The State Bar of California

OPEN SESSION
AGENDA ITEM
MAY 2020
FINANCE COMMITTEE III.C

DATE: **May 6, 2020**

TO: **Members, Finance Committee**

FROM: **John Adams, Chief Financial Officer**

SUBJECT: **Review of Metrics for Offices Under Finance Committee Purview**

A brief explanation of performance metrics under the Finance Committee's purview that did not meet their Q1 2020 target is provided below.

FINANCE COMMITTEE METRICS PERFORMANCE

- **F-1**, **Provide accurate, timely and informed budget projections to enable efficient financial planning by client division/office and the Executive Director**
  - Goal not met

  The new financial system went live in March 2020. This new system will eliminate the manual nature of this work and streamline month end closing processes, which should enable staff to meet this goal by the end of the second quarter of 2020.

- **F-2, Reduce number of billing-related phone calls from attorneys to ARCR by 10 percent**
  - Target, reduce by 10 percent; Q1 2020 performance, +63 percent

  Unfortunately, the calling system does not capture the question behind each billing related call. However, Q1 2020 included the period when the increased annual fees were due; it is likely this contributed to the increase in calls over the same period last year. Staff also noticed a steady stream of calls from noncompliant licensees regarding rejection notices and courtesy reminders related to the December 2019 re-fingerprinting deadline which were part of this count of billing related calls. Finance staff will continue to monitor this metric and make efforts to reduce billing-related calls.

- **F-3, Pay 90 percent of vendor invoices within 30 days of receipt**
  - Target, 90 percent; Q1 2020 performance, 79 percent

Finance made a significant outreach to offices to submit invoices in advance of the two week planned system shut down needed to effectively implement the new finance system, Oracle Fusion. This outreach produced many invoices that were outside of the 30 day window prior to arriving in Finance. The implementation of the new financial system also required staff to test and train in the new system and allowed for less time to process invoices. With continuous staff training, this office anticipates meeting this target by Q2 2020. Note: March 2020 data is unavailable and will be reported in the next reporting cycle.

- **HR-1, Process performance evaluations within 30 days of due date**
  - Target, 100 percent, January and February 2020 performance, 49 and 86 percent, respectively

Human Resources is engaging in key initiatives to ensure greater understanding of the importance of performance evaluations (PE) and management to employee engagement including the redesign of the Performance Management process.

  - HR sends out reminder emails to Chiefs 30 days prior to PE due dates as well as a reminder for any past due PEs. The move to using Oracle Fusion for performance evaluation management has been delayed; automated reminders will be issued once fully implemented.
  - In April 2020, HR began to personally reach out to all supervisors/executives to remind them of overdue and upcoming evaluations to encourage them to ensure that they are done in a timely manner.
  - An emphasis on the importance of Performance Management has been added as an element of the New Supervisor training being done by HR and Recruitment and Retention (R2).

- **RR-8, Reduce turnover rate among attorneys**
  - Baseline 12 percent, Q1 2020 performance, 18 percent

- **RR-9, Reduce turnover rate among investigators**
  - Baseline, 16, Q1 2020 performance, 16 percent

Exit interviews of the seven attorneys and five investigators who completed them revealed that the majority cited workload and/or work/life balance as a reason for leaving. The Office of Recruitment and Retention implemented several initiatives over the course of the last year that we hope will help to reduce turnover, including:

  - New Employee Experience Interviews are conducted within employees' first 90 days to learn what is important to them as well as any obstacles or challenges they are experiencing and their relationship with their managers. The goal is to

combine this information with data from the Exit Interviews and the Annual Staff Survey to create action plans to help increase employee engagement throughout the State Bar.

- o Encouraging offices to increase telecommuting options to twice per week, an increase from once per week; and to combine alternative work schedules (AWS) with telecommuting.
- o A wellness program was also implemented in 2019 which offers employees programs to help improve their financial, physical and emotional well-being through partnerships with CalPERS and Fidelity, as well as Yoga and Zumba sessions offered by staff for State Bar employees.

Staff will continue to review the data to determine if there are trends that might assist in reducing turnover.

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Q1 2020 Metrics for
Offices Under the Finance Committee's Purview

Finance
General Services
Human Resources
Information Technology
Recruitment and Retention

The State Bar of California, Finance Committee Meeting, May 6, 2020

FINANCE

F-1   Provide accurate, timely and informed budget projections to enable efficient financial planning by client division/office and the Executive Director

Did not meet

F-2   Reduce number of billing-related phone calls from attorneys to Attorney Regulation & Consumer Resources by 10%

+63%

2,052 — Q1 2019

3,339 — Q1 2020
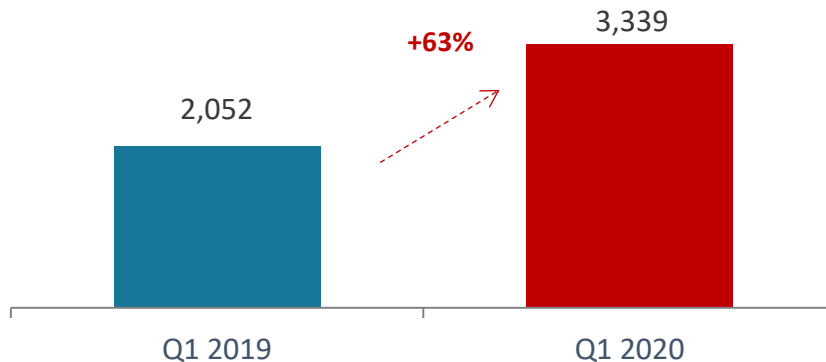
F-3   Pay 90% of vendor invoices within 30 days of receipt

90% — Target

79% — Jan-Feb 2020
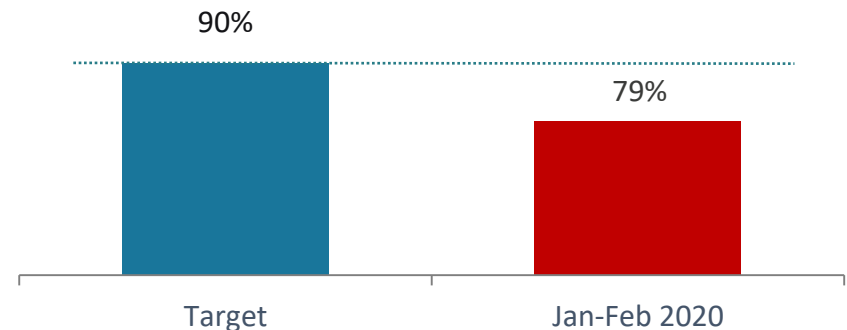
Note: this metric is reported quarterly but data for March 2020 is not available for analysis at this time. It will be reported in the next metrics reporting period.

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GENERAL SERVICES

GS-1 Process 90% of procurement requisitions with 100% accuracy within three business days
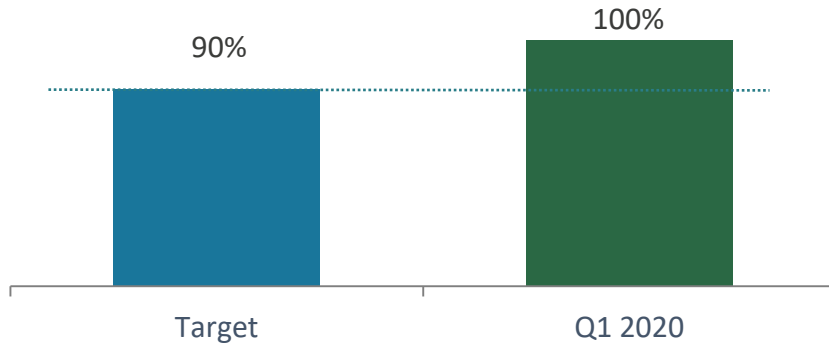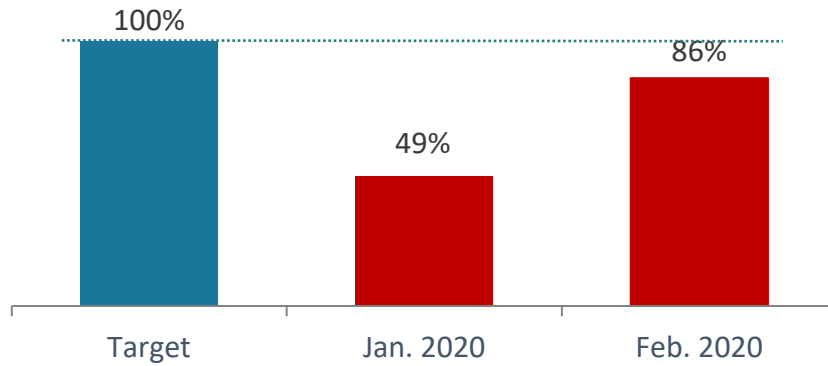

GS-2 Process 85% of all facilities requests (not requiring parts/equipment ordering) within three business days or less
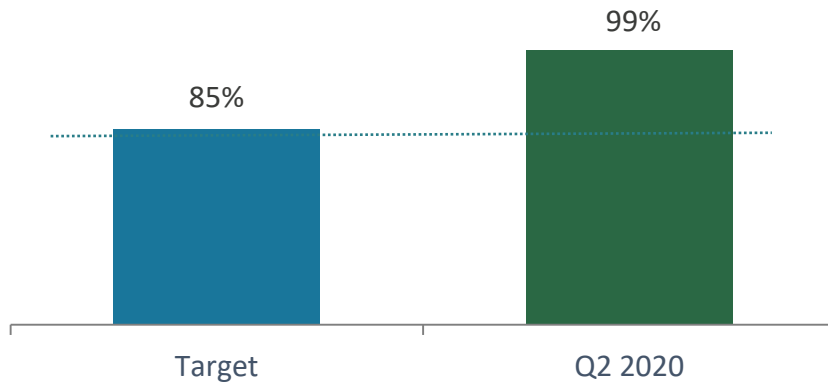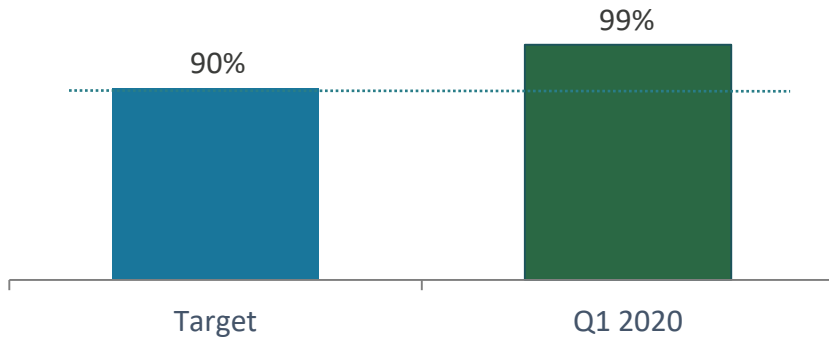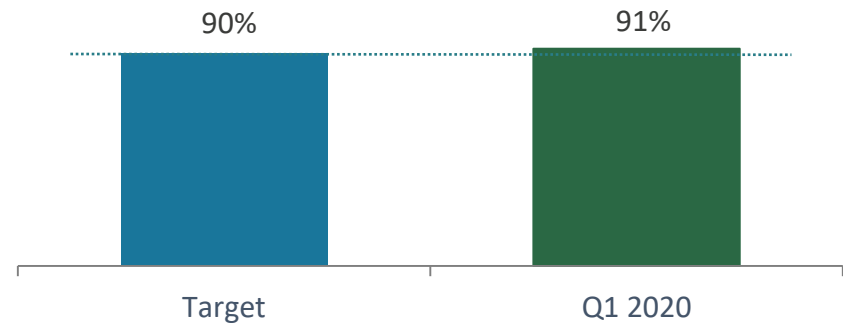

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INFORMATION TECHNOLOGY

IT-1   90% of stakeholders report a high level of overall satisfaction with new technology deployments

90%	99%
Target	Q1 2020

IT-3   Complete 90% of planned major IT projects on schedule and on budget

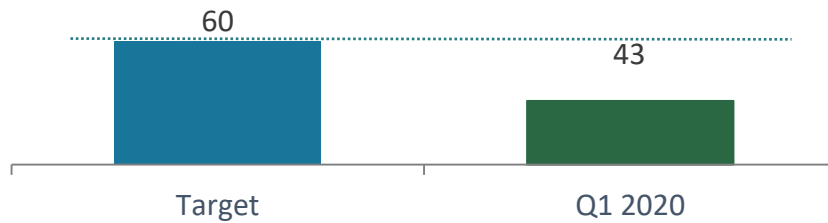|	
90%	91%
Target	Q1 2020

IT-2   Process 85% of all IT service requests (not requiring parts/equipment ordering or software development) within five business days or less)
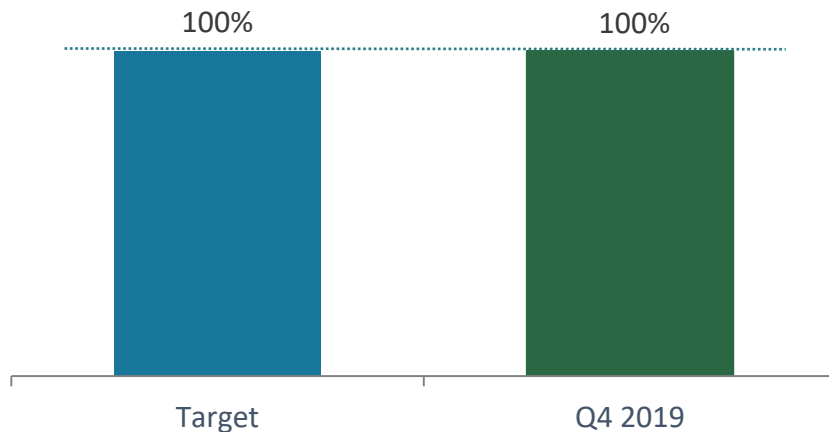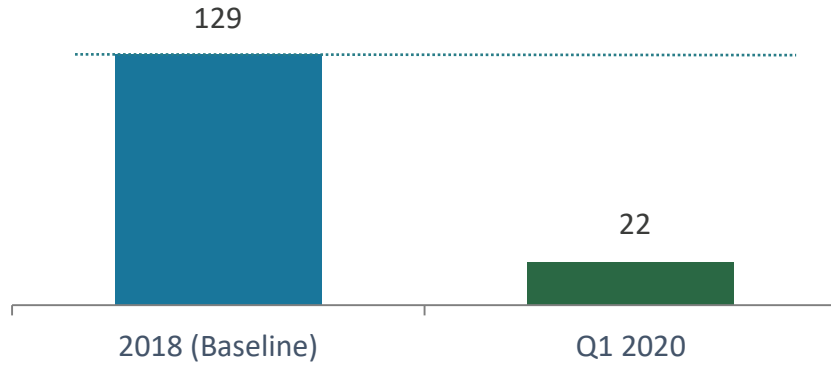
85%	86%
Target	Q1 2020
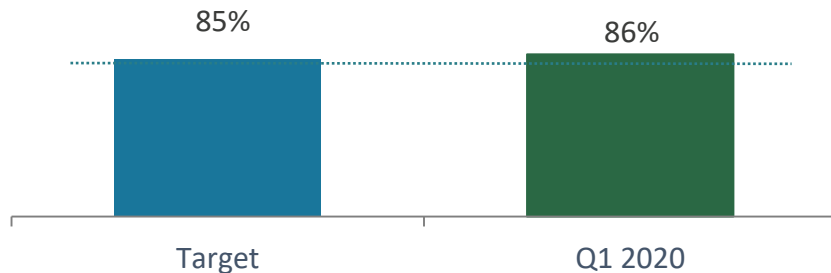
RECRUITMENT AND RETENTION

RR-1   Reduce average time to hire to 60 days

60	43
Target	Q1 2020

RR-2   Stay interviews are conducted for 100% of new hires within 90 days of hire

100%	100%
Target	Q4 2019

RR-3   Reduce average number of days to fill attorney positions

2018 (Baseline)	Q1 2020
129	22

RR-4   Reduce average number of days to fill investigator positions

2018 (Baseline)	Q1 2020
60	56
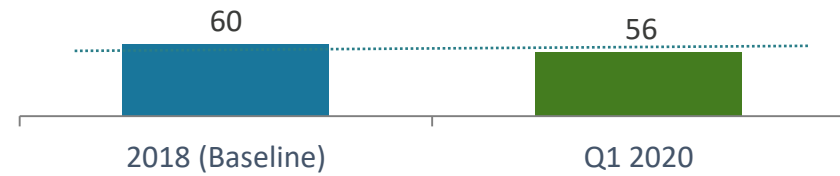
RR-6 90% of participants report a high level of overall satisfaction with trainings
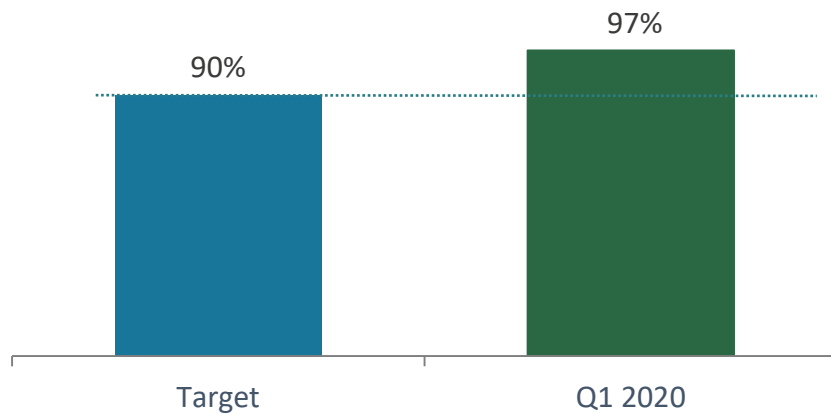
Target	Q1 2020
90%	97%

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RR-8   Reduce turnover rate among attorneys

18%

12%

2018 (Baseline)   2019
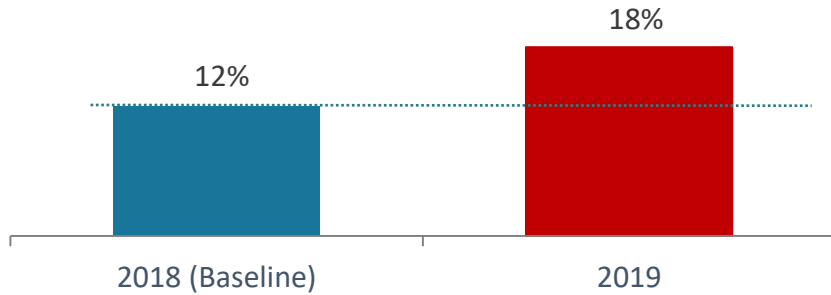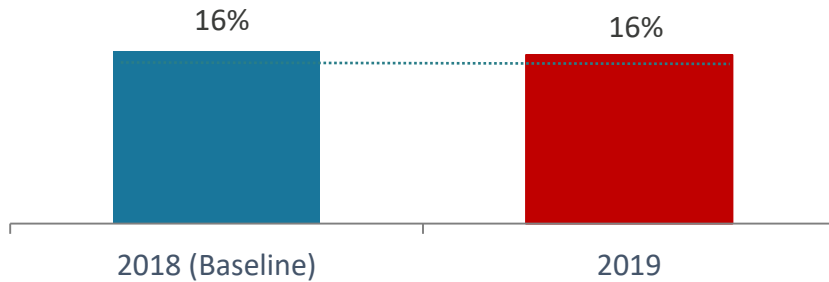
Note: these are annual metrics and were not included in the March 2020 metrics report when annual metrics were reported.

RR-9   Reduce turnover rate among investigators

16%   16%

2018 (Baseline)   2019

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