



# The State Bar *of California*

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## **OPEN SESSION AGENDA ITEM MARCH 2019 PROGRAMS COMMITTEE III.E**

**DATE:** March 14, 2019

**TO:** Members, Programs Committee

**FROM:** Leah T. Wilson, Executive Director

**SUBJECT:** Review of Metrics for Offices under Programs Committee Purview

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Staff has produced the first iteration of the State Bar Metrics Report covering the period January 1 – January 31, 2019; it was provided as an attachment to this month's Executive Director Report. There are 16 metrics that align with the Offices of the State Bar that report up to the Programs Committee. A listing of these metrics is provided as Attachment A.

### **PROGRAMS COMMITTEE METRICS PERFORMANCE**

Of the 20 Monthly Metrics, performance targets were not met for the following 7, 1 of these relates to a Programs Committee functional area:

- Metric 2, External callers report a high level of overall satisfaction with call center experience
  - Target, 75 percent; Performance 59 percent.

The call center, or Resource Center, which is housed in the Office of Attorney Regulation and Consumer Resources (ARCR) was established in 2017 pursuant to a Workforce Planning recommendation. Its creation was intended to increase both efficiency and consistency, the thought being that a centralized group of dedicated and specially trained staff would be best able to provide licensees and the public with timely, accurate, and uniform information over time. The Resource Center is staffed by 8 Resource Center Representatives and a Program Supervisor.

The Call Center currently handles calls for the Office of Admissions, licensee calls formerly handled by a separate arm of ARCR, calls formerly handled by general reception lines,

Lawyer Referral Services calls, and intake calls for the Office of the Chief Trial Counsel. As reflected in Table 1 below, the Resource Center handles thousands of calls each month:

**Table 1**

<b>Month Year</b>	<b>Calls Presented</b>	<b>Average Queue Time</b>	<b>Max Queue Time</b>	<b>Average Handle Time</b>	<b>Max Handle Time</b>	<b>Calls Abandoned</b>	<b>Max Time To Abandon</b>
<b>Dec 2017</b>	7336	0:03:05	0:30:28	0:03:03	1:01:51	1041	1:42:53
<b>Dec 2018</b>	11316	0:05:17	1:24:06	0:03:32	0:52:52	2794	1:24:06
<b>Jan 2018</b>	18880	0:06:01	1:04:27	0:04:03	0:56:59	4765	1:04:27
<b>Jan 2019</b>	30613	0:06:05	4:36:00	0:03:32	1:09:26	8311	4:36:00
<b>Feb 2018</b>	12167	0:02:38	1:03:01	0:03:53	1:30:24	1564	1:03:01
<b>Feb 2019</b>	16250	0:05:31	4:36:33	0:03:15	0:58:38	4567	4:36:33

As the data reflects, average wait and call handling times appear to be reasonable; additional work is needed to determine if the call abandon and maximum wait times are aligned with similar statistics for other call centers. Staff will work with the Resource Center team to review the customer satisfaction data and its relationship to wait time and abandonment metrics, and report its findings back to the Committee at a future meeting.

## **REGULAR MONITORING**

The metrics will be on the agenda for each Programs Committee meeting going forward, as a mechanism for ensuring active and regular monitoring of the performance of those functional areas under its purview.

## **ATTACHMENT(S) LIST**

### **A. Performance Metrics**

Performance Metrics

Programs Committee

(March 15, 2019)

DATA COLLECTION PLAN – AMY NUÑEZDivision/Office: Programs -AdmissionsMeasurement Focus: Quality Control, Cycle Time, Cost Control

	<b>Performance Target</b>	<b>Data Sources</b>	<b>Data Collection Method</b>	<b>Timing</b>	<b>Responsibilities</b>
1	Implement 100% of Sept 2018 BOT adopted reforms by Q4 2019  Target: Develop project plan, with quarterly target dates, for codifying all new standards by Q1 2019	Board reports BOT	Track against implementation plan / project plan	Quarterly	Admissions
2	Advance 80% of Moral Character applications from “received” to “filed” status within 60 days by Q2 2019	Moral Character applications Admissions Case Management system	Number of filed Moral Character applications	Bi-annually	Admissions
3	Reduce exam costs by 5% by Q3 2019	Average exam cost, per taker, per accommodation Oracle Financial System	Review of exam costs per exam taker	Annually	Admissions
4	Reduce time to grade bar exams from 11 weeks to 9 weeks by Q4 2019	Reviewer input Graded Bar exams	Number of graded Bar exams Process time averages for graded Bar exams	Bi-annually	Admissions

DATA COLLECTION PLAN - DINA DILORETODivision/Office: Programs - Attorney Regulation & Consumer Resources (ARCR)Measurement Focus: Efficiency (Operational Management), Cycle Time

	<b>Performance Target</b>	<b>Data Sources</b>	<b>Data Collection Method</b>	<b>Timing</b>	<b>Responsibilities</b>
1	By Q1 2019 develop targets for average wait times, calls abandoned, and % of calls transferred to other State Bar offices	ARCR Admissions OCTC Websites	Survey/feedback from ARCR, Admissions, OCTC, and General Services	Quarterly	ARCR
2	75% of participants completing phone system survey report a high level of OVERALL satisfaction with a "4" or above rating (on a scale of 1 to 5, with 5 being the highest rating) with their call center experience	Reports from Cisco System ARCR, IT	Cisco System report	Monthly	ARCR
3	Process 75% of MCLE applications within 30 days of receipt	ARCR	AS400 reports and queries	Quarterly	ARCR
4	Continue implementation of LLP online renewal with a goal of 90% LLPs completing online by Q4 2019	ARCR IT	Online renewal system	Annually	ARCR
5	Convert 20% of Law Corporations to a strictly online renewal process by Q3 2019	ARCR IT	Online renewal system	One-Time	ARCR
6	Fulfill 100% of requests for certificates of standing within 5 days of receipt	ARCR	ARCR database	Quarterly	ARCR

DATA COLLECTION PLAN – DONNA HERSHKOWITZDivision/Office: Programs – Office of Access & InclusionMeasurement Focus: Efficiency (Operational Management), Compliance

	Performance Target	Data Sources	Data Collection Method	Timing	Responsibilities
1	Demonstrate full integration of grant- making, diversity, and legal services policy work by Q2 2019	Staff assignments Policy outputs	Staff survey Assignment review	Q2 and annually thereafter	A&I
2	Develop detailed operational plan for Legal Services Trust Fund & Access Commissions based on BOT decisions in January 2019, with a target goal for implementation of 90% of identified changes by Q4 2019	BOT adopted changes for these two sub-entities	Review documentation re implementation	Q4 2019	A&I
3	Identify 3-5 key improvement opportunities in data reporting and collection from the 2017 Main Benefits Report by Q1 2019	2017 Main Benefits Report	Data analysis of reporting needs and gaps	One time, Q2	A&I
4	Roll out 75% of identified data reporting and collection improvements by Q2 2019 for changes involving State Bar only, and by Q3 2019 for changes impacting data collection by legal services programs for collection beginning 2020	2017 Main Benefits Report	Data collection report reviews	One time, Q3 and Q4	A&I
5	Monitor bank compliance with agreed upon interest rates.	Bank remittances Agreement letters	Review remittances and compare against agreed rates	Quarterly	A&I
6	Complete Justice Gap Study by end of Q4 2019	Household Panel telephone and online surveys Intake Census Law School Focus Groups / surveys Young Lawyer surveys	Manager contract with NORC; review and analyze intake census data; review law school and new lawyer data	End of Q4	A&I NORC Legal Services Providers ORIA