

GOAL 1

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

OBJECTIVES

- A. Determine where additional State Bar functional areas will transition to and develop an action plan
- B. Implement and pursue governance, composition, and operations reforms
- C. Determine the appropriate role of, and Board responsibility for, State Bar Standing Committees, Special Committees, Boards, and Commissions in the new State Bar

GOAL 2

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

ADMISSIONS

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

UPL

- A. Evaluate response to UPL
- B. Enhance partnerships with law enforcement
- C. Identify funding sources to support
- D. Use communications effectively

ATTORNEY DISCIPLINE

- A. Deploy Odyssey CMS
- B. Evaluate workforce planning
- C. Workload study & discipline metrics
- D. Implement & evaluate New Attorney MCLE
- E. Automate MCLE compliance auditing
- F. Increase CSF funding
- G. Identify attorney self-assessment models
- H. Implement preventative self-assessment model
- I. Require attorneys to report firm size

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
- B. Improve staff morale and career satisfaction through recognition, career path development and communication
- C. Implement and evaluate a Training and Development Program
- D. Conduct an annual employee engagement survey
- E. Finalize Communications Strategy Plan

FINANCIAL MANAGEMENT OBJECTIVES

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

INFORMATION TECHNOLOGY OBJECTIVES

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

MANAGEMENT OF OTHER ASSETS OBJECTIVES

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

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
- B. Study and implement approaches to increasing access to justice
- C. Review and update LRS rules
- D. Study online legal service delivery models and make necessary regulatory changes
- E. Complete a California Justice Gap Study
- F. Study licensing of paraprofessionals

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
- B. Measure effectiveness of communications and engagement strategies
- C. Enhance relationships with courts and enforcement agencies
- D. Increase public access to State Bar meetings and materials

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
- = On Track
- = Delayed
- = Not Yet Initiated

2018 Major Projects Dashboard

180 Howard/845 S. Figueroa Capital Improvements (2018)

Smoke Control and Fire Life Safety Upgrades, OCTC office expansion

OCTC Expansion LA 6/30

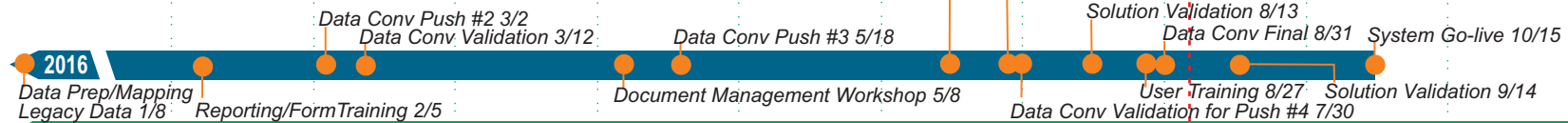
OCTC Expansion SF 5/25

\$2.6m

2019

\$4m

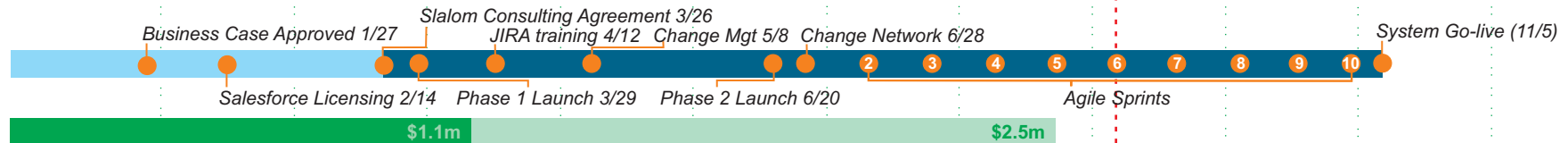
Case Management System



\$4.6m *

of \$5.6m

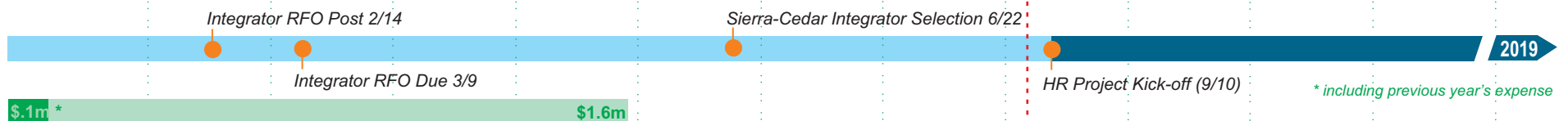
Admissions Information Management System



\$1.1m

\$2.5m

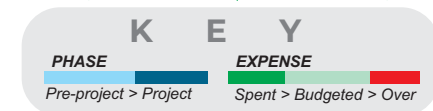
Enterprise Resource Planning System Upgrade



\$1m *

\$1.6m

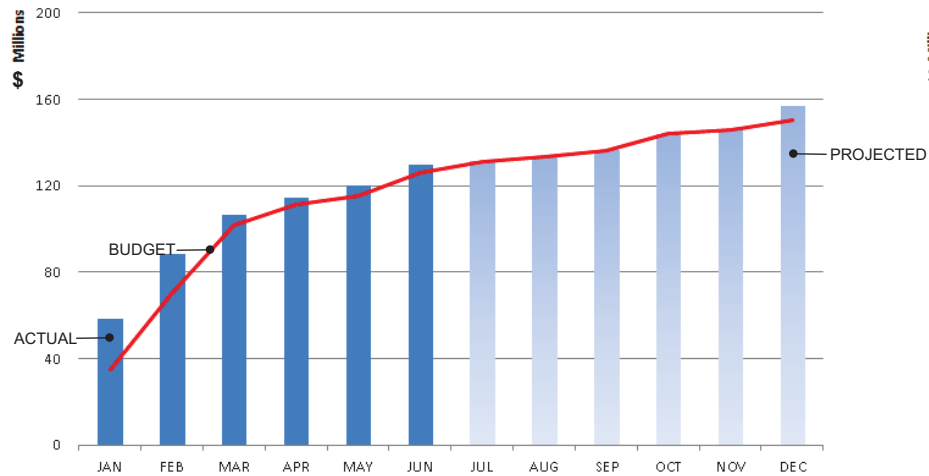
* including previous year's expense



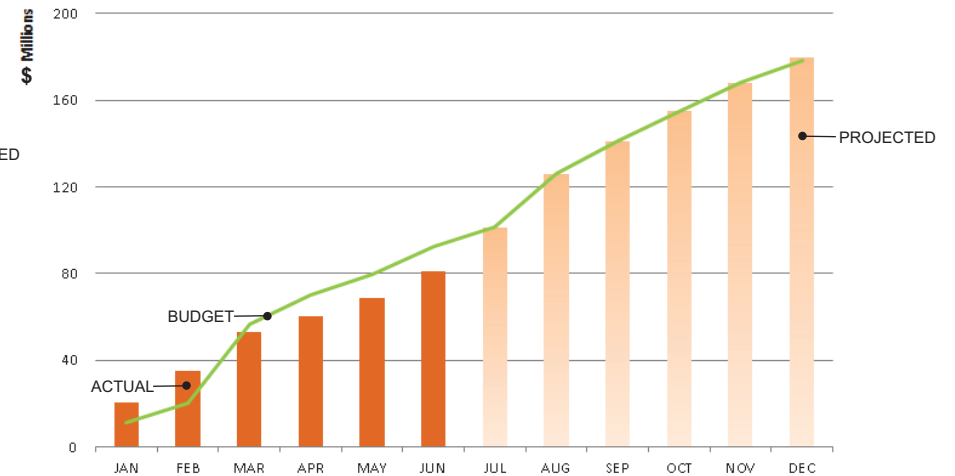
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2018 Financial Dashboard

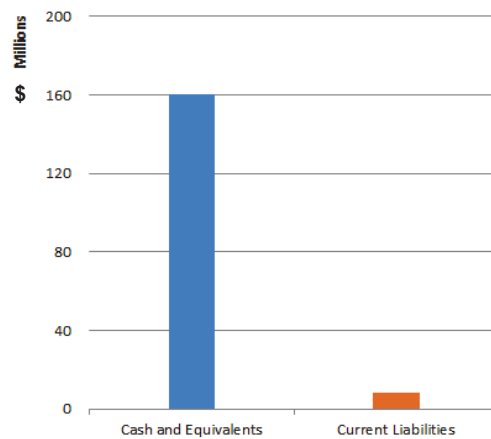
Revenues



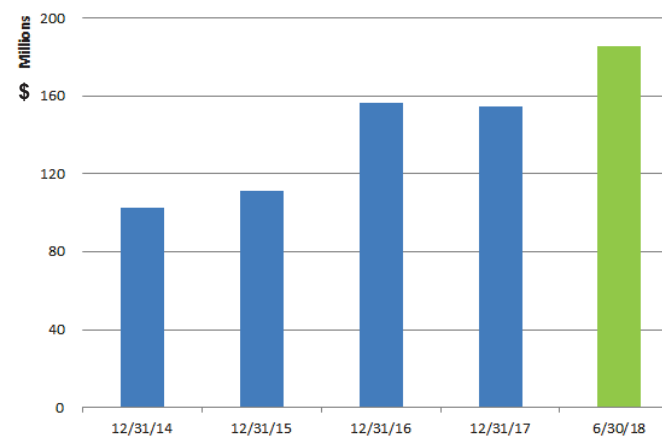
Expenses



Liquidity (AS OF 5/31/18)

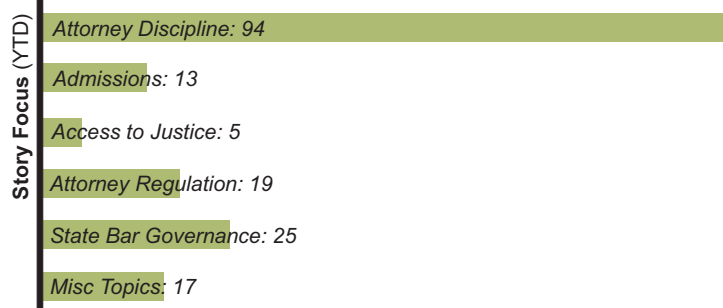


Net Position (ASSETS – LIABILITIES)



2018 Communications Dashboard

Media Coverage



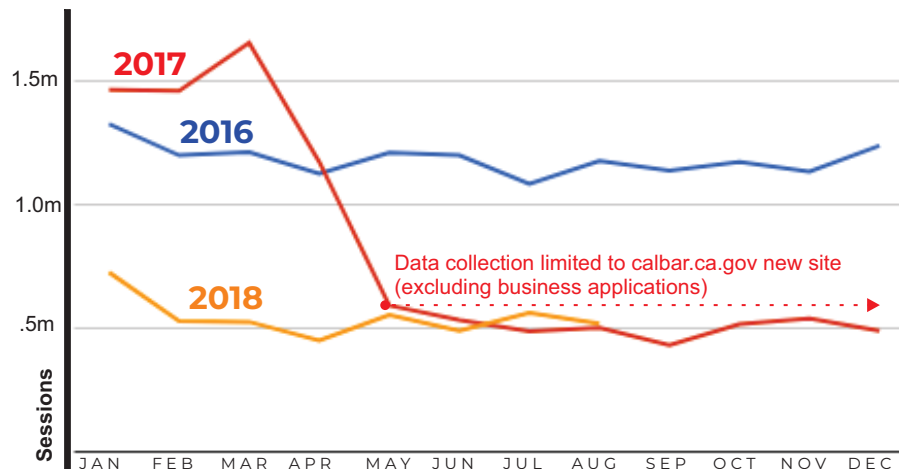
Legislative Email Newsletter

- Attorney Discipline and Legal Services Grant Funding update 2/9
- Attorney Discipline update 4/19
- Quarterly News and Attorney Discipline Update 7/20

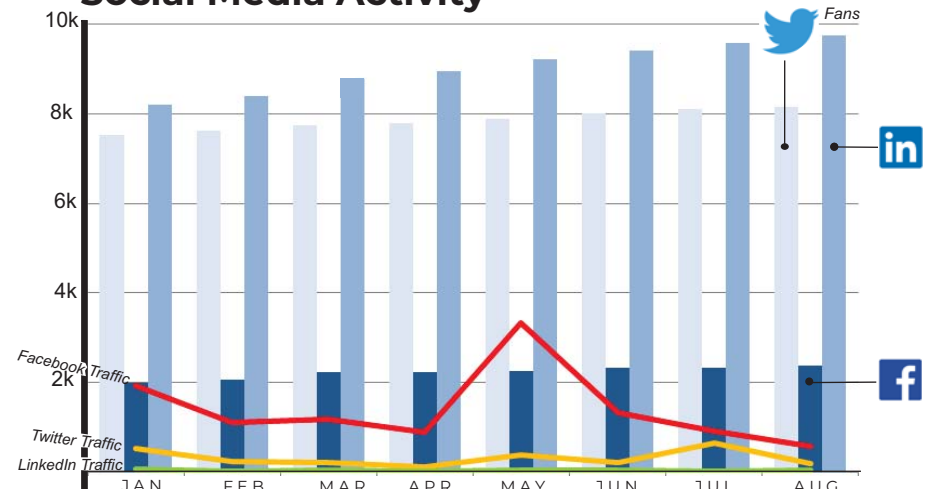
Proactive Media Outreach

- 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
- State Bar Board Addresses Governance Reform and Accountability Measures 7/19
- State Bar Issues Fraud Alert for Immigrants Seeking Legal Help Following Family Separation and Detentions at the Border 7/25
- Media Pitching Monthly Discipline Report 8/2
- Free Legal Assistance Available for California Fire Survivors 8/10
- California Supreme Court Appoints New Chair, Vice-Chair of the State Bar 8/24
- State Bar of California Names Office of Access & Inclusion and Announces Related Initiatives 8/28

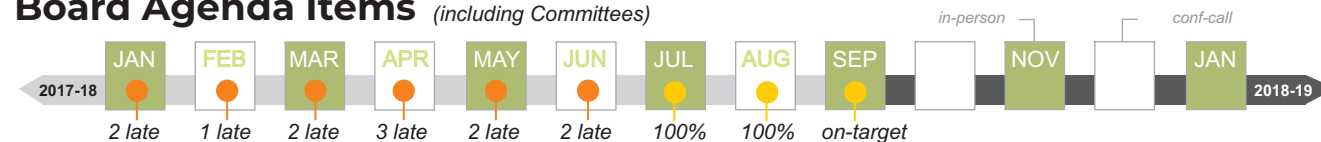
Website Activity



Social Media Activity

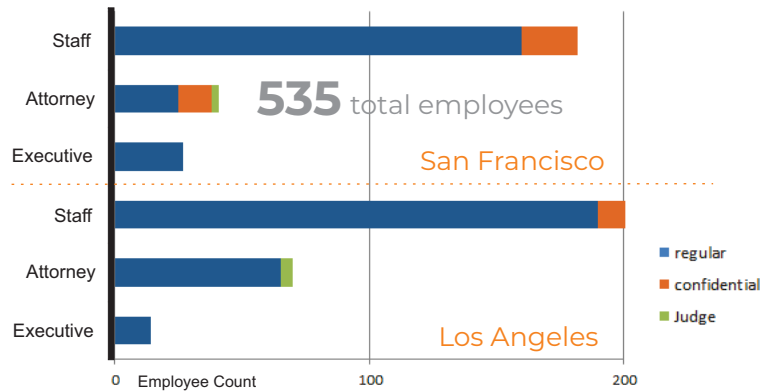


Board Agenda Items (including Committees)

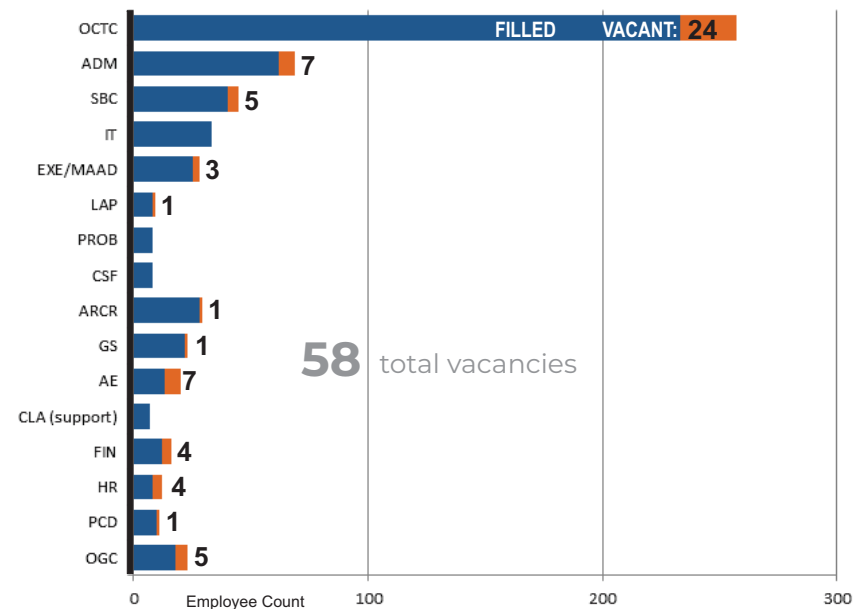


2018 Human Resources Dashboard

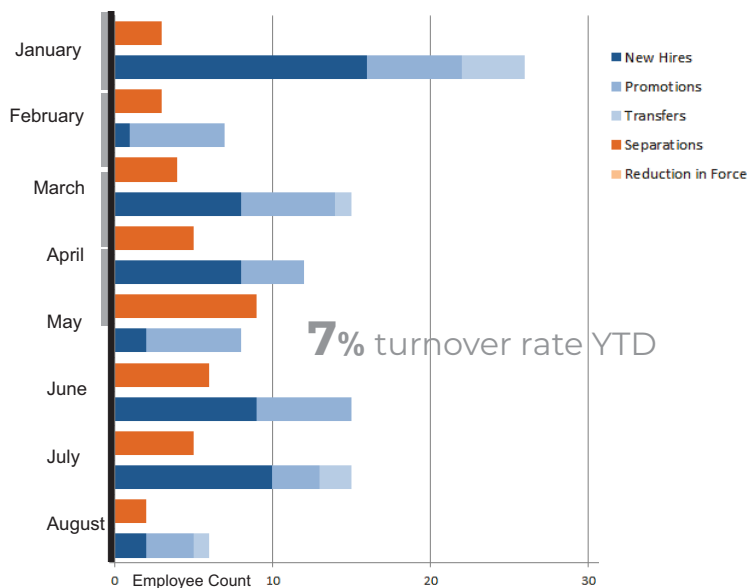
Employee Type



Vacancies by Area



Employment Activity



Employee Years of Service

