

## **AGENDA ITEM**

### **III.F. MAY 2017**

**DATE:** May 5, 2017

**TO:** Members, Regulation and Discipline Committee

**FROM:** Dag MacLeod, Director, Office of Research & Institutional Accountability

**SUBJECT:** Case Management System Implementation Update

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#### **EXECUTIVE SUMMARY**

In December 2016, the State Bar entered into a contract with Tyler Technologies to purchase a new case management system (CMS) for the Office of Chief Trial Counsel, State Bar Court and Office of Probation. Implementation work on the project began in January 2017 and is scheduled to continue into the fall of 2018.

To ensure transparency and accountability on this project, an update on the status of the CMS implementation will be provided at every regularly-scheduled meeting of the Regulation and Discipline Committee. These updates will continue until the end of the project.

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#### **BACKGROUND**

At its July 2016 meeting, the Board of Trustees approved the recommendation of State Bar staff to enter into a contract with Tyler Technologies to purchase and deploy a new case management system for the Office of Chief Trial Counsel, State Bar Court and Office of Probation. The contract with Tyler Technologies was finalized in December 2016 and work on the project began in January 2017.

#### **DISCUSSION**

Because of the responsibility of the Regulation and Discipline (RAD) Committee over the discipline system of the State Bar, updates on the project will be scheduled for every regularly-scheduled meeting of RAD. Principal Analyst in the Office of Research and Institutional Accountability and Project manager, Hatem Khalek, will provide the updates.