



The State Bar *of California*

OPEN SESSION AGENDA ITEM MAY 2019 PROGRAMS COMMITTEE III.F

DATE: May 16, 2019

TO: Members, Programs Committee

FROM: Leah T. Wilson, Executive Director

SUBJECT: Review of Metrics for Offices under Programs Committee Purview

The 2019 First Quarter Metrics Report has been submitted to the Board of Trustees as an attachment to the Executive Director's May 17 report. This agenda item addresses those metrics under the purview of the Programs Committee where identified performance targets were not met.

PROGRAMS COMMITTEE METRICS PERFORMANCE

Of the 2019 First Quarter Metrics Report performance targets were not met for the following seven, one of these relates to a Programs Committee functional area:

- Metric ARCR2, External callers report a high level of overall satisfaction with call center experience
 - Target, 75 percent; Q1 Performance 66 percent.

Information regarding the structure and workload of the State Bar's call center, formally known as the Resource Center, was provided in the March Programs Committee metrics report. Relatively low satisfaction levels seem to be driven by long wait times and a high abandoned call rate. Pursuant to a different metric, staff has established a wait time target of no more than 8 minutes and an abandon rate target of no more than 30 percent. Recognizing both our own lack of expertise in this area and the challenges presented by sheer call volume alone, staff has also recently engaged the services of a call center specialist to assist in a review of current workload, response/wait times, and staffing levels. Staff will report back to the Programs Committee on the results of that review in the near term.

- Metric ARCR6, Process requests for certificates of standing within five business days of receipt
 - Target, 100 percent; Performance, 98 percent.

Minor variance from target performance level is not viewed as significant at this time.

- Metric OAI5, Monitor bank compliance with agreed upon interest rates
 - Target, implement monitoring; Q1 Performance, not implemented.

Office of Access & Inclusion staff continues its first comprehensive review of bank compliance with a newly set Established Comparability Rate (ECR), assessing the performance remittance of close to 200 banks in California comprising 50,000 accounts. Staff has not yet established a process for ongoing monitoring; realistically, these efforts should focus on the top 20-30 banks in California, which collectively hold 85-90 percent of attorney trust account deposits. A revised metric will be generated reflecting this more targeted performance objective. In addition, staff will provide the Programs Committee with a full briefing on the State Bar's bank compliance work at the Committee's July meeting.