to Section members beginning in early August of 2020. She inquired about both the Section’s history and whether there was any interest in reviving the Section’s activities.

These emails bore fruit. Numerous current members begged for new activities from the Section. Mary Jo advised that we would be able to redirect the mission of the Section if there was consensus in that regard. With pari-mutuel betting no longer an active issue in Georgia, redirection would be imperative.

Illustrating by example, I have personally reviewed the professional backgrounds of our members and discovered that only a small number (4-5) practice in the equine law field. The majority of the members of the Section are instead horse enthusiasts or have a personal interest in equine law that is separate and distinct from their fields of practice. Others represent clients in unrelated matters where those clients are professionally involved with horses. Many members are interested in animal rights and the humane treatment of horses. Others simply enjoy equine activities as a hobby. Some even live on horse farms, board horses, and breed horses. Many members show horses at competitive events.

With this enthusiastic response, despite the fact that there were only thirty-six (36) active members, Mary Jo put forth a call for interested parties to take the positions of Chair, Vice Chair, and Secretary. She also called a meeting of the Section on August 24, 2020.

Having been the Chair of the Intellectual Property Section of the State Bar of Georgia from 2012-2013, and having served many additional years on its Executive Committee, I volunteered to serve as the Interim Chair and was elected at this meeting. Natalie Henry was elected as Vice Chair, and Angela Hinton was elected as Secretary.

The agenda for this first meeting included the following topics: solicitation of interested parties to run for Chair, Vice Chair, Secretary; a discussion of section responsibilities throughout the Bar year; and revising the current bylaws. The meeting also included an open forum. During this meeting and after the election, members began sharing their thoughts about what activities they would like the Section to provide. Ideas ranged from an Equine Law Bootcamp or 101 Basics educational event, to a field trip to the University of Georgia Field Hospital, to having an Equine Law Section booth at publicly facing events such as horse shows. Starting from a dead stop, we had a lot of work to do.

~Committee Formation~

In accordance with its bylaws, the Equine Law Section's Executive Committee manages the Section's day-to-day activities. According to the current bylaws, the Executive Committee is comprised of the Section's Officers (Chair, Vice Chair, and Secretary) as well as the chairpersons of its standing and special committees.

In view of the feedback we received in response to Mary Jo's email campaign and at our first meeting, we quickly established four special committees: a Programs Committee, a Social Committee, a Communications Committee, and an Outreach Committee. To date we have recruited committee chairpersons to two of these committees. To wit, Lisa Blackstone serves as the Outreach Committee Chair and Lindsey Vance serves as our Program Committee Chair.

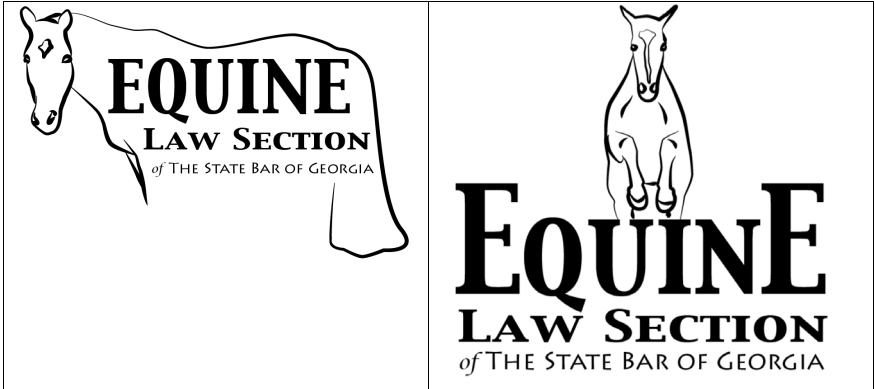
The Program Committee helps to coordinate substantive programming for the Section. The Communications Committee provides assistance with our newsletter and website. The Social Committee plans and coordinates social interactions among the members when substantive matters of law are not the principal focus. The Outreach Committee coordinates communication and outreach efforts both within the State Bar of

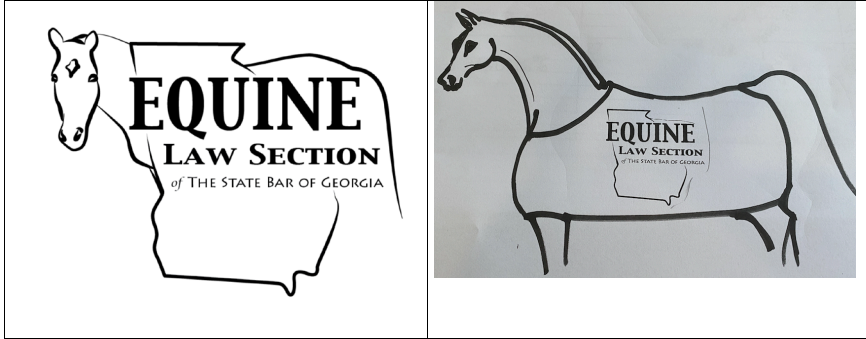
Georgia and with the public. As the mission statement of the Section states that the purpose of the section includes rendering service to the general public, the Outreach Committee became an imperative component in our strategy for fostering relationships with both attorneys practicing in other fields and the public at large.

~Marketing: Logo Creation~

Since many State Bar members did not even know that the Equine Law Section existed, the Executive Committee made marketing and outreach a top priority. One of the first branding tasks we commenced was the design of a new logo.

To say the least, a section with less only thirty-six members initially, paying twenty dollars a year, does not have a large budget. Accordingly, we were unable to pay an experienced, professional design firm to assist with our marketing efforts. Additionally, the work product of “reasonably” priced designers looked more like clip art. Undeterred, the members of the Executive Committee rolled up their sleeves and began creating logos for consideration. I am quite proud of our efforts. Here are some that were submitted for consideration:





Ultimately, we settled on the following logo:



The two “E” letters at the beginning and end of “Equine” symbolize standards that are positioned at the sides of jumps in both Hunter-Jumper and Jumper competitions. The actively engaged horse leaping above the logo signifies the rebirth of the Section, as well as its future ongoing active status. The generic lines of the horse are intended to allow the silhouette to encompass any of the many breeds of horses that abound. The logo both clearly and instantly tells who we are and identifies us as a constituent section of the State Bar of Georgia. We are quite proud of our new logo.

~Marketing: Website~

Continuing our marketing efforts, we next wanted to create a website that would serve as not only a bulletin board for current events, but also as an informational archive of our activities and communications hub for our members. Again, we had little to no budget with which to work in developing a website.

Bootstrapping once again, the Section secured the domains georgiaequinelaw.org and georgiaequinelaw.com, with the latter pointing to the former, which now serves as the Section’s website. We also learned how to use development software to construct and maintain a webpage. We now have a thriving webpage that is continually updated with information concerning the Section. The site, www.georgiaequinelaw.org, includes the following pages:

- A home page with welcome messages, places to sign up for our newsletter, and brief introductory information about our leadership, our members, and our mission;
- An “about us” page discussing:
 - what we do, including our educational activities, our service to the State Bar of Georgia, and our Service to the Community;
 - our mission statement;
 - a listing of our officers, including contact information;
 - descriptions of our committees;
 - our membership roster; and
 - links to our bylaws;
- A “news” page featuring Section news, newsletters, past events, and events from other organizations that may be of interest to our members;
- A “programs” page featuring program announcements and a virtual tour of the University of Georgia Large Animal Veterinary Hospital;
- An “events calendar” listing upcoming events with dates, times, and registration information;

- A “media gallery” featuring pictures submitted by Section members; and
- A “contact” page allowing interested parties to communicate with the Officers to become involved in the Section and/or subscribe to the newsletter.

We are quite proud of our website development efforts in creating this informational exchange for our members. We are even more proud of the fact that this site is now *actively being kept up to date*, thereby informing our members of news events and upcoming programming.

~Marketing: Newsletter~

Since access to the website requires (1) knowing that the website exists and (2) affirmatively searching to find the domain, the Executive Committee wanted to also have a “pushed” mechanism of communication with our members as well. Accordingly, we created a new newsletter template to be used for distributing a quarterly newsletter to our members. The first edition, attached as an appendix to this report, set expectations for the rest of the bar year, and reported on recent Section events. A copy of this newsletter – as well as the subsequent newsletter being distributed later in the week in which this report is being written – are also available on the Equine Law Section’s web site at www.georgiaequinelaw.org under the “News” tab. A third newsletter will be published in the summer. We hope to continually push the newsletter to even more exceptional quality, potentially including scholarly articles and reports on recently held events. Always keeping consideration of the environment in mind, our newsletter will only be distributed electronically. This saves Section funds, reduces labor requirements of those supporting the Section, and also prevents the unnecessary use of paper.

~Marketing Efforts: Early Successes~

The combined efforts of creating the new logo, establishing the new website, and distributing the newly created newsletter have borne immediate fruit. I am happy to

report that Section membership has increased a whopping thirty-one percent since August of last year. We hope to see this success continue as we continue our marketing efforts.

~Bylaws~

With the Section having been dormant for many years, its bylaws have become badly outdated. As noted above, the direction of the Section was changing as well. Moreover, the operation and functioning of the Section desired by the Executive Committee was inconsistent with the provisions of the bylaws. Illustrating by example, the Officers generally prefer the ability to conduct meetings virtually (a need brought precisely into focus during the pandemic) and voting in elections electronically. The current bylaws are focused around physical mailings of notices through the postal service and voting with physical presence. Through communications with other Section chairs, we discovered that many sections today streamline this process using electronic ballots. Additionally, by allowing new officers to be nominated at the mid-year meeting, rather than the annual meeting, our preferred earlier process will allow newly elected officers time to prepare before assuming office.

Accordingly, we are taking affirmative steps to amend the bylaws this year to better conform our desired Section operations. We are also working so that these amendments more closely support the Section's current needs, as well as to more closely resemble the revisions being made to the State Bar of Georgia's Model Bylaws.

To date we have been through four rounds of revisions with each and every member of the Executive Committee weighing in on the proposed changes. We have also corresponded with Mary Jo several times to understand the process concerning bylaw amendments. We now have a working copy that, upon final approval by the Executive Committee at our next meeting, will be ready for submission to the Office of General Counsel for consideration. If approved, we then plan to present the proposed changes to the Board of Governors of the State Bar of Georgia for consideration and, thereafter, the membership for consideration and vote. A large number of hours have been poured into this effort.

~Section Outreach~

In a continuing effort to foster education, networking, and good will throughout the State Bar of Georgia, I have personally reached out to the chairs of many other Sections, including the Intellectual Property Law Section, the Animal Law Section, the Entertainment and Sports Law Section, and the Insurance Law Section. During my conversations with these colleagues, I have relayed our members' interest potentially partnering with other sections for a joint event. For instance, I conveyed to the Insurance Law Section that since there is so much money (and liability) involved in equine sporting activities, e.g., hunter/jumper/equitation competitions, western riding, dressage et al., it may be interesting to partner with the Insurance Law Section to coordinate collaboratively with reference to an event focused around insurance and liability in the equine space.

Several of these chairs have expressed an interest in a joint social event once we are able to meet again in person. With the Bar offices slowly beginning to reopen, we hope to have such events in the near future.

~Social Programming~

The Section hosted a virtual happy hour on September 10, 2020. While we would much prefer to have an in-person social event, the pandemic dictates otherwise. While primarily a social event, the Officers were also seeking input from our members regarding how to make the Section work more effectively in their service. The meeting ran from 4:30 - 6 PM, and invited members to discuss the following topics:

- What interests you about the Equine Law Section;
- Possible programs you'd like to see from the Section;
- What communications you'd like to receive from the Section;
- How to get involved the Executive Committee as a Committee Chair;
- How the Section can best support its members; and
- Favorite horse stories.

The goal of the meeting was for the members of the Section to get to know each other, as well as to have a group discussion about the direction of the Equine Law Section throughout the next year.

We had several Section members attend the meeting, with each engaging in a lively discussion about the Section and their interests in equine activities. We were able to learn from each other regarding how to make membership in the Section more fun, more active, more informative, and more rewarding.

~Equine Law Library~

With the help of Mary Jo procuring titles, the Equine Law Section now has a nascent law library. We now have three volumes, which include *Understanding Equine Law – Your Guide to Horse Health Care and Management* by Milton C. Toby and Karen L. Perch, *More Equine Law and Horse Sense – The Ultimate Legal Guide to Horse Owners and Business* by Julie Fershtman, and *Equine Law, 2nd Edition* by Frank T. Becker. These volumes are available for any Section member to use on a limited, check out and return basis.

~Virtual Veterinary Hospital Tour~

During the social event hosted September 10, 2020, several members expressed a desire to tour the University of Georgia Large Animal Veterinary Hospital. While in-person tours are temporarily suspended due to the pandemic, the Executive Committee was able to still provide members with a complete virtual tour of the facility. The tour is available on the Equine Law Section's web site at www.georgiaequinelaw.org under the "Programs" tab.

The tour offers members the ability to take individually guided tours of the exterior of the Large Animal Hospital, admissions, the equine performance area, the isolation rooms, surgery facilities, the breezeway, outpatient services, and the diagnostics and imaging wing. In addition to providing an immersive and interactive educational experience, the tour allows members to see just how fortunate we are as Georgians to have such a wonderful facility within driving distance. The section is grateful both to the

University of Georgia and Stacey Hillard, Business Operations Professional in Large Animal Medicine, for their help in making these tours available to our Section members.

~CLE EVENT 1: Waivers and Releases in Equine Activities~

Thanks in large part to the efforts of our Outreach Chair, Lisa Blackstone, we will be hosting our first Continuing Legal Education event since our re-launch on May 11, 2021 from 12-1 PM. The event will be exciting as, it features a nationally renowned speaker and author of one of the volumes in our legal library, Julie Fershtman.

Equine facilities of all types, including boarding facilities, event facilities, transportation services, and even veterinary facilities, frequently require clients to sign liability release forms and assent to waivers prior to engaging in any equine related activity. Understanding these liability releases and their accompanying waivers can be a daunting task, especially without sufficient time for review. Julie Fershtman will be discussing recurring issues that arise with waivers and releases. During this meeting, members will learn more about what to look for before entering such agreements, as well as things to consider when drafting waivers and releases. It should be quite the affair. The Equine Law Section is making this event free not only to Section members, but to all members of the State Bar of Georgia who are interested in attending.

~CLE EVENT 2: Equine Case Law Update~

The Section's second Continuing Legal Education Event is already scheduled as well, and will be held June 23, 2021 from 12-1 PM. This event will feature another prominent national speaker, Krysia Nelson. Ms. Nelson will be presenting an equine case law update. Indicative of her expertise, she is also presenting a case law update to the National Conference on Equine Law, which will be held at the end of this month at the Rosenberg College of Law at the University of Kentucky (details on the website if you wish to attend). As with our first event, the Equine Law Section is making this event free not only to Section members, but to all members of the State Bar of Georgia who are interested in attending. As an added bonus, all attendees will receive a complementary one-year subscription to Ms. Nelson's information-packed newsletter.

~Outreach Committee~

Chair: Lisa Blackstone

We are quite fortunate to have Lisa Blackstone serving as our Outreach Committee Chair. She is pushing her committee forward with serious momentum and growth, putting together a list of more than twenty-five active equine organizations in Georgia with whom she is initiating contact to discuss outreach possibilities. With experience riding, training, and breeding horses, as well as traveling the country to show and compete, Lisa brings a broad spectrum of equine knowledge to our Executive Committee.

Lisa is also very active in the governance of equine sport. Illustrating by example, the United States Equestrian Federation (USEF) is the governing body over most breeds and disciplines and is the National Governing Body (NGB) for the United States Olympic equestrian sport. Protests and complaints of rule violations for all affiliates under the umbrella of the USEF are sent to the USEF Hearing Committee. Lisa serves as one of the two co-chairs of the USEF Hearing Committee. In that capacity, she hears cases involving various rule infractions such as drug violations, horse abuse, unsportsmanlike conduct, and amateur rule infractions. She is experienced in the USEF hearing process and personally knows many equine lawyers across the country. Lisa further has knowledge in the Safe Sport Act enacted by Congress in 2017. As noted above, Lisa was largely responsible for securing Julie Fershtman as presenter for our first Continuing Legal Education event.

~Programs Committee~

Chair: Lindsey Vance

We are truly lucky to have Lindsey Vance as our Programs Committee Chair. Lindsey moved to Georgia from New Jersey, having to sit for the Georgia Bar as a result of her move. Prior to even moving, she contacted me regularly with a desire to help our

Section. Once she was admitted in Georgia and became a Section member, we welcomed her with open arms. Her enthusiasm and dedication will serve as a springboard from our first two Continuing Legal Education events to propel the Section to even higher heights in 2022.

A graduate of New York University and Fordham Law School, Lindsey grew up in Georgia. While practicing in commercial real estate, Lindsey has been riding since she was five years old and feels more comfortable on a horse than on the ground. Growing up, she competed in the hunters, jumpers, and equitation on the “A” circuit, from Florida to New York. She also played polo for several years. She plans to bring exciting, educational, and fun events to the calendar as Program Committee Chair.

~Budget~

Starting with absolutely no documentation, the Section has created a budget for the present year and future years. The present year is seen as an abnormal year due to the fact that the Section has been inactive for so long. Accordingly, the Officers acknowledge that additional efforts may be required during a “reboot” phase that may not be necessary during normal operations. Accordingly, a budget for the present year that slightly exceeds revenue (considering current balances) has been proposed. However, to ensure the future success of the Section, I have also created a standard budget that should serve as a template for future Chairs.

~Diversity~

During the reboot the Section enjoys an excellent record for promoting women and minority members to positions of leadership. This year four of the five Executive Committee members are women. We will continue to strive to increase the representation of minority, women, and openly gay members on the Executive Committee and in Officer positions.

~Financial Report~

Financially, the Equine Law Section is in better shape now than it has ever been. This is largely an unintended gift of the Section being inactive for some time. Specifically, the Equine Law Section started the bar year with a balance of \$13,262.73. As of the latest financial report available (April 11, 2012), the Section maintains a balance of \$12,798.93. When the 2021-2022 Section dues are added to the balance at the start of the bar year, the balance exceed \$13,000.00. Accordingly, despite budgeting in excess of revenue for our reboot year, the Executive Committee will leave the Section in a solid financial position from which to start future years. The Equine Law Section will enter the 2021-2022 bar year on solid financial footing to continue promoting the interests of its members.

Equine Law Section,
State Bar of Georgia
Annual Report
Page 17 of 17

APPENDIX A – SAMPLE NEWSLETTER



CALENDAR

PAST EVENTS

The Section held a virtual happy hour on September 8, 2020. Thank you to all who attended!

UPCOMING EVENTS

The Executive Committee is working on new programs, which we hope will include an equine law basics seminar and a case law update. We hope to have additional (pandemic friendly) social events as well. Stay tuned!

VOLUNTEERS NEEDED

The Executive Committee is seeking volunteers to lead our Programs Committee, Communications Committee, and Social Committee. Please email Philip Burrus at pburrus@burrusiplaw.com if you are interested.

NEWSWORTHY NOTES

The Section has a website! Check it out at the following link: <http://www.georgiaequinelaw.org>



Message from the Chair

Welcome to the inaugural newsletter of the newly relaunched Equine Law Section! I am honored to serve as your interim Chair. The other Officers and I look forward to working with you to help to reboot and rejuvenate the Section.

As you may be aware, prior to last August our Section had been dormant for a number of years. The Section owes a huge thank you to both MaryJo Sullivan and Lane Sosebee of the State Bar of Georgia for their efforts in initially bringing the Section back to life. After soliciting general interest from members in the section last summer, MaryJo scheduled an initial meeting of the members on August 24, 2020. The quorum in attendance elected officers and discussed preliminary goals for the upcoming year.

We then had a virtual happy hour on September 8, 2020. Discussion topics included member interest in the Section, possible programs from the Section, and what the Section could do to best support its membership. We also shared favorite horse stories. Did you know that less than ten percent of the membership actually practices equine law? I did not until the happy hour, but it appears to be true. The majority of members practice in other fields but are horse enthusiasts and have a personal interest in equine law.



Since that time, the Executive Committee has been hard at work. We now have a fancy new logo, a working budget, and a brand new website, which can be found at georgiaequinelaw.org. We are also working on a revision to the bylaws to, among other things, make the election of officers and the selection of committee chairs more efficient and allow for virtual meetings. We also have a nascent equine law library consisting of three books! They are available for members to use on a limited, check out and return basis.

Despite the pandemic, we are hoping to be able to present a virtual program or two as well. Suggested topics include an introduction to equine law and a case law update.

Your support will be critical to the success of our revival. When you see events and other activities, please try to attend if at all possible. We look forward to working with you all to relaunch the Section together!

Committee News OUTREACH CHAIR

Lisa Blackstone

Greetings members of the Equine Section of the Georgia Bar. I am excited that this Section is gaining momentum and growth. I would like to introduce myself and share with you what I hope I can contribute to the Section.

Like many of you, I began riding horses as a kid. After college, my family began our own Arabian horse training and breeding business. At our peak, we had roughly 125 head, stood a syndicated stallion and bred about 20 mares a year. We traveled around the country showing and competing at national events.

Over time, I found myself dealing more with the mundane issues of payroll taxes and workers compensation claims, rather than enjoying my sport. Eventually, I liquidated the herd, sold the property, and went to law school at the University of Georgia in my thirties. I've now practiced law since 1997 but have remained very active in the governance of equine sport. Additionally, I continue to ride and compete as an amateur.

For those of you who may not know, the United States Equestrian Federation (USEF) is the governing body over most breeds and disciplines and is the National Governing Body (NGB) for the United States Olympic equestrian sport. Protests and complaints of rule violations for all affiliates under the umbrella of the USEF are sent to the USEF Hearing Committee.

I serve as one of the two co-chairs of the USEF Hearing Committee. We hear cases involving various rule infractions such as drug violations, horse abuse, unsportsmanlike conduct, and amateur rule infractions, just to name a few. I've become extremely familiar with the USEF hearing process and have met many equine lawyers across the country who appear before us in hearings. Unlike a civil proceeding, we serve more like an administrative hearing. Both sides are

usually represented by counsel. Although not as formal as a civil case, we do offer opening and closing statements, direct, cross, and redirect of each witness. All witnesses testify under oath and we usually have a court reporter present to take down the case. We bend over backwards to be sure both parties feel they have had a fair and equal opportunity to be heard. Perhaps my experience in these matters could assist anyone of our members who may have questions about the USEF hearing process.

Since Congress enacted the Safe Sport Act in 2017 the equine world has been in an uproar! (Formally, the Act is "Protecting Young Victims from Sexual Abuse and Safe Sport Authorization Act of 2017.") Most people do not understand the Act in its entirety and "blame" the USEF for the inconveniences it seems to impose on USEF members. I have been intricately involved in Safe Sport Act issues since its inception and it remains a work in progress. It is not perfect, but improving each year. Because there is so much confusion about the Act and the USEF rules and procedures as they pertain to the Act, I hope my experience with this subject could bring some clarity to those who find it challenging.

For anyone with questions or concerns regarding most any USEF issues, my door is always open!

NEW PROGRAMS!

The Executive Committee is currently working on two programs for the current year. The first would be an Equine Law 101 webinar generally explaining the Equine Activity Liability statutes in the 48 states and how the two states without a statute (CA and MD) analyze the equine activity injury cases. The second would be an Equine Case Law Update discussing recent court cases across the country involving equine activities.

VET HOSPITAL TOUR!

During our most recent Happy Hour, several members expressed a desire to tour the University of Georgia Large Animal Veterinary Hospital. While in-person tours are temporarily suspended due to the pandemic, you can still take a full virtual tour of the facility! By clicking the link to the right, you can take individually guided tours of the exterior of the Large Animal Hospital, admissions, the equine performance area, the isolation rooms, surgery facilities, the breezeway, outpatient services, and the diagnostics and imaging wing. See just how fortunate we are as Georgians to have such a wonderful facility within driving distance.

The Executive Committee would like to thank the University of Georgia and Stacey Hillard, Business Operations Professional in Large Animal Medicine, for her help in making these tours available to our Section members. Thank you, UGA!



EVENTS

The Executive Committee is working to coordinate additional programming! Potential topics include best practices for equine liability release, boarding agreements, and purchase and sale agreements. We need help, however! If you are interested in serving on our Programs committee, please let us know! Send us a message via our website at georgiaequinelaw.org, or send a message directly to Philip Burrus, the interim Section Chair, at pburrus@burrusiplaw.com.

Recent Events

Our first meeting of the year was held via Zoom on August 24, 2020. We had eleven members in attendance. Interim officers for the year were elected and initial Section plans were discussed. We also had an open forum during which members were free to brainstorm and discuss general Section business.

Our second meeting was a virtual happy hour held on September 10, 2020 via Zoom. We had about ten members join to discuss, among other things, what interested them about the Section, possible programs they would like to see, how the Executive Committee could best communicate with its members, and how to get involved with Section leadership. We also shared favorite horse stories, which was a lot of fun.

By-Laws Revision

With the Section being dormant for so long, our bylaws have become a bit stale. Illustrating by example, elections of

officers in the current bylaws were focused around physical mailings of notices through the postal service and voting with physical presence at the annual meeting of the State Bar of Georgia. Many sections today, however, streamline this process using electronic ballots. Additionally, by allowing new officers to be nominated at the mid-year meeting, rather than the annual meeting, this earlier process will allow newly elected officers time to prepare before assuming office. In addition to requiring approval of the Section's membership, any proposed amendments would need to be approved by the Board of Governors of the State Bar of Georgia as well.

Website

Please check out our new website at georgiaequinelaw.org!

Volunteers Needed!

We need assistance! The Executive Committee has openings for a Program Committee Chair, a Communications Chair, and a Social Chair. Program Committee Chair is a high impact position helping to coordinate substantive programming for the Section. Communications Chair provides assistance with our newsletter and website. Social Chair would help to plan social events, be they virtual or (hopefully one day soon) in person.

Each position is a great way to help with our efforts to relaunch the Section. No previous experience is required and ample assistance is available. So please help!

LEADERSHIP OFFICERS

Philip H. Burrus, IV - Chair
Burrus Intellectual Property Law Group

Natalie Henry - Vice Chair
Henry Law Group

Angela Hinton - Secretary
Hinton Law

Betsy Choder - Treasurer (soon)
Vercounsel LLC

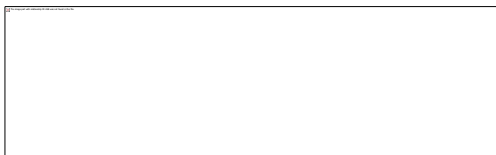
COMMITTEE CHAIRS

Lisa Blackstone - Outreach
Blackstone PC

Could be You! - Programs
Your firm here

Could be You! - Communications
Your firm here

Could be You! - Social
Your firm here



May 2021

**ANNUAL REPORT OF THE FAMILY LAW SECTION OF THE STATE BAR OF
GEORGIA BY THE EXECUTIVE COMMITTEE OF THE FAMILY LAW
SECTION 2020-2021**

The Family Law Section strives to support our members and our community, via CLEs, community service, charitable contributions, and various other activities. Our goals to provide these services continued during the COVID-19 pandemic, despite obvious obstacles. Our accomplishments in the past year are detailed below.

CONTINUING LEGAL EDUCATION (CLE) PROGRAMS

Despite the shut-down of the Institute for Continuing Legal Education (ICLE) for the majority of the year, and despite ICLE's inability to provide CLE programming via Zoom during the remainder of the year, The Executive Committee of the Family Law Section worked hard to attempt to provide CLE programs to its membership. Our annual Family Law Institute had to be cancelled in both May 2020 and May 2021. ICLE offered no programming alternatives to the Section in lieu of those live events. Our early attempts to conduct our annual Nuts and Bolts of Family Law CLE through ICLE were not fruitful, as ICLE was unable to provide us with acceptable dates or logistics for the program. Thus, we took action and contacted an outside vendor

to produce a one-day Nuts and Bolts of Family Law seminar in February 2021. The seminar was chaired by Ted Eittrheim, and included presenters from various areas of the state. We had 148 attorneys in attendance via Zoom, and extremely positive feedback on the seminar.

The Family Law Section also hosted its annual meeting in connection with the State Bar of Georgia's Mid-Year Meeting. Following the Executive Committee's monthly meeting, the Family Law Section hosted a one-hour CLE organized by Jeremy Abernathy. The CLE, "Race in Family Law" included a panel of Judges and attorneys discussing their personal and professional experiences with how racial issues and injustice in our society impact directly impact the practice of family law and the administration of justice for families in Georgia.

The Inclusion Committee of the Family Law Section, Chaired by Ivory Brown, produced a series of monthly one-hour CLEs. These seminars included "Families with Biracial Children," "Children of the African Diaspora," and "Families with LGBTQ Parents and/or Children." Each seminar provided the registrant with a link to view a topic-related film prior to the seminar and discussion, as well as a panel of family law practitioners and judges speaking on the specific issue.

Finally, in order to rectify the CLE hours many members and educational opportunities missed due to the cancellation of the Family Law Institute, the Section will be hosting a monthly one-hour seminar series, featuring topics included on the agenda for the 2020 Family Law Institute. These "lunch and learn" seminars will begin on May 19, 2021, with our legislative update.

FAMILY LAW REVIEW

The Section publishes the *Family Law Review* ("FLR"), a periodical with articles, interviews, information, and communications authored by members and friends of the Section. This is typically published three times per year, however our typical 2020 publications were truncated due to the pandemic and the publisher being shut down. We were able to publish a 2020

“Holiday Issue” which included 36 pages of content on family law topics. Our FLR Editor, Jonathan Dunn, is currently hard at work on our Spring, 2021 edition.

MONITORING AND DRAFTING LEGISLATION

The 2021 legislative session included a flurry of activity related to family law. The Family Law Section’s Legislative Liaison, Hannibal Heredia, and a subcommittee made up of Family Law Section members tracked numerous pieces of legislation, discussed various bills with sponsors and legislators (within the parameters of the of the Bar Rules and the limitations of *Keller v. State Bar of California*, 496 U.S. 1 (1990)) and advised Executive Committee members of the status and progression of the relevant proposed legislation.

The Family Law Section will continue to actively track legislation as it is proposed, work with legislators who seek help related to proposed legislation, and to keep members of the Section apprised of what is going on under the Gold Dome. Finally, we have a “Legislative Update” one hour CLE planned for

SECTION MEMBERSHIP, FINANCES, AND ORGANIZATION

The Family Law Section is one of the largest sections with more than two thousand (2,000) members. We currently have an account balance of approximately \$350,000. Our Executive Committee consists of Family Law practitioners from all over Georgia. We met via Zoom monthly in 2020-2021, and we are excited to hold our May, 2021 meeting in person.

One of the goals for the year to was to determine how to hold CLEs and meet the requirements of the Section’s Bylaws during COVID. This required extensive work by our officers, who held multiple meetings to determine the viability of any partnership with ICLE, and how to move forward with CLEs once it became clear that ICLE’s policies and practices were not workable for the Section’s goals.

YOUNG LAWYERS DIVISION - FAMILY LAW COMMITTEE

The *Young Lawyers Division (YLD)* Family Law Committee continued its mission to increase the involvement in our section of younger and/or newly barred attorneys practicing in the area of family law. Membership in the *Young Lawyers Division* is automatic through the State Bar of Georgia for attorneys who are under the age of 36 or who have been admitted to their first bar less than five years.

While programming for the current bar year has been postponed due to COVID-19, the YLD Family Law Committee is excited to host additional CLEs, mixers, and fundraising events in the next few months which will continue to connect and unite our newest family law members with the enormous talent and experience of which our section is comprised. Amy Saul Mollengarden, the YLD Family Law Section Chair, has served as a member of the Executive Committee for this Bar year.

COMMUNITY SERVICE PROJECTS

Our “normal” hands-on and in person community service projects were unable to move forward this year, for obvious reasons, but we did our best to continue to assist our communities through financial contributions. This year, we provided contributions to the *Solomon’s Temple Foundation*, which supports, among other things, a shelter that provides temporary housing to women and children. The Section also provided Christmas gifts to the children who attend the Warren Boys and Girls Club. The wish list provided by the Boys and Girls Club director was fulfilled by Section members in less than 48 hours. We contributed to the DeKalb Volunteer Lawyers Foundation, which provides pro bono legal services to those in need in DeKalb County, and to STE(A)M Truck, a nonprofit that provides hands-on learning to children in Title I schools. Our STE(A)M Truck contribution provided the organization with the ability to procure kits for

students to learn to create their own mechanical computer game to solve logic puzzles. We hope to continue to work with STE(A)M Truck in a more “hands-on” way once we are able to do so.

CONCLUSION

We have done our best to support our Section and its members during a very unique and difficult year. Hopefully many of the lessons learned will have a positive impact on our ability to continue to serve the Section and the Bar in the future. It has been my pleasure to serve as the “COVID-Chair” this year, however I look forward to some sense of normalcy.

Kyla S. Lines

Chair, Family Law Section

State Bar of Georgia

FIDUCIARY LAW SECTION

ANNUAL REPORT 2020-21

Despite the global pandemic, the Fiduciary Law Section (“the Section”) has had an active and successful year as highlighted by the information referenced below. We remain appreciative of the assistance provided by the staff of the State Bar, particularly during this difficult year, as well as of the leadership provided by the officers and Board of Governors of the State Bar of Georgia.

Members

The Fiduciary Law Section has 1128 members.

Account Balance

The current balance of our operating account is \$213,926.13.

Continuing Education

The section typically holds four programs annually, two institutes and two seminars, in conjunction with ICLE. The programs typically are chaired by officers of the Section. Because of the pandemic, the only full seminar the Section conducted this year was the Basic Fiduciary Practice 101 seminar, which was live streamed from Bar headquarters on October 29, 2020.

In lieu of its regular programming, the Section conducted five stand-alone CLE seminars via the Bar’s web platform. The State Bar, and in particular, Mary Jo Sullivan and Lane Sosebee, were instrumental making these programs the successes that they were.

The seminars were:

- Revisions to the Georgia Probate and Trust Codes, August 13, 2020
- Lessons from the Trenches: Avoiding Family Disputes Over Money, Estates, and Businesses, September 1, 2020
- Electronic Records and Signatures in Estate Planning, October 6, 2020
- Professional Client Counseling: Asking and Answering the Hard Questions, November 11, 2020

-- Proposed Psychiatric Advance Directive and Fiduciary Legislative Update, February 23, 2021 (conducted in conjunction with the Section's Annual Meeting).

Attendance at each of these events was overwhelming, occasionally exceeding the Bar's capacity to host. Because of the cancellation of the Section's popular Institutes, the Section decided to offer these sessions free of charge, opting instead to use Section funds to pay the CLE fee for each program for each registrant.

Leadership

The Section is led by five officers (chair, vice chair, secretary, assistant secretary, and immediate past chair) which are, Patricia Friedman, Brian Deutsch, LeAnne Gilbert, Joseph Sillitto and Margaret Scott.

The Section maintained its formal committees—a Forms Committee, co-chaired by Ophelia Chan and Margaret Head, a newly combined Code Revision/Legislative Committee, co-chaired by Nick Djuric and Kyle King, a Programs Committee, chaired by Margaret Scott, and an Executive Committee that is comprised of the officers and also includes six at-large members serving staggered three year terms. To provide for continuity, the committee appointments (except for the officers) are for two years, with the current officers serving through June 30, 2021.

Achievements

Primary accomplishments, separate from the continuing education programs held, of the Section this year include:

1. *Code Revision/Legislative Committee.* The Section, through the Code Revision/Legislative Committee, succeeded in having the Section's bill passed unanimously in both houses and signed by the Governor, with revisions taking effective on January 1, 2021.
2. *Forms Committee:* Working with the probate judges, the Forms Committee completed substantial changes to the Probate Court Standard Forms, which are available to Section Members via the Section's Intranet and are awaiting Supreme Court approval.
3. *Grant to Georgia Heirs Property Law Center.* The Section again awarded a grant of \$5,000.00 to the GHPLC to fund the Center's work with the Probate Council of Georgia, as well as other judicial and legislative partners, to understand, streamline, and make more efficient the resolution and prevention of heirs property.
4. *Governor's Executive Order.* The Section's members were instrumental in drafting both the language for the Governor's Executive Order Number 04.09.20.01 regarding

remote notarization of estate planning related documents, as well as the suggested best practices regarding such notarization, which appear on the State Bar's website.

5. *Annual Meeting.* The Section's business meeting was held during a CLE session on February 23, 2021, and included the election of officers and executive committee members for 2021-22 as well as an update on Section information.

Respectfully submitted, this April 19, 2021.

Patricia D. Friedman
Chair, Fiduciary Law Section

GENERAL PRACTICE AND TRIAL SECTION
BOARD OF GOVERNORS
ANNUAL REPORT
AS OF APRIL 20, 2021

The past year has been filled with ups and downs, program cancellations, social distancing, mask wearing and Covid fatigue. While we are not out of the woods the sun is surely starting to break through and bring normalcy back slowly in the very near future. However, we still must stay vigilant in order to rid the country of this virus.

We would like to express our deepest sympathies to those families who have lost a loved one to Covid and extend our thoughts and prayers to those who are still fighting to overcome this virus.

Due to coronavirus, we had to cancel our very successful Jury Trials program our General Practice and Trial Institute causing the section to pay damages and enter into a contract to book the 2022 Institute at the Omni Amelia Island Resort. Finally, we cancelled our renowned “Tradition of Excellence” Award Breakfast and Reception at the Annual Meeting.

With the cancellation of the 2020 “Tradition of Excellence” events, we were unable to properly celebrate the recipients as we normally do. In order to celebrate last year’s recipients, we will be honoring them along with the 2021 recipients at the Annual Meeting, June 11, 2021 at the Wild Dunes Resort, in Isle of Palms, South Carolina. The 2020 recipients are: Michael D. St. Amand, Hon. Thomas E. Cauthorn, Judge Kathy S. Palmer and Virgil L. Adams. The 2021 recipients are: Chilton Varner, Myles E. Eastwood, Hon. Clarence F. Seeliger and Hon. Roy E. Barnes. Having 8 recipients ought to make for some great speeches at the breakfast and a grand reception that no one will want to miss.

This has been a very active legislative session and the Section has commented on a large number of House and Senate bills.

We have kept our schedule of board meetings by Zoom. We have kept our members informed by broadcast emails and our magazine Calendar Call.

We have taken surveys for the State Bar on Section Support and have been active in attending the Zoom meetings with Bar officials and Section leaders to voice our position and policy governing the sections including seminars.

A sub-committee was formed to find out the needs of rural and small-town lawyers and how the section can better assist and help our members.

We currently have 1929 active members. The section will continue to be active in seminar programs, recruitment and retention. We try to cover all aspects of interest to general practitioners in our seminar programs, magazine articles and broadcast emails to the membership.

The General Practice and Trial Sections has always aspired to help the State Bar, the public and other organizations when needed. Our first concern is to inform, help and guide our membership in any way we can through our magazine, seminars, broadcast emails to keep them advised and informed about issues of interest to the general practitioner. The section is in good shape to grow and continue for many years to come.

**NONPROFIT LAW SECTION
STATE BAR OF GEORGIA**

**ANNUAL REPORT
April 13, 2021**

Membership

The Nonprofit Law Section currently has 313 members.

Account Balance

The current balance of our operating account is approximately \$24,870.

2020-2021 Officers and Executive Committee Members

Officers

- Chair –Sabrina Fitze, Habitat for Humanity International
- Vice Chair –Jake Kaplan, Alston & Bird
- Secretary/Treasurer – Kathryn Hecker, Arnall Golden Gregory

Additional Executive Committee Members:

- Dan Alfino, Krevolin Horst
- Robyn Miller, Immediate Past Chair, Pro Bono Partnership of Atlanta
- Kristie Piasta, Children’s Healthcare of Atlanta
- Jonathan Poole, Emory University
- Tanesha Steward, Georgia Tech
- David Wilson, The Wilson Firm
- Ballard Yelton, Morris Manning & Martin

Section Activities

Continuing Legal Education (“CLE”)

This fiscal year, with the help of the State Bar, the Section organized ten (10) hours of free CLEs for Section members.

- Sept 2020 (2 hrs)
 - Navigating COVID-19: Negotiating Contracts, Volunteer/Employee Return to Work, and Alternative Financing Options
- January 2021 (2 hrs)
 - Important Employment Law Considerations and Emerging Topics for Nonprofits
- March 2021 (6 hrs, including 1 ethics)
 - Three Part CLE Series - Nonprofit Law
 - In place of ICLE full-day seminar, which was restricted due to COVID-19

Newsletters

This year the Section continued for its second year to send out newsletters to its members to keep the membership up to date on the Section's activities. We sent newsletters in September 2020, December 2020, and plan to issue another newsletter in May of 2021.

Legislative Committee

In early 2020, the Nonprofit Law Section established a legislative committee made up of attorneys from law firms, nonprofit inhouse counsel and government all who work extensively with nonprofits. The goal of the committee is to review the Nonprofit Corporation Code including comparing it to the Business Code and the Nonprofit Model Act in order to update the Code to make it more effective. The committee was stalled due to COVID-19 and began its work in earnest in January 2021. The lofty goal is to complete the work by September or October in order to present it to the State Bar Legislative Committees for support of passage in 2022.

Membership Development Initiative

While COVID-19 impacted our ideas for in-person membership development, we began targeted outreach to Georgia Law Schools to invite law students to our Section's CLEs and garner interest in nonprofit law.

Officers Elected at Annual Meeting for 2021-2022 Fiscal Year

- Chair – Jake Kaplan, Alston & Bird
- Vice Chair – Kathryn Hecker, Arnall Golden Gregory
- Secretary/Treasurer – Ballard Yelton, Morris Manning & Martin

In addition, the Section's bylaws allow for up to eight (8) additional members to join the 2021-2022 Fiscal Year Executive Committee. We are in the process of interviewing Section members from across the nonprofit sector and look forward to diverse representation on next year's Executive Committee.

Respectfully submitted,

Sabrina Fitze
Chair – Nonprofit Law Section, State Bar of Georgia

Professional Liability Law Section
State Bar of Georgia

Annual Report

2020-21

Due to the pandemic, we had to cancel our interactive ICLE seminar for 2020 – Not Your Typical CLE: What We Have Is Failure to Communicate. The seminar is a mini legal malpractice trial with opening statements, direct examinations and cross examinations of a few witnesses and expert witnesses and closing arguments. We had planned to have a jury consultant speak at lunch, and then have the audience “deliberate” and come up with a verdict. The program would have concluded with an ethics Q&A with Paula Frederick and a Professionalism Panel of Judges. We were also unable to have any of our usual social events. We hope to be able to reschedule our ICLE seminar for later this year or next, as we have a very interesting problem drafted.

Betsy Hodges, Chair
Professional Liability Law Section
State Bar of Georgia

STATE BAR OF GEORGIA INVESTIGATIONS REGARDING
THE UNLICENSED PRACTICE OF LAW

Reporting period May 1, 2020, through April 30, 2021

Informal Investigations Initiated in 2020 (CY)	141
Informal Investigation Initiated in 2021 (to date)	53
Informal Investigations Pending (as of April 30, 2021)	75

Statistics

Formal Investigations Initiated	22
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Nature of Formal Investigation:

Regular UPL	10
Paralegal/Document Preparation Service	7
Disbarred/Suspended/Inactive Lawyer	3
Out of State Lawyer	2

Source of Formal Investigation:

State Bar of Georgia	9
Lawyer	5
Public (Individual)	4
Judge	2
Public (Corporation)	1
State Agency	1

Judicial Districts:

District 1	0
District 2	0

District 3	0
District 4	1
District 5	15
District 6	4
District 7	0
District 8	0
District 9	1
District 10	1
Formal Investigations Pending	117
Formal Investigations Closed	15
Disposition:	
Subject agreed to comply	13
Subject referred to prosecutor	2

PUBLISHED ARTICLES 2020-2021

Date	Newspaper	Headline	Circulation
6/15/2020	Daily Citizen-News, Dalton	Miller reelected to Board of Governors of State Bar of Georgia	6,409
6/16/2020	Cherokee Tribune, Canton	Cherokee judge re-elected to board of state bar association	3,929
6/16/2020	Marietta Daily Journal	Cobb attorneys re-elected to Board of Governors of State Bar of Georgia	10,334
6/17/2020	Adel News Tribune	Judge Tomlinson re-elected to Board of Governors of State Bar of Georgia	2,490
6/17/2020	Albany Herald	Joe Dent re-elected to serve on State Bar's board of governors	9,569
6/17/2020	Lanier County Advocate, Lakeland	Tomlinson re-elected to Board of Governors	1,055
6/19/2020	Rome News-Tribune	Andy Davis re-elected to board of governors of State Bar of Georgia	9,556
6/20/2020	Walton Tribune, Monroe	Jones elected to Bar's governors	4,249
6/21/2020	Albany Herald	Camilia attorney re-elected to State Bar's board of governors	9,569
6/21/2020	Augusta Chronicle	John R.B. "Jack" Long / Danny L. Durham	18,314
6/23/2020	Douglas County Sentinel, Douglasville	Crawford elected to Board of Governors	1,918
6/23/2020	Marietta Daily Journal	Around Town: (Dawn Jones / Elissa Haynes)	10,334
6/24/2020	Savannah Tribune	Dawn M. Jones Installed as 58th President of State Bar of Georgia	10,000
6/25/2020	Union-Recorder, Milledgeville	Area attorneys re-elected to Board of Governors of State Bar of Georgia	3,592
6/26/2020	Coastal Courier, Hinesville	Craig Stafford Re-Elected to Board of Governors of State Bar of Georgia	4,000
6/29/2020	Daily Report	Georgia Legal Community Mourns Loss of John Sweet	2,243
7/1/2020	Dodge County News, Eastman	Daniels named treasurer	3,877
7/3/2020	Walton Tribune, Monroe	Letter: Legal community mourns loss of Jones	4,249
7/4/2020	Gwinnett Daily Post, Lawrenceville	Lawrenceville attorneys re-elected to State Bar of Georgia's Board of Governor	57,342
7/5/2020	Statesboro Herald	Dan Shippe re-elected to Board of Governors for the State Bar of Georgia	7,200
7/10/2020	Savannah Morning News	Savannah attorneys honored by State Bar of Georgia's Young Lawyers Division	16,322
7/15/2020	Northeast Georgian, Cornelia	Congratulations to Judge Caudell	5,228
7/15/2020	Daily Citizen-News, Dalton	Congratulations to area attorneys for Georgia Legal Food Frenzy	6,409
7/19/2020	Gwinnett Daily Post, Lawrenceville	Gwinnett County attorney honored by State Bar of Georgia Young Lawyers Divi	57,342
7/21/2020	Valdosta Daily Times	Davis: S.Ga. Lawyers praised for Food Frenzy work	6,933
7/23/2020	Newton Citizen, Covington	Letter: Georgia legal community mourns loss of Judge Horace Johnson Jr.	1,160
8/5/2020	Daily Report	Georgia Legal Community Owes Debt of Gratitude to Rep. John Lewis	2,243
8/9/2020	Gwinnett Daily Post, Lawrenceville	Letter: Georgia legal community mourns loss of Judge Ramon Alvarado	57,342
8/9/2020	Augusta Chronicle	Biz Bits for Aug. 9 - Awards, achievements in metro Augusta business commu	18,314
8/18/2020	Daily Report	Ga. Legal Community Mourns Loss of Richard Shafritz	2,243
8/19/2020	LaGrange Daily News	Georgia legal community mourns loss of John Taylor	1,692
8/31/2020	Atlanta Jewish Times	Happy birthday to Hubert Shafritz	10,737
9/2/2020	Press-Sentinel, Jesup	Letter to the Editor (Richard Shafritz)	4,059
9/2/2020	Metter Advertiser	Congratulations to new Superior Court Judge	1,627

9/17/2020	Albany Herald	State Bar Young Lawyers organization offers free legal assistance	9,569
9/17/2020	Rockdale Citizen, Conyers	State Bar Young Lawyers organization offers free legal assistance	1,495
9/17/2020	Henry Herald, McDonough	State Bar Young Lawyers organization offers free legal assistance	1,250
9/29/2020	Daily Report	Congratulations to Chief Justice Melton on Auburn University honor	2,243
9/29/2020	Daily Report	Congratulations to GSU Law's Charity Scott on Retirement	2,243
9/30/2020	Moultree Observer	Letter to the Editor: Congratulations to new judge	3,138
10/5/2020	Savannah Morning News	Saddened by loss of local legal legend	16,322
10/7/2020	Herald-Leader, Fitzgerald	Your opinions... (Judge Wilcox)	4,285
10/27/2020	Covington News	State Bar of Georgia congratulates Judge McCamy	2,915
10/31/2020	Walton Tribune, Monroe	Gov. Kemp makes wise choice with his selection of Cheveda McCamy	4,249
11/6/2020	DeKalb Champion	Congratulations to new Doraville Municipal Court judges	494
12/3/2020	Daily Report	Georgia Legal Community Mourns Loss of Justice George Carley	2,243
12/5/2020	Albany Herald	Georgia legal community mourns loss of Rick Langley	9,569
12/7/2020	Savannah Morning News	Congrats to local banker on new position	16,322
12/8/2020	Daily Report	Ga. Bar Congratulates New Supreme Court Justice Shawn LaGrua	2,243
12/11/2020	Savannah Morning News	Kudos to local lawyer appointed to state board	16,322
12/23/2020	Madison County Journal, Danielsville	State Bar of Georgia names MCHS alum Sarah Bartleson Coole as COO	2,324
12/28/2020	Daily Report	Congratulations to New SEC Regional Director Nekia Hackworth Jones	2,243
1/12/2021	Daily Report	GC Rolls Home to Steer State Bar	2,243
1/31/2021	Albany Herald	State Bar of Georgia condemns attack on Capitol	9,569
2/8/2021	Banks County News, Horner	Offers congratulations to Dorina Seagraves on reappointment to state council	1,319
2/10/2021	Dahlonega Nugget	Congratulations to new University of North Georgia general counsel	3,994
2/10/2021	Jackson Herald, Jefferson	Congratulations to Donna Seagraves on reappointment to state council	4,376
2/10/2021	Barrow News-Journal, Winder	Congratulations to new Barrow State Court officials	2,627
2/17/2021	Adel News Tribune	Congratulations to new Superior Court Judge Dick Perryman	2,490
2/17/2021	Lanier County Advocate, Lakeland	State Bar congratulates Perryman on appointment	1,250
2/19/2021	Savannah Morning News	Congrats to Pooler lawyer on legal award	16,322
2/26/2021	Savannah Morning News	Congrats to Heap on parole board appointment	16,322
4/4/2021	Albany Herald	Judge Herbert Phipps selected for judicial advisory commission	5,271
		TOTAL CIRCULATION	542,132



GEORGIA
LAWYERS
LIVING WELL

In March 2021, the State Bar of Georgia's Attorney Wellness Committee introduced a quarterly emailed newsletter focused exclusively on the Bar's wellness initiative, Lawyers Living Well. You will find a snapshot of the the second installment here. Make sure to subscribe to receive future emails.

Featuring:

- Well-being spotlight
- Events
- Article and podcast recommendations
- Social media highlights
- #UseYour6 information
- And more!

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Learn more at www.lawyerslivingwell.com or follow #LawyersLivingWell on social media.

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QUARTERLY NEWSLETTER



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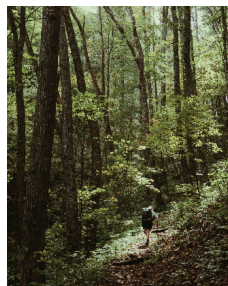
Thank you for subscribing to the Lawyers Living Well quarterly newsletter! Our goal is to bring you helpful tips, news, articles, event reminders and more to encourage you to live well.

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Spotlight: Physical Well-Being

As the weather warms in Georgia, we invite you to embrace your physical well-being this quarter. Just like your social well-being, which we highlighted in our [first newsletter](#) of 2021, your physical health is equally as important.



Most likely, you've felt the effects of the past year in your physical health. Maybe you've snacked a bit too much while working from home this past year (no judgment—we've all been there), or

maybe exercise has taken a back seat as you've been juggling thoughts and emotions. Whatever the reason, we want to offer you some simple tips for improving your physical well-being this summer.

From forest bathing (don't panic—it's not as scary as it sounds) to learning healthy ways to combat stress with food, we encourage you to take a few small steps toward physical wellness. Find ideas and suggestions below!

Get Outside!

Take advantage of Georgia's natural beauty through its [state parks](#) and [national forests](#). Plus, beyond perhaps a small parking fee, most of these places are free to



visit. Here are a few of our favorites, from north to south:

- [Cohutta Wilderness](#)
- [Lula Lake Land Trust](#)
- [Panola & Arabia Mountain](#)
- [Ocmulgee Wildlife Management Area](#)
- [Augusta Canal Trail](#)
- [Cumberland Island](#)

Regardless of where you go, spending time outside while walking, hiking or biking can [benefit your overall well-being](#).

Forest Bathing (Hint: It's not what you think)



While visiting the great outdoors, learn the Japanese practice of “forest bathing,” or *shinrin-yoku*, which is simply the art of “bathing in the forest atmosphere, or taking in the forest through our senses.” To learn more, check out *TIME*'s [“Forest Bathing’ Is Great for Your Health. Here’s How to Do It”](#) by Qing Li.

Discounts from Wellness Resources



State Bar of Georgia members can receive special discounts from athletic clubs, exercise studios, fitness facilities and gyms across the state. View a full listing of participating businesses on the [Lawyers Living Well website](#). *Please note that offers and discounts are subject to change.*

Events: In Case You Missed It

This spring, the Attorney Wellness Committee offered multiple events (monthly “touches”) to encourage and promote attorney well-being through the State Bar of Georgia and others. But if you missed it, don’t worry! We’ve got you covered with links to the recordings below.



Monthly “Touch” Events:

- [What Happens When You Call? Demystifying the LAP Hotline and #UseYour6](#)
- [Setting the Bar: A Vision Board Party for Lawyers](#)
- [How to Say No to Last-Minute Requests & Feel Good About It](#)

Read: Body Talk

The #SoberCurious movement picked up in 2021 as a response to unhealthy alcohol habits developed during the height of the pandemic. Megan Murren Rittle discusses this movement, its significance and suggestions for a healthier way of living in [“Sober Curious,”](#) featured in the April issue of the *Georgia Bar Journal*.



If you feel a little stuck and don't know where to start—either working toward better physical wellness or any other facet of your well-being—you might find Plamen Russev's article, [“Designing and Living an Integrated Life”](#) (Feb. 2021, *Georgia Bar Journal*), incredibly helpful. He offers an evaluative tool and practical suggestions that you can apply to your particular circumstances.

Did you know that certain foods can help to relieve stress? Or can induce stress? Check out these resources for suggestions about what to eat more of and what to avoid if you're struggling with stress or anxiety.

- [“18 Terrific Foods to Help Relieve Stress,”](#) Jillian Kubala, MS, RD, Healthline.com
- [“7 Foods That Can Make You Feel Totally Anxious,”](#) Stephanie Eckelkamp, Prevention.com
- [“The Anti-Anxiety Food Solution: How the Foods You Eat Can Help You Calm Your Anxious Mind, Improve Your Mood & End Cravings,”](#) Trudy Scott, CN

Listen: #LLWPod

New episode: Lynn Garson sits down with Javoyne Hicks, Attorney Wellness Committee chair and a devoted advocate for mental health in the legal community. From the widespread effects of COVID-19 to the tension surrounding the racial justice movement, Hicks discusses the challenges facing attorney wellness, what the State Bar of Georgia is doing to address those challenges, and what she has done personally to combat stress and the stigma against getting help.



> Listen now on [SoundCloud](#), [iTunes](#), [Spotify](#) and [Stitcher](#).

The podcast [“Ten Percent Happier with Dan Harris”](#) featured an interview with [Emma Seppälä](#) in its episode, [“Three Lessons from Happiness](#)

[Research.](#)²⁷ Harris and Seppälä cover three wellness-related topics: breathing exercises, the power of nature to impact your mind and the importance of social connection.

Follow: Social Media



Stay in the loop on all Lawyers Living Well info, activities and more by following the State Bar of Georgia on social media! Look for the hashtag #LawyersLivingWell.

[Facebook](#) | [Instagram](#) | [Twitter](#) | [LinkedIn](#)

#SustainaSoundBar

Regardless of the hurdles, challenges, loss and pain that this year has brought us, and not knowing what the future holds, President Jones believes that if we work together and support each other, Georgia's legal community can #SustainaSoundBar. If you have any ideas, comments or questions for President Jones, please email president@gabar.org.

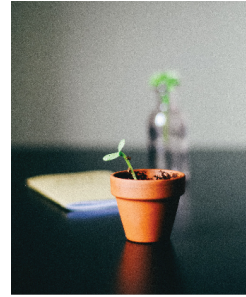


Be Well: #UseYour6

Through the Lawyer Assistance Program, all State Bar of Georgia members in good standing are entitled to six prepaid clinical sessions per calendar year with a licensed counselor. All sessions are strictly confidential and administered

through CorpCare Associates, Inc., an outside clinical contractor.

Don't forget to complete your own wellness check-ins throughout the year! Need instructions how to do that? Here's [a helpful article](#) for you.



What is it like to call the LAP Hotline or speak to a therapist? Check out the videos below to see a role-play of each!

[LAP Hotline Role-Play](#)
[Therapist Role-Play](#)

Call the LAP Hotline any day of the year, 24/7, to speak with a counselor or schedule an appointment: 1-800-327-9631. > [Learn more](#)

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