

**The State Bar of California**  
**Council on Access & Fairness**

**Long Range Strategic Plan**  
**2017 -2018**

(Revised draft developed during COAF 11/19/16 Annual Planning Retreat and approved by COAF on May 6, 2017 for recommendation to the State Bar Board of Trustees)

## ***Mission of the State Bar of California***

*(Source: Business & Professions Code Section 6002)*

Public protection is the highest priority for the State Bar in exercising its licensing, regulatory, and disciplinary functions. Whenever public protection is inconsistent with other interests sought to be promoted, public protection is paramount.

## ***Board of Trustees Confirms Commitment to Achieving Diversity*** *(Source: Board of Trustees Resolution July 20, 2011)*

The State Bar Board of Trustees also confirmed its commitment to achieving diversity through the following resolution:

**Whereas** the Board of Trustees is undergoing governance changes to enhance and ensure that public protection is the highest priority in the licensing, regulation and discipline of attorneys; and

**Whereas** the State Bar's mission, vision and goals have supported a justice system reflecting the diversity of the State and the elimination of bias in the profession;

**NOW, THEREFORE, IT IS RESOLVED**, that the Board of Trustees hereby reaffirms its commitment to and support of effective policies and activities to enhance access, fairness and diversity in the legal profession and the elimination of bias in the practice of law, consistent with limitations on the expenditure of mandatory dues.

## ***Creation of the Council on Access & Fairness***

The State Bar of California, Council on Access and Fairness (COAF) was created in 2006 as the State Bar diversity "think tank" to advise the State Bar Board of Trustees on strategies to enhance diversity opportunities and advancement in the legal profession.

"*Opportunities*" encompass leadership development and appointment to State Bar entities, as well as initiatives to educate students along the diversity pipeline about the law and career opportunities in the law.

"*Advancement*" encompasses recruitment, employment, retention and promotion in the legal profession.

COAF is composed of 25 attorney and public members appointed by the Board of Trustees. The membership represents a wide range of stakeholders engaged in programs and initiatives focusing on increasing diversity in the legal profession. Consistent with State Bar appointments policies and diversity criteria, COAF members are drawn from diverse constituencies, including but not limited to: race, ethnicity and

national origin; gender; age; LGBT; disabilities; large, medium, small and solo firms; government and public sector practice; public interest organizations, domestic corporate and private firm practice; Pre-K to 12, community colleges, universities and law schools; and the judiciary, as well as years of experience and geographical location.

The vision, mission, strategic goals, and charge of The State Bar of California Council on Access and Fairness are detailed, below.

## ***COAF Mission***

The Council on Access and Fairness provides leadership and guidance for the State Bar of California to ensure the legal profession reflects the rich diversity of the people of California in a way that is equally accessible and free of bias.

## ***COAF Vision***

COAF's vision is of a culture of inclusion within California legal and judicial communities that accommodates the needs of California's diverse population and ensures that the justice system delivers procedural fairness and substantive justice to the people of California; of a legal profession comprised of a diverse population of attorneys (including minorities, women, LGBT, seniors, and persons with disabilities); of the elimination of the educational achievement gap between diverse K through 12 students and other student populations; of equal access for diverse students to enhanced educational opportunities and information about the legal profession to cultivate and support their interest and involvement in the judicial system; and of a student population that understand its role and responsibilities as active participants in our democracy.

## ***COAF Strategic Goals***

- 1. Produce Institutional and Attitudinal Changes.** Produce institutional and attitudinal changes to create a culture of inclusion within the legal profession and judiciary that fosters diversity.
- 2. Communicate to Inspire and Engage Diversity.** Serve as a catalyst for change by framing and communicating ways to respond to diversity challenges to inspire and empower potential lawyers from diverse communities.
- 3. Partner, Collaborate and Coordinate to Achieve Diversity.** Partner, collaborate and coordinate with existing entities and individuals already working toward the goal of diversity within the justice system to achieve that goal.
- 4. Measure Change.** Create mechanisms to measure change in the diversity of the legal profession over time.

## **COAF Charge**

*(approved by the Board of Trustees, June 2006)*

The charge of the Council on Access & Fairness is to:

- A. Advise the Board on strategies to develop collaborative activities and efforts along the diversity pipeline to raise interest in the legal profession
- B. Serve as liaison between the State Bar and the diverse stakeholders and constituencies in the legal profession
- C. Identify and encourage individuals from diverse backgrounds to enter the legal profession.
- D. Encourage full and equal opportunity for individuals from diverse backgrounds to remain and advance in the legal profession.
- E. Identify and encourage attorneys from diverse backgrounds to become active participants in the administration and governance of the State Bar and make specific recommendations to the Board of Governors for increasing that participation.
- F. Promote and ensure collaborative efforts to generate and provide support and to increase the numbers of attorneys from diverse backgrounds entering and advancing in the legal profession.
- G. Study and report on the status of attorneys from diverse backgrounds in the legal profession and in State Bar activities.
- H. Produce on an ongoing basis programs and materials designed to maximize opportunities for individuals from diverse backgrounds in the legal profession and in the administration and governance of the State Bar's programs and activities.
- I. Comment, when requested by the Board of Governors or the Executive Director, on barriers directly related to access opportunities within the profession for attorneys from diverse backgrounds
- J. Screen applicants and make recommendations to the Board of Governors for recipients of the Annual Diversity Awards.
- K. Educate all attorneys of State Bar policy within the authority of this charge.

# Creating the COAF Long Range Strategic Plan

**Applying the “SMART” Criteria to Evaluate Ongoing/Proposed Initiatives:**

**S**trategic and **S**pecific, **M**easurable/**M**etrics, **A**chievable, **R**elevant/**R**ealistic and **T**imely (with specific **T**imeline)

Each initiative in the long range strategic plan has been evaluated for alignment with respect to the four strategic goals listed above.

Specific initiatives for achieving the goals also must meet these **SMART** criteria. The following **SMART** Template was used by each of the COAF committees to review the proposed initiatives.

**SMART Template**

Council on Access & Fairness Strategic Planning Template 2015
<b>Committee:</b>
<b>Chair:</b>
Proposed New or Continuing Initiative
Strategy Addressed:
<b>“SMART” Analysis:</b>
<b>S</b> trategic and <b>S</b> pecific
<b>M</b> easurable/ <b>M</b> etrics
<b>A</b> chievable (consider resources available)
<b>R</b> elevant/ <b>R</b> ealistic
<b>T</b> imely (and within specific <b>T</b> imeline)
<b>Recommendation for including in 2015 through 2018 Priorities</b>

## Proposed Council on Access & Fairness 2017-2018 Long Range Strategic Plan

**Strategic Goal 1: Produce Institutional and Attitudinal Change:**  
*Produce institutional and attitudinal changes to create a culture of inclusion within the legal profession and judiciary that fosters diversity.*

### ***Initiative A: Increase Diversity and Inclusion Within the California State Judiciary***

#### **Task 1: Conduct judicial appointments and mentoring workshops**

Hold judicial appointments workshops re: the application and appointments process. Hold mentoring workshops to provide one-on-one feedback for attorneys who have drafted their online judicial application. Conduct Appointments workshops for major local bar associations, including those in counties which need increased diversity in the applicant pool for consideration by the Governor. Distribute and collect evaluation forms from workshops. Continue to update judicial informational PowerPoint slides so data and content remain current.

#### **Task 2: Continue convening Judicial Diversity Summit every five years**

Convene statewide summit every 5 years; Review findings and recommendations from prior Summit to determine completion of "action plan". Record discussion/feedback for review and compilation by Planning Committee and COAF; Complete 2016 Judicial Summit Report and Recommendations. Develop Action Plan for next 5 years. Note: Conducted 2016 Summit...need to provide feedback, report, recommendations, and develop action plan for adoption and implementation over next 5 years

#### **Task 3: Educate and train local and statewide Judicial Screening committees re: formal/objective vetting process and judicial appointments provisions in Gov. Code 12011.5**

Present annual JNE EOB trainings; Create resource materials re diversity provisions in Gov. Code 12011.5; periodic meetings with Governor's appointment secretary re status of judicial recruitment and appointments. Presenting workshops as appropriate for local judicial screening committees re: criteria to be considered in evaluating applicants.

#### **Task 4: Assess judicial training models regarding implicit bias and impact on access and fairness in the judicial system**

Work with Judicial Council Staff and Advisory Committees to assess judicial training curriculum offered through CJER; make recommendations and provide support for additional training.

### ***Initiative B: Disseminate COAF Elimination of Bias Resources to Legal Employees to Encourage Adoption and Expansion of In House Diversity Programming***

#### **Task 1: Disseminate Legal Employer Focus Group Report and EOB Video "Walk the Walk"**

Conduct MCLE presentations highlighting State Bar EOB Video “Walk the Walk” and the feedback from the focus groups re: model in-house diversity programs; distribute materials to local/minority/ specialty bars, in house counsel, law schools etc. -- statewide and nationally).

**Task 2: Who is on your team? Hiring and Retention in a corporate setting**

Convene meetings with teams of in-house counsel for dialogue and feedback on how to leverage influence to increase diversity and inclusion among hired outside law firms and among in-house counsel

***Initiative C: Compile and Distribute Demographic Information from California Law Schools to Educate and Inform Potential Law School Applicants***

**Task: Compile and post demographic, academic support, bar passage and employment data from California law schools for student reference re: law school applications**

Compile existing demographic, academic support, bar passage and employment data for all California Law Schools and post data on California LAW Inc. website, so easily accessible to prospective law students as they evaluate law schools and decide on submission of law school applications

***Initiative D: Collaborate with and Support Initiatives to Increase Bar Passage Rates Among Students from Diverse Backgrounds***

**Task 1. Monitor bar passage data for students from diverse backgrounds and support bar passage initiative on Psychological Interventions and Bar Foundation/MLER Pilot Program**

**Task 2. Compile and distribute information re: bar passage programs**

Survey bar passage programs addressing needs of students in the identified underrepresented groups, identify model programs and compile resources for reference by students .

***Initiative E: Monitor Ongoing Use of Implicit Bias/Stereotype Threat Curriculum Developed for High School Law Academies and 2+2+3 Pathway to Law Pipeline***

**Task: Develop and Train High School Law Academy and Community College Faculty and Students on Implicit Bias/Stereotype Threat Curriculum.**

Bar Foundation grant received to develop and present curriculum during professional development programming for high school and community college faculty. Training completed June 2016 and February 2017. COAF will track faculty use of training concepts.

**Strategic Goal 2: Communicate to Inspire and Engage Diversity:  
*Serve as a catalyst for change by framing and communicating ways to respond to diversity challenges and to inspire and empower potential lawyers from diverse communities***

***Initiative A: Update and Present Master “Road Show” PowerPoint Slides Providing Status of Diversity along the Diversity Pipeline***

**Task: Slide Show Updates including data revisions/additions, formatting and design**

Review and update on an ongoing basis, slide show content, format and design; Configure formatting and presentation of slides as needed for COAF outreach presentations and as requested by various stakeholder entities.

***Initiative B: Engage in Stakeholder Outreach, Dialogue and Communication re: Key Diversity Issues and Initiatives***

**Task 1: Convene COAF Annual Stakeholder Forum**

Select annual theme; develop and produce MCLE programming; conduct outreach and convene forum.

**Task 2: Convene stakeholders periodically, as needed, for ongoing communication, dialogue and collaboration on key issues and initiatives**

Ongoing identification of key issues and trends for ongoing communication and dialogue; convene quarterly stakeholder Diversity Dialogues via teleconference among local, regional, statewide and national participants.

**Task 3: Develop and disseminate COAF e-Newsletter**

Convene Editorial Board, identify themes for quarterly issues; create and disseminate newsletter

**Task 4: Conduct Outreach to Promote COAF Initiatives and Programs**

Create branding for COAF; incorporate use of social media to communicate with stakeholders; post resources on State Bar website; create/enhance resource site for students; cultivate network and partnerships with law-related groups focusing on diversity pipeline issues and programs; develop and distribute COAF resources; provide representatives at statewide conventions/ meetings to discuss diversity pipeline programs and issues; and enhance State Bar partnerships with local schools, community colleges, universities and law schools

**Task 5. Conduct education and outreach to encourage applications from diverse attorneys for appointment to State Bar and other entities**

Identify key entities for focused recruitment and do outreach and recruitment (Create outreach plans and present workshops to encourage applications from diverse attorneys for State Bar and other entities; identify key entities for added recruitment and outreach;

***Initiative C: Develop and Present Elimination of Bias Programs and Articles***

**Task 1: Presentation of MCLE Programs at various forums during the year**

Develop and present EOB MCLE programming during the year; seek sponsorships for programming; respond to requests from stakeholder entities for COAF presentations.

**Task 2: Write/Submit Self Study MCLE articles addressing the elimination of bias**

Write and submit articles to California Bar e-journal and other legal periodicals; circulate draft articles to local and minority bar associations and other entities for additional publication

**Strategic Goal 3: Partner, collaborate and coordinate to achieve diversity with existing entities and individuals already working toward the goal of diversity**

***within the justice system to achieve that goal***

***Initiative A. Support California Partnership Law Academies***

**Task 1: Develop and Implement a “Calling All Lawyers” Campaign to promote California Partnership High School Law Academies**

Coordinate with the Law Academy Advisory Boards to conduct outreach promoting the law academies and encouraging attorneys, judges, law students, local and minority bar associations, and local business/ community representatives, elected officials, etc. to volunteer with the programs and to support the academies with funding and other resources

**Task 2: Hold high school law academy essay contest among the CPA Law Academies to promote law-related concepts and enhance student writing skills**

Select annual theme with input from law academy teaching teams; coordinate with teaching teams to provide time for teachers to incorporate topic into curriculum/lesson plans and to select essays to submit to COAF for review.

**Task 3: Develop and present “Know Your Rights” programs to California High School Partnership Academies**

Identify and partner with national and local minority bar associations presenting “Know Your Rights” programs to high school students to advise students re: proper responses/interaction when encountering law enforcement officials; expand programming to California Partnership Academies.

***Initiative B: Promote and Support Community College 2+2+3 Pathway to Law School Initiative***

**Task: Promote and Provide Support for Community College Pathway to Law Program through partnership with CaliforniaLAW, Inc.**

Coordinate State Bar/COAF partnership through California LAW inc. Help to build California LAW Inc. to assume ongoing leadership and administrative role for pathway program. Assist with promoting the 2+2+3 program nationally, statewide and locally; help to recruit members of the legal profession and judiciary to provide support and to volunteer for the programs as Advisory Board members, mentors, internship sites, classroom speakers, field trip chaperones, etc.; help to promote Pathways program among all California undergraduate and law schools for potential applications by future Community College Pathway Scholars ; collect and distribute resource materials; present forums at COAF and State Bar meetings and other venues; review annual reports re: program performance and provide feedback to California LAW re: continued program operations during and after the initial 10 year pilot phase of the program; and propose revisions to 2+2+3 MOU as needed so provisions align with ongoing partnership with State Bar/COAF.

***Initiative C: Develop Education Pipeline from Law School to Practice Through “Graduate Legal Assistant” Program***

**Task: Replicate DFEH program to place “Graduate Legal Assistants” in various state agencies**

Encourage law graduates from diverse backgrounds to take Civil Service exam for “Graduate Legal Assistant” (GLA) level; promote program among state agencies to create GLA positions and to use the

civil service “Graduate Legal Assistant” eligibility list to hire law graduates as interns and eventually to hire from this list for open attorney positions; track student and agency participation.

***Initiative D: Partner with Bar Associations and Other Entities to Create and Expand Mentoring Programs for New Lawyers***

Note: BOT’s referred creation of pilot Mentoring Program to COAF, which formed a separate Mentoring Working Group to follow up on BOT Mentoring Task Force recommendations. Working Group provides status reports to COAF. COAF will support the work of the Mentoring Working Group creating a pilot mentoring program as assigned by the BOT’s.

**Task: Support development of Pilot Mentoring Program by Mentoring Working Group**

COAF conducted survey of local and minority bar associations and other entities re: existing mentoring programs; reviewed information and identified model programs; shared feedback with State Bar and other entities as follow up to BOT Mentoring Task Force recommendations and possible creation of pilot mentoring program for new lawyers. COAF now partnering with the Mentoring Working Group to create a pilot mentoring program.

**Strategic Goal 4: Measure Change**

***Create programming and mechanisms to create and measure change in the diversity of the legal profession over time***

**Task 1: Hold COAF Diversity Metrics Session**

Conducted facilitated diversity metrics session as part of initial Annual Planning session; created initial long range strategic plan; created templates and structure for ongoing annual planning sessions and updating of Long Range Plan.

**Task 2: Create Long Range Strategic Plan which includes meaningful evaluation and measurement of initiatives to achieve strategic goals and update each year**

Identify annual accomplishments; review and adjust ongoing initiatives as needed; incorporate additional new initiatives for rolling three year plan.

**Task 3: Hold diversity Metrics Session with Diversity Stakeholders and Constituents**

Convene stakeholders/ constituents periodically to dialogue re: key diversity issues, COAF strategic plan, diversity metrics/outcomes; Create report/ recommendations from dialogue, including consistent measurement of outcomes. Introduce Windtunneling Process for 2017-2018 planning. See [www.windtunneling.com](http://www.windtunneling.com)

**Task 4: Raise additional voluntary funds to support access & fairness programs and initiatives**

Appoint and convene Fundraising Committee each year to raise funds to supplement approved annual budget for additional diversity programs and events. Develop and implement annual fundraising goals/plan.