



# FORGING CONNECTIONS, EMPOWERING OUR COMMUNITY



## DISTRICT OF COLUMBIA BAR **ANNUAL REPORT**

2020–2021

# A Year Like No Other

It is hard to look back on 2020 and find positive stories from our months-long social isolation and physical, mental, and emotional exhaustion. It was a year of loss, fear, and anxiety that tested our capacity to handle what seemed like a never-ending crisis.

But if there is anything we have learned from the pandemic, it is that people are resilient. As life as we knew it was upended, we pivoted, adapted, and found ways to push forward. The D.C. Bar, like many organizations around the country and the world, had to learn how to operate in the new normal and rethink the ways we reach and serve our members.

In March 2020, the D.C. Bar shifted to fully remote operations for the first time in its history, reimagining how it could continue to assist and empower its members in a year of uncertainty. For example, within six months of going virtual, the D.C. Bar offered more than 60 programs focused on the impact of the COVID-19 crisis on attorneys' personal and professional lives. The Bar remained accessible to members by phone and email. Member Services not only achieved a 97 percent renewal rate but also seamlessly transitioned to virtual orientations to welcome new members.

From our CLE Program to our Practice Management Advisory Service to our Communities, the D.C. Bar worked to ensure our members have access to the tools and resources they need to weather the pandemic, including ethics guidance and mental health and wellness advice.

Throughout this difficult year, the D.C. Bar remained committed to promoting access to justice and enhancing the delivery of legal services to those in need. The D.C. Bar Pro Bono Center virtually assisted more than 350 customers through its Consumer Law Resource Center, helped launch the Family Law Assistance Network that connected more than 750 clients to attorney volunteers, and provided legal help to more than 1,700 pro se tenants and small landlords through its new Landlord Tenant Legal Assistance Network.


The pandemic certainly derailed many of the things we set out to do in 2020, but thanks to our dedicated volunteer leaders and staff, the Bar withstood the challenges of going completely virtual with our services and stayed connected with our members. We also hit a couple of important milestones. Last summer our Board of Governors adopted a new strategic plan outlining the Bar's priorities until 2025. The Bar also took a major step in clarifying how Communities can issue public statements and file amicus briefs, striking the right balance between protecting the First Amendment interests of our members and encouraging those who join our voluntary Communities to participate in the free exchange of ideas.

None of us could have predicted that we would be facing the worst economic and health crisis of our lifetimes, but the D.C. Bar prevailed over the challenges by the strength of our membership and leadership. Together we confronted multiple types of grief — the death of loved ones due to COVID-19, the loneliness of living in a world put on pause, the isolation from our support networks.

While our lives may have forever been altered by the pandemic, we also proved that our community is strong, resilient, and ready to assist our most vulnerable neighbors. As we plan for a return to normalcy, we at the D.C. Bar are committed to doing things even better than before — to serving and supporting you with the benefit of lessons learned from this transformative and challenging year.



Geoffrey M. Klineberg

  
D.C. Bar President



Robert J. Spagnoletti

  
D.C. Bar CEO

# Emerging Stronger From a Crisis

In early 2020, as the coronavirus swept across the United States, the D.C. Bar faced an unprecedented challenge — how to continue serving its more than 111,000 members in all 50 states and in over 80 countries and territories in a world in lockdown and enveloped by fear. Like most organizations, the Bar was only beginning to understand the magnitude of the crisis, but it was not unprepared to face it.

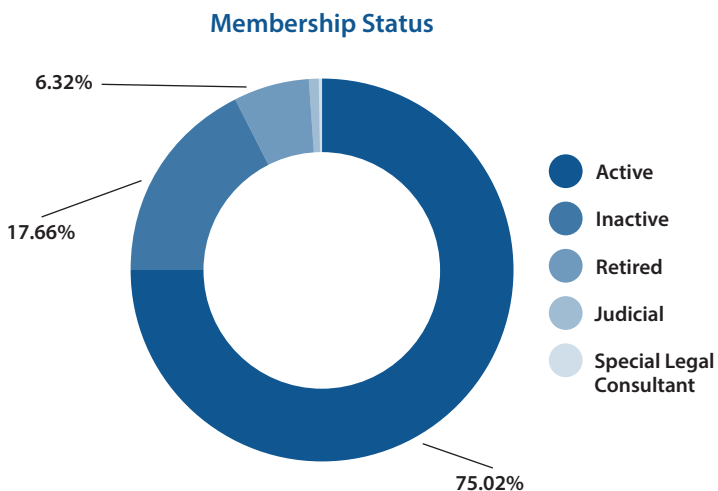
The Bar’s foresight to mitigate operational disruptions and its willingness to embrace change propelled the organization into the new world of virtual work. A digital transformation months in the making to improve its systems and business processes allowed the Bar to not only move its operations online but also ensure continuity of service to its members. The Bar’s agility was key to its success story.

## Growth and Engagement

While operating on a fully remote basis, the D.C. Bar grew its membership, admitting more than 3,000 new members during the 2020–21 fiscal year and welcoming them through virtual orientations, a first for the Bar. Although new members were unable to gather in person, engagement was high. The April 2021 orientation, for example, drew approximately 300 attendees.

## Membership Distribution\*

Total Membership: 111,138



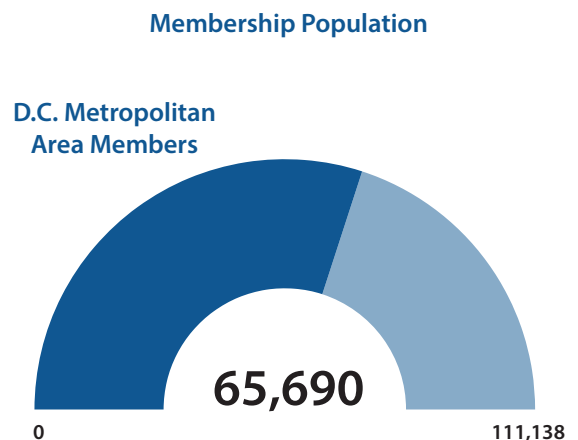
\*As of May 3, 2021

License renewal topped 97 percent, due in large part to the Bar’s seamless online renewal process. Through affinity partnerships and the introduction of four new categories of member benefits, Bar members can now take advantage of thousands of dollars in savings on everything from practice resources to legal research.



“The D.C. Bar made me feel welcomed and encouraged during the new member orientation. They shared so much beneficial information, and it was refreshing to see all the opportunities and benefits the Bar has to offer. This was important to me, being someone who lives outside of the area. I am looking forward to pro bono and the courses that are offered.

— Wittlee Retton-Tennant  
U.S. Department of Justice  
New Member Virtual Orientation Attendee





## Growth and Engagement

A challenge for many large organizations like the D.C. Bar during the pandemic was how to stay connected to members and keep them engaged. The Bar went a step further by working to ensure its programming was tailored to the emerging and immediate needs of its members.

The Bar's Continuing Legal Education (CLE) Program and Communities presented hundreds of valuable virtual programs, many addressing the unique challenges confronting lawyers in the age of COVID-19. The Practice Management Advisory Service (PMAS) was a critical resource for solo and small firm practitioners, while the Lawyer Assistance Program (LAP) focused on attorney wellness. The Bar's Legal Ethics Helpline remained accessible to members, fielding more than 2,000 ethics queries.

Through *Washington Lawyer* magazine and the Bar's other communication platforms, members shared their stories about how they navigated the new normal, as well as their concerns around financial wellness, privacy rights, the survival of small firms and solo practices, and the stresses of remote work, among others.

The COVID-19 crisis upended plans for a three-day, in-person conference commemorating the centennial of the 19th Amendment, but the Bar swiftly converted the program into a virtual event. The conference, which brought together prominent legal experts, historians, and journalists over two days in October 2020, covered the history of voting rights and ongoing challenges.

## Professional Enrichment

When the D.C. Bar decided to close its headquarters in March 2020 to ensure everyone's safety, the CLE Program sprang into action by transitioning its courses online to continue to help members achieve professional excellence. This year the CLE Program offered 226 live online courses (including a record 81 new courses) and an additional 150 on-demand classes. Overall, more than 6,500 members took advantage of the CLE Program's wide-ranging programming.

New classes addressed timely and relevant topics such as vaccines and immunization law, the challenges and opportunities of returning to the workplace post-pandemic, and taking white supremacy to court, focusing on the Charlottesville case.

Last July the CLE Program won the Association for Continuing Legal Education's Award of Outstanding Achievement (Programs) for its on-demand Mandatory Course on the District of Columbia Rules of Professional Conduct and D.C. Practice.



“

This was the best online experience I've had during COVID. The class was so engaged . . . While I would have loved to take the class in person, this was the closest I've come to feeling like I was at an in-person event.

— Sarah Holz  
*U.S. Department of Labor*  
*CLE Attendee (More Effective Writing Makes More Effective Lawyers)*

The D.C. Bar's re-envisioned John Payton Leadership Academy also successfully pivoted to a virtual format. Twenty-four attorneys from diverse practice settings completed the training, which equipped them with both hard and soft skills to succeed in fast-paced legal and business environments.



“ This is exactly what leadership is for. In times of difficulty this is when we have an opportunity to bring people together, to help them resolve problems together, and to lead through positive, inspirational leadership.

— Roger Lu Phillips  
*Syria Justice and Accountability Centre  
Leadership Academy Class of 2020*



Despite a disruption in the ability to gather, the D.C. Bar Communities continued to foster connections among its more than 18,000 members across 21 practice areas. Communities attracted more than 9,000 registrants to its 250-plus events that drew upon the contributions of more than 700 volunteer attorney planners and speakers. An additional 200 programs were made available on-demand, and more than 200 leadership and committee meetings were held online.

Significant virtual Communities events included the annual Tax Legislative and Regulatory Update conference, the D.C. Cup Moot Court Competition, and the Melvin R. Wright Youth Law Fair. The Law Student Community also hosted the Leadership Fellowship and the Judicial Clerkship Bootcamp, two fully remote, day-long programs.

Communities also partnered with the Marketing & Communications Department to launch its first Writers in Residence Program, an opportunity for aspiring attorneys to hone their writing and interviewing skills, earn publication credit, and benefit from one-on-one interactions with lawyers across various practice areas.



## Support and Guidance

Recognizing the uncertainty many attorneys faced in running their practices during a global health crisis, the PMAS conducted a survey to assess COVID-19's impact on small firms and tailored its programming to members' needs for maximum benefit. Its Small Firm Lunch and Learn sessions offered advice on weathering the pandemic by boosting digital marketing, creating efficiencies through technology, and more. The PMAS also developed a new course, *Managing Money*, focused on developing various fee agreements and earning mechanisms.

A record 361 attendees took part in last year's virtual Practice 360° | A Day for Lawyers & Law Firms. In all, more than 1,200 members took advantage of PMAS programs throughout the fiscal year.

Going beyond helping attorneys fulfill their professional obligations, the LAP provided nearly 100 consultations and 1,000 remote therapy sessions for those in need of support. The LAP also launched its attorney wellness column in *Washington Lawyer*.

To help D.C. Bar members and their clients remotely resolve disputes over legal fees, the Attorney/Client Arbitration Board (ACAB) redesigned its training for volunteer arbitrators, identifying best practices on using Zoom for hearings. To increase access and inclusion, the Clients' Security Fund updated its application to a fillable PDF and made it available in English and Spanish.



The course was a game-changer. After I left my government job, I needed structure. The course was free, and it gives you all the issues you need to be aware of. To this day, [advisor] Dan Mills' advice remains in my head.

— Mohaimina Haque  
*Law Office of Mohaimina Haque PLLC*  
*Basic Training & Beyond Attendee*

## Attorney/Client Arbitration Board by the Numbers\*



\*Figures as of March 31, 2021



## In Service to the Public

The D.C. Bar Pro Bono Center was a driving force in the fight for access to justice, rallying the legal community to help fill the critical need for civil legal services among low-income individuals, nonprofit organizations, and small businesses in the District. In 2020 the Pro Bono Center responded to more than 20,000 requests for legal assistance.

Collaborative efforts to address community needs were particularly effective. The new Family Law Assistance Network (FLAN) pooled the resources of the Pro Bono Center, DC Affordable Law Firm, and D.C. Legal Aid Society by providing advice and representation in

family law matters by phone, eliminating barriers to representation presented by both the pandemic and by the indigency of many of those served. More than 850 families have received assistance since FLAN launched in March 2020.

The Pro Bono Center also worked with five sister legal services organizations to establish the Landlord Tenant Legal Assistance Network, seeking to address the needs of an estimated 51,000 to 58,000 District residents at risk of eviction because of the COVID-19 pandemic. To date, the Pro Bono Center has served 3,167 pro se litigants in landlord-tenant matters.

“ I was blessed with countless opportunities that allowed me to get to where I am. So much of it was due to mentors and people opening doors to me . . . I feel the obligation to pay that forward.

— Darren Skinner  
*Arnold & Porter  
 D.C. Bar Pro Bono Center  
 Small Business Brief Advice Legal  
 Clinic Volunteer Attorney*



## Pro Bono Center at a Glance

<b>REPRESENTATION</b>	Advocacy & Justice Clinic <b>185</b> cases placed for full representation	Housing Attorney of the Day <b>304</b> clients	Bankruptcy Clinic <b>38</b> cases placed for full representation
<b>NONPROFIT &amp; SMALL BUSINESS ASSISTANCE</b>	Matched <b>52</b> nonprofits with counsel	Connected <b>502</b> business owners to lawyers	Trained <b>1,896 &amp; 639</b> nonprofits small businesses
<b>CLINICS/CENTERS</b>	Consumer Law Resource Center <b>359</b> customers	Saturday Advice & Referral Clinic <b>1,343</b> people served	Quarterly Immigration Legal Advice & Referral Clinics <b>207</b> people served
<b>RESOURCES/TRAINING</b>	Help Line <b>11,830</b> calls fielded	LawHelp.org/DC <b>112,325</b> average views per month	<b>19</b> training events <b>497</b> registered attorneys and paralegals

\*Figures from July 1, 2019 through June 30, 2020

# Operational Excellence

**Information Technology.** A significant amount of credit for the Bar’s successful virtual delivery of member services goes to its Information Technology (IT) Division. Caterina Luppi, the Bar’s chief information officer, says many of the systems that became essential to the Bar’s remote operations were put in place precisely for the purpose of addressing potential disruptions.

“The Bar is actually going through a transformation,” Luppi says. “We’re moving from a monolithic system, which does a little bit of everything and not much very well, to more ‘best-of-breed’ systems for specific functions.” Luppi expects the transition to deliver greater efficiency, stability, and functionality for the Bar.

IT also completed the second and final phase of the D.C. Bar website relaunch, which introduced a new e-commerce site that enhances members’ experience when searching and signing up for courses and events.



**Marketing and Communications.** The Bar further sought to enhance member value and experience through its communications efforts. To strengthen the dialogue between the Bar and its membership, the Marketing and Communications Department is focusing more heavily on marketing. Suzanne Takeuchi, a 25-year strategic and global marketing veteran, was hired in 2020 to lead the department. “Helping to drive awareness of and engagement with the Bar is at the heart of everything we do,” says Takeuchi.

“We cannot fully optimize the member experience without insights into what our members think, feel, desire, and expect from us as an organization,” Takeuchi adds. “Having access to these insights, in addition to real-time availability of market data, business intelligence, and analytics, will ultimately inform the strategies and tactics needed to optimize the member experience.”



Paul Kiernan • 3rd+

Business Litigation, Real-Estate Disputes, Pro Bono and Charitable Servi...

3w ...

This is a terrific issue, cover to cover.

Like · 🗨️ 2 | Reply

The department continued its efforts to strengthen the Bar’s digital presence, including development of the “Hear/Say” podcast in which D.C. Bar content producers interview attorneys, academics, activists, and others on topics of interest to the District’s legal community. The show will be the latest addition to the Bar’s growing podcast catalog, which currently includes the Communities-produced “Brief Encounters,” “Let’s Brief It,” and “The Tea on International Arbitration.”

*Washington Lawyer* magazine also strengthened its national and global coverage of important developments in the legal industry, including the use of emergent technology, efforts to respond to social justice issues, the impact of the pandemic on legal practice, and more.



**Strategic Planning and Risk Management.** As the Bar continues to meet its strategic priorities, from ensuring operational excellence and fostering connections to empowering individuals and providing public service, its Executive Office is relying on the experience of its first in-house general counsel, Erum Mirza. “Her experience assessing and managing risk is an important addition to the current leadership team and will help the Bar meet the priorities of its new five-year strategic plan,” says D.C. Bar CEO Robert J. Spagnoletti.

Shortly after she joined the Bar, Mirza guided an update of the Bar’s Whistleblower Policy and undertook a comprehensive review of the D.C. Court of Appeals Rules Governing the Bar and the D.C. Bar Bylaws. After deconstructing several years of ad hoc amendments, Mirza plans to produce a streamlined, unified document “that is evergreen, user-friendly, flexible, and unburdened by minutiae.”

Other Executive Office accomplishments include the streamlining of the Mandatory Course compliance process and the establishment of an electronically secure way to disseminate confidential judicial evaluation results to the necessary parties.

## ***Commitment to Diversity and Inclusion***

Events throughout 2020 provided continual reminders of the historic and ongoing inequities faced by people on account of their gender, sexual preference, race, religion, nationality, and disability. In response, the Bar undertook several efforts to identify and address issues relating to diversity, equity, and inclusion and their impact on its staff and membership. The Executive Office established the Diversity & Inclusion Committee, a group comprising Bar staff that will guide efforts to ensure organizational racial justice awareness and to create a racially sensitive workplace.




Erum Z. Mirza  
*D.C. Bar General Counsel*

Communities also facilitated the creation of the member-driven Diversity, Equity & Inclusion Initiative, a working group that collated and expanded upon digital resources relating to best practices, contributed articles on the topic for Communities newsletters, and held a half-day educational summit. Prior to the traumatic events of 2020, Communities had amended its mission statement to make diversity, equity, and inclusion part of its core values.

The Rules of Professional Conduct Review Committee concluded work on proposed revisions to Rule 8.4 (Misconduct) and the comments section to address discrimination and harassment related to the practice of law. The proposed revisions were approved by the Board of Governors and submitted to the D.C. Court of Appeals for consideration.

## ***Transforming for the Future***

The pandemic has transformed various facets of the way we work and live, and some of those changes are here to stay. The D.C. Bar is committed to meet members where they are in as close to real time as possible by investing in novel, more targeted ways of delivering member value. In the coming year, the Bar will increase its focus on digital engagement to further optimize member experience and deliver on its mission to serve its members so they can serve the community. 



# The District of Columbia Bar

## Statements of Activities and Financial Position

Years Ended June 2020 and 2019

REVENUE	2020	2019
Membership License Fees	\$30,487,695	\$30,354,371
Communities Dues	1,370,104	1,448,791
In-Kind Contributions	2,118,477	3,774,011
Contributions	2,500	4,500
Admission and Registration	827,687	1,758,300
Investment Income	675,185	738,069
Other Fees and Services	2,822,148	1,663,868
Cost Center Transfers	(12,000)	(15,000)
<b>Total Revenue</b>	<b>\$38,291,796</b>	<b>\$39,726,910</b>

### EXPENSES

#### Program Services

Board on Professional Responsibility	\$9,483,509	\$8,988,447
Regulation Counsel	3,725,341	3,416,596
Continuing Legal Education	2,076,932	2,882,919
Communications	2,625,992	2,610,371
Communities	1,726,617	1,537,011
Annual Meeting and Judicial Reception	19,728	335,888
Clients' Security Fund Activities	149,828	245,995
<b>Total Program Services</b>	<b>\$19,807,947</b>	<b>\$20,017,227</b>

#### Supporting Services

Administration and Finance	\$14,432,484	\$13,722,013
Executive Office	1,700,529	3,025,822
<b>Total Supporting Services</b>	<b>16,133,013</b>	<b>16,747,835</b>

#### Total Expenses

Change in Net Assets Before Other Activity	2,350,836	2,961,848
Gain (Loss) on Lease	117,596	(96,849)
Net Gain (Loss) on Fair Value of Interest Rate Swap Agreements	(6,095,420)	(4,589,370)
<b>Change in Net Assets</b>	<b>(3,626,988)</b>	<b>(1,724,371)</b>
Net Assets — Beginning of Year	13,965,141	15,689,512
<b>Net Assets — End of Year</b>	<b>\$10,338,153</b>	<b>\$13,965,141</b>

ASSETS	2020	2019
Cash and Cash Equivalents	\$15,027,219	\$15,220,546
Restricted Cash — Building Escrow	2,021,660	3,144,045
Restricted Cash — Clients' Security Fund	1,101,242	1,046,212
Investments	13,372,709	12,700,728
Other Assets	2,330,853	1,448,118
Property and Equipment	75,131,712	76,115,230
<b>Total Assets</b>	<b>\$108,985,395</b>	<b>\$109,674,879</b>

### LIABILITIES AND NET ASSETS

#### Liabilities

Accounts Payable and Accrued Expense	\$6,926,376	\$6,159,786
Amount Due to Affiliate	878,000	906,086
Deferred Revenue	22,201,943	20,370,441
Accrued Loss on Lease	3,402,834	6,928,854
Interest Rate Swap	10,626,934	4,531,514
Loans Payable	54,611,155	56,813,057
<b>Total Liabilities</b>	<b>\$98,647,242</b>	<b>\$95,709,738</b>

#### Net Assets

Undesignated	\$2,069,221	\$1,954,395
Board Designated		
Mandatory License Fee Purpose	4,867,251	8,661,545
Communities	1,413,331	1,518,216
Clients' Security Trust Fund	1,101,242	1,001,070
Continuing Legal Education	887,108	829,915
<b>Total Net Assets</b>	<b>\$10,338,153</b>	<b>\$13,965,141</b>

#### Total Liabilities and Net Assets

<b>Total Liabilities and Net Assets</b>	<b>\$108,985,395</b>	<b>\$109,674,879</b>
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## D.C. Bar Board of Governors 2020–2021

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### President

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*Kellogg, Hansen, Todd, Figel &  
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## D.C. Bar Committees and Task Forces

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Susan M. Hoffman, *Chair*

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### Rules of Professional Conduct Review

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## D.C. Bar Communities

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### Administrative Law and Agency Practice

*Chair (Undeclared)*  
*Vice Chair (Undeclared)*

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John Ingrassia, *Chair*  
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### Corporation, Finance and Securities Law

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*Vice Chair (Undeclared)*

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*Vice Chair (Undeclared)*

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*Chair (Vacant)*  
*Vice Chair (Vacant)*

## Affiliated Programs

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### Board on Professional Responsibility

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Lucy Pittman, *Vice Chair*

### Clients’ Security Fund

Kim Brooks-Rodney, *Chair*  
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Nathalie F.P. Gilfoyle,  
*Vice President*





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www.dcbar.org



**Faces of the D.C. Bar**

*Front cover:* D.C. Bar members Glenda Santiago-Marrero, Clarence Stanback, Marymagdaline Onyango, Ana Gracia, Sarah Crawford, Kim Boyle, Vishrut Shelat, Charles Work, and David Park

*Back cover:* D.C. Bar members Marcia G. Madsen, Damilola Arowolaju, Derek Centola, Diana Ashton, Amber Harding, Mustapha Nyallay, and Peter Hull