



The State Bar *of California*

OPEN SESSION AGENDA ITEM MAY 2019 FINANCE AND PLANNING COMMITTEE III.D

DATE: May 16, 2019

TO: Members, Finance and Planning Committee

FROM: Steve Mazer, Chief Administrative Officer

SUBJECT: Review of Selected Strategic Plan Objectives

The Finance and Planning Committee periodically receives updates regarding the progress of State Bar 2017-2022 Strategic Plan (Plan or Strategic Plan) implementation as related to Plan Objectives that fall under the committee's purview. This update focuses on an Objective that is delayed in implementation, as outlined below.

DELAYED STRATEGIC PLAN OBJECTIVE

Goal 3, Objective b: Improve staff morale and career satisfaction through recognition of performance, career path development, transparent and collaborative communications, and recognition and encouragement of innovation, efficiencies, and money saving ideas.

This Strategic Plan objective formalized various employee engagement efforts the State Bar initiated in 2016 and 2017, and was the subject of a panel discussion at the Board's January 2018 Strategic Planning Meeting.

ACTIVITIES TO DATE

In 2017 the State Bar created, for the first time, a full-time position within the Office of Human Resources devoted to training and development. That year we significantly expanded the number of training courses available to all staff, and implemented a new training program for supervisors and managers, focused on team development, communication skills and performance management. We also initiated "Peer Recognition Awards" at the year-end employee recognition and service award event, which was enthusiastically received.

In 2018 we rebranded “training and development” as “Talent Engagement & Development” (TED), to highlight the State Bar’s commitment to engaging and developing its staff. In addition to further expanding traditional training, we introduced more targeted career development opportunities, including courses on Managing your Career, Intentional Interviewing, and Resume Review; one-on-one career counseling to help employees define and manage progress toward career goals; and transition support for employees who promote or transfer. Another significant innovation was a new Training & Development (T&D) Assignment Program, which allows the temporary loan or assignment of employees to other Offices or positions for up to six months, to broaden their work experience and increase their skills. In the last 12 months, 65 employees have participated in career development courses, 26 have requested formal career counseling, 14 have completed T&D assignments and seven have T&D assignments in progress.

In the last quarter of 2018 we conducted employee-led focus groups to gather more information about areas of concern noted in staff surveys, including employee recognition, performance accountability and career development.

In October 2018 we implemented an anonymous electronic suggestion box, by which employees can send suggestions directly to the Executive Director. Suggestions and questions are occasionally answered publicly in the weekly blast.

In April 2019 we launched a new telecommuting program, which may make a significant positive impact on morale and help with recruitment and retention.

We also continue to communicate with staff about State Bar issues and initiatives, and where relevant provide public recognition, through the weekly Leadership Team email blast and the monthly newsletter.

CHALLENGES EXPERIENCED

In mid-2018 we began a restructuring in the Office of Human Resources, which included staff turnover and review of all HR processes, initiatives and goals; that effort continues today. In the last 12 months significant progress was made on many important employee engagement initiatives, as described above. But because limited resources were divided among many important areas of focus, we could not devote quite as much time and effort as we’d hoped on expanding our employee engagement initiatives.

It is also true that the “secret sauce” of morale and career satisfaction does not have an exact recipe. This is demonstrated by the results of the all-staff survey, conducted in December 2018 (the previous survey in December 2017 produced comparable results).

There was a very positive response to many questions that relate to morale and career satisfaction, including:

- I understand how my work supports the key goals of the State Bar: 96 percent agree
- I am informed about important events/activities affecting the State Bar: 88 percent agree

- I am supported by my manager/supervisor: 88 percent agree
- The performance expectations of my job are reasonable: 80 percent agree
- The State Bar is flexible and allows me to maintain an appropriate work/life balance: 80 percent agree
- I have access to training/professional development for my career goals: 78 percent agree

At the same time, the survey indicated there is more work to do in certain areas:

- Excellent performance is recognized at the State Bar: 52 percent agree
- There is a clear path for career advancement at the State Bar: 46 percent agree
- Everyone at the Stat Bar is held to the same standard of performance: 33 percent agree

PLANNED NEXT STEPS

We are continuing to rebuild and restructure the Office of Human Resources, and to make employee engagement, including morale and career satisfaction, a high priority effort that is shared among the Leadership Team, office directors and managers. Additional efforts that are already in progress or planned for the near future include:

- A deeper analysis of issues impacting retention, particularly in certain classifications in the Office of Chief Trial Counsel.
- More clearly defining the promotional criteria between certain classifications, such as Attorney and Senior Attorney, with the hope of simplifying the promotional path. This may eventually include a “promotional in place” mechanism similar to the one used by the State of California.
- Implementing “Stay Interviews” –interviews at various points early in a new employee’s tenure, to get their feedback about what’s working and what’s not.
- Identifying additional opportunities for public and personal recognition of employee accomplishments.
- Expanding the “One State Bar” new employee orientation to all employees, to help them feel more connected to other parts of the State Bar.

ATTACHMENT(S) LIST

None