

2023

A N N U A L R E P O R T

TOTAL MEMBERS including judicial, retired, inactive and in-house counsel	TOTAL ACTIVE MEMBERSHIP	CALLS handled by PHOENIX RESOURCE CENTER	ATTENDANCE AT CLE SEMINARS including OnDemand programs	OUT-OF-STATE ACTIVE MEMBERS
25,811	19,406	11,045	21,827 live-only attendance was 10,195	3,693



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Jessica S. Sanchez

Dear Members,

I wanted to take a moment to express my deepest gratitude for the honor and privilege of serving as your leader over the past year. It has been an incredible journey, cemented by the unwavering dedication of each and every one of you to the pursuit of justice and the betterment of our legal profession.

Together, we have achieved significant milestones that I am immensely proud of. They are noted throughout this annual report.

For instance, our Public Service Center led the way in providing mission driven access to justice. Through free legal events 149 attorneys volunteered 372 hours benefiting 2,160 members of the public. Through a now long-standing and much valued partnership with ABC15 Arizona, the State Bar recruited 94 volunteer attorneys who served 1,792 members of the public during monthly live legal hotline segments.

Another source of pride – our commitment to continuing legal education. In 2023, the State Bar’s Continuing Legal Education Department provided 157 new live seminars. The CLE catalogue offered 472 hours of programming including 149 hours of ethics training.

In line with our commitment to fairness and accountability, we have also strived to maintain balance in the area of lawyer regulation. We have and will continue to review questions and concerns raised about the process. Thanks to those members who completed our discipline survey. An offshoot of that survey – a newly formed Bar committee, will ensure that remains a top priority.

Services provided to Bar members in 2023 and noted throughout this report all occurred without an increase in annual dues. In fact, the Bar hasn’t initiated an increase in dues since 2017. This is in large part a result of our Board of Governors’ work at ensuring financial strength of the organization.

In 2023 the State Bar of Arizona provided support to many of our affiliate and affinity bars. This came in the form of donations to The Arizona Women Lawyers Association, the Arizona Black Bar’s Hayzel B. Daniels Scholarship Gala, the Pima County Bar Association as well as Sothern Arizona Legal Aid and Community Legal Services and many others. This support strengthens the legal community as a whole, fosters knowledge sharing, extends networking opportunities, and ensures professional development.

As I reflect on the year gone by, I am filled with hope for the future of the legal profession in Arizona. Together, we have laid a foundation built on principles of justice, equity, and compassion. I am confident that with your continued dedication and passion, our profession will continue to thrive, serving the people of Arizona with integrity and excellence.



Benjamin Taylor

Benjamin Taylor
State Bar of Arizona President

Access to Justice Programs and Statistics

- The Public Service Center (PSC) handled approximately 1,410 calls from the public seeking help for hiring a lawyer or direction to legal resources.
- The PSC met with members of the Legal Services Advisory Panel three times to discuss ways in which the State Bar could support Legal Service Organizations in their endeavors to connect members of the public with free legal resources.
- The PSC met with members of the Military Legal Assistance Panel six times to discuss ways in which the State Bar could support military members.
- In 2023 the PSC partnered with Maricopa County and the City of Glendale along with the Triple M Military and Veterans Committee to provide veterans with free legal resources.
- The PSC met with the Marble Law firm to discuss ways in which the firm or firms could contribute to the Modest Means Program.
- The PSC coordinated a variety of free legal help events. In all, 149 volunteer attorneys provided 372 hours benefiting 2,160 members of the public.
- The PSC launched new community partnerships with the City of Glendale and Avondale in the form of free legal clinics with the former and a newly created Senior Planning Legal Clinic series of legal clinics in the latter.
- The PSC recruited 94 volunteer attorneys for the Let Joe Know partnership with ABC15. A total of 1,792 consumers benefited from the televised free legal hotline.
- The PSC partnered with the Area Agency on Aging’s Night of the Living Will event to model and create similar programs to bring statewide.
- A digital advertising campaign with ABC15 Arizona promoting free legal resources offered by the Bar reached nearly 1.2 million consumers in Arizona who recently searched for legal assistance, resulting in 10,463 clicks to the State Bar website. The Facebook component reached nearly 80,000 consumers.
- A successful four weeklong radio advertising campaign with KTAR News promoting upcoming free legal clinics yielded a net reach of 172,300 (number of people who heard the spot) and 395,000 gross impressions (total number of times the spot was heard).
- The PSC and the Arizona Foundation for Legal Services & Education (AFLSE) recruited 70 active attorneys to participate in the Modest Means program providing discounted legal services to qualifying consumers – 6,955 individuals applied to receive a list of participating attorneys.
- 559 legal questions from members of the public were answered on the Arizona Free Legal Answers website.
- The Bar helped AFLSE recruit 200+ attorneys to participate in law related education programs in the Bar’s bi-monthly newsletters. 583 students participated from 31 schools in the mock trail program. 193 attorneys volunteered as judges at regional and state competitions, and more than 40 attorneys volunteered as Mock Trail coaches to specific teams in 2023.
- The Bar assisted AFLSE in recruiting attorneys and volunteers for the *We the People: Citizen and the Constitution* program, which teaches institutions of American constitutional democracy with a simulated congressional hearing as the culminating activity. In total, 397 students from 18 schools participated in the We the People competition, and 78 attorneys and experts volunteered their time as judges at regional and state competitions.
- In other recruitment efforts, the Bar worked with AFLSE to garner participation in the Connecting with Classrooms program, which connects judges and attorneys with teachers across the state to provide classroom presentations and encourage civic engagement. In total, 3,517 students from 51 schools

Access to Justice Programs and Statistics (cont.)

- participated, with 49 attorneys and judges volunteering their time to speak with students about the law and constitution.
- With the assistance of Bar staff through the Wills for Heroes program, AFSLE recruited 35 attorneys, who donated 487 hours of their time to provide 327 first responders with free wills.
- Through Bar programs legal aid organizations received \$232,523 in funding and 2,000+ attorneys donated through the Bar dues Opt Out program.
- In Pro Bono efforts
 - 50 attorneys were recognized for their extraordinary Pro Bono contributions.
 - 681 attorneys learned about pro bono opportunities during the professionalism course required for those new to the practice of law.
- The Bar made cash and in-kind contributions to the Foundation for pro bono legal services, their Mock Trial Competition, among other programs and services. The total contribution for 2023 was \$119,740.

Competency

- Practice 2.0, the Bar's free, confidential practice management advice program available to members and their staff, provided in-depth virtual consultations to 26 members, provided advice on practice management, legal technology, and best practices through 827 advice-line calls, and provided advice on trust accounting and related issues through 279 calls to the helpline, as well as providing rich resource materials, guides and forms on the Practice 2.0 website. Practice 2.0 also worked with AZCLE to create programming on practice management, legal technology, and trust account management.
- The State Bar's Continuing Legal Education Department continued to lead the way in education and training with 157 new live seminars. State Bar Members reported the SBA is one of the top providers for CLE with 56.6% using the Bar's courses, according to the 2023 Member Satisfaction Survey.
- The State Bar's 2023 CLE catalog offered 472 hours of live seminars, including 149 hours of ethics training, and 61 hours of law practice management courses.
- AZCLE® partnered with organizations including The American College of Trial Advocacy, AZ Chapter of the American Academy of Matrimonial Lawyers, Tribal In-House Counsel Association, American Planning Association and Rocky Mountain Land Use Institute.
- 635 professionals volunteered to act as faculty and share their expertise for the various CLE programs the Bar offers.
- The State Bar's Publication department issued two new criminal treatises: Search and Seizure, and Confessions.

Ethics

- The Ethics Hotline is accessible to members every day, free of charge — an invaluable resource to lawyers needing outside ethics advice, including solo and small-firm practitioners. In 2023 the Ethics Hotline received 2,016 calls; 546 were routed to Practice 2.0 or the Trust Account Hotline (a concerted effort was made to help members calling the hotline by providing better screening and optimal use of other hotlines) and 1,470 calls were handled by the Ethics Hotline.

Trending topics included confidentiality, terminating representation and conflicts.

- In-house attorneys provided the ethics component in more than 12 CLE seminars, providing ample CLE options for members to comply with MCLE requirements.
- Providing greater accessibility, the Ethics Advisory Group continues publishing its Best Practices series on azbar.org.

Professionalism

- The State Bar's Member Assistance program staff and peer support volunteers provided support and resources to members struggling with substance use disorder, mental health challenges, stress, depression and anxiety.
- AZCLE® continued a bi-monthly ethics update, Ethics Café series, with over 342 members attending in 2023.
- The Bar Leadership Institute helps develop future leaders in the legal community. The 2024 class of 16 graduates completed two projects focused on lawyer well-being and stress management. (Should we end this sentence at well-being, since we've made an effort to not mention mental health?) BLI members also participated in Bar advisory groups and graduates continue to serve through the Board of Governors, judiciary, legislature, and other community organizations.
- The Bar engaged over 7,100 members by supporting 30 Sections, organized around substantive practice areas, the Young Lawyers Division which has approximately 3,732 members, and the Senior Lawyers Division, with approximately 6,468 members. State Bar Sections produce hundreds of hours of continuing education, provide networking and engagement opportunities and provide a forum for the ongoing discussion of law.
- The Arizona Supreme Court requires the State Bar to ensure that all members have met their mandatory continuing legal education requirement. In 2023, Bar staff processed 18,412 affidavits.

Notable Highlights

- The Bar surveyed active members to learn more about Arizona attorneys' experiences and perceptions concerning diversity and inclusion in the workplace.
- In recognition of Domestic Violence Awareness Month, AZCLE® offered a day-long seminar entitled, "Roundup: A Multi-Disciplinary Review of Domestic Violence Law and

Southern Regional Office

1,314

Calls handled by Southern Regional Office

45

Number of CLE seminars

2,372

Attendance at CLE seminars

14

Number of Section Programs

653

Attendance at Section Programs

\$314,000

Revenue/Income Generated and Processed

Lawyer Regulation

2,797

Inquiries and Charges

568

Investigations Conducted

5

Disbarments

36

Suspensions

21

Reprimands

37

Informal Sanctions

109

Diversion Orders/Agreements

198

Instructional Comments

**STATE BAR
ANNUAL REWARD
RECIPIENTS**
AWARD OF APPRECIATION

*Dr. Susan Trentham,
PCBA Executive Director*

AWARD OF SPECIAL MERIT

*Barbara A. Atwood,
UA College of Law*

**DIVERSITY AND INCLUSION
LEADERSHIP AWARD**

*Hon. Amanda S. Chua,
Maricopa County Superior Court*

**HON. JOHN R. STICHT
EXCELLENCE IN DISABILITIES
ACCESSIBILITY
AWARD**

*Hon. Danelle B. Linski,
Pima County Superior Court*

**JAMES A. WALSH
OUTSTANDING JURIST AWARD**

*Hon. Samuel L. Thumma, Arizona
Court of Appeals Division One*

**MARK I. HARRISON
EXCELLENCE IN
MENTORSHIP AWARD**

Hon. (ret.) Mina E. Méndez

**MEMBER OF THE YEAR
AWARD**

*Steven Guttell,
Steven M. Guttell PLC*

**MICHAEL C. CUDAHY
CRIMINAL JUSTICE AWARD**

*Bradley W. Carlyon,
Navajo County Attorney's Office*

**OUTSTANDING
IN-HOUSE COUNSEL OF
THE YEAR AWARD**

*Kevin P. Schutz, Savvas Learning
Company LLC*

**SHARON A. FULLMER LEGAL
AID ATTORNEY OF THE YEAR
AWARD**

*Habib A. Pierce-Byrd,
Four Rivers Indian Legal Services*

**TOM KARAS CRIMINAL
JUSTICE AWARD**

Margarita Silva, Silva & Fontes

PRESIDENT'S AWARD

Staff of the State Bar of Arizona

Notable Highlights (cont.)

- Issues” and offered a significant discount to volunteers with the Modest Means Project and complimentary registration for Legal Aid organizations.
- AZCLE® partnered with the Tribal In-House Counsel Association and the Bar’s Indian Law section to continue offering the Lunch in Indian Country series. The annual, ten-part series focuses on the latest in Indian Law and features both local and national speakers. In 2023, over 350 people attended the series.
 - AZCLE® provided 6 hours of free CLE to lawyers who work for legal aid organizations in Arizona.
 - AZCLE® offered 8 virtual Professionalism courses and 663 members attended.
 - The Senior Lawyers Division continues to focus its attention on keeping retired lawyers engaged with the Bar and assisting lawyers transitioning out of the active practice of law. The Division holds virtual drop-in sessions on a variety of “life after law” topics including succession planning, the impact of dementia and developing new hobbies and avocations.

Financial Information

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

The Client Protection Fund

In 2023, the Client Protection Fund maintained the integrity of our self-regulated profession by refunding \$617,713 to 68 clients who suffered financial losses due to the misconduct of their lawyer.

Savings for Retired Members

Responding to input from retired lawyers, who had practiced in Arizona for a considerable amount of time and wished to remain Bar members, the State Bar reduced annual fees for lawyers in retired status who have practiced in Arizona for 35 years or more, saving members a total of \$128,570.

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

Publish ARIZONA ATTORNEY MAGAZINE?

ARIZONA ATTORNEY MAGAZINE is published 11 times per year by the State Bar of Arizona. It has long been considered one of the Bar’s most valuable member benefits with its award-winning legal content and appealing design. In 2023, the direct cost of producing the magazine was \$759,705. Advertising revenue totaled \$1,232,412 resulting in \$472,707 in revenue for the bar.

Bar’s Income in 2023
\$18,903,659*
Bar’s expenses in 2023
\$17,109,998*
Bar Net Investment Gain (includes unrealized loss)
\$1,027,768*

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

For a complete report of the Bar’s finances, go to:

<http://www.azbar.org/AboutUs/FinancialStatements>