



## GOAL 1

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



### SUB-ENTITY REVIEW

● September 2018



### OTHER GOVERNANCE AND OPERATIONAL REFORMS

● December 2018

## GOAL 2

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



### ATTORNEY DISCIPLINE

- A. Deploy Odyssey CMS
  - October 2018 go live
- B. Evaluate workforce planning
  - January 2019
- C. Workload study & discipline metrics
  - Workload study completed
  - Discipline metrics presented to BOT July 2018
- D. Implement & evaluate New Attorney MCLE
  - New MCLE implemented
  - July 2021 evaluation due
- E. Automate MCLE compliance auditing
  - December 2019
- F. Increase CSF funding
  - Implement selected recommendations from March 2018 CSF report by December 2018
- G. Identify attorney self-assessment models
  - December 2019
- H. Implement preventative self-assessment model
  - July 2020
- I. Require attorneys to report firm size
  - January 2019



### ADMISSIONS

- A. Deploy AIMS
  - June 2019
- B. Evaluate 2-Day Bar exam
  - November 2019
- C. Conduct CA job analysis
  - June 2019
- D. Review special admissions rules
  - December 2018



### UPL

- A. Evaluate response to UPL
  - Evaluation plan to be developed
- B. Enhance partnerships with law enforcement
  - Not yet initiated
- C. Identify funding sources to support
  - Grant funding to be pursued
- D. Use communications effectively
  - To be incorporated into Communications Plan

## GOAL 3

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



### EMPLOYEE ENGAGEMENT OBJECTIVES

- A. Improve productivity through performance accountability, training and professional development
  - On Track
- B. Improve staff morale and career satisfaction through recognition, career path development and communication
  - Delayed
- C. Implement and evaluate a Training and Development Program
  - January 2019
- D. Conduct an annual employee engagement survey
  - December 2018
- E. Finalize Communications Strategy Plan
  - July 2018



### FINANCIAL MANAGEMENT OBJECTIVES

- A. Determine whether internal reallocation of funds possible as part of annual budget development process.
  - November 2018
- B. Evaluate collections efforts
  - January 2019
- C. Determine whether LAP reserves can be transferred to CSF annually
  - Completed



### INFORMATION TECHNOLOGY OBJECTIVES

- A. Implement new ERP system
  - December 2019
- B. Implement a new Licensee Information Management System
  - December 2021
- C. Implement funded upgrades to IT infrastructure
  - December 2019



### MANAGEMENT OF OTHER ASSETS OBJECTIVES

- A. Develop performance metrics for State Bar
  - November 2018
- B. Effectively maintain State Bar real estate
  - On Track
- C. Pursue a two-year fee bill
  - Delayed

## GOAL 4

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



### OBJECTIVES

- A. Support increased funding and enhanced outcome measures for Legal Services
  - On Track
- B. Study and implement approaches to increasing access to justice
  - Delayed
- C. Review and update LRS rules
  - December 2018
- D. Study online legal service delivery models and make necessary regulatory changes
  - December 2019
- E. Complete a California Justice Gap Study
  - December 2019
- F. Study licensing of paraprofessionals
  - December 2020

## GOAL 5

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



### OBJECTIVES

- A. Develop Communications Strategy Plan
  - July 2018
- B. Measure effectiveness of communications and engagement strategies
  - July 2018
- C. Enhance relationships with courts and enforcement agencies
  - Not yet initiated
- D. Increase public access to State Bar meetings and materials
  - On Track

## MISSION STATEMENT

The State Bar of California's mission is to protect the public and includes the primary functions of licensing, regulation and discipline of attorneys; the advancement of the ethical and competent practice of law; and support of efforts for greater access to, and inclusion in, the legal system.

KEY

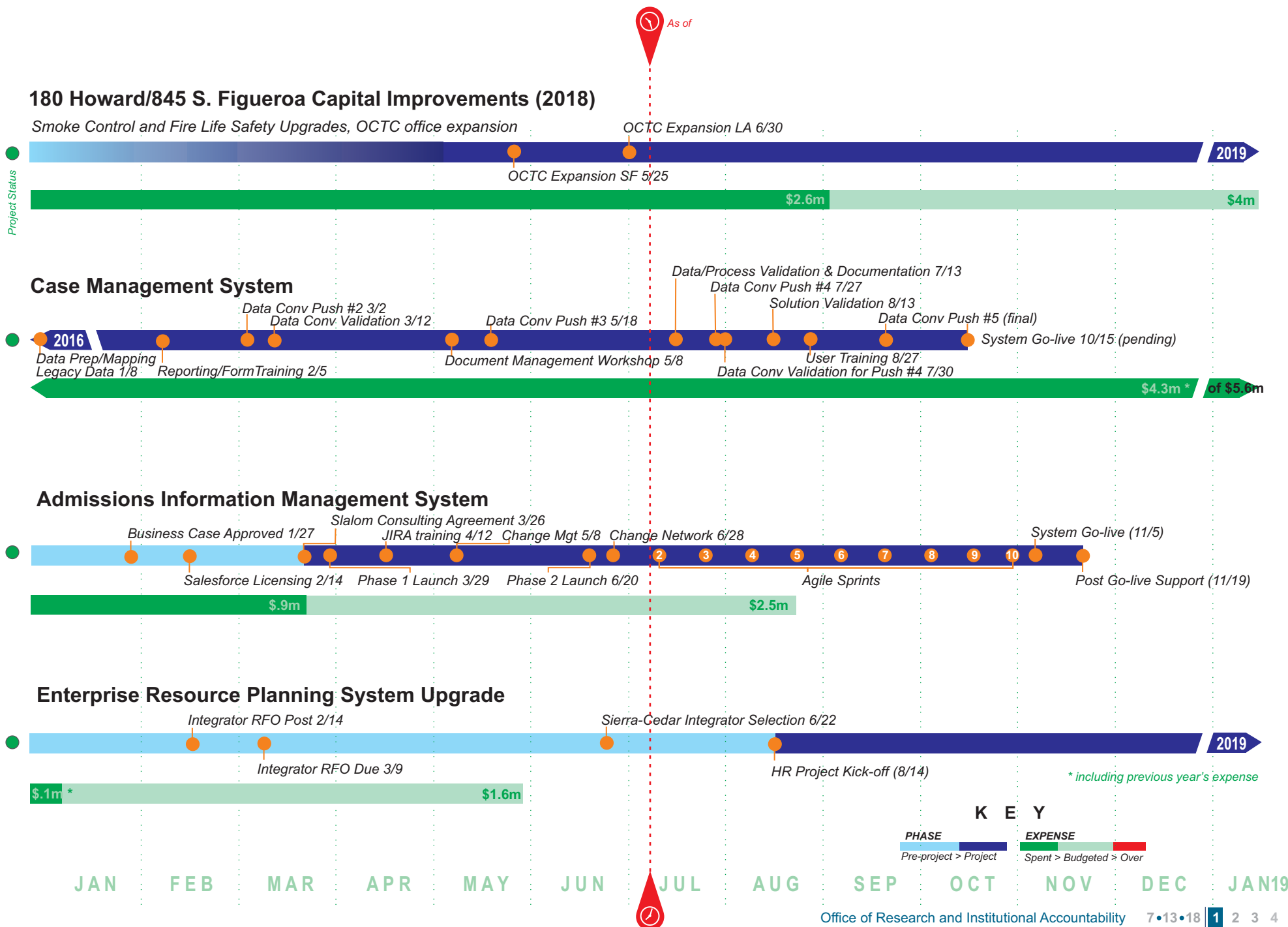
● = Completed

● = Delayed

● = On Track

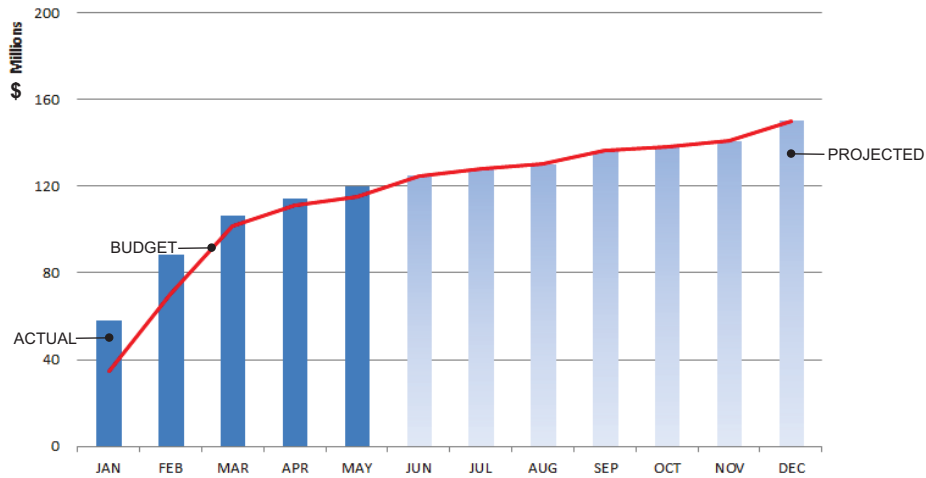
● = Not Yet Initiated

# 2018 Major Projects Dashboard

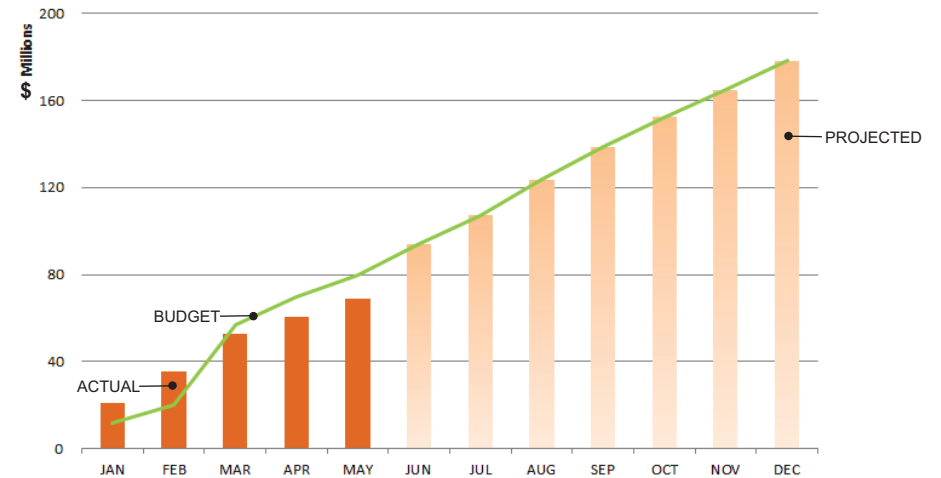


# 2018 Financial Dashboard

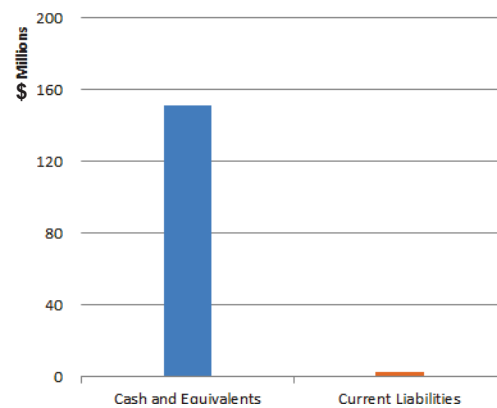
## Revenues



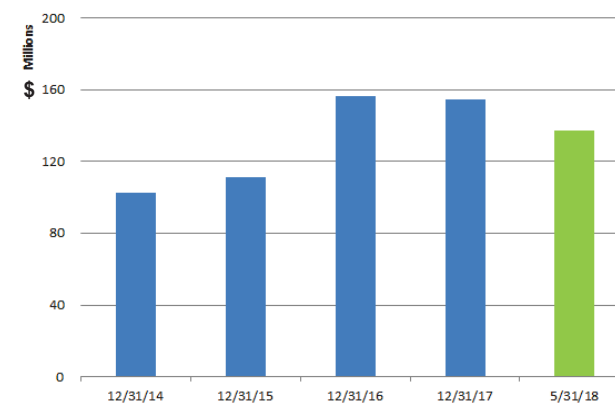
## Expenses



## Liquidity (AS OF 5/31/18)

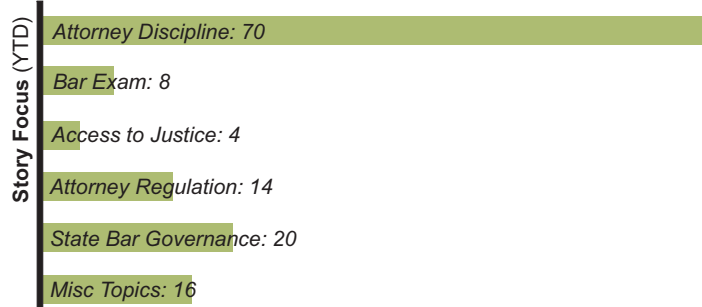


## Net Position (ASSETS – LIABILITIES)



# 2018 Communications Dashboard

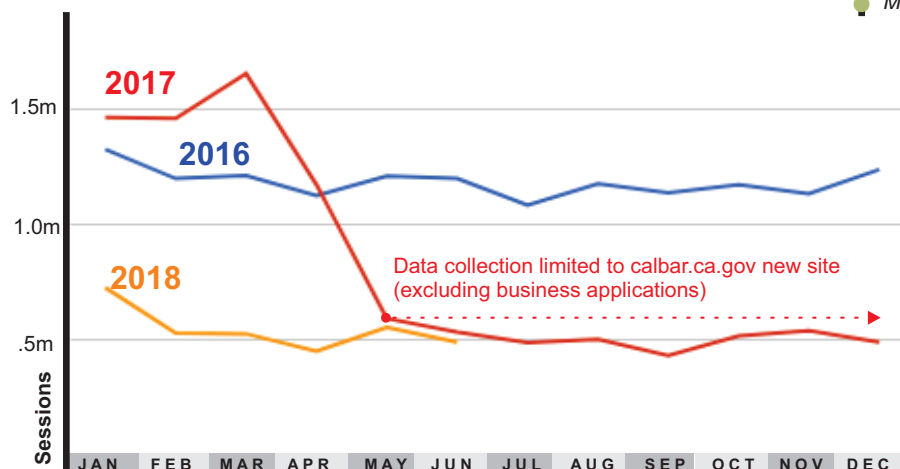
## Media Coverage



## Legislative Email Newsletter

- Attorney Discipline and Legal Services Grant Funding update 2/9
- Attorney Discipline update 4/19

## Website Activity



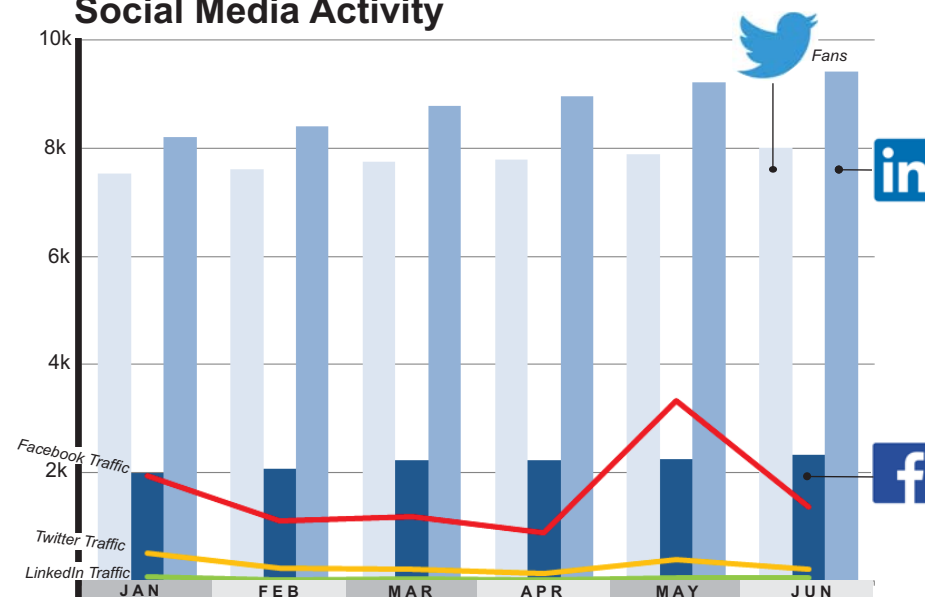
## Board Agenda Items



## Proactive Media Outreach (YTD)

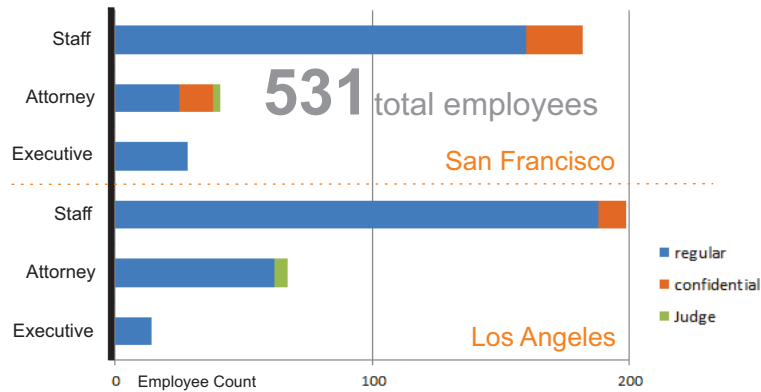
- Media Pitching on Attorney Discipline 1/5
- Media Pitching on Attorney Discipline 1/10
- Media Pitching on Attorney Discipline 1/11
- California Supreme Court Names Chair, Vice-Chair, as Part of Continued Governance Reforms 1/19
- State Bar Takes Over Unauthorized Law Practice in Central Valley 1/30
- State Bar to Petition Court for Encino Attorney's Disbarment in Loan Modification Case 2/15
- Media Pitching on Attorney Discipline 2/27
- State Bar Issues Fraud Alert for Immigrants Seeking Legal Help Following Immigration Raids 2/28
- Media Pitching on Attorney Discipline 3/13
- Media Pitching on Attorney Discipline 3/19
- Media Pitching on Attorney Discipline 3/21
- State Bar of California Annual Ethics Symposium 3/22
- Media Pitching on Attorney Discipline 3/27
- State Bar issues Attorney Self-reporting Guidelines 3/29
- State Bar of California Releases Draft of 2017 Annual Discipline Report, 4/12
- State Bar of California Seeks Candidates for Appointment to the California Rural Legal Assistance Board 4/13
- Media Pitching on Attorney Discipline 4/15
- Media Pitching on Attorney Discipline 5/1
- Media Pitching on Attorney Discipline 5/8
- State Bar will Implement Nearly 70 New Rules of Professional Conduct, effective November 2018, 5/10
- Media Pitching on Attorney Discipline 5/16
- Media Pitching on Attorney Discipline 6/27
- Media Pitching on Attorney Discipline 6/28
- Media Pitching on Attorney Discipline 7/3
- Media Pitching on Attorney Discipline 7/6
- Media Pitching on Attorney Discipline 7/10
- Media Pitching on Attorney Discipline 7/11
- Media Pitching on Attorney Discipline 7/12

## Social Media Activity

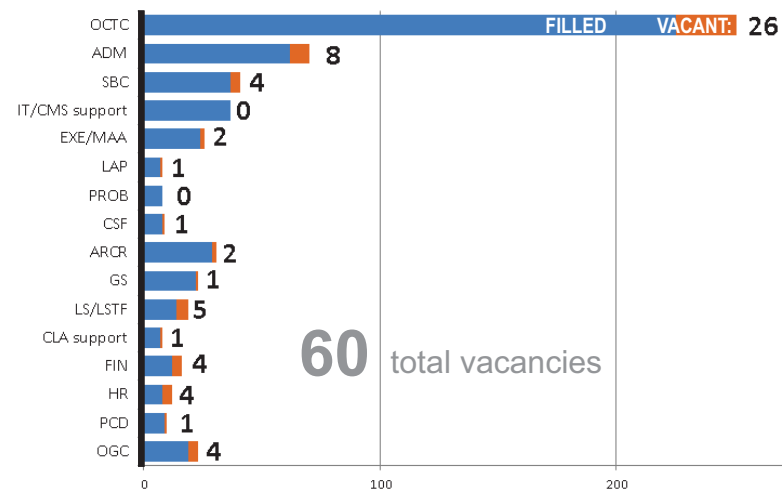


# 2018 Human Resources Dashboard

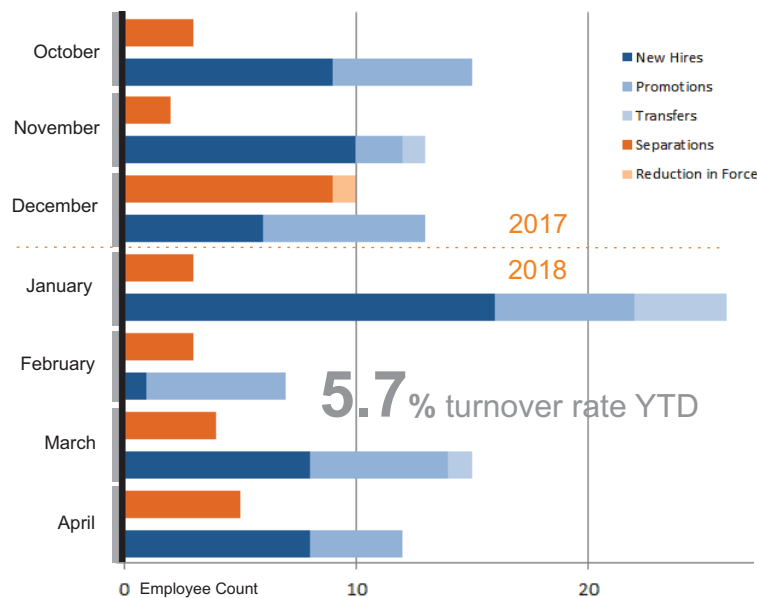
## Employee Type



## Vacancies by Area



## Employment Activity



## Employee Years of Service

