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SCMF-10-0000186

IN THE SUPREME COURT OF THE STATE OF HAWAI‘I

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In the Matter of the

DISCIPLINARY BOARD OF THE HAWAI‘I SUPREME COURT

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ORDER APPROVING THE BUDGET OF THE DISCIPLINARY  
BOARD OF THE HAWAI‘I SUPREME COURT FOR CALENDAR YEAR 2025  
(By: Recktenwald, C.J., McKenna, Eddins, Ginoza, and Devens, JJ.)

Upon consideration of the 2025 proposed budget, submitted to this court on October 1, 2024 by the Disciplinary Board of the Hawai‘i Supreme Court, and our review of the Hawai‘i State Bar Association’s (HSBA) letter dated September 30, 2024, wherein the HSBA concurred with the 2025 proposed Disciplinary Board budget, we note the Disciplinary Board seeks to increase the annual fees from the current rates as follows:

| <u>Type Registration</u> | <u>Current Rate</u> | <u>Increased Rate</u> |
|--------------------------|---------------------|-----------------------|
| Active/Gov. <5 yrs       | \$150.00            | \$200.00              |
| Active/Gov. >5 yrs       | \$250.00            | \$350.00              |
| Pro Hac Vice             | \$600.00            | \$650.00.             |

The Disciplinary Board proposes to keep the following annual fees the same:

| <u>Type Registration</u>       | <u>Current Rate</u> |
|--------------------------------|---------------------|
| Inactive <70 years age         | \$50.00             |
| Inactive >70 years age/medical | \$ 0.00             |

IT IS HEREBY ORDERED, pursuant to Rule 2.4(e) (8) of the Rules of the Supreme Court of the State of Hawai'i that the Disciplinary Board's proposed budget for calendar year 2025, a copy of which is attached hereto, and the requested annual fees, including the increased rates, are approved.

DATED: Honolulu, Hawai'i, November 4, 2024.

/s/ Mark E. Recktenwald

/s/ Sabrina S. McKenna

/s/ Todd W. Eddins

/s/ Lisa M. Ginoza

/s/ Vladimir P. Devens



PROPOSED 2025 DISCIPLINARY BOARD BUDGET  
(08/30/2024)

|  | 2024 Budget         | 2024 Estimated Actual | 2025 Budget         | Notes for 2025 |
|--|---------------------|-----------------------|---------------------|----------------|
| <b>1 Revenue</b>   |                     |                       |                     |                |
| 2 Attorney Registration Fees                             | \$ 1,500,350        | \$ 1,642,726          | \$ 2,168,400        | Note A         |
| 3 Interest on Bank Accounts                              | \$ 10,000           | \$ 30,000             | \$ 24,000           |                |
| 4 Lawyers' Fund  | \$ 120,000          | \$ 120,000            | \$ 120,000          | Note B         |
| 5  |                     |                       |                     |                |
| <b>6 TOTAL REVENUE</b>                                   | <b>\$ 1,630,350</b> | <b>\$ 1,792,726</b>   | <b>\$ 2,312,400</b> |                |
| <b>7 Expenditures</b>                                    |                     |                       |                     |                |
| 8 Salaries   |                     |                       |                     | Note C         |
| 9 Chief Disciplinary Counsel (Tamm)                      |                     |                       |                     |                |
| 10 Deputy Chief Disciplinary Counsel (Fasi)              |                     |                       |                     |                |
| 11 Deputy Disciplinary Counsel (Hebblethwaite)           |                     |                       |                     |                |
| 12 Deputy Disciplinary Counsel (Harada)                  |                     |                       |                     |                |
| 13 Disciplinary Investigator (Sayavong)                  |                     |                       |                     |                |
| 14 Law Student (Sewell)                                  |                     |                       |                     |                |
| 15 Manager Office Administration (Okamoto)               |                     |                       |                     |                |
| 16 IT and Administrative Specialist (A Sakurai)          |                     |                       |                     |                |
| 17 IT and Administrative Specialist (E Sakurai)          |                     |                       |                     |                |
| 18 Administrative Assistant (new)                        |                     |                       |                     |                |
| 19 Disciplinary Board Administrative Dir (Hee)           |                     |                       |                     |                |
| 20 Management Premium                                    |                     |                       | \$ 40,000           | Note C         |
| <b>21 TOTAL SALARIES</b>                                 | <b>\$ 948,000</b>   | <b>\$ 945,047</b>     | <b>\$ 1,031,950</b> |                |
| Disciplinary Board Professional Contract Service         |                     |                       |                     |                |
| 22 (includes Board Counsel)                              | \$ 15,000           | \$ 10,000             | \$ 10,000           | Note D.1       |
| ODC Professional Contract Services                       |                     |                       |                     |                |
| 23 (Adjunct/Contract Trustees)                           | \$ 250,000          | \$ 250,000            | \$ 250,000          | Note D.2       |
| 24   |                     | \$ -                  | \$ -                |                |
| 25   |                     |                       |                     |                |
| <b>TOTAL SALARIES AND PROFESSIONAL CONTRACT SERVICES</b> | <b>\$ 1,213,000</b> | <b>\$ 1,205,047</b>   | <b>\$ 1,331,950</b> |                |
| 26   |                     |                       |                     |                |
| 27   |                     |                       |                     |                |
| <b>Benefits:</b>   |                     |                       |                     |                |
| 28 Retirement  | \$ 94,800           | \$ 84,000             | \$ 103,195          | Note E.1       |
| 29 Medical Plans   | \$ 109,860          | \$ 93,100             | \$ 112,620          | Note E.2       |
| 30 Group Life Insurance                                  | \$ 4,000            | \$ 3,918              | \$ 4,000            |                |
| 31 FICA  | \$ 72,522           | \$ 70,878             | \$ 81,774           |                |
| 32 Workers' Compensation                                 | \$ 3,000            | \$ 5,000              | \$ 6,000            |                |
| 33   |                     |                       |                     |                |

PROPOSED 2025 DISCIPLINARY BOARD BUDGET  
(08/30/2024)

|     | 2024 Budget | 2024 Estimated Actual | 2025 Budget | Notes for 2025 |
|-----|-------------|-----------------------|-------------|----------------|
| 34  | \$ 10,000   | \$ 10,400             | \$ 11,000   |                |
| 35  | \$ 9,500    | \$ 5,000              | \$ 6,000    |                |
| 36  | \$ 3,500    | \$ 4,008              | \$ 4,500    |                |
| 37  | \$ 2,036    | \$ 2,016              | \$ 3,095    | Note E.3       |
| 38  | \$ 12,000   | \$ 16,720             | \$ 16,920   | Note E.4       |
| 39  | \$ 1,000    | \$ 1,000              | \$ 1,000    | Note E.5       |
| 40  | \$ 322,218  | \$ 296,040            | \$ 350,104  |                |
| 41  |             |                       |             |                |
| 42  |             |                       |             |                |
| 43  |             |                       |             |                |
| 44  | \$ 6,276    | \$ 6,276              | \$ 6,600    |                |
| 45  | \$ 13,000   | \$ 10,000             | \$ 13,000   |                |
| 46  | \$ 15,000   | \$ 14,400             | \$ 15,000   |                |
| 47  | \$ 3,000    | \$ 3,000              | \$ 3,000    |                |
| 48  | \$ 2,500    | \$ 2,500              | \$ 2,500    |                |
| 49  | \$ 3,200    | \$ 3,200              | \$ 3,200    |                |
| 50  | \$ 7,000    | \$ 5,600              | \$ 6,000    |                |
| 51  | \$ 900      | \$ 900                | \$ 900      |                |
| 51A | \$ 2,500    | -                     |             |                |
| 52  | \$ 4,000    | \$ 6,000              | \$ 5,000    |                |
| 53  | \$ 4,000    | \$ 3,000              | \$ 3,000    |                |
| 54  | \$ 9,000    | \$ 8,500              | \$ 9,000    |                |
| 55  | \$ 4,000    | \$ 2,000              | \$ 4,000    | Note F.1       |
| 56  | \$ 5,000    | \$ 10,000             | \$ 10,000   | Note F.2       |
| 57  | \$ 3,000    | \$ 3,000              | \$ 3,000    | Note G.1       |
| 58  | \$ 5,145    | \$ 5,145              | \$ 5,145    | Note G.2       |
| 59  | \$ 1,500    | \$ 1,500              | \$ 1,500    | Note G.3       |
| 60  | \$ 1,000    | \$ 1,000              | \$ 1,000    |                |
| 61  | \$ -        | \$ -                  | \$ -        |                |
| 62  | \$ 350      | \$ 1,000              | \$ 1,000    |                |
| 63  | \$ 93,823   | \$ 93,823             | \$ 96,674   | Note H         |
| 64  | \$ 17,491   | \$ 17,491             | \$ 25,044   | Note I         |
| 65  | \$ 9,800    | \$ 10,000             | \$ 10,000   | Note J.1       |
| 66  |             |                       |             |                |
| 67  |             |                       |             |                |
| 68  |             |                       |             |                |
| 69  | \$ 500      | \$ 500                | \$ 500      | Note J.2       |

PROPOSED 2025 DISCIPLINARY BOARD BUDGET  
(08/30/2024)

|     |   | 2024 Budget | 2024 Estimated Actual | 2025 Budget | Notes for 2025 |
|-----|---|-------------|-----------------------|-------------|----------------|
| 70  | Insurance                               |             |                       |             |                |
| 71  | Commercial Package                      | \$ 1,500    | \$ 1,706              | \$ 1,800    |                |
| 72  | Umbrella                                | \$ 1,000    | \$ 675                | \$ 700      |                |
| 73  | Erisa Bond                              | \$ -        |                       |             |                |
| 74  | Director's & Officers Liability         | \$ 5,500    | \$ 7,255              | \$ 8,000    |                |
| 75  | Cyber Security Insurance                | \$ -        | \$ -                  |             |                |
| 76  | Professional Organization Dues          |             |                       |             | Note K         |
| 77  | NOEC                                    | \$ 1,200    | \$ 1,600              | \$ 1,600    |                |
| 78  | ABA (CPR)                               | \$ 500      | \$ 550                | \$ 585      |                |
| 79  | NCLDB                                   | \$ 100      | \$ 100                | \$ 100      |                |
| 80  | OBI                                     | \$ 150      | \$ 175                | \$ 175      |                |
| 81  | Hawaii Employers Council                | \$ 1,610    | \$ 1,550              | \$ 1,550    |                |
| 82  | Computer Fees                           | \$ 43,750   | \$ 40,000             |             | Note L         |
| 83  | Luhina (Internet Service)               |             |                       | \$ 5,532    |                |
| 84  | Zoom                                    |             |                       | \$ 2,093    |                |
| 85  | LogMeIn                                 |             |                       | \$ 1,609    |                |
| 86  | Microsoft Office 365                    |             |                       | \$ 10,000   |                |
| 87  | Dropbox (ODC)                           |             |                       | \$ 1,203    |                |
| 88  | Dropbox (DB)                            |             |                       | \$ 1,131    |                |
| 89  | Westlaw                                 |             |                       | \$ 23,734   |                |
| 90  | Hawaii Information Service              |             |                       | \$ 1,571    |                |
| 91  | Pacer                                   |             |                       | \$ 500      |                |
| 92  | Adobe                                   |             |                       | \$ 6,120    |                |
| 93  | Sonic Wall (Router)                     |             |                       | \$ 610      |                |
| 94  | Website Server                          |             |                       | \$ 900      |                |
| 95  | Remote Desktop Connection License       |             |                       | \$ 440      |                |
| 96  | New [Potential] Data Management System  | \$ -        | \$ -                  |             | Note M         |
| 97  | Action Step (to Replace Time Matters)   |             |                       | \$ 42,912   |                |
| 98  | 35/45 (Implement and Train-Action Step) |             |                       | \$ 12,000   |                |
| 99  | Action Step Consultant                  |             |                       | \$ 55,443   |                |
| 100 | DUO (Advantage) MFA Software            |             |                       | \$ 1,728    |                |
| 101 | Employee Training                       | \$ 2,500    | \$ 500                | \$ 2,500    |                |
| 102 | Litigation Costs                        | \$ 20,000   | \$ 2,500              | \$ 10,000   | Note N         |
| 103 | Trusteeship Costs                       | \$ 20,000   | \$ 20,000             | \$ 20,000   | Note O.1       |
| 104 | Trusteeship Costs-Recovered             | \$ -        | \$ -                  |             |                |
| 105 | Contract Trustee                        |             |                       |             | Note O.2       |
| 106 | Contract Trustee Costs-Recovered        |             | \$ -                  |             |                |



**A. COMPUTATION OF DISCIPLINARY BOARD FUNDS IN 2025**

A. PROJECTED 2025 REGISTRATION FEES BY CATEGORY (estimate).

| Category         | No. of Attorneys* | Registration Fee | Amount          |
|------------------|-------------------|------------------|-----------------|
| Active Attorneys |                   |                  |                 |
| 1-4 Years        | 419               | \$ 200.00        | \$ 83,800.00    |
| 5+ Years         | 4605              | \$ 350.00        | \$ 1,611,750.00 |
| Inactive         | 2424              | \$ 50.00         | \$ 121,200.00   |
| Pro Hac Vice     | 541               | \$ 650.00        | \$ 351,650.00   |
|                  |                   |                  | \$ 2,168,400.00 |

B. CALCULATION OF 2025 TOTAL AVAILABLE REVENUE.

|                           |                |
|---------------------------|----------------|
| 2025 ARS Receipts         | \$2,168,400.00 |
| Interest on Bank Accounts | \$24,000.00    |
| Lawyers' Fund Admin Fee   | \$120,000.00   |
|                           | \$2,312,400.00 |

C. CALCULATION OF CARRYOVER AT DECEMBER 31, 2024.

|  |                |
|--|----------------|
| 2024 Projected Revenue                   | \$1,792,726.00 |
| 2024 Project Expenditures                | \$1,832,221.00 |
| 2024 Excess of Revenue Over Expenditures | -\$39,495.00   |
| December 31, 2023 Carryover              | \$581,498.00   |
| 2024 Estimated Ending Reserves           | \$542,003.00   |

D. TOTAL FUNDS AVAILABLE FOR 2025. \$2,854,403.00

8/29/2024

**B. NOTES**

A. Attorney Registration Fees [Line 2]

The revenue projection is based on the number of attorneys registered in 2024 with HSBA through the end of June 30, 2024.

This year's (2025) budget, for the first time in 15 years, seeks an increase in the Disciplinary fees paid by Hawaii lawyers. The specific increases sought are:

| Type registration            | Current rate | Increased rate |
|------------------------------|--------------|----------------|
| Active/Govt <5yrs            | \$150        | \$200          |
| Active/Govt >5yrs            | \$250        | \$350          |
| Inactive <70 yrs age         | \$50         | No change      |
| Inactive >70 yrs age/medical | \$0          | No change      |
| Pro Hac Vice                 | \$600        | \$650          |

It is also noted that given a recent reduction in the registered population, if no increase is allowed, the total revenues for 2025 would decrease by \$81,000.00.

B. Lawyers' Fund for Client Protection [Line 4]

ODC currently provides, under contract, administrative and professional support to the Lawyers' Fund primarily consisting of shared use of five staff members [one disciplinary investigator (Fund Investigator), two disciplinary counsel (Fund Counsel and Fund Administrator), and two administrative staff members for processing Lawyers' Fund claims.

In 2024, the Disciplinary Board and the Lawyers' Fund agreed on an annual administrative fee of \$120,000.00. It is anticipated that this fee will remain the same in 2025.

C. Salaries [Lines 8 through 21]

The salaries are based upon the following 11 full-time positions:

| Number of Staff | Full-Time Position                         |
|-----------------|--|
| 1               | Chief Disciplinary Counsel                 |
| 1               | Deputy Chief Disciplinary Counsel          |
| 3               | Deputy Disciplinary Counsel                |
| 1               | Disciplinary Investigator                  |
| 1               | Manager Office Administration              |
| 2               | IT and Administrative Specialist           |
| 1               | [new] Administrative Assistant             |
| 1               | Disciplinary Board Administrative Director |



All "counsel" positions are compensated based on experience and individual skills. Additional positional "Management Premiums" (paid in addition to base salary, pro-rated monthly) is apportioned between Chief and Deputy Chief Counsel.

In 2025, ODC is budgeting for a maximum 6% salary increase for all employees. This is for budgeting purposes only, as the final salary amount will be based upon the individual employee's annual performance review.

The 2024 Law Student Intern will take the July 2024 Bar Exam, and if admitted will be retained as a Deputy Disciplinary Counsel. This budget reflects that anticipated accession.

D. Professional Services

1. Disciplinary Board Professional Contract Services  
[Line 22]

This category includes the employment of outside legal services as needed, including an employment attorney and tax/ERISA attorney. Disciplinary Board Counsel is also an outside attorney/contractor who provides legal research and advice to the Board in its adjudicatory and administrative roles. All of the above offer discounted rates to the Board.

2. ODC Professional Contract Services (Adjunct Disciplinary Counsel/Contract Trustee) [Line 23]

This category includes the utilization of independent contractors, on an hourly basis: "adjunct" Deputy Disciplinary Counsel to supplement full time ODC staff; outside lawyer and non-lawyer consultants (including auditors); and Special Assistant Disciplinary Counsel to serve where ODC and the Disciplinary Board are conflicted or disqualified, such as when a complaint is filed against a Board member, Board Counsel, or Disciplinary Counsel. This category also includes payment to attorneys who are appointed to serve as compensated trustees by the Hawaii Supreme Court. In 2025, the Board expects to pay for the services of contract Trustees in the following trusteeships: Milton Soo, Thomas Yano, Arnold Phillips, Michael Lippert, Melody Parker, Brian De Lima, David Mikonczyk, Walter Vierra, David Sereno, Maria Avinante, Stuart Ing, Lionel Riley, and Clayton Ikei.

E. Benefits

1. Retirement Plan-Employer's Contribution [**Line 29**]  
10% of gross base salary (total with 11 employees  
= \$103,195.00)

2. Medical Plans [**Line 30**]

a. Qualified ODC employees: \$635.00/month x 11  
employees x 12 months = \$83,820.00.

b. Additional maximum allowance for qualified  
employees enrolled in a dependent/family  
plan (partial coverage): \$800.00/month x 3  
employees x 12 months = \$28,800.00

Total a + b = \$112,620 (11 employees, 3 with  
dependent/family plans)

Remaining benefits (e.g. group life insurance, FICA,  
workers' comp, unemployment insurance, TDI, long-term  
disability, Employee Assistance Program) are based on either a  
percentage of salary total, or actual costs.

3. Bar Membership Fees [**Line 37**]

This category includes mandatory HSBA annual  
license/dues for full time (salaried) ODC attorneys.

| HSBA Dues          |                          |
|--------------------|--------------------------|
|                    | Admitted 5+ Years        |
| HSBA               | \$210.00                 |
| Processing Fee     | 15.00                    |
| Disciplinary Board | 350.00                   |
| AAP                | 44.00                    |
|                    | <hr/>                    |
|                    | 619.00 x 5 ODC attorneys |

Total HSBA Dues: \$3,095.00

4. Parking [**Line 38**]

Parking at City Financial Tower will be paid in full for the following positions:

Chief Disciplinary Counsel  
Deputy Chief Disciplinary Counsel  
Disciplinary Investigator  
IT/Admin Specialist  
Disciplinary Board Administrative Director

Employees in these managerial and administrative positions are on-call and need safe access to the building, and parking, 24/7. Our investigator needs to be able to serve subpoenas and pick up documents from banks and courts throughout Oahu.

4 - Unreserved stall - \$260.00/mo x 12 = \$3,120 x 4 =  
\$12,480.00 (lease limit max 4 stalls)  
1 - Additional stall - \$370.00/mo x 12 =  
\$4,440.00 (excess of lease limit)

Total: \$16,920.00

5. Employee Assistance Program (EAP) through  
WorkLife Hawaii [**Line 39**]

This program assists employees, as well as their family members, with personnel-related, and/or other health and wellness issues by providing individual employee counseling, family counseling, and/or mediation.

F. Transportation and Subsistence-Neighbor Island  
[**Lines 55 and 56**]

1. Neighbor Island [**Line 55**]

In 2025, ODC will continue to offer the technology and meeting space for hybrid (both in person and virtual) meetings to the Disciplinary Board and for formal disciplinary conferences and hearings. Hybrid technology reduces the expense of neighbor island travel/expense. Thus, the budget anticipates 5 Board members for four Board meetings in Honolulu at \$200.00 per trip (which may accommodate parties in formal hearings as well.)

Five Board members for four Board meetings in Honolulu  
at \$200.00 per trip = \$1,000.00 x four meetings = \$4,000.00

Total Line 55 = \$4,000.00

2. Subsistence (Neighbor Island) [**Line 56**]

This category includes parking validation at 201 Merchant Street for any Board, Lawyers' Fund, or ODC related hourly parking, presently at \$5.50 per hour. In 2024, remote employees were required to "touch-down" in the office once a week for 8 hours and ODC validated their parking. This will continue in 2025, along with an increase in in-person Board meetings, ODC hearings, and perhaps sponsored training seminars. Public, vendor, and respondent parking are not validated.

Total Line 56 = \$10,000.00

G. Travel and Subsistence-Out of State [**Lines 57 and 58**]

In 2025, ODC will send Disciplinary Counsel to National Organization of Bar Counsel (NOBC) meetings and the Board will continue to send a Disciplinary Board member to the annual meeting of the National Council of Disciplinary Boards (NCLDB).

1. Travel-Out of State [**Line 57**]

a. NCLDB (one Board member)

Round trip airfare \$1,000.00 (est. location dependent)

b. NOBC (one ODC attorney to attend the Mid-Year Meeting and one ODC attorney to attend the Annual Meeting)

Round trip airfare \$1,000.00 x 2 = \$2,000.00  
(est. location dependent)

Total a + b = \$3,000.00

2. Subsistence-Out of State [**Line 58**]

a. Hotel: \$250.00/night x 5 nights =  
\$1,250.00/trip

b. Meals: \$73.00/day x 5 days = \$365.00/trip

c. Ground Transportation: \$100.00/trip

Total a + b + c = \$1,715 per trip x 3 trips =  
\$5,145.00

3. Conference Registration Fees [Line 59]

Participation or attendance (live or virtual) at NOBC, NCLDB, ABA, or OBI functions, seminars, conventions.

H. Office Rent-City Financial Tower [Line 63]

The budget for 2025 is as follows:

01/01/25-11/30/25 = \$3,581.11/mo x 11 mo = \$39,398.59  
12/01/25-12/31/25 = \$3,683.68/mo x 1 mo = 3,683.68  
Rent Total = \$43,082.27

2025 CAM = \$4,466.00 (est.) x 12 = \$53,592.00  
CAM = Rent Total = **\$96,674.27**

I. Office Rent-212 Merchant Street [Line 64]

In 2025, ODC will continue to rent small commercial office space (810 sq. ft. @ \$1.15 rent, \$1.31 CAM) to process and store client files in active trusteeship cases (Document Processing Facility). In 2024, ODC relocated its facility at 1136 Union Mall to 212 Merchant Street, as it is nearer ODC's main 201 Merchant Street location, and it provides additional space to eliminate the continuing expensive off-site storage with commercial vendors.

The cost of the space at 212 Merchant Street, Suite 310 is locked in on a 3-year lease, with the first year at \$2,087/mo x 12 months = **\$25,044.**

J. Repair and Maintenance

1. Leasing of Equipment [**Lines 65-68**]

ODC will continue to lease selected office equipment included one printer/copier/scanner, and a postage meter. Leasing is a cost-effective method of financing and maintaining this technological equipment.

2. Office [**Line 69**]

This category includes the cost of general repairs within the office not covered by building management.

K. Membership in Professional Organizations [**Lines 76-81**]

National Organization of Bar Counsel (NOBC). Only organization that provides educational seminars, interactive user Forums and consulting on topics/issues specific to attorney discipline. All ODC attorneys are members of NOBC.

National Council of Lawyer Disciplinary Board (NCLDB), which is the Board's counterpart to the NOBC.

American Bar Association (ABA) annual membership for the Chief, Deputy Chief, and one Deputy Disciplinary Counsel (tasked with ODC staff training). This membership also includes the Center for Professional Responsibility (CPR), providing resource materials, and access to ABA Formal Ethics Opinions, along with other education (CLE) programs that can be re-broadcast for ODC staff training.

Organization of Bar Investigators (OBI), which provides information sharing and educational opportunities for ODC's Disciplinary Investigator.

Hawaii Employers' Council (HEC) provides support and guidance to employers on personnel issues. The membership includes a hotline for questions about, employee discipline, discrimination, bullying and leaves of absence. HEC is also a great resource for staff training, from how to be a manager, to first aid, and CPR.

L. Computer Fees [**Lines 82-95**]

In 2025, ODC professional staff and adjuncts work remotely and nearly all records have been digitized. Our budget reflects the critical technology needed to keep our computer

systems safe and secure. This category includes the cost of subscriptions to the following:

- Luhina (internet service)
- Zoom (remote conferencing for outside participants)
- LogMeIn (remote desktop for staff)
- Microsoft Office 365 (monthly subscription)
- Dropbox for ODC and DB (secure cloud storage/backup)
- Westlaw (Legal Research-Public Records)
- Hawaii Information Service (real estate/business records)
- Pacer (Federal court records access)
- Adobe (pdf document management software)
- Sonic Wall (software for router)
- Website Server (software for main server)
- Remote Desktop Connection License

M. New [Potential] Data Management System [**Lines 96-99**]

ODC has selected Actionstep as its new data management software to replace the existing, pre-21<sup>st</sup> century data system, Time Matters ("TM" a former Lexis/Nexis product). The cost of the new software is estimated at \$42,912 as an annual subscription (by user, and negotiations are continuing). [**Line 97**]. To facilitate the migration of data from TM to Actionstep, it is estimated at \$55,443 as a one-time expense [**Line 99**]. A third-party company ("35/45 Consulting"), will implement, train and advise employees on Actionstep [**Line 98**] on a continuing basis. The amount stated here is for the first year, but may be similar in following years (35/45 replaces the prior consultant "Micheal Matters".)

N. Litigation Costs [**Line 102**]

This category includes costs for any court or bank documents used in the investigation of ODC cases, service of subpoenas and Supreme Court orders, transcription of hearings, interviews, and transcription of telephone calls from the public used to assist in the filing of complaints, storage of ODC administrative files, and any other costs associated with the investigation and litigation of cases by ODC and the Board.

O. Trusteeship Costs [**Line 103**]

Under Supreme Court Rule 2.20, trustees are appointed by the Court when an attorney dies, is disabled, is suspended or disbarred, or abandons his or her law practice, and no other responsible party can be found to wind down the practice. ODC is charged with initiating these proceedings and supervising trustee performance, reviewing fee/cost applications, and other oversight.

Presently there are 48 active trusteeships, with 6 assigned to compensated trustees.

1. Trusteeship Costs [**Line 103**]

Costs include postage, shipping, movers, commercial storage (other than storage at ODC's Document Processing Facility), publication of notices of trustee appointment, secure destruction of files, and other trusteeship related expenses.

2. Contract Trustee [**Line 105**] is now combined with "ODC Professional Contract Services" [**Line 23**], and Note D.2 above.

08/09/2024