

# **AGENDA ITEM**

## **III C MARCH, 2017**

**DATE:** March 3, 2017

**TO:** Members, Regulation and Discipline Committee  
Members, Board of Trustees

**FROM:** Stewart Hsieh, Chair, Lawyer Assistance Oversight Committee

**SUBJECT:** Lawyer Assistance Program Strategic Plan

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### **EXECUTIVE SUMMARY**

During 2016, as part of the implementation of the California State Bar's Workforce Planning recommendations submitted to the Legislature by the National Center for State Courts, the Oversight Committee of the Lawyer Assistance Program engaged in a strategic planning process. The final product of that work, a three-year strategic plan to guide the Lawyer Assistance Program, is attached to this report and is presented to the members of the Board of Trustees for their review and acceptance.

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### **BACKGROUND**

In December, 2015, the California State Bar entered into a contract with the National Center for State Courts (NCSC) to conduct a workforce planning analysis. In the report on workforce planning submitted to the Legislature in May, 2016, the NCSC made 15 recommendations related to the Lawyer Assistance Program (LAP).

Most of the recommendations were implemented either fully or in part by the end of 2016. One recommendation, in particular, the creation and adoption of a new strategic plan, was not expected to be formally adopted by the LAP Oversight Committee until March 4, 2017. This report provides background on the strategic planning process and summarizes the contents of the plan which the Oversight Committee submits for the review and acceptance of the Board of Trustees.

### **DISCUSSION**

State Bar staff worked closely with members of the LAP Oversight Committee beginning in June to formulate a strategic plan. The planning process involved:

- Weekly conference calls with a subcommittee of the Oversight Committee to begin drafting the strategic plan;

- A public meeting of the full Oversight Committee to hear testimony from stakeholders. In addition to receiving testimony from respondents' counsel, members of the Other Bar, and treatment providers, the Bar invited nationally recognized experts to present findings related to substance abuse in the legal community and the efficacy of treatment models such as drug courts. Representatives of OCTC and the State Bar Court also attended to hear the presentations and provide input;
- Oversight Committee meetings in September, November and December 2016 to review strategic plan language and consider alternatives.

The strategic plan is established for a three-year period from March, 2017 to March, 2020. The plan is divided into two broad sections:

- Outreach and education focuses on disseminating information broadly to members of the legal community and their families and proactively identifying those members of the community that are most at risk for substance abuse and mental health issues by:
  - developing educational content about the risks of substance abuse and mental illness to attorneys and promoting healthy life-style choices;
  - ensuring the broadest possible dissemination of materials to the target audience including the families of attorneys;
  - raising awareness among these same audiences about the services available through the LAP and in the community.
- Program design and effective intervention focuses on specific components of the LAP especially in those areas related to the discipline system:
  - Establishing and sustaining collaborative relationships with representatives of the Office of the Chief Trial Counsel, State Bar Court, and respondents' counsel to develop policy and procedures for effective case management and treatment of attorneys who come before the discipline system;
  - improving the identification of attorneys in the discipline system who would benefit from participation in the LAP and/or Alternative Discipline Program;
  - promoting legislation that would allow bar applicants to participate in the LAP;
  - tracking data and evaluating the impact of the LAP for purposes of reporting to the LAP Oversight Committee and for on-going program monitoring and improvement.

## **ATTACHMENT(S) LIST**

- A.** The Lawyer Assistance Program Strategic Plan – from March, 2017 to March 2020