

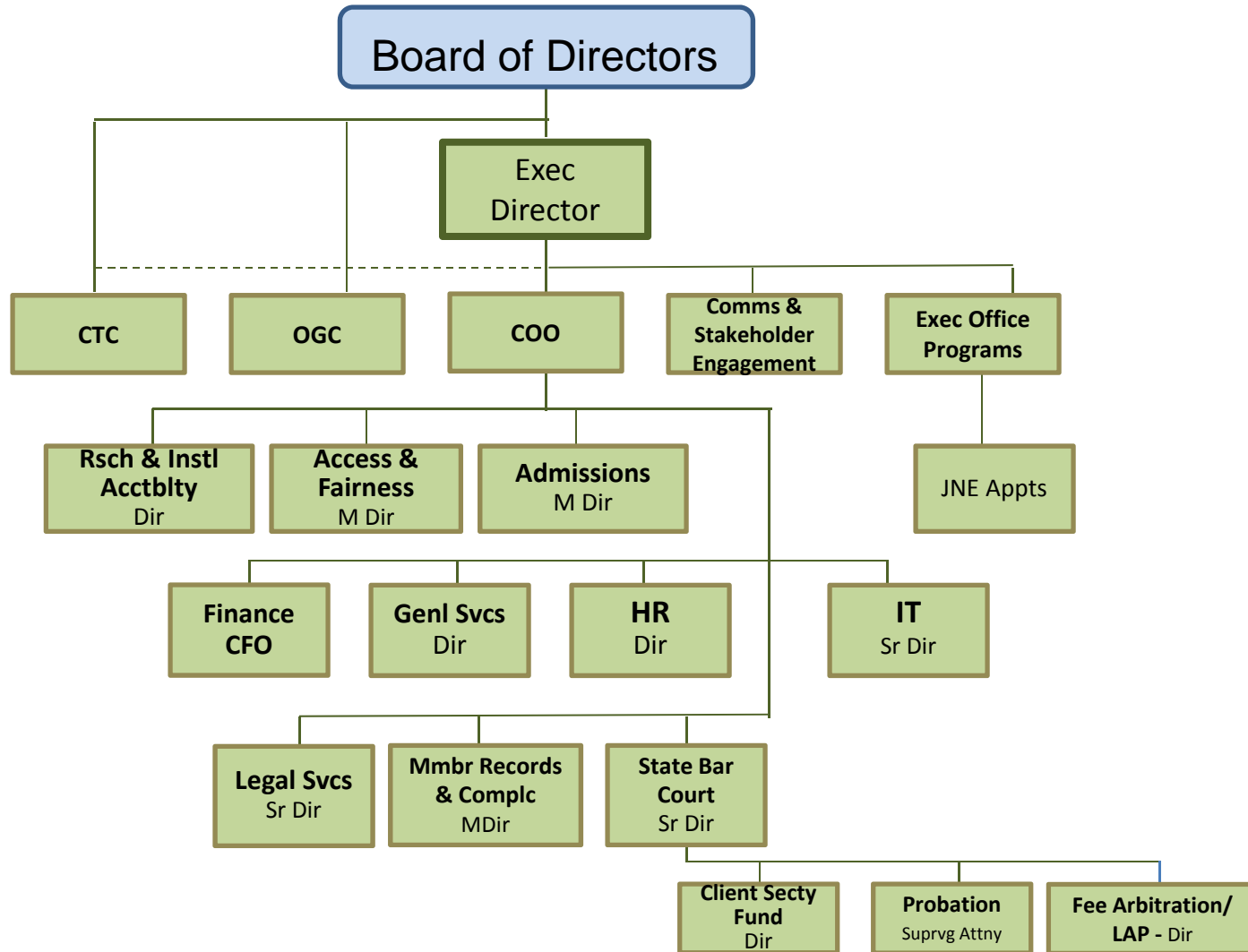
# Project Objectives

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- Develop an effective, accountable and transparent organization
- Ensure strength of focus on core mission
- Integrate reforms and initiatives undertaken into a holistic and logical operating model
- Improve management coordination and communications with board
- Build talent depth and capability

# Current Organization Assessment

We reviewed current organization design and functioning



## Finding: Current “flat” organization structure creates specific organizational risks

- Key Person Dependency, Executive Director – as the key relationship between the State Bar and the Chief Justice, as well as the Legislature, the institution is highly dependent on the individual’s knowledge and relationships.
- Key Person Dependency, COO – as the singular individual with oversight on programs and functions (exception for OCTC, Communications), the organization places material management capacity in this role and is highly dependent on the individual’s knowledge, capacities, and relationships.
- Scope of COO job is excessive – increased span in overseeing and supervising 14 individual managers increases stress and increased probability of management lapses.
- Fragmentation impedes transparency to the board. The board has good exposure to the Executive Director, the COO, and to some degree, the OCTC and the OGC. Less so to other functions.
- While there are specific points of institutional accountability, individual and organizational accountability is insufficient, given current board and management reporting relationships and practices. Moreover, the current approach limits proactive oversight.

# Finding: The structure enhances fragmentation; impedes communications and integration

- Strategies adopted and communicated to the court and the legislature are not widely disseminated in the organization – a missed opportunity to align goals of functions and teams with organizational goals
- Staff continue to identify primarily with functions and departments rather than The Bar. Recommendations from the Workforce Planning (below) have not been addressed.
  1. The Bar should operate as one organization rather than multiple departments, as appropriate, particularly as related to sharing of information relevant to advancing various aspects of the discipline system;
  2. The Bar should expand overall communication to, from, and among staff;
  3. The Bar should increase overall staff knowledge of all/other Bar areas;
- Numerous required actions (Comp & Class, Workforce Planning) have created distinct improvements; have not yet yielded system-wide improvements

## Finding: Internal talent building is important, has not received sufficient, sustained focus

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- No cross training, rotation
- Little investment in people (with focus and follow up)
- No feeder positions for senior roles; no succession planning
- Note: management has begun action on this finding with new training programs, executive development plans, and related HR activities

# Recommendations

Specific roles, and related accountability, should be created to institutionalize mission critical capabilities. Including:

- **Director – Mission Realization:** oversees, supports and develops functions that engage the public and key stakeholders; oversees, develops and monitors key success and impact metrics/measures. accountable for critical external stakeholders and relationships (the public, Legislature; Chief Justice, Board, lawyers). The role which will proactively coordinate, document and monitor external engagement and communications, including activities of the Executive Director, Board liaisons, Communications, Government Relations and State Court. The role should be able to foresee, anticipate and appropriately respond to critical Bar-related issues (from audits, to bar pass rates, to access to justice concerns, etc.)
- **Director – Services and Support:** oversees, supports and develops core support functions – HR, IT, General Services. This position would ensure the overall costs, effectiveness, and performance of support functions meet the needs of the mission-critical functions.
- **Director – Programs:** oversees, supports and develops core mission-critical functions (excluding CTC/discipline). This position may be redundant with COO, and recommended not to start immediately.

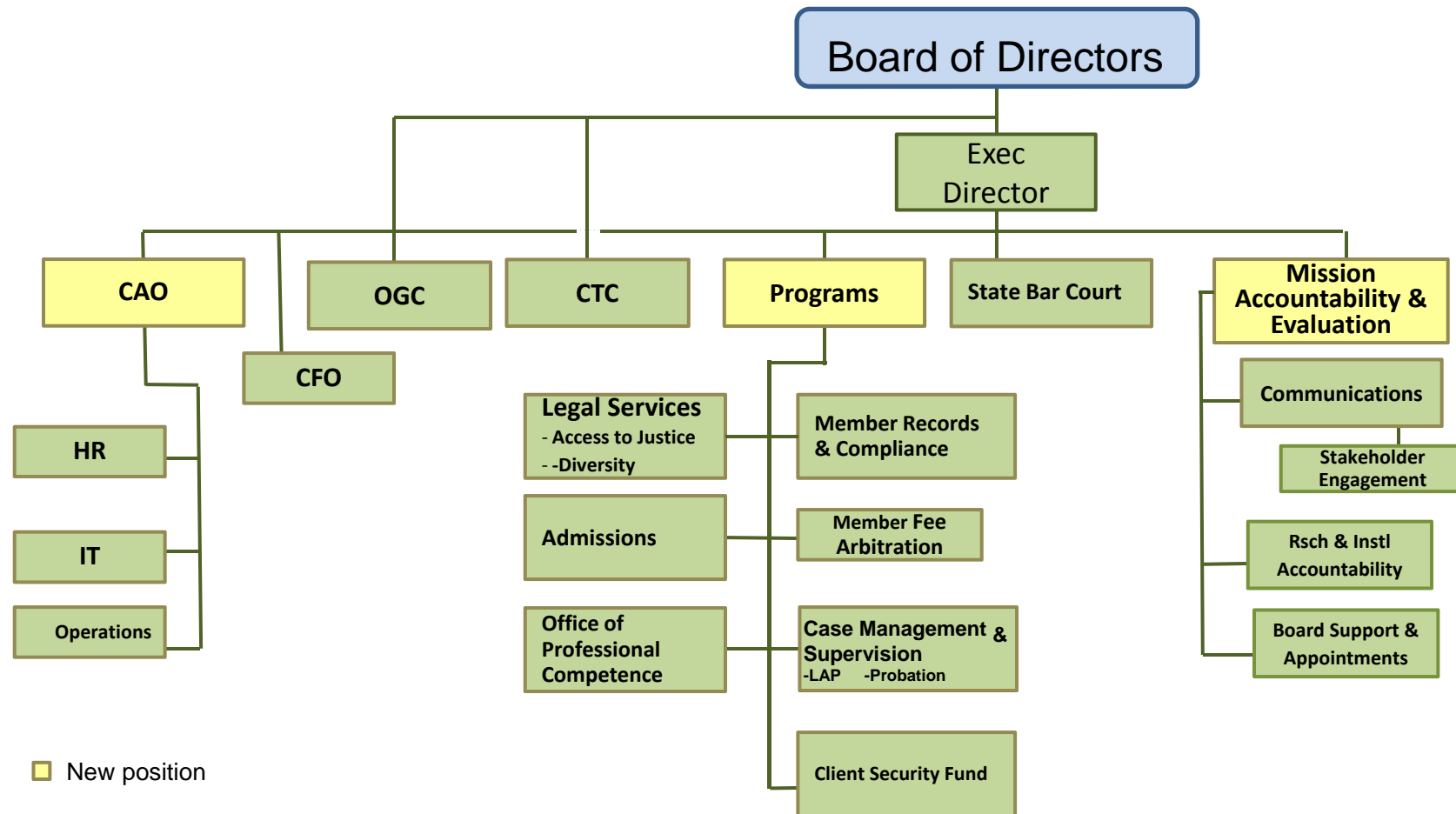
# Recommendations

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- Require management to outline accountability practices for key executive roles, both internally and to the Board
- Implement a one State Bar staff engagement program to strengthen linkages, communication, awareness and accountability among departments
- Clarify coordination and communication between specific management functions and the board and committees

# Organization Design

“Ideal” Future State





# Board & Management Communication and Coordination “Ideal” Future State

