

STATE BAR *of* TEXAS

# ANNUAL REPORT 2023-2024



Welcome to the 2023-2024 Annual Report of the State Bar of Texas.

This year, thanks to the hard work of our volunteer leaders and professional staff, the State Bar found new ways to advance its role of regulating the profession and improving the quality of legal services. Under the leadership of 2023-2024 President Cindy Tisdale and our board of directors, we tackled issues including artificial intelligence, lawyer well-being, attorney vacation letters, and new disciplinary rules—all with the goal of helping lawyers better serve their clients.



By proposing clear guidelines and promoting best practices, the Taskforce for Responsible AI in the Law (TRAIL) is working to ensure that AI enhances, rather than diminishes, the role of lawyers, while also demonstrating that technology and ethics can work hand in hand. And speaking of ethics, President Tisdale led the way with her dozens of presentations across the state on what the TV character Ted Lasso can teach us about ethics in the practice of law. Meanwhile, as part of the 2024 rules referendum, the bar membership overwhelmingly approved a collection of new and amended disciplinary rules designed to protect the public while also making the rules clearer for lawyers to follow.

The board took an important step to invest in our bar and safeguard its long-term financial stability by approving the first increase in membership dues rates since 1991. The increase—\$23 a year for most lawyers—will take effect June 1, 2025, and will help counter the rising costs of conducting bar business due to inflation. Even with the pending rate increase, bar dues in Texas will remain among the lowest in the country.

At the same time, the State Bar expanded our best-in-the-country member benefits program to provide all Texas lawyers access to free billing and trust accounting software and one month of free online mental health therapy. Discounted therapy is available to bar members who choose to continue after the first month. A priority of President Tisdale's, the therapy benefit provides our members with additional tools to improve their performance and deal with the grief, anxiety, depression, and other common mental health difficulties that may impact their ability to serve clients.

As we move ahead, our goals are clear: embrace innovation, equip lawyers with tools to enhance their practices, invest in our bar, and uphold the highest standards of professionalism. To our many volunteer leaders and our staff, thank you for your hard work and dedication to these goals. Here's to another year of excellence.

Sincerely,

A stylized, handwritten signature in black ink, appearing to read 'Trey Apffel'.

Trey Apffel  
Executive Director, State Bar of Texas



# 2023-2024 ACHIEVEMENTS

2023-2024 President Cindy Tisdale's term focused on moving the State Bar of Texas forward in areas including the responsible use of artificial intelligence in the profession, improving lawyer well-being, standardizing attorney vacation letters, and promoting ethics and civility in the law.

After meeting throughout the year, the presidential Taskforce for Responsible AI in the Law (TRAIL) issued a year-report to the board of directors on issues surrounding artificial intelligence and its use in the practice of law. The task force's work provides a strong foundation as the bar continues to study and respond to new developments in the field of AI.

Under Tisdale's leadership, the bar also worked to help find a way to make the filing of attorney vacation letters more efficient for lawyers and for the courts. After extensive work by the Law Practice Management Committee, the Office of Court Administration is working to add vacation letters to its system.

Regarding member benefits, the State Bar started providing all Texas lawyers access to free billing and trust accounting software along with access to one free month of online mental health therapy, with discounted therapy available to those who continue beyond the free month. Meanwhile, hundreds of lawyers across the state saw Tisdale's traveling CLE presentation on what Ted Lasso, the lead character from the Apple TV+ series, can teach lawyers about civility in the practice.

In the 2024 rules referendum, Texas attorneys approved all 12 proposed disciplinary rule amendments, which had been proposed by the Committee on Disciplinary Rules and Referenda (CDRR) and approved by the board of directors. The Supreme Court adopted a majority of those rule changes effective October 1, 2024.



**STATE BAR of TEXAS ★ 2023-2024 BOARD OF DIRECTORS**

The board's Building Planning Special Committee and bar staff continued with plans for the bar's property at 1415 Lavaca St. in Austin. The project would preserve and restore the historic structure on the site and build a new, three-story building for use as an education and conference center for the legal profession.

Finally, the State Bar responded to ensure compliance with the U.S. Court of Appeals for the 5th Circuit opinion in *Boudreaux v. Louisiana State Bar Association*, 86 F.4th 620 (5th Cir. 2023). The *Boudreaux* decision expanded on the holdings of prior caselaw governing mandatory bars by adding a requirement that bar speech—in addition to being germane to the regulation of lawyers, improving the quality of legal services, or the functioning of the state's courts or legal system—should be clearly connected to the practice of the law.

---


## CONNECT WITH US ON SOCIAL MEDIA

 [FACEBOOK.COM/STATEBAROFTexas](https://www.facebook.com/STATEBAROFTexas)

 [@STATEBAROFTexas](https://twitter.com/STATEBAROFTexas)

 [LINKEDIN.COM/COMPANY/STATE-BAR-OF-TEXAS](https://www.linkedin.com/company/state-bar-of-texas)

 [@STATEBAROFTexas](https://www.instagram.com/STATEBAROFTexas)

 [YOUTUBE.COM/STATEBAROFTexas](https://www.youtube.com/STATEBAROFTexas)

# WHAT WE DO

## SELF-GOVERNANCE

Texas lawyers practice law in a self-regulated profession with an independent grievance system. Since the inception of the State Bar of Texas, Texas lawyers have retained the right to approve proposed disciplinary rule changes in referendum elections and vote on members of the board of directors, which governs all manner of bar administration, programs, policies, and budget management. Learn more at [texasbar.com/board](https://texasbar.com/board).

## PROTECTING THE PUBLIC

The State Bar of Texas furthers the state's interests in regulating the legal profession and improving the quality of legal services. The Texas attorney discipline system is administered by the Office of Chief Disciplinary Counsel (CDC) whose work is overseen by the Commission for Lawyer Discipline. CDC represents the commission in disciplinary litigation. In the 2023-2024 bar year, the disciplinary system issued 314 sanctions, resolving 353 complaints. The Client-Attorney Assistance Program processes written Requests for Assistance received from clients that have specific communication concerns with their Texas attorneys and answers the Grievance Helpline to provide information to the public about the grievance process and services of the State Bar of Texas. Also, the Client Security Fund assists clients whose lawyers improperly take funds belonging to the clients. Clients can apply to the fund after disciplinary proceedings are completed. Payouts are funded through an annual allocation from the bar, interest on the corpus, and any restitution received. In the 2023-2024 bar year, 121 applications were approved for a total of \$889,140 in grants awarded.

## LAW PRACTICE MANAGEMENT

The State Bar of Texas offers tools to help attorneys grow their practices. One is the Lawyer Referral and Information Service, which connects clients in need of legal representation with attorneys who can help. LRIS makes referrals in the 248 Texas counties that do not have local referral programs. The bar also offers the Texas Bar Career Center, an online portal for both employers and job seekers. Visit the Career Center to post open positions or search for legal-related jobs. The State Bar's Law Practice Resources Division created [texasbarpractice.com](https://texasbarpractice.com) to provide law practice management tools in addition to housing Texas Bar Books and Texas Bar Books Online resources. For emergency management and client protection, the State Bar

urges members to designate in advance one or more custodian attorneys. A custodian attorney assists with closing a practice in the event need arises. Lawyers can make advance designations by accessing the State Bar portal at [texasbar.com/succession](https://texasbar.com/succession).

## COMMUNICATIONS

Each month, except a combined issue of July/August, members receive the *Texas Bar Journal*, which includes information and in-depth stories on current legal topics, disciplinary actions, technology, and more. It can also be viewed online at [texasbar.com/tbj](https://texasbar.com/tbj) or via the digital edition at [texasbar.com/digitaltbj](https://texasbar.com/digitaltbj). Members and the public can follow the bar on social media for timely announcements. The *State Bar of Texas Podcast* showcases interviews with experts on the latest legal trends and topics.

## CONTINUING LEGAL EDUCATION

TexasBarCLE is one of the top providers of continuing legal education in the country and often sets the national standard for CLE content and delivery. During the 2023-2024 bar year, TexasBarCLE offered 137 webcasts, 1,652 online classes, 98 live courses, and 111 video replays. Most programs are recorded and archived for online viewing, with 3,210 hours available as online classes. Also, more than 30,326 CLE articles are featured in the online library, including 2,664 ethics-related articles.

## EDUCATING THE PUBLIC

The State Bar, the Texas Young Lawyers Association, and the bar's Law-Related Education Department publish, in print and online, dozens of handbooks and pamphlets in both English and Spanish to educate the public on a variety of legal topics (see [texasbar.com/resources](https://texasbar.com/resources), [tyla.org/resources](https://tyla.org/resources), and [texaslr.org](https://texaslr.org)). Law-Related Education holds teacher workshops and publishes educational materials about the law and civics for teachers and K-12 students. To learn more, go to [texaslr.org](https://texaslr.org).

## EDUCATING YOUNG LAWYERS

In addition to providing continuing legal education for all lawyers, the bar plays an important role in educating young lawyers, helping them build a strong foundation for law practices. Programs include: After the Bar Exam, which offers links to more than 2,000 hours of CLE online classes and access to other helpful resources for students who have graduated from law school and are awaiting the results of the bar exam, and the Texas Young Lawyers Association's



# WHAT WE DO

podcast collection offering practical advice or tips on specific legal topics. Also, 39 State Bar sections offer free memberships for lawyers licensed two years or less, and 25 sections offer free memberships to law students. Sections often participate in mentoring programs for law students and sponsor CLE programs at Texas law schools, which students are allowed to attend for free. Finally, the State Bar of Texas Law Student Division provides an avenue for law students to connect to the bar before graduating—offering educational, networking, and scholarship opportunities.

## ETHICS HELPLINE

The Ethics Helpline at 800-532-3947 is a free benefit to attorney-members of the State Bar of Texas. Ethics attorneys provide nonbinding, nonconfidential guidance to Texas-licensed attorneys. Guidance is limited to questions involving the Texas Disciplinary Rules of Professional Conduct, Texas Rules of Disciplinary Procedure, and ethics opinions. Some caselaw and additional resources are also provided. In the 2023-2024 bar year, the Ethics Helpline returned approximately 4,600 calls, 93% of which were returned within 24 hours.

## LEGAL SERVICES FOR ALL TEXANS

The State Bar of Texas is committed to ensuring that all Texans have access to justice regardless of income. The State Bar's Legal Access Department works to achieve this goal by providing resources such as malpractice insurance, Westlaw, CLE, and language access services to legal aid organizations and pro bono attorneys; striving to remove barriers to pro bono service; and partnering with legal aid organizations on disaster preparedness and response efforts. The Legal Access Department also assists the public by providing information to low-income Texans. For more information, go to [texasbar.com/probono](https://texasbar.com/probono) and [probonotexas.org](https://probonotexas.org).

## LOCAL BAR SERVICES

The Local Bar Services Department fosters and maintains relationships between the State Bar and local bar associations. Each year, the Local Bar Leaders Conference offers education and networking for local bar executives, young lawyer affiliates, and other volunteer leaders. Outreach to local bars helps to fulfill one of the purposes outlined in the State Bar Act.

## MEMBER BENEFITS

The State Bar of Texas Member Benefits Program offers numerous resources to help attorneys with the everyday practice of law. In the 2023-2024 bar year, 47 benefits were offered through the program. Goods and services offered to assist lawyers include free legal research, free billing and trust accounting software, health insurance through the Texas Bar Private Insurance Exchange, and professional liability insurance through TLIE.

## REGULATION

As part of its duty to regulate the legal profession, the State Bar of Texas works to ensure Texas attorneys remain in compliance with their membership and minimum continuing legal education requirements. The Minimum Continuing Legal Education Committee administers the MCLE program, formulates rules and regulations, evaluates accreditations of CLE activities, and encourages the development of high-quality programs. Also, the Advertising Review Department is responsible for reviewing attorney and law firm advertisements and solicitation communications as required by Part VII of the Texas Disciplinary Rules of Professional Conduct.

## TEXAS LAWYERS' ASSISTANCE PROGRAM

January 2024 marked 35 years of the Texas Lawyers' Assistance Program assisting attorneys, law students, judges, and other legal professionals who are struggling with mental health or substance use concerns, chronic stress, or cognitive decline. In the 2023-2024 bar year, TLAP handled 987 consultations and offered numerous educational programs and resources, including a free CLE on depression and suicide prevention as well as an online Support Toolbox. TLAP continued to expand outreach to legal professionals, such as paralegals, court administrators, and justices of the peace, and hosted Mental Health First Aid (MHFA) training for 19 State Bar of Texas employees. All communication with TLAP is confidential by statute. For more information, go to [tlaphelps.org](https://tlaphelps.org).

## TEXAS LAWYERS FOR TEXAS VETERANS

Texas Lawyers for Texas Veterans (TLTV) is a collaborative effort with local bar associations, legal aid organizations, and veterans service providers to host legal advice clinics throughout the state.

# BY THE NUMBERS

The State Bar of Texas adopts a strategic plan every two years that includes goals and performance measures. The State Bar has identified six broad categories guiding these measures: 1) Service to the Public; 2) Service to Members; 3) Protection of the Public; 4) Access to Justice; 5) Sound Administration and Resources; and 6) Financial Management. The following are highlights of the results and outcomes for the 2023-2024 bar year. For a full list of results, go to [texasbar.com/performance-measures-numbers](https://texasbar.com/performance-measures-numbers).

## SERVICE TO THE PUBLIC

Number of people who received a referral through the Lawyer Referral and Information Service:

**97,429**  
INQUIRIES FIELD BY LRIS

**106,198**  
REFERRALS MADE

Visits to pages on State Bar-related websites containing legal information on issues of importance to the public:

**21,220,980**  
TOTAL HITS  
TEXASBAR.COM

**4,518**  
PAGE HITS  
TEXASBAR.COM/DISASTER

**24,471**  
PAGE HITS  
TEXASBAR.COM/RESOURCES

## SERVICE TO MEMBERS

**TexasBarCLE**

**144,335**  
Registrations obtained through **1,998**  
continuing legal education offerings.



TEXAS LAWYERS'  
ASSISTANCE PROGRAM  
*Confidential. Respectful. Voluntary.*

**987**  
CONSULTATIONS

**61%** were related to mental health, **36%** to substance use, and **3%** to cognitive issues. TLAP's website—[tlaphelps.org](https://tlaphelps.org)—garnered **8,130** users and **18,021** page views. TLAP's social media garnered **106,400** impressions. TLAP made **122** educational outreach presentations, including to law schools, paralegals, court administrators, and justices of the peace.

## PROTECTION OF THE PUBLIC

**=CAAP=**  
CLIENT-ATTORNEY  
ASSISTANCE PROGRAM

**32,451**  
Contacts received via mail, email, and phone to CAAP program. CAAP closed a total of **1,207** cases with productive communication established in **86.2%** of those cases.

## ATTORNEY DISCIPLINE (CDC)

|                                  |            |
|----------------------------------|------------|
| Total complaints resolved .....  | <b>353</b> |
| Total sanctions .....            | <b>314</b> |
| Disbarments .....                | <b>18</b>  |
| Resignations .....               | <b>12</b>  |
| Suspensions .....                | <b>74</b>  |
| Public reprimands .....          | <b>40</b>  |
| Private reprimands .....         | <b>91</b>  |
| Grievance Referral Program ..... | <b>79</b>  |

## ACCESS TO JUSTICE



Over **11,518** Texas attorneys made contributions in the amount of

**\* \$1,610,190.51**

through the bar dues access to justice donation check-off option.

*\* the reporting period for these ATJ numbers is from September 2022 to August 2023*

# DUES INCREASE FAQs

## IS THE STATE BAR OF TEXAS INCREASING DUES?

Yes, in 2025. On April 19, 2024, the State Bar Board of Directors approved a 10% increase in membership dues rates, as authorized by statute, to be effective June 1, 2025. The Supreme Court of Texas approved the increase on May 28, 2024. The dues increase will be part of the bar's proposed budget for fiscal year 2025-2026. The budget process is transparent and includes extensive review and approval by the Budget Committee, Executive Committee, Board of Directors, and Supreme Court.

## BY HOW MUCH WILL DUES RATES INCREASE?

Annual membership dues will be adjusted as follows effective June 1, 2025:

- **Licensed under 3 years: \$68 to \$74 (\$6 increase)**
- **Licensed 3-5 years: \$148 to \$162 (\$14 increase)**
- **Licensed over 5 years: \$235 to \$258 (\$23 increase)**
- **Inactive: \$50 to \$55 (\$5 increase)**
- **Emeritus: \$0 (no change)**

## WHY IS THE STATE BAR INCREASING DUES RATES?

Like every organization, the State Bar is subject to the inflation affecting the national economy. The 10-year average rate of inflation from calendar year 2014 to 2023 was 2.75%, with the last three years hitting record numbers of 4.1% up to 8% in 2022. And, the State Bar has not raised dues since 1991. If membership dues had kept up with inflation, the maximum dues rate would be approximately \$540 a year today. In addition, as the membership continues to both grow and age, the State Bar is serving more lawyers each year, including an increasing number who are transitioning to emeritus status at age 70 and, by statute, therefore no longer pay dues. The result is that the bar's budgeted operating expenditures are increasing faster than its budgeted operating revenues, resulting in budgeted deficits that started in fiscal year 2023. Because of years of responsible fiscal planning, the State Bar has reserves to cover deficits in the short term. The board is attempting to address the bar's long-term needs by increasing dues rates.

## WHY DOESN'T THE STATE BAR CUT STAFFING OR PROGRAMS TO BALANCE THE LONG-TERM BUDGET?

Because our goal is to meet the bar's statutory purposes and maintain the high level of services that our members and the public have come to expect. Many programs are statutorily required, and others are very popular with our members because they help support lawyers in the practice of law. The State Bar has reduced staffing and programs in the past, which helped delay a dues increase for over 30 years. During that time, the number of active members of the State Bar has doubled, while the number of State Bar staff has declined from a peak of 324 budgeted employees in 1999 to 271 for the 2023-2024 bar year.

## WHAT DO I GET FOR MY BAR DUES?

Dues help to fund the operations of the State Bar, which is an administrative arm of the judicial branch of state government. Through your State Bar membership, you have the ability to practice law in a self-regulated profession with an independent grievance system. Since the bar's inception, Texas lawyers have retained the right to approve proposed disciplinary rule changes in referenda elections and vote on members of the board of directors, which governs all manner of bar administration. In addition, the State Bar serves its members with continuing education and resources such as the *Texas Bar Journal*, Law Practice Management Program, Ethics Helpline, Texas Lawyers' Assistance Program, Texas Bar Career Center, vLex Fastcase free legal research, TexasBarCLE (including scholarships for free CLE programs), Client-Attorney Assistance Program, and the Member Benefits Program, which offers access to health insurance as well as discounts on a variety of services to help members with the practice of law.

## CAN I PROVIDE FEEDBACK TO THE BOARD?

Yes. The board invites public comment at each of its quarterly meetings, and you can email comments anytime to [boardofdirectors@texasbar.com](mailto:boardofdirectors@texasbar.com). A public hearing on the proposed 2025-2026 budget will take place in the spring of 2025.

Find answers to more questions by reading the complete Dues Increase FAQs at [texasbar.com/ourfinances](https://texasbar.com/ourfinances).

# STATE BAR OF TEXAS

## OFFICERS AND DIRECTORS

2023 - 2024

### **PRESIDENT**

Cindy V. Tisdale *Granbury*

### **PRESIDENT-ELECT**

Steve Benesh *Austin*

### **IMMEDIATE PAST PRESIDENT**

Laura Gibson *Houston*

### **CHAIR OF THE BOARD**

Kennon Lily Wooten *Austin*

### **BOARD OF DIRECTORS**

Cade W. Browning *Abilene*  
Elizabeth Sandoval Cantu *Edinburg*  
Luis Cavazos *Brownsville*  
Jason M. Charbonnet *Fort Worth*  
Craig Cherry *Waco*  
Kelly-Ann F. Clarke *Dallas*  
Jeff Cochran *Burleson*  
David C. Courreges *Austin*  
Thomas A. Crosley *San Antonio*  
August Watkins Harris III *Austin*  
Britney E. Harrison *Dallas*  
Noelle Hicks *Houston*  
Matthew J. Hill *New Braunfels*  
Forrest L. Huddleston *Dallas*  
Kristina N. "Krisi" Kastl *Dallas*  
Lori M. Kern *Richmond*  
Bill Kroger *Houston*  
Hisham Masri *Irving*  
Dwight McDonald *Lubbock*  
Rudolph "Rudy" K. Metayer *Austin*  
Lawrence Morales II *San Antonio*  
Kimberly M. Naylor *Fort Worth*  
Rosalind V.O. Perez *Victoria*  
Christopher D. Pineda *Brownsville*  
Chris Popov *Houston*  
Laura Pratt *Lubbock*  
Shannon Quadros *Houston*  
Michael J. Ritter *San Antonio*  
Audie Sciumbato *Hereford*  
John Sloan *Longview*  
G. David Smith *Rockwall*

Paul K. Stafford *Dallas*  
Alex J. Stelly Jr. *Beaumont*  
Nitin Sud *Bellaire*  
Carlo Taboada *Brownsville*  
Radha Thiagarajan *Houston*  
Dr. Martin A. Tobey *Dallas*  
Robert L. Tobey *Dallas*  
Aaron Z. Tobin *Dallas*  
G. Michael Vasquez *Austin*  
Stephen J. Venzor *El Paso*  
Michael J. Wynne *Houston*

### **LIAISONS TO THE BOARD**

Rakhi Israni *Fremont, California*  
Senior Justice Debra H. Lehrmann *Austin*  
Chief Justice Rebeca C. Martinez *San Antonio*  
Judge Jesse F. McClure III *Austin*  
Judge Jason Pulliam *San Antonio*

### **SECTION REPRESENTATIVES TO THE BOARD**

Jerry D. Bullard *Grapevine*  
Kenda L. Culpepper *Rockwall*  
Robert B. "Bob" Goss *Houston*  
Pierre Grosdidier *Houston*  
Sonya D. Hoskins *Dallas*  
Brandy Wingate Voss *Edinburg*

### **EX-OFFICIO**

### **IMMEDIATE PAST CHAIR OF THE BOARD**

Chad Baruch *Dallas*

### **EXECUTIVE DIRECTOR**

Trey Apffel *Austin*

### **GENERAL COUNSEL**

Ross Fischer *Austin*

### **CHIEF DISCIPLINARY COUNSEL**

Seana Willing *Austin*