



EXECUTIVE DIRECTOR EVALUATION 2014

1. Competence Criteria: Champions the State Bar's Mission, Achieves Goal Priorities and Positions the State Bar Effectively with Constituents

- a. GOAL 1. PUBLIC PROTECTION – The public is protected and served by a legal profession that meets the highest standards of competency and ethics.
- b. GOAL 2. ADMINISTRATION OF JUSTICE – The State Bar is recognized as a leader in improving the administration of justice and ensuring the rule of law in society.
- c. GOAL 3. MEMBER EDUCATION – The State Bar assists members to meet their professional development needs.
- d. GOAL 4. STATE BAR ADMINISTRATION – The State Bar obtains and uses resources effectively and efficiently to support its operations cost effectively.

Measures/Performance Indicators:

- a. Board assessment.
- b. Input of staff and constituencies.
- c. Measured progress on redefined strategic plan priorities. Examples include:
 - i. Information technology initiative (modernizing information technology)
 - ii. Physical facilities initiative (preserving and improving physical facilities)
 - iii. Operations re-engineering initiative (streaming programs and processes)
 - iv. Establishing new standards for education and practical skills training for new lawyers
 - v. Strengthening the legal services delivery system
 - vi. Developing external relations.

[See 2012-2016 Strategic Plan and February 2014 report on progress]

Extraordinary
Needs Improvement

Exceeds Expectations
Unsatisfactory

Successfully Meets Expectations

COMMENTS: (please provide comments especially for a “Needs Improvement” or lower rating). Please keep answers less than 100 words:

2. Competence Criteria: Manages Effectively and Strengthens the Executive Management of the State Bar.

- a. Effectively directs and oversees the operation of the State bar, its programs and constituent parts.
- b. Encourages effective interaction among management and among divisions of the State Bar.
- c. Articulates expectations for staff performance, conducts effective evaluations, and maintains measurable criteria.
- d. Effectively manages relations with the union. Seeks greater flexibility in management’s ability to enhance productivity and quality performance.
- e. Executes management of the organization from the San Francisco headquarters, with visits to Los Angeles as needed.
- f. Oversees effective responses to audits of the State Bar.
- g. Effectively serves as the spokesperson for the State Bar when called upon to do so and appropriately delegates responsibility to respond to the media, the Legislature, the membership and other constituencies.

Measures/Performance Indicators:

- a. Board assessment.
- b. Input of staff and constituencies.
- c. Progress on organizational change to enhance State bar’s delivery of services, of information internally and to key stakeholders, and of the State Bar’s work product.

- d. Time spent in San Francisco Office and Los Angeles Office on State Bar matters.
- e. Status of relations with the Union and progress on removing impediments to effective management.
- f. Effectuation of Governance Task Force assignment with a positive outcome in the Legislative, Executive and Judicial branch.
- g. Progress on re-establishing sound governance standards for Board and staff, including a review of the current Board Policy Book.
- h. Progress on State Bar media outreach including enhanced use of existing and emerging media to better communicate with the public and the legal profession.

Extraordinary

Exceeds Expectations

Successfully Meets Expectations

Needs Improvement

Unsatisfactory

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3. Competence Criteria: Sustains and Enhances Board and Constituency Relations

- a. Collaborates effectively with others to achieve optimal results.
- b. Provides the Board of Governors and the State Bar’s constituencies with necessary and appropriate information and assistance related to the State Bar’s operation, including responding to requests for information.
- c. Interacts with the Supreme Court, particularly appropriate Supreme Court staff, to ensure that the court’s instructions and intentions are carried out.
- d. Effectively orients and educates new Board members. Keeps the Board and its officers informed on matters of significance which may affect the State Bar.
- e. Provides effective liaison and staff support to the Board Committees and State Bar sub-entities. Assures that Board and sub-entity actions are informed effectively communicated for appropriate action.

Measures/Performance Indicators:

- a. Board assessment.
- b. Input of staff and constituencies.
- c. Orientation of new board members and ongoing orientation of existing members.
- d. Attendance and performance at board meetings
- e. Number and nature of communications with the Board about operational and other issues of interest to the Board and with constituent groups, Judicial, Legislative and Executive branch representatives and others.
- f. Progress on re-establishing sound governance standards for board and staff.

Extraordinary

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Needs Improvement

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4. Competence Criteria: Provides Strong Fiscal Management

- a. Provides the Board with information necessary to its budget planning.
- b. Assures staff adherence to budget limitations by all parts of the State Bar’s operations.
- c. Uses financial resources effectively.

Measures/Performance Indicators:

- a. Board assessment.
- b. Input of staff and constituencies.
- c. Budget is adopted on time and is balanced with no overruns in the short term.
- d. Longer term fiscal stability is enhanced through multi-year fee bill.
- e. Cost savings and spending initiatives are undertaken effectively.

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5. Competence Criteria: Leadership and Preparation of the Organization for the Future

- a. Effectively coordinates the Board’s planning process.
- b. Formulates and implements, consistent with Board adopted institutional policy, long-term and short-term goals and plans.
- c. Develops and implements standards and systems to evaluate performance of the State Bar against Board adopted goals.

Measures/Performance Indicators:

- a. Board assessment.
- b. Input of staff and constituencies.
- c. Keeps current on trends in governmental, non-profit corporation, bar association, public protection, professional regulation and other areas relevant to position.
- d. State Bar’s institutional strategic plan is reviewed and updated.
- e. Progress on State Bar strategic initiatives.
- f. Sets forth in writing to the Board his strategic initiatives for the year so that his success or lack of success on the initiatives can be assessed at year-end.

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**6. Competence Criteria: Performance on Strategic Initiatives and Specialized Goals
Adopted for the 2013-014 Evaluation Period.**

- a. Successfully transition to the new Los Angeles State Bar facility on Figueroa Street.
- b. Successfully deploy case management and document management systems in the Office of the Chief Trial Counsel.
- c. Effectuate the external relations program in support of the State Bar’s mission.
- d. Expand and develop the State Bar’s institutional communications activities, including media relations, communications to attorneys the public and other constituencies.
- e. Enhance the management skills of the State Bar’s management staff.
- f. Assure appropriate key staff succession planning is taking place within each State Bar operational unit.
- g. Continue to enhance confidence in the State Bar from the Legislature, the Supreme Court and other constituencies.
- h. Continue to advance the State Bar’s public protection mission by facilitating internal communications, to the extent possible by the Executive Director, between the Office of the Chief Trial Counsel and the State Bar Court.

Measures/Performance Indicators:

- a. Board assessment.
- b. Input of staff and constituencies.
- c. Input of Executive Director

Extraordinary

Exceeds Expectations

Successfully Meets Expectations

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7. OVERALL RATING:

Extraordinary

Exceeds Expectations

Successfully Meets Expectations

Needs Improvement

Unsatisfactory

OVERALL COMMENTS. (please provide comments especially for a “Needs Improvement” or lower rating). Please keep your answers less than 100 words.

Evaluator's Name: