
For the Society, Three Years of Significant Progress

BY DAN GRUNFELD*

SHORTLY AFTER I became the Society's President in 2011 we developed a list of initiatives and tasks which I believed should be the focus of the Society's efforts. As is always the case with nonprofits, more work needs to be done. But I'm pleased to report that we have made significant progress in enhancing the Society's work and mission. In no particular order, the six primary areas which were the focus of our efforts in the past three years were:

I. PRESENTING MORE VIBRANT AND DIVERSIFIED PROGRAMS AND COLLABORATING WITH OTHER NONPROFIT ORGANIZATIONS

The decision to move proactively to collaborate with other outstanding nonprofits has proved, in the view of most, to have been of great benefit to the Society. This direction met with some initial board members' concerns that the quality of our programs would suffer, and our "brand" would diminish. However, collaborations with, for example, Zócalo, the continued popularity of the David Terry program, and our collaboration in that effort with, among others, the Northern District of California Historical Society, and many other examples have helped expose our work to new audiences and potential supporters without impacting our longstanding commitment to the excellence of our programs.

II. MAINTAINING FINANCIAL STABILITY AND GROWTH

Three years ago the Society, like the vast majority of other nonprofits, was operating under the cloud of the aftermath of the Great Recession and the ensuing general decline of support for the nonprofit sector. Thanks to precise budgeting, careful attention to expenditures, our policy of paying as we go and remaining debt free, and the outstanding work by the Budget, Executive and other committees, the Society's financial situation has not only been stable but also steadily improved.

In FY 2009/2010 our Total Equity ("TE" which is assets minus liabilities) was \$451,013. In FY 2010/2011 TE was \$467,645; in FY 2011/2012 TE was \$494,090, and in FY 2012/2013 the figure was \$506,993. In FY 2013/2014, it is anticipated that TE will be in a similar range.

This represents strong and disciplined financial performance at a time when many other nonprofits continue to struggle. Keeping our financial infrastructure



Dan Grunfeld interviewed former Chief Justice Ronald M. George about his oral history in December 2013.

PHOTO: HUGH WILLIAMS

and performance strong will remain critical to the Society's future growth and success.

III. ENHANCING OUR FUNDRAISING

A June 2013 memorandum from the Development Committee outlined potential fundraising opportunities and initiatives. We have made significant progress on some of the items outlined in the memorandum, less so on others. The report remains an excellent blueprint and action plan for moving forward on this important initiative.

IV. PUBLISHING THE HISTORY OF THE CALIFORNIA SUPREME COURT

It appears that this seemingly long-elusive goal is likely to be accomplished soon. The decision to change publishers has been key to progress on this front. Based on recent communication with the publisher, the book is expected to be published early next year. The publication of the book provides the Society a unique opportunity to reach out to new stakeholders, reconnect with old friends, conduct extensive media outreach, and generally raise the profile of the organization.

V. RAISING THE SOCIETY'S PROFILE

Because of the somewhat specialized mission of the organization, it is unlikely that the Society will ever become a widely popular nonprofit with vast numbers of supporters. Nonetheless, it has long been the view of

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many on the Board that, considering the importance of the California Supreme Court and the excellence of our work, the Society is not as well-known as it should be. In the past three years, significant steps have been taken to address this issue. This includes, among other things, the collaborations discussed above. In addition, programs like the interview of former Chief Justice Ronald George in Beverly Hills, which attracted managing partners of major law firms and others who have traditionally not been aware of the Society, were welcome examples of our efforts to better communicate the Society's mission and work to a more diverse audience. More work needs to be done on this front but progress has been made.

VI. MAINTAINING AND SUSTAINING THE EXCELLENCE OF OUR PUBLICATIONS AND PROGRAMS

We should be proud of the fact that the Society's "work product" — our publications, programs and initiatives — are as strong and vibrant as they have been at any point in my well over a decade of involvement with the Society. Selma Moidel Smith's exemplary contributions and insistence on excellence are part of the Society's DNA. In my view, the newsletter has never been better. The programs, as discussed above, are more innovative and our writing competition draws increasingly more accomplished participants. Maintaining this excellence

in the years and decades to come, and securing the financial resources to support and enhance this excellence, is of critical importance to the Society's future.

MOVING FORWARD

In upcoming years, in addition to continuing to expand and improve on the efforts above, the Society, in my view, should also focus on the following:

1. Developing a more diverse board, including members from communities of color and better geographical representation from all parts of the state.
2. Holding events outside of our core support areas in the Bay Area and Southern California. In this regard, the presentation of the David Terry program in Fresno, spearheaded by Justice Marvin Baxter, and our presentation at the annual State Bar meeting in San Diego were welcome and important developments.
3. Continuing and enhancing the recruitment of committed Board members who will actively contribute to the Society's mission.

There are, of course, other opportunities and challenges that will present themselves in the years to come. But the past three years have been productive for the Society, and I believe that we are well positioned to become an even better organization in the future. ★

'A FIRM AND STEADY HAND'

Dear Dan:

As Chair of the California Supreme Court Historical Society, I congratulate and thank you for your dedicated service as President of the Society over the past three years, and for your many prior years of service on the board before that. Despite having many other pressing professional obligations, you have, with a firm and steady hand, expertly led the Society's noble efforts to recover, preserve, and promote California's legal and judicial history through its publications, educational programs, and support of scholarly research.

You have also been an integral part of the Society's efforts to assist private and public agencies with exhibitions and oral histories, as well as the acquisition and archiving of judicial materials. Notably, during your term as President, the Society has been involved in significant outreach and archival programs — including the well-received oral history of former Chief Justice Ronald M. George.

In addition to your work for the Society, I also take this opportunity to acknowledge your other

extracurricular work, giving back to the legal profession and your community. While previously serving for nine years as the president and chief executive officer of Public Counsel — the nation's largest pro bono public interest law firm — that organization has more than doubled its size and expanded its scope nationally and internationally. In addition, at Morgan Lewis, you continue to undertake pro bono work, dedicating a portion of your practice to the development of strategies and opportunities in the areas of life sciences, green technology and alternative energy, and nonprofits.

On behalf of the People of the State of California and the Supreme Court Historical Society, I thank you for your service and wish you the very best in your future endeavors — including, I hope, a continuing relationship with the Society.

Sincerely,

Tani G. Cantil-Sakaue
Chief Justice of California