

The State Bar of California

Five-Year Strategic Plan

2012 – 2016

“Protection of the public shall be the highest priority for the State Bar of California and the board of trustees in exercising their licensing, regulatory, and disciplinary functions. Whenever the protection of the public is inconsistent with other interests sought to be promoted, the protection of the public shall be paramount.”

California Business & Professions Code § 6001.2

February 5, 2012

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I. Introduction

In keeping with the legislative mandate that public protection shall be its first priority, the State Bar showed renewed energy and focus in 2011. In the latter half of the year, the State Bar's new leadership sharpened its focus, totally committing itself to satisfying its public protection mandate, especially in the area of attorney discipline system.

To implement this commitment, a new senior management team in the Office of Chief Trial Counsel reinvigorated the effort to address the backlog of discipline complaints - with tremendous success. The backlog of active investigations was reduced from over 1,500 to zero. The notice drafting backlog that existed as of July 2011 was eliminated and the backlog from cases arising after that date was reduced from 554 to 187. All this was accomplished while absorbing the increased caseload flowing in from the re-invigorated investigative units.

Improvements in public protection and effective resource management have been evident in other areas of the State Bar as well. For example in January 2012, the Bureau of State Audits reported that – for the first time in years – the State Bar has no unresolved audit issues. All of the Bureau's recommendations have been fully implemented.

The State Bar also took steps to improve its transparency in 2011. In April, it published its Annual Discipline Report in a substantially revised format, providing a more comprehensive and detailed view of the discipline system than had ever been available in the past. And throughout the last half of the year, its newly formed Office of Budget, Performance Analysis, and Internal Audit provided the Board of Trustees with independent weekly reports on the State Bar's progress toward eliminating its backlog.

Finally, less tangible, though perhaps equally important, improvements have been noted in staff morale and in collaboration across department boundaries. An excellent example of cross collaboration is the working relationship that has developed between the Office of Chief Trial Counsel and the newly established department of Budget, Performance Analysis and Audit. This partnership has enabled increased information flow within the department as well as to the Board of Trustees.

But a great challenge remains. While these improvements are positive results of the State Bar's renewed commitment to its core mission of public protection, the State Bar also recognizes that these steps are only the beginning in what must be a continuing and sustained trajectory of improvement over the next five years, and beyond.

II. Past Issues and Strategy for the Future

The State Bar's principal goal is to continue to earn and maintain credibility in the eyes of its key stakeholders, most importantly the citizens of the State of California. Acknowledging this mission will open the way to a broader public policy debate on the substance of that regulation – that is, how to improve the protection of the public by “raising the bar” for the professional competence and the public service commitment of lawyers in California.

A. The Past: Some Lessons Learned

To devise an effective strategy, the State Bar needs to be candid about the improvements that must be made to fulfill its core mission of public protection. Based on criticisms that have been directed at the Bar in the past - some objectively warranted by the facts, others more subjective and based on perception - it has learned some specific lessons noted below that will help guide its path forward.

The Objective Record of Recent Events That Drew Criticism. Although public confidence in the State Bar as an effective regulatory agency has risen and fallen many times over the organization's nearly ninety year history, it takes guidance for the future from shortcomings - perceived and real - in the past. In keeping with this approach, it acknowledges a number of valid criticisms of State Bar operations in recent years.

- In 2008, State Bar staff discovered that a long-term trusted employee of the Bar had embezzelled hundreds of thousands of dollars from the State Bar's coffers. This employee was convicted and imprisoned. While the State Bar was able to recover the entire amount of the loss through restitution and insurance proceeds, this episode was a wake-up call that internal systems and controls needed reassessment.
- In 2009, the Bureau of State Audits issued a report on the State Bar's discipline system that was highly critical of the Office of Chief Trial Counsel, specifically its cost tracking system and its inability to demonstrate its efficiency. It also concluded that the annual information provided by Trial Counsel regarding case processing time and backlog of disciplinary cases was misleading.
- In 2010, concerns regarding the State Bar's performance prompted the Legislature to establish the Governance in the Public Interest Task Force to consider whether changes were needed in the agency's governance model.
- In the fall of 2010, the Supreme Court began receiving record numbers of so-called “Walker petitions,” contesting the State Bar's decisions to close cases without disciplinary action. The spike in Walker petitions generated an internal review of procedures for closing cases. The internal review led

to the conclusion that significant changes in the initial review process were necessary.

- In early 2011, the Legislature considered the majority and minority reports of the Governance Task Force. While adopting neither set of recommendations in their entirety, the Legislature did conclude that the State Bar's existing governance model was inadequate. The resulting legislation brought about significant changes in the structure of the State Bar.

Taken together, these examples illustrate how weaknesses in internal operations and systems can result in periodic breakdowns, which, over time, erode the confidence that key outside stakeholders have in the Bar. They serve as a wakeup call to the Trustees and Staff of the Bar that the attitudes of its members and its employees, the systems on which they rely to fulfill their duty to the public, and manner in which they allocate resources, require a thorough review and a new way of thinking. The 5 year plan discussed below embodies the result of the State Bar recognizing the past shortcomings and recommitment to the future success in carrying out its mission.

Signs of Improvement. A number of significant improvements were achieved in 2011. As discussed previously - the elimination of the investigative backlog and major reduction in notice pending backlog; the enhanced transparency in the annual Discipline Report; and the implementation of all State Auditor recommendations - represent a sharp turnaround in the attitude and operations of the Bar. The creation of the Discipline Metrics Task Force is also a positive step toward enhanced performance measurement of the discipline system.

These are promising developments, to be sure. But as the history above shows, the stakeholders' concerns have developed over a period of years, not months. Earning and maintaining the confidence of the Legislature, the Supreme Court, and the public is now an everyday priority at the Bar.

Therein lies the next great challenge: the State Bar must sustain its trajectory of improvement over the long run. In the past, the State Bar has not always met this challenge. Too often, it has allowed itself to fall back into old and comfortable ways of doing business. Until its new direction has become a self-sustaining long-term process, the State Bar's immediate strategic objective of restoring and maintaining the organization's credibility in the eyes of key stakeholders will remain unsolved and, going forward, must be addressed with the same energy and vigilance that fostered the recent positive changes noted above. The State Bar is committed to meeting this challenge. In particular there are three areas of focus that are priorities in effecting the positive and necessary change described above. The State Bar draws the following lessons:

- **Perceived Insularity:** Units of the State Bar perform complex and specialized functions. The intricacies of the attorney discipline system, the logistical demands of holding the bar exam, even the challenges of maintaining records pertaining to every past, current and - often - future members of the State Bar, are not necessarily well understood by outside

stakeholders or the general public. Unfortunately, this has given rise to an internal culture of insularity - a belief that those outside of the organization, or even outside of particular departments within the organization, have no business asking questions about how the State Bar carries out its mission.

- **Perceived Complacency:** The expectation of scrutiny from outside the agency - that is, the expectation of accountability - is one of the principal drivers of organizational improvement. Without outside accountability, it is all too easy to tell ourselves that all is well. Therefore, insularity, which isolates an organization from scrutiny, naturally breeds complacency.
- **Diminished Expectations of Ourselves:** Internal expectations for how well the State Bar can perform over the long run have been eroded over the years, with lasting consequences for motivation and morale.

B. A New Culture for the State Bar

To effect positive and lasting change and put the organization onto a permanent positive trajectory, the State Bar must instill a new culture, founded on three principles:

- **One mission, many tools.** The mission of the State Bar has never been clearer. It exists to protect the public by devising, supporting, and enforcing rigorous standards of competence and ethical behavior in the legal profession. While the State Bar carries out many different functions, each of its services must ultimately contribute to the execution of the core public protection mission.
- **Transparency is paramount.** Outside scrutiny may be uncomfortable at times. In fact, that is a great part of its value; this kind of discomfort, or the wish to avoid it, can be a powerful motivator for continued improvement. The State Bar will view transparency as routine and necessary to carry out its public protection mission.
- **We must get better at something every year.** Like transparency, the State Bar will regard continuous improvement as the rule, not the exception. There is always room for improvement, so the State Bar will never stop looking for ways to do its job better, faster, and at lower cost.

C. Effecting Positive and Lasting Change

The State Bar's strategy for lasting cultural change is to systematically create tangible "facts on the ground" with these strategic objectives:

- **Changing existing routines and habits.** In any organization, much of the day-to-day work is a matter of simply doing things as they have always been done. But existing routines and habits are deeply tied to the existing culture. If adhering to – or returning to – the comfortable ways of the past remains possible, it is likely to happen.
- **Impose new activities and routines consistent with the new culture.** It is not enough to break old habits. New, better habits must be established. The State Bar must actively create circumstances in which acting in accord with the new culture becomes the easiest available option.
- **Sustain new routines and activities long enough for the new culture to become habit.** Organizational culture is the product of years of history; it will not change overnight. Effecting lasting change is a long-term commitment, requiring both patience and persistence.

How the State Bar will accomplish these objectives is a matter of implementation, discussed in the next section.

III. Implementation

The State Bar's strategy for the next five years is to re-tool the organization for sustainable, lasting improvement by re-making key aspects of its organizational culture. The essence of the State Bar's strategy for achieving this is to insist upon change throughout the organization. This section of the *Five-Year Strategic Plan* lays out the three large-scale initiatives the State Bar is undertaking to carry out this strategy.

- **Information Technology Initiative:** Under this initiative, the State Bar will retire and replace all four of its core software applications. This process is already underway. It will transform the attorney discipline system from a largely paper-driven process into a near-paperless operation. And it will improve and expand access to State Bar services and information by delivering a user-friendly, task-driven online e-portal.
- **Physical Facilities Initiative:** This initiative will transform the physical workspace occupied by the State Bar. Wherever possible, operations will be centralized in the State Bar's headquarters in San Francisco. The headquarters building itself will be reconfigured to accommodate the relocated functions, to provide modern open-plan workspace consistent with a silo-free culture, and to provide a more engaging environment for the public. In Los Angeles, the State Bar will procure workspace suitable to the reduced operational footprint, configured in accordance with the same design goals as in San Francisco, to achieve the same efficiency and increased productivity.

- **Operations Re-engineering Initiative:** Each of the major service areas of the State Bar will undergo a top-to-bottom process review and re-engineering effort. These efforts will focus on leveraging technology to achieve efficiencies and service improvements; identifying linkages (and possibly duplications) across departments and service areas; and eliminating processes which are redundant or otherwise unnecessary.

These three initiatives support one another and when combined, will reshape the State Bar for the future.

A. Information Technology Initiative

The Information Technology Initiative is a set of projects which will accomplish the following objectives:

1. Retire & Replace Outdated Software

Though the State Bar relies upon dozens of application programs of varying scale and complexity, the core business of the Bar is built around four software applications:

- Prosecutorial Case Management System
- Court Case Management System
- Admissions System
- Member Records & Billing System

All four of these are custom systems developed by the State Bar's in-house programming team over a period of many years before the Internet world became prevalent. The existing systems support fundamentally paper-driven business processes.

Several tactical benefits will be realized through these system replacements including:

- Efficiencies and cost savings, releasing financial and human resources to higher-value, higher-priority tasks and services.
- Improvements in service quality and turn-around times.
- Improvements in work environment for staff.
- A more mainstream computing platform, enabling the State Bar to benefit from future technological improvements.

Strategic benefits include:

- Replacement of key systems makes continuing habitual "business-as-usual" processes simply impossible.

- Preparation for selection and implementation of new systems requires thorough analysis of existing processes and procedures – and creates the context for re-thinking them.
- New systems are configured to support re-engineered business practices.
- New systems will be selected and implemented to produce actionable management information and performance data that is fully transparent.

2. Near-Paperless Discipline System

Today, the attorney discipline system is fundamentally a paper-driven process. We are presently moving forward with plans to implement a case management system in the Office of Chief Trial Counsel and the State Bar Court as the first steps toward a near-paperless model that will include electronic filing capability.

Several tactical benefits will be realized through a near paperless discipline system including:

- Efficiency and speed improvements. Multiple investigators and/or attorneys will be able to access case file materials simultaneously. Delays arising from the need to move physical files between San Francisco and Los Angeles, or within offices, will be eliminated.
- Ease of filing papers in State Bar Court – for both internal and external parties – will be increased. Access by authorized parties to filed documents will be enhanced.
- Bar-wide document management infrastructure creates opportunities for data exchange between departments and other business process improvements.

Strategic benefits of replacing existing paper-based processes include an analysis and re-thinking of these processes.

3. Streamlined E-Portal

To the greatest extent possible, the State Bar will make all of its information and services online, and in a format that is readily accessible.

Tactical benefits will be realized through a streamlined E-Portal including:

- Filings, submissions, and requests submitted via the e-portal can be handled electronically.
- Electronic forms can be validated prior to actual submission.
- Easy availability of self-service information via the e-portal will reduce telephone requests for the same information.

Strategic benefits of an E-Portal include a broader availability of State Bar data, which reinforces a culture of transparency (and customer focus).

B. Physical Facilities Initiative

At present, the physical arrangement of the State Bar neither encourages collaboration within the organization nor presents a welcoming environment to the public. To change this, the State Bar is undertaking three projects.

1. Staff and Functional Consolidation

The State Bar is headquartered in San Francisco, but approximately one half of its staff is located in Los Angeles. To some extent, this is an inevitable consequence of the geographical distribution of the work to be done. The largest part of the attorney discipline system will, in all likelihood, remain in Los Angeles for the foreseeable future. However, there are functions which are divided between the State Bar's locations that could be consolidated into our San Francisco location.

Within two to three years, the State Bar will consolidate all of its operations, to the maximum extent feasible, in its San Francisco headquarters at 180 Howard Street.

Several tactical benefits will be realized through a staff and functional consolidation including:

- Maximizes the use of the State Bar's existing real property assets. Re-locating operations, where possible, to space which the State Bar already owns is economic common sense.
- Reduces the size of the State Bar's staffing footprint in southern California allows us to acquire or lease a smaller quantity of space upon the expiration of the Los Angeles lease at the end of 2013.

Several strategic benefits will be realized through a staff and functional consolidation including:

- Determining which operations can and cannot be relocated from Los Angeles to San Francisco, and planning their relocation, are additional opportunities to force re-thinking of the State Bar's traditional ways of doing business.
- Relocating operations in San Francisco will solidify and institutionalize new processes and better habits of thought and action.

2. Renovation and Reconfiguration of 180 Howard Street

Over the next three years, the State Bar will execute all of the deferred maintenance projects which have been identified for the 180 Howard building. Also over the next two to three years, it will build out and/or remodel sufficient office space to accommodate functions relocated from Los Angeles. As part of this process it will effect a complete remodel and re-configuration of its workspaces in line with current design principles and best practices.

Several tactical benefits will be realized the renovation and reconfiguration of 180 Howard Street including:

- Carrying out deferred maintenance projects will preserve and extend the life of the State Bar's most valuable physical asset.
- Repurposing currently vacant space to house staff and functions now occupying leased office space in Los Angeles will put the Bar's most significant asset to full use.

Several tactical benefits will be realized through the renovation and reconfiguration of 180 Howard Street including the usage of modern design principles and best practices to create a workplace that communicates internal transparency, collaboration, and openness to the members of the general public.

3. Los Angeles Space and Planning for its Use

Over the next year, the State Bar will determine whether it should continue leasing office space in southern California or purchase a facility. In either case, the State Bar will acquire a new location or extend its present lease, and will effect changes to the physical workspace along the same lines as in San Francisco.

Several tactical benefits will be realized through the Los Angeles space and planning for its use including:

- The State Bar should be able to house its LA operations in considerably less space than it now occupies.
- If the State Bar pursues the ownership option, it will obtain long-term stability.

Several strategic benefits will be realized through the Los Angeles facility and space planning including the re-configuration of the State Bar's office space in southern California to deliver benefits similar to those obtained by remodeling and re-configuring workspace in San Francisco.

C. Operations Re-engineering Initiative

To maximize the benefits of the changes effected by the IT and Facilities initiatives, the State Bar is concurrently undertaking a systematic program of operational reviews and process re-engineering in each of its principal service areas. These efforts are designed as interdisciplinary collaborations between the following:

- Executives within each service area, as leaders with bottom-line responsibility for organizational performance;
- Manager and staff within each service area, as the source of front-line, hands-on knowledge of day to day operations;
- The Office of Budget, Performance Analysis, and Internal Audit, to provide analytical support;
- The Office of Information Technology, to provide systems and technology support.

The objective of these efforts is not merely the identification of opportunities to increase performance at the margin; it is also to reconsider the fundamental design of the State Bar's programs and processes.

One example of this fundamental re-thinking (which is already being implemented) is the internal reorganization of the Office of Chief Trial Counsel on a "vertical prosecution" model. Under this model, the same attorney handles a case throughout the investigation, notice drafting, and trial stages. This eliminates inefficient "hand-offs" of cases from one attorney to the next as the case progresses, and it removes the temptation to pass incomplete work "down the pipeline."

The objective of this initiative is to bring the same level of thinking and analysis to all of the operations of the State Bar. By the end of 2012, "reorganization" plans will be developed for each of the State Bar's principal service areas, with implementation timelines of up to three years. These plans will lay out how the State Bar can best structure each of its operations, particularly in light of opportunities afforded by the Information Technology Initiative and the Physical Facilities Initiative.

Several tactical benefits will be realized through the operations re-engineering initiative including:

- New technology and re-designed facilities to yield actual benefits, the State Bar must consciously adapt its ways of doing business to leverage the capabilities that these investments provide.

- Reengineering multiple service areas concurrently may identify opportunities for improving cross-functional cooperation, streamlining business processes that cross organizational boundaries, and eliminating redundant efforts.

Several strategic benefits will be realized through the operations re-engineering initiative including:

- Supplying the crucial change management framework.
- Bringing first-hand experience with the re-examination of practices and procedures to executives, managers, and staff in all of the State Bar's principal service areas.

IV. Financial Implications

Many of the elements of the State Bar's strategic plan have little or no direct budget impact. Exploring policy options under the auspices of the Trustees' Policy Agenda, for example, may have enormous long-run impact on the regulation of the profession, but in the exploratory stages there is little direct cost. However, two of the initiatives entail substantial financial investments: the Information Technology Initiative and the Physical Facilities Initiative. This section of the *Five-Year Strategic Plan* lays out the anticipated costs and funding sources for these initiatives.

A. Information Technology Initiative

The first component of the Information Technology Initiative is the retirement and replacement of four key production systems: the Prosecutorial Case Management System (CMS), the Court CMS, the Admissions system, and the Member Records & Billing system. Over and above the costs of purchasing and implementing these systems, this project will require systems integration software and support to ensure that the necessary communications links between these four systems is preserved. The combined direct cost (i.e. excluding the costs of regular State Bar staff who may participate in the project) is estimated at \$7.3 million.

To support a near-paperless discipline system, the State Bar will need to acquire and implement a Bar-wide content and document management system, estimated at \$0.9 million. Finally, work will be needed to integrate the web-based public user interfaces associated with the new line-of-business systems into the State Bar's existing online presence, to create a one-stop e-portal for all State Bar information and services. This is estimated at \$0.4 million.

These costs – particularly the costs of replacing the four line-of-business applications – are estimates and are therefore subject to variation. A contingency reserve of \$1 million is therefore included in the funding requirements for the initiative. The combined cost of the entire initiative is estimated at \$9.6 million.

The principal funding source for these investments will be the proceeds of the \$10 dedicated surcharge on each active member's annual dues. It will finance approximately two-thirds of the total \$9.6 million price tag. An additional \$1.2 million is available from the State Bar's

IT Initiative Funding Requirements (\$ millions)	
Prosecutorial CMS	\$ 1.9
Court CMS	1.2
Admissions	2.0
Records & Billing	1.9
Systems Integration	0.3
Sub-Total	7.3
Content & Document Management System	0.9
Online E-Portal	0.4
Contingency	1.0
Total Funding Requirement	\$ 9.6

Discipline Fund. This fund accounts for the unexpended proceeds of the special assessment for discipline that was imposed during the period in which the State Bar lost the authority to collect member dues. Since the restoration of the State Bar's dues authority, the balance of the Discipline Fund has been earmarked as a funding source for the replacement of the Prosecutorial Case Management System. The Admissions Fund is expected to contribute \$1 million from its existing uncommitted fund balance. The remainder, estimated at \$0.9 million, will be supplied by the State Bar's General Fund.

B. Physical Facilities Initiatives

With respect to the State Bar's headquarters building in San Francisco, the Physical Facilities Initiative encompasses a number of deferred maintenance projects as well as the renovation and reconfiguration project. The maintenance projects, collectively, have an estimated cost of \$5.1 million, while the reconfiguration project is estimated at \$6.6 million.

The cost of relocating all feasible services from Los Angeles to San Francisco is difficult to forecast, but, based on figures provided by the State Bar's real property consultant, an estimate of \$ 1 million is included in the funding requirements.

The cost of purchasing a building and readying it for occupancy can only be estimated based on market conditions that currently exist. The figure of \$25 million for a hypothetical 100,000 square foot facility has been selected as a starting point.

Fully funding the Physical Facilities Initiative will require an estimated \$37.7 million. The State Bar will look to four sources of funding to meet this requirement.

The 180 Howard Street Fund has an available balance of \$7.6 million, including General Fund dollars earmarked by the Board of Trustees for deferred maintenance projects, as well as accumulated rental revenue. In addition, over the five-year planning period, the building is expected to generate another \$4 million in rent.

IT Initiative Funding Sources	
(\$ millions)	
IT Special Assessment	\$ 6.5
Discipline Fund	1.2
Admissions Fund	1.0
General Fund	0.9
Total Funding	\$ 9.6

Physical Facilities Initiative	
(\$ millions)	
Masonry & Waterproofing	\$ 1.4
Roof Replacement	0.3
HVAC Overhaul	0.3
Boiler & Cooling Towers	0.3
Elevators	1.3
Emergency Generator	0.6
Other Maintenance	0.4
Contingency	<u>0.5</u>
Sub-Total	5.1
Reconfigure 180 Howard	6.6
Relocation Costs	1.0
LA Facility	25.0
Total Funding Requirement	\$ 37.7

The \$10 surcharge on each member's annual dues dedicated to facilities in southern California is expected to yield about \$10.1 million by the time it sunsets at the end of 2013.

It is expected that the remaining \$16.0 million will be financed with long-term debt. Depending upon the terms and interest rate available, the annual cost of servicing such a loan would be about \$1.3 million, which is less than the State Bar's current lease payments.

Another potential source of funding for this initiative would be proceeds from the sale of the parking lot which the State Bar owns in Los Angeles (adjacent to the building in which it leases office space). Estimates of the value of this property vary considerably, but if it is sold at an advantageous time, it appears likely that the proceeds would enable the State Bar to extinguish most or all of the remaining loan balance and thus own its Los Angeles facility outright.

Physical Facilities Funding Sources (\$ millions)	
Existing 180 Howard Funding	\$ 7.6
180 Howard Rent	4.0
Building Special Assessment	10.1
Long Term Debt	16.0
Total Funding	\$ 37.7

Existing 180 Howard Funding	\$ 7.6
180 Howard Rent	4.0
Building Special Assessment	10.1
Long Term Debt	16.0

Total Funding	\$ 37.7
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V. Looking Ahead: A Policy Agenda

In the long run, the goal of the cultural shift to which we are committed is to clear a path toward a new, substantive dialogue about the future of the regulation of the legal profession. The State Bar should be taking the lead in exploring ways to strengthen the regulation of the profession and raising standards for the practice of law – that is, “raising the bar” for California lawyers.

In the immediate future, the State Bar’s strategy will be to lay the groundwork for this dialogue at the Board of Trustees’ level. At the State Bar’s January 2012 planning meeting, the Trustees identified a number of specific policy areas to be explored, both independently by the State Bar and in collaboration with stakeholders.

At its Annual Planning Meeting, held January 6th and 7th, 2012, the Trustees of the State Bar engaged in discussions of a variety of policy options -- within each of the State Bar’s principal service areas – for enhancing public protection by “raising the bar” for the practice of law. Out of these discussions emerged a number of policy initiatives for further exploration or, where feasible, immediate action. These initiatives include the following:

- Strengthening the regulation of California-accredited and registered, unaccredited law schools.
- More closely integrating the enforcement work of the Office of Chief Trial Counsel with that of law enforcement agencies.
- Expanding outreach efforts by the Office of Chief Trial Counsel to the individual courts in order to increase the likelihood of detection and prosecution of attorney misconduct.
- Strengthening the requirements for mandatory continuing legal education (MCLE) – possibly increasing the total number of hours required; raising the number of ethics-related hours required; and/or adding requirements for practice management education.
- Strengthening the requirements for certifying MCLE providers and for auditing their programs on an ongoing basis.
- Establishing a mandatory education program for all new lawyers, specifically geared to the needs of those just entering the profession.
- Working to enhance the effectiveness of *pro bono* service
- Working to enhance the effectiveness of the legal services delivery system, including the mechanism for the allocation of funding.
- Working to enhance the effectiveness senior legal services.
- Reviewing the status and future of the Lawyer Assistance Program (LAP).

The Trustees have asked staff to prepare blueprints and action plans for the exploration of these potential policy initiatives.