



The State Bar of California

OPEN SESSION AGENDA ITEM SEPTEMBER 2020 FINANCE COMMITTEE III.E

DATE: September 8, 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 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 Office of Finance did not meet this metric in Q2 2020 because incorporating payroll costs into budget reports in the newly implemented system took longer than expected. Q1 and Q2 2020 financial statements have since been completed and distributed to division Chiefs and other stakeholders. The office does not anticipate further delays and expects to meet this metric going forward.

- **F-3, Pay 90 percent of vendor invoices within 30 days of receipt**
 - Target, 90 percent; Q2 2020 performance, 61 percent; target not met

The Office of Finance paid 61% of invoices within 30 days of the invoice date. COVID-19 has impacted the timeliness of offices submitting invoices to Finance. For example, the average number of days between the invoice date and the date submitted to Finance was 34 days, with the median being 24. Staff will reach out to offices when the submission date of the invoice is greater than two weeks from the invoice date to inquire about the delay and to stress the importance of timely submission of vendor invoices. The Office of Finance processed 93% of invoices within 30 days of receiving

them from offices. The average number of days from submission to Finance to payment was 12 days.

- **HR-1, Process performance evaluations within 30 days of due date**

- Target, 100 percent; Q2 2020 performance, 75 percent; target not met

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).

On March 17, 2020, the State Bar transitioned to mandatory telecommuting for all staff, as a result of the Safer at Home orders related to the Coronavirus pandemic. While the Bar has successfully carried out the majority of its functions during this time, the abrupt transition and the adjustment period that followed did contribute to a delay in some administrative processes, including the timely completion of performance evaluations.

- **IT-2, Process 85% of all IT service requests (not requiring parts/equipment ordering or software development) within five business days or less**

- Target, 85 percent; Q2 2020 performance, 80 percent; target not met

The preparations and execution for supporting a full remote workforce due to Covid-19 caused the priorities to shift for the entire IT organization, and in the process, a few incidents and service requests may have slipped. During the same period, and in order to provide support to our full remote workforce, we introduced a new support system, Zendesk. So while we continue to use Footprints, Zendesk allowed IT to provide remote helpdesk support. That process also caused delays in some of our responses to submitted tickets, as dual entry in some cases was necessary.

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

- Target, 90 percent; Q2 2020 performance, 50 percent; target not met

IT completed two projects during this reporting period and one of them was delayed. This was caused by several factors, the primary one related to the transition of the Oracle project from the vendor to the Internal Team (IS3), and the complications

around completing the transition, which caused the project that was next in the pipeline to be delayed.



The State Bar *of California*

Monthly and Q2 2020 Metrics for Offices Under the Finance Committee's Purview

**Finance
General Services
Human Resources
Information Technology
Recruitment and Retention**

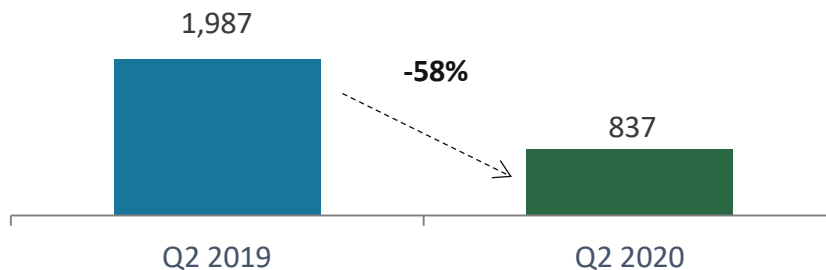
The State Bar of California, Finance Committee Meeting, September 08, 2020

FINANCE

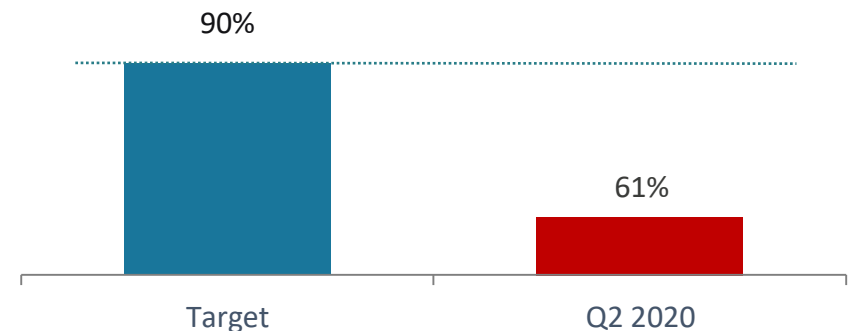
F-1 Provide accurate, timely and informed budget projections to enable efficient financial planning by client division/office and the Executive Director



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



F-3 Pay 90% of vendor invoices within 30 days of receipt



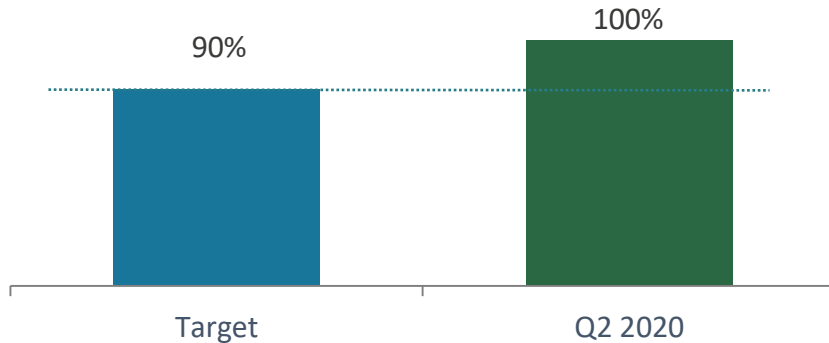
FINANCE

F-4 Process 100% monthly financial statements accurately and on time within 20 days of the close of the month

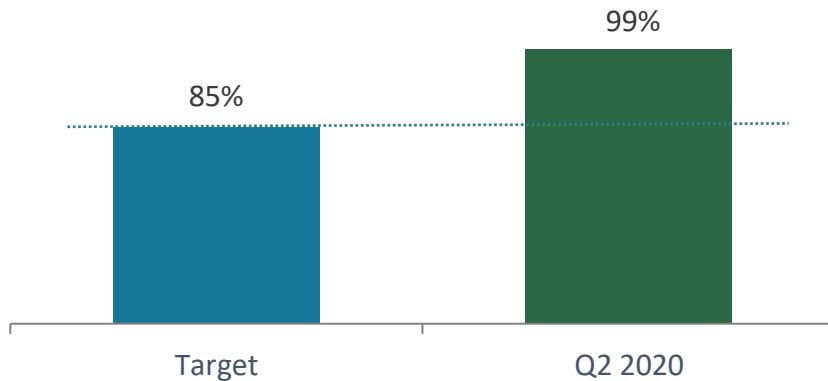


GENERAL SERVICES

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

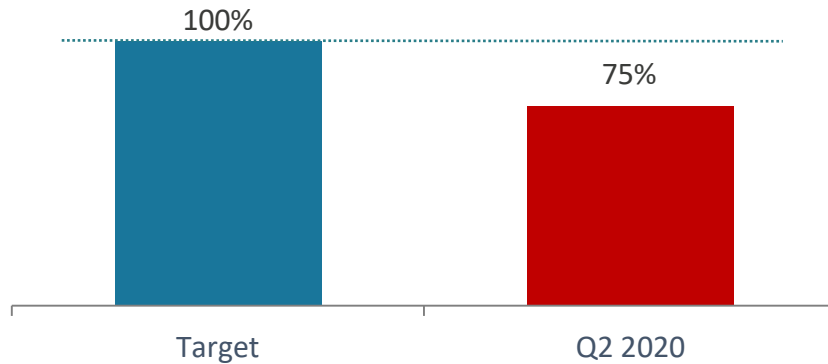


GS-2 Process 85% of all facilities requests (not requiring parts/equipment ordering) within three business days or less



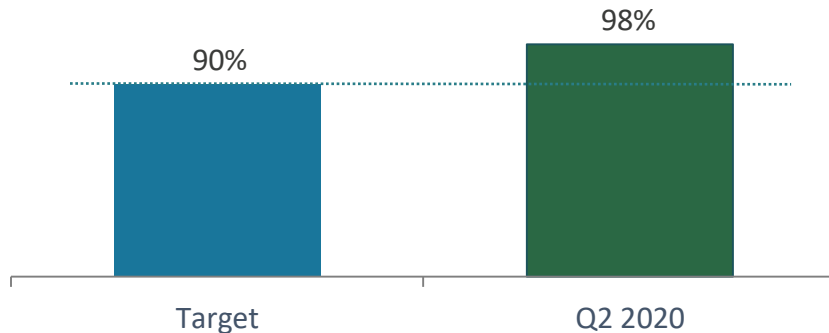
HUMAN RESOURCES

HR-1 Process performance evaluations within 30 days of due date

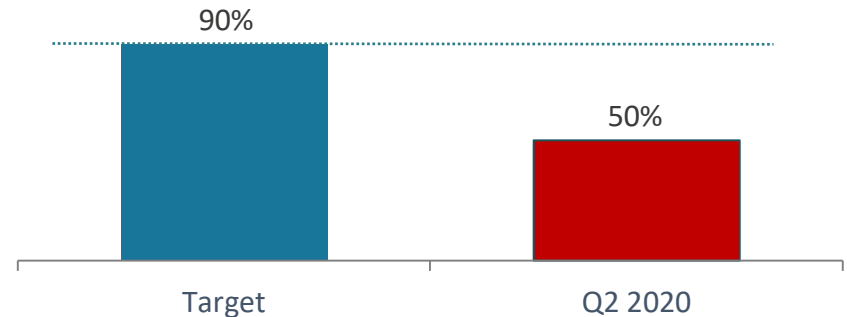


INFORMATION TECHNOLOGY

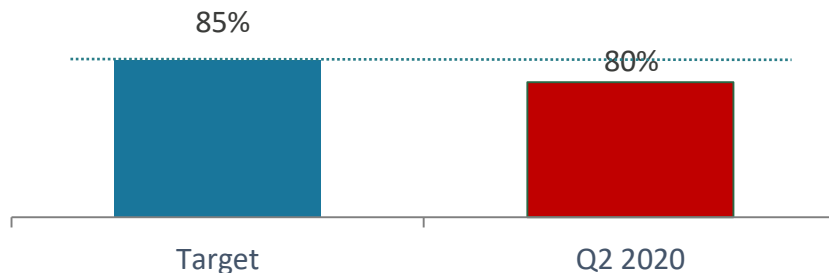
IT-1 90% of stakeholders report a high level of overall satisfaction with new technology deployments



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

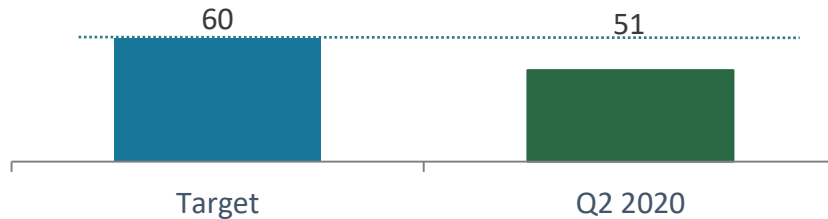


IT-2 Process 85% of all IT service requests (not requiring parts/equipment ordering or software development) within five business days or less



RECRUITMENT AND RETENTION

RR-1 Reduce average time to hire to 60 days

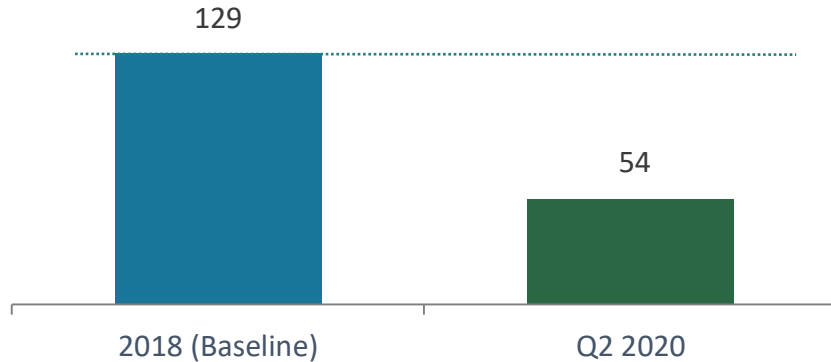


RR-2 Stay interviews are conducted for 100% of new hires within 90 days of hire

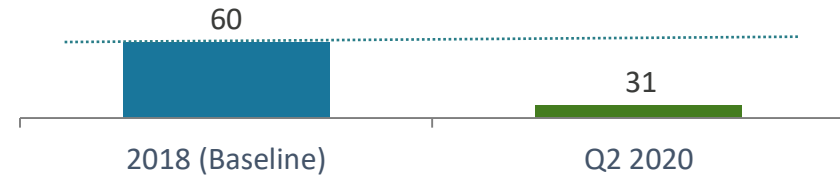


RECRUITMENT AND RETENTION

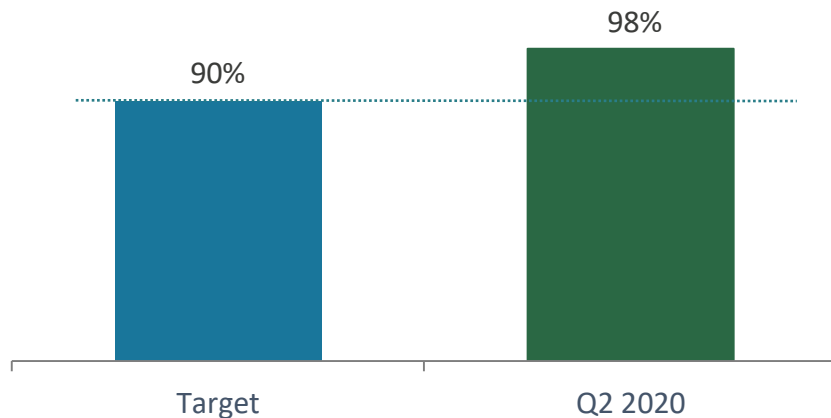
RR-3 Reduce average number of days to fill attorney positions



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



RR-6 90% of participants report a high level of overall satisfaction with trainings

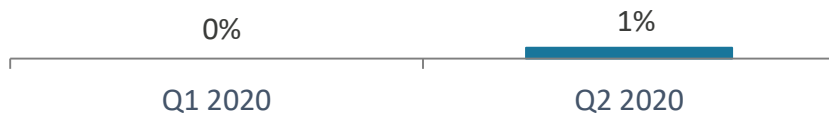


RECRUITMENT AND RETENTION

RR-8 Reduce turnover rate among attorneys



RR-9 Reduce turnover rate among investigators



Note: Employee turnover rates for accountability purposes are reported annually. Quarterly turnover rates will be reported for information only.

