

# **OPEN SESSION AGENDA ITEM**

**701 MARCH 2018  
PRO COMM III.D.**

**DATE:** March 8, 2018

**TO:** **Members, Programs Committee  
Members, Board of Trustees**

**FROM:** Trustee Joanna Mendoza

**SUBJECT:** Amendments to the 2017-2022 Strategic Plan Goal 4: Support Access to Justice for all California Residents and Improvements to the State's Justice System

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## **EXECUTIVE SUMMARY**

At its February 16, 2018, meeting, the Board took action to adopt modifications to Goals 1, 2, 3, and 5 of the State Bar's 2017-2022 Strategic Plan (Strategic Plan). Due to time constraints and the desire to have a fuller, in-person discussion, the Board chose to discuss Goal 4 at its March 2018 meeting. This agenda item outlines possible amendments to Goal 4 for Board consideration.

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## **BACKGROUND**

In 2017, the Board of Trustees adopted the 2017-2022 Strategic Plan. The plan sets forth the following five goals for the State Bar:

Goal 1. Successfully transition to the "new State Bar" – an agency focused on public protection, regulating the legal profession, and promoting access to justice.

Goal 2. Ensure a timely, fair, and appropriately resourced admissions, discipline, and regulatory system for the more than 250,000 lawyers licensed in California.

Goal 3. Improve the fiscal and operational management of the State Bar, emphasizing integrity, transparency, accountability, and excellence.

Goal 4. Support access to justice for all California residents and improvements to the state's justice system.

Goal 5. Proactively inform and educate all stakeholders, but particularly the public, about the State Bar's responsibilities, initiatives, and resources.

## **DISCUSSION**

At its February 16, 2018, meeting, staff presented to the Board of Trustees a list of possible changes to the Strategic Plan objectives for Goals 1, 2, 3, and 5 resulting from discussions during the Board's planning session held on January 26 and 27, 2018.

With respect to Goal 4: Support access to justice for all California residents and improvements to the state's justice system, the Board opted to defer discussion of potential Strategic Plan amendments to its in-person meeting in March. Goal 4 was originally adopted with two objectives. This item presents seven additional objectives for potential inclusion in the Strategic Plan, which are detailed in attachment A.

## **FISCAL/PERSONNEL IMPACT**

Unknown

## **RULE AMENDMENTS**

None

## **BOARD BOOK AMENDMENTS**

The Board Book includes several provisions related to the strategic planning process in multiple sections including Tab 1.2. While these sections are not directly implicated by the present agenda item, staff notes that, as part of the larger Board Book clean-up effort, these provisions will need to be consolidated and updated.

## **STRATEGIC PLAN GOALS & OBJECTIVES**

Goal: 4. Support access to justice for all California residents and improvements to the state's justice system.

## **RECOMMENDATION**

**It is recommended that the Programs Committee and Board of Trustees approve the following resolution:**

**RESOLVED**, that the Board of Trustees adopt revisions to the 2017-2022 Strategic Plan.

## **ATTACHMENT(S) LIST**

- A.** Goal 4: Support access to justice for all California residents and improvements to the state's justice system

**OPTIONS FOR NEW GOAL 4 OBJECTIVES****Goal 4: Support access to justice for all California residents and improvements to the state's justice system.**

## New Objective Options

- a. Review Lawyer Referral Services certification rules with a goal of increasing access to justice.
  - ✓ LRS Rules revision is currently reflected in the Programs Committee workplan. Addition of this objective would clarify that the review process currently underway should be conducted with a goal in part of identifying revisions that will increase access to justice.
- b. Review Special Admissions rules with a goal of increasing access to justice.
  - ✓ A review of Special Admissions rules is currently contemplated by the Strategic Plan. The proposed modification would clarify that the review is intended in part to identify revisions that will result in increased access to justice.
- c. Study online legal service delivery models and determine if any regulatory changes are needed to better support and/or regulate the expansion of access through the use of technology.
  - ✓ Addition of this objective would result in the creation of a Committee or Taskforce charged with studying the use of technology to provide legal services and to identify any rule changes that might be needed to better support and regulate identified delivery models.
- d. Explore options to increase access to paraprofessionals, limited license legal technicians, and other paraprofessionals.
  - ✓ Addition of this objective would result in the creation of a Committee or Taskforce charged with studying existing models for the provision of legal services by non-lawyers including LLLT programs in other states and California's LDA and UDA programs.
- e. Increase access to justice in rural areas by supporting targeted loan forgiveness and/or incubator programs.

- ✓ Addition of this objective would result in an examination of existing loan forgiveness programs, identification of options for targeting or incentivizing rural practice, and options for funding a targeted loan forgiveness program, including through the use of the Bar's discretionary grant funding.

f. Conduct a California specific justice gap study.

- ✓ Addition of this objective would result in the Bar contracting for a California Justice Gap study to quantify (cost), specify (type of legal services needed), and place (geography) the need for legal services in the state.

g. Study law school tuition in California and the ability to obtain legal employment after becoming licensed.

- ✓ Addition of this objective would result in a study of law school tuition and the rate at which attorneys gain employment upon becoming licensed and their corresponding salaries.