



The State Bar *of California*

OPEN SESSION AGENDA ITEM 41-1 JULY 2019

DATE: July 11, 2019

TO: Members, Board of Trustees

FROM: Leah T. Wilson, Executive Director

SUBJECT: Report from Executive Director

Your staff leadership team held a retreat earlier this year where we established goals for 2019. These goals, which I recently shared broadly during all staff meetings, align with and drive forward the State Bar's Strategic Plan:

1. Secure a 2020 Licensing Fee Increase and Lay the Foundation for a Multi-Year Fee Bill
2. Implement 2018 and 2019 Strategic Priorities
3. Further Engage and Develop the Workforce
4. Innovate! (but not by adding more projects, right now)

As we enter the final stretch of activity around the 2020 fee bill we are obviously focused on the first goal above, working to secure a fee increase that will best enable us to effectuate our public protection mission and fairly compensate our hard working staff. At this time, the State Auditor (Auditor) and the Legislative Analyst's Office (LAO) have released their assessments of the State Bar's identified funding need. Both the Auditor's recommendations and the LAO's "high" funding option will allow us to achieve our public protection and employee equity goals, particularly when paired, as both reviewing bodies recommended, with a multiyear approach to at least some aspects of the funding.

Interestingly and somewhat ironically, both the Auditor and the LAO cite progress in implementing reforms in the discipline system as a basis for delaying the full scope of hiring necessary to enable us to meet statutory case processing timeframes. The Auditor similarly welcomed the State Bar's recent implementation of performance metrics, and used this fact as an additional rationale for delayed funding, certain that the metrics will ultimately lead to efficiencies. While this hypothesis remains to be proven, there may truth to the adage "you get what you measure." It will take a year or more of data collection and analysis to assess the true

impact of metric implementation. May 2019 results are summarized below and detailed in Attachment A.

I will provide the Board with an update regarding the other Leadership Team goal areas in future Executive Director reports.

MAY PERFORMANCE ON THE METRICS

The May 2019 Metrics Report, which includes data regarding monthly metrics, those metrics with first quarter reporting requirements, and selected annual metrics, is provided as Attachment A.

Of the 9 May metrics, performance targets were not met for the following 3:

- Metric ARCR2, External callers report a high level of overall satisfaction with call center experience
 - Target, 75 percent; May Performance 67 percent.
- Metric HR2, Performance evaluations processed within 30 days of due date
 - Target, 100 percent; April Performance 75 percent.
- Metric OCTC3, Maintain annual caseload clearance rate of 1.0 or higher
 - Target 1.0; May Performance .89.

Note that one of the Office of the Chief Trial Counsel's 7 metrics, and none of the State Bar Court metrics, are available due to challenges with retrieval of data from the new Odyssey case management system (CMS). There has been significant progress on this issue in the last month and it is expected that all metrics will be reported in the next publication.

The metrics failing to achieve targeted performance levels will be addressed by the Board Committee with oversight over the respective functional areas of the State Bar.

ATTACHMENT(S) LIST

- A.** Metrics Report



The State Bar of California

State Bar Metrics Monthly Metrics May 2019

| | |
|------------|----------|
| LINE ITEMS | 16.15 MS |
| SHIPPING | 0.15 MS |
| TAXES | 0% |
| TOTAL | 16.3 MS |

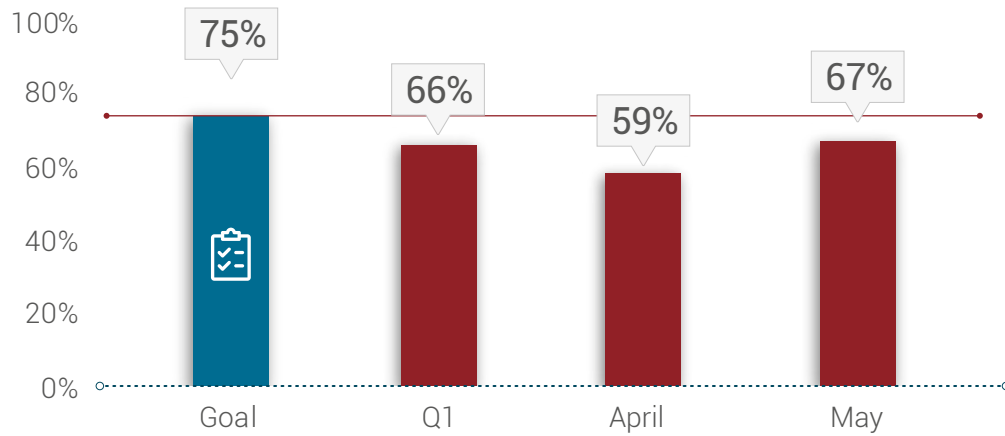
| | |
|------------|---------|
| LINE ITEMS | 13.5 MS |
| SHIPPING | 0.2 MS |
| TAXES | 0% |
| TOTAL | 13.7 MS |

| | |
|------------|----------|
| LINE ITEMS | 13.00 MS |
| SHIPPING | 0 \$ |
| TAXES | 0% |
| TOTAL | 13.00 MS |



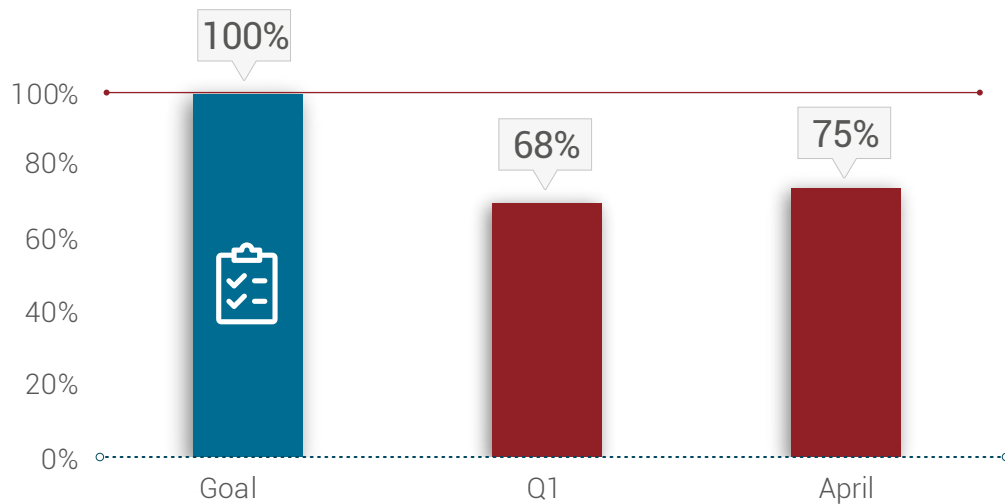
ARCR2

Callers who report a high level of overall satisfaction with their call center experience



HR2

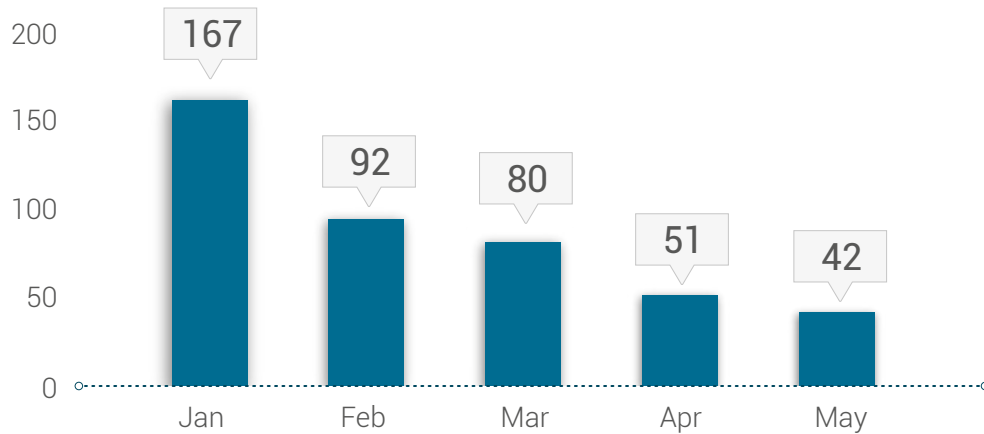
Process performance evaluations within 30 days of due date





OPC2

Increase attorney awareness of the new Rules of Professional Conduct, effective November 1, 2018: # of new rules calls



OCTC1

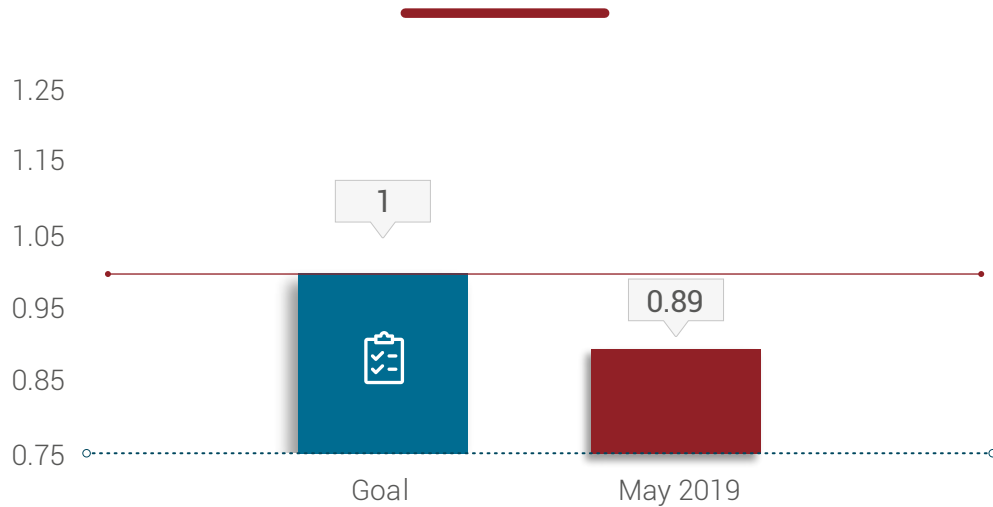
Minimize number of P-1 cases in backlog





OCTC3

Maintain annual caseload clearance rate of 1.0 or higher

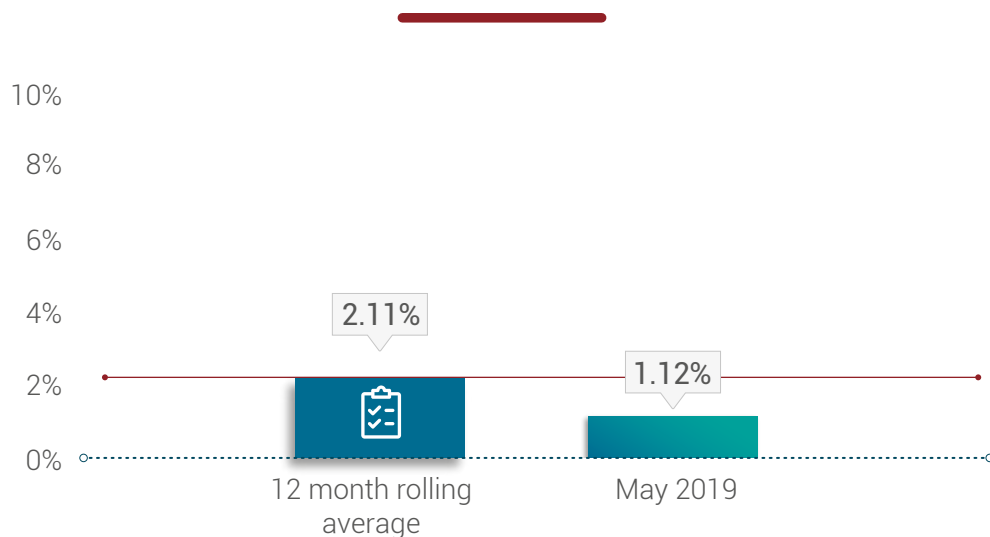


OCTC4

| May case disposition times: | Days | |
|-----------------------------|--------|-----|
| | Median | 60 |
| | 90th | 256 |

OCTC5A

Maintain current level of CRU reopens for reasons other than new evidence





OCTC5B

Number of Walker Reopens



OCTC 6

Case Inventory trends

| | 18-Dec | 19-Jan | 19-Feb | 19-Mar | 19-Apr | 19-May |
|---------------------|--------|--------|--------|--------|--------|--------|
| Total Inventory | 6087 | 6060 | 6333 | 6840 | 7158 | 7487 |
| Change in inventory | 1.00% | -0.40% | 4.50% | 8.00% | 4.60% | 4.60% |

State Bar Court

The Case Management System for SBC was transitioned to Odyssey in February 2019. Because of this transition, monthly reports are not available at this time. The information for May will be updated once it becomes available.