OPEN SESSION
AGENDA ITEM
41-1 SEPTEMBER 2020

DATE: September 24, 2020

TO: Members, Board of Trustees

FROM: Donna S. Hershkowitz, Interim Executive Director

SUBJECT: Report from Executive Director

An examination of the agendas for the September Board of Trustees and Board Committee meetings demonstrates a State Bar continuing to vigorously pursue its mission, even while activity across the nation may have slowed down, or in some cases, completely stalled out. The agenda for the Board meeting requests adoption of six separate rule change packages. Two additional rule changes are on the Regulation and Discipline Committee agenda with a request to circulate for public comment, along with two formal advisory opinions for which we are seeking approval for publication. All the while, the subentities continue to meet and implement the many, many items on their workplans.

The Board agenda includes an update on the recently formed Paraprofessional Program Working Group and requests appointment of members for the new Closing the Justice Gap Working Group. One agenda item recommends the formation of an ad hoc commission on the Attorney Discipline System, in order to take a comprehensive look at the efforts to address racial disparity in the discipline system, as well as efforts to improve the overall discipline system. The proposed purpose of the commission is to review and evaluate recent changes to the discipline system, as well as determine what additional improvements can be made to make for a more fair and effective discipline system for all.

This level of activity is far from uncommon for the State Bar I have come to know during my three-year tenure as part of the State Bar's Leadership Team. But this proactive work is only part of the picture. Throughout the past six months, it seems as though the amount of reactive work has increased, mostly attributable to the COVID-19 pandemic and the various issues it has brought to the State Bar and others to tackle. Some of that work shows up on Board agendas, but some goes unseen, as it is simply handled day-to-day by our staff.

As we look forward to the Board's annual planning session in January 2021, the final year to achieve the objectives set forth in the 2017–2022 State Bar Strategic Plan, it is time to honestly catalog the volume of work currently being performed, and what can realistically be completed in furtherance of the State Bar's mission.

METRICS FOR JUNE AND JULY 2020 AND Q2 2020

There are 52 metrics with monthly and quarterly performance goals, as discussed in Attachment A. Of those, 43 have specific targets against which to measure ourselves to promote accountability. For this reporting period, 34 met their targets and nine did not. Of those nine, two were discussed with the Regulation and Discipline Committee, and six were discussed with the Finance Committee. Only ARCR-1A, described on page 13 of Attachment A, was not addressed.

However, for this report, I wanted to take a moment to focus on just a few of the successes:

- **ARCR-1B:** Target – Less than 30 percent of calls abandoned. Actual – 11 percent.
- **ARCR-1C:** Target – Average call wait time is less than eight minutes. Actual – 3 minutes, 44 seconds.
- **ARCR-2:** Target – 75 percent of participants completing phone system survey report a high level of overall satisfaction with their call center experience. Actual – 100 percent.
  - Although the State Bar began remote work on March 17, the call center was closed through April 1. On April 1, we were able to transition most of the technology and secure the necessary equipment to allow for remote operations. The ability to train newer staff on different call queues was severely hampered while staff was awaiting the call monitoring function to be operational in a remote environment, meaning that fewer staff were able to respond to all incoming calls. The fact that the call center was able to surpass these targets during this period is to be commended.
- **IT-1:** Target – 90 percent of stakeholders report a high level of overall satisfaction with new technology deployments. Actual – 98 percent.
  - At a time when the State Bar transitioned to operate nearly entirely remotely and we deployed Zoom as a meeting platform, as well as IT operations staff being besieged with calls for assistance with remote setups, exceeding this target is a phenomenal success that should be applauded.
- **LAP-4B:** Target – 80 percent of participants are satisfied with their Lawyer Assistance Program experience. Actual – 100 percent.
  - During this period, LAP switched from in-person group sessions to remote. The Clinical Rehabilitation Coordinator addressed increased stress and anxiety in those served by the program as a result of COVID-19, unexpected unemployment, reduced wages, or other reasons. Achieving a 100 percent satisfaction rate in such times is impressive.

- **RR-6:** Target – 90 percent of participants report a high level of overall satisfaction with trainings. Actual – 98 percent.
  - The Office of Recruitment & Retention (R^2) transitioned to 100 percent remote training during this period, using the Zoom platform to replace what was previously in-person training. During this period, R^2 quickly adapted to the needs of the time, offering training to staff on how to work remotely, and to supervisors on how to supervise remote work. R^2 also deployed trainings on guided meditation to assist staff in addressing the added stress of COVID-19 and the work-from-home environment.

However, it may be that some of these metrics have outlived their usefulness. As I mentioned in the July Executive Director report:

> Although these measures have absolutely not been static in the last two years, offices across the State Bar have developed a better understanding of the import of performance metrics, and may be in a better position to help create even better metrics by which to hold ourselves accountable. . . As a result, I recommend that a fresh look be taken at the performance metrics before the end of the year and an updated list of performance metrics be discussed at the January 2021 planning session.

Therefore, although we will continue to capture these metrics through the end of 2020, there will be no metrics report at the November 2020 Board meeting while we make efforts to retool the metrics for 2021.

ATTACHMENT(S) LIST

A. State Bar Metrics Report for Second Quarter 2020, June 2020 and July 2020

Attachment A
State Bar Metrics

Monthly and Q2 2020

September 2020

The State Bar *of California*

Overview

This report contains results for 52 State Bar metrics. The majority of these metrics are reported for Q2 2020, while some are reported for June and July 2020 per their reporting requirements. Of the 52 metrics reported, 43 have targets for accountability purposes. As detailed on pages 13-17, nine of these metrics did not meet their targets.

All data and metric names in this report supersede those previously reported. Please refer to the "Metric Updates" section on page 18 for a list of all metrics currently tracked and organized by operational area.
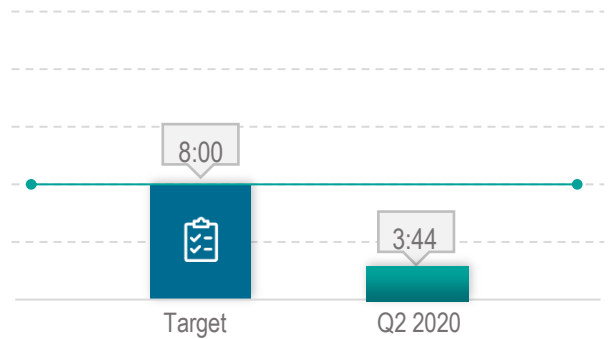
Less than 30% of calls abandoned
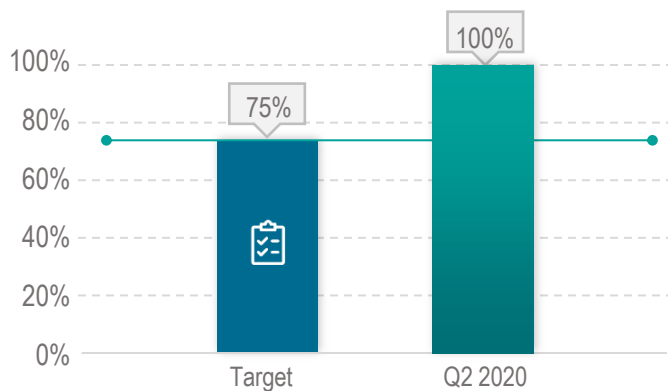
ARCR-1B
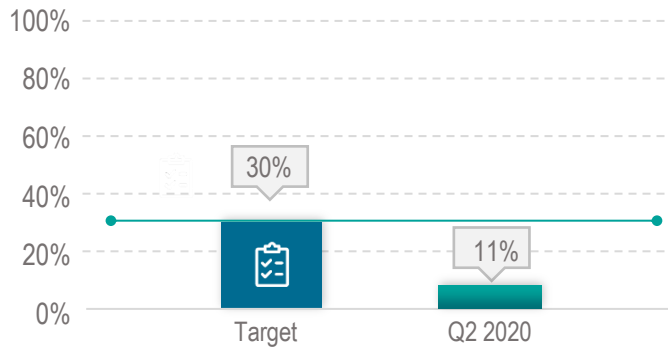
Average call wait time is fewer than eight minutes
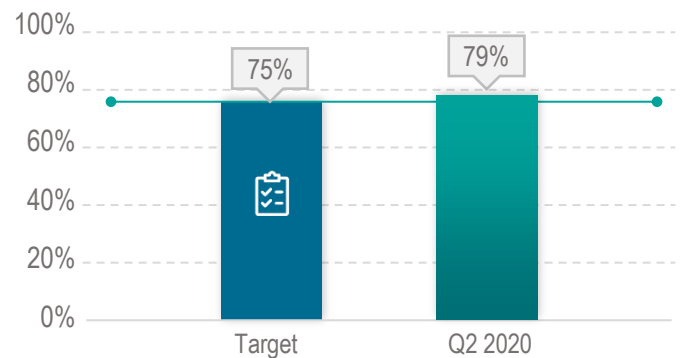
ARCR-1C

75% of participants completing phone system survey report a high level of overall satisfaction with their call center experience

ARCR-2

Process 75% of MCLE applications within 30 days of receipt
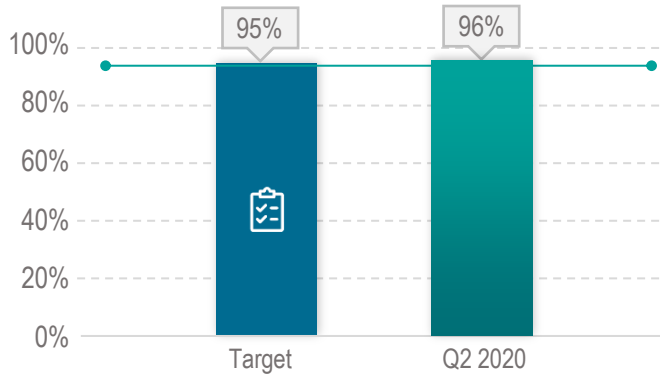
ARCR-3

Note: 354 MCLE applications were processed during Q2 2020.

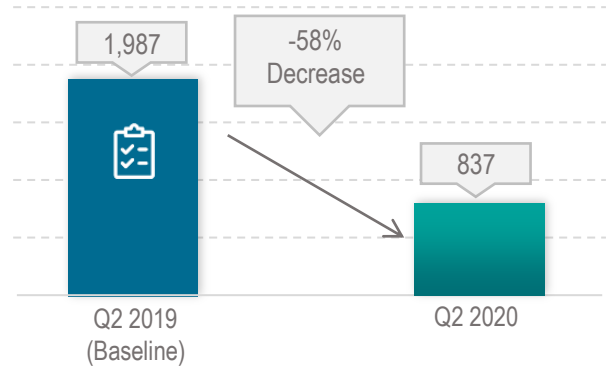## Fulfill 95% of requests for certificates of standing within five days of receipt

ARCR-5

95% 96%

100%
80%
60%
40%
20%
0%

Target   Q2 2020

Note: ARCR received 2,013 requests for certificates of standing during Q2 2020.

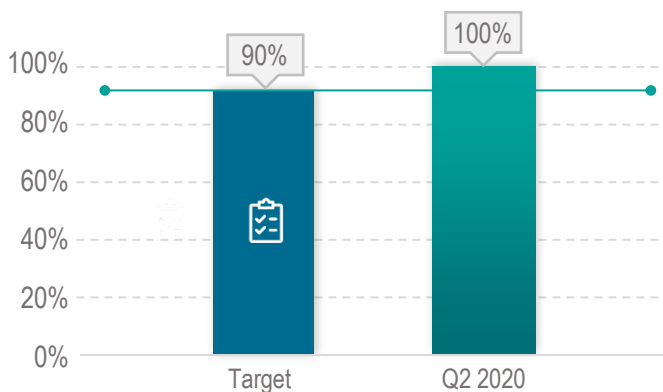## Reduce number of billing-related phone calls from attorneys to Attorney Regulation & Consumer Resources by 10%
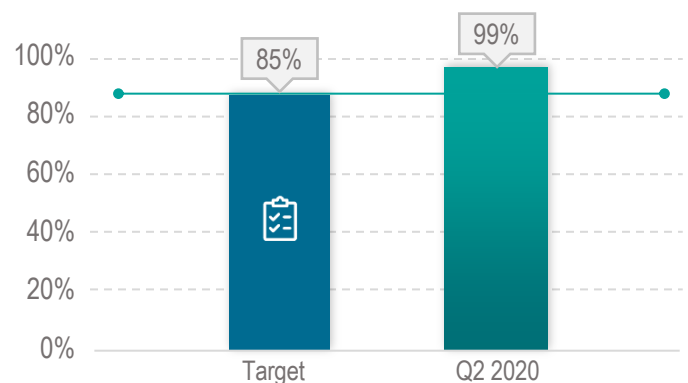
F-2

1,987   -58% Decrease   837

Q2 2019 (Baseline)   Q2 2020

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

GS-1

90%   100%

100%
80%
60%
40%
20%
0%

Target   Q2 2020

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

GS-2

85%   99%

100%
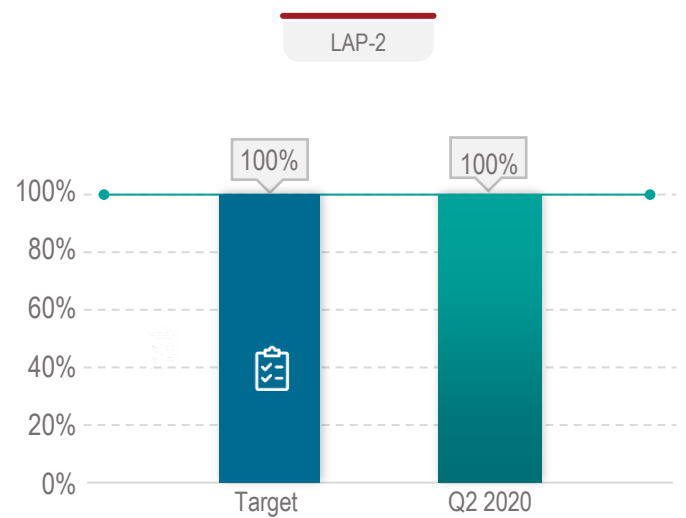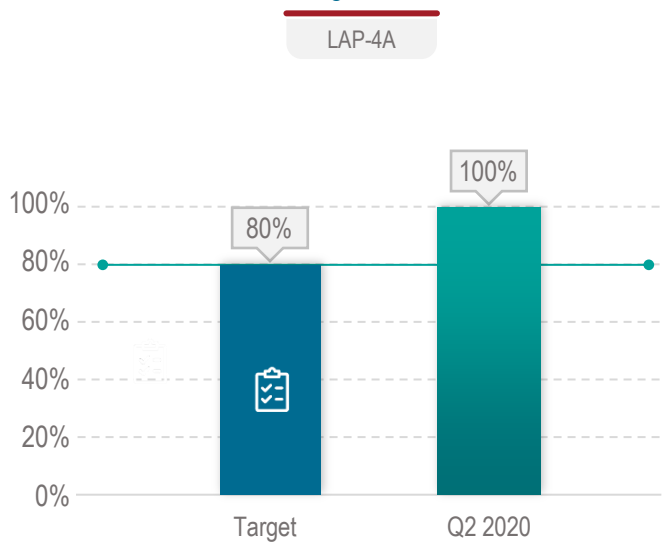80%
60%
40%
20%
0%

Target   Q2 2020

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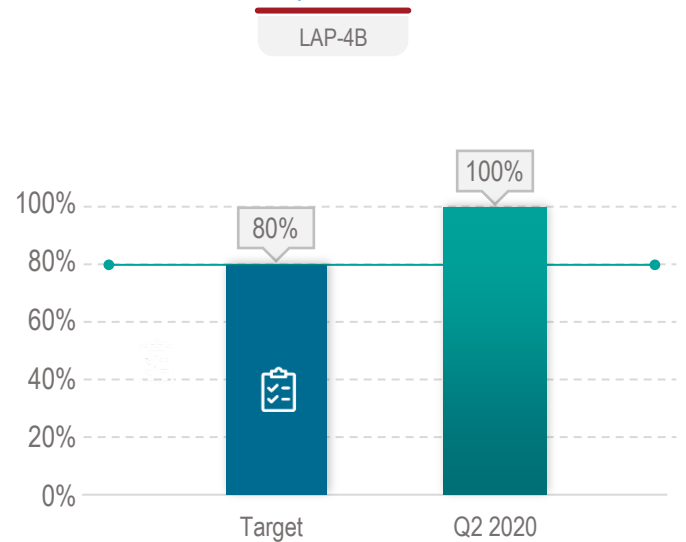
IT-1

Respond to 100% of requests for presentations within two business days

LAP-2

80% of survey participants report that the Lawyer Assistance Program addressed their goals

LAP-4A

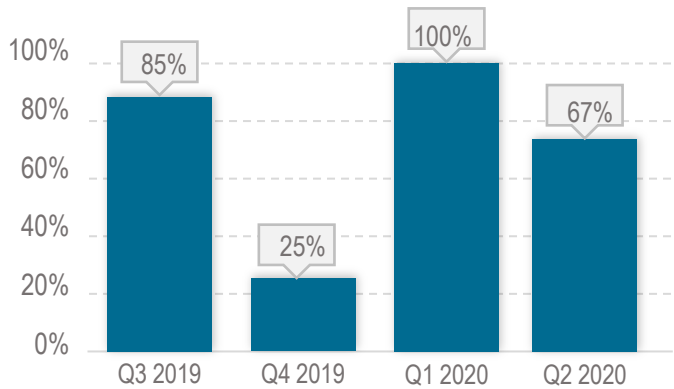80% of survey participants are satisfied with their Lawyer Assistance Program experience

LAP-4B

Track successful completion rates for Alternative Discipline Program cases

LAP-5

85%	25%	100%	67%

Q3 2019 — Q4 2019 — Q1 2020 — Q2 2020

Monitor bank compliance with agreed-upon interest rates

OAI-2

Goal Met

Minimize number of Priority 1 (P1) cases in backlog

OCTC-1

18.9%	18.3%	18.1%	17.5%

April 2020 — May 2020 — June 2020 — July 2020
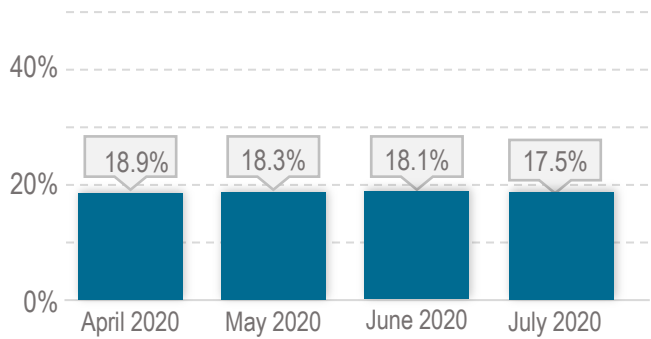
Ensure Priority 2 (P2) cases are processed in an expedited fashion

OCTC-2

June 2020		July 2020	
79	179	80	159

● Median   ● 90th Percentile
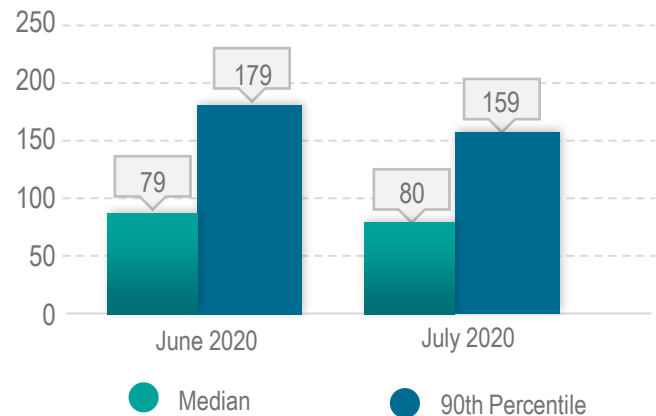
Note: This metric is measured by number of days.

Maintain OCTC annual caseload clearance rate of 1.0 or higher

OCTC-3

Note: This metric is calculated using a 12-month rolling average to stabilize month-to-month fluctuations in caseload clearance rates. For example, the July 2020 annual caseload clearance rate reflects the average monthly caseload clearance rates of August 2019 through July 2020.

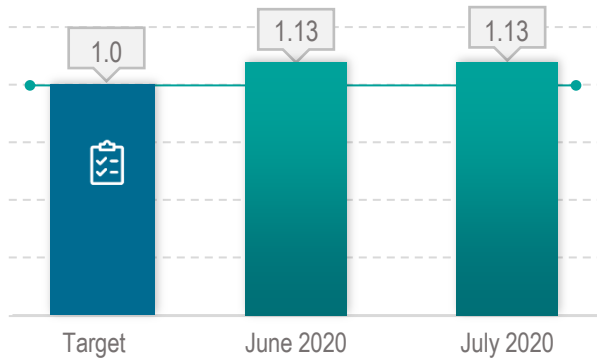## Case disposition times (OCTC)

OCTC-4A & OCTC-4B
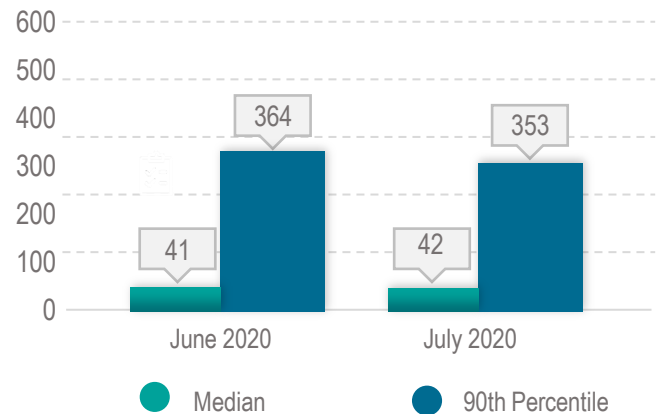
Note: This metric is measured by number of days.

Cases in inventory at months end (OCTC)

OCTC-6
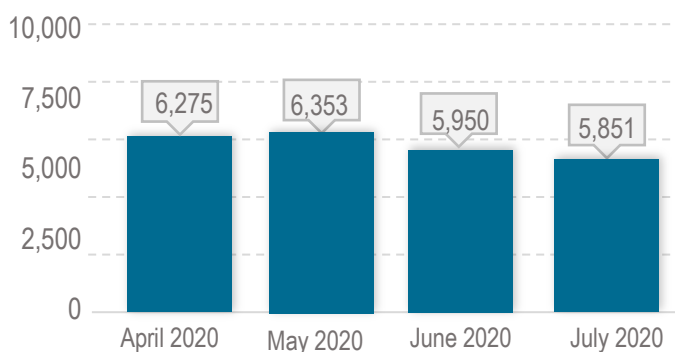
Note: This chart describes cases that are reported in the Annual Discipline Report (ADR).

Complete/resolve an average of 60 Complaint Review Unit (CRU) cases per month

OGC-1
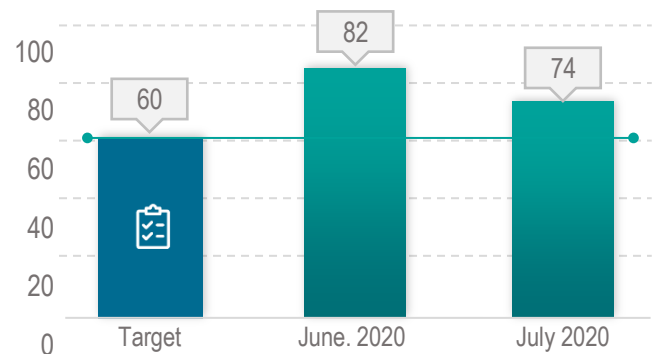
75% of callers report a high level of overall satisfaction with the Ethics Hotline experience

OPC-1
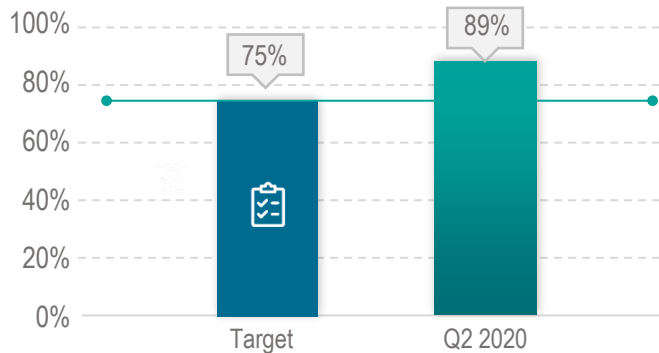
Voluntary e-Learning courses: 85% of participants report that courses contained significant practical content

OPC-2B
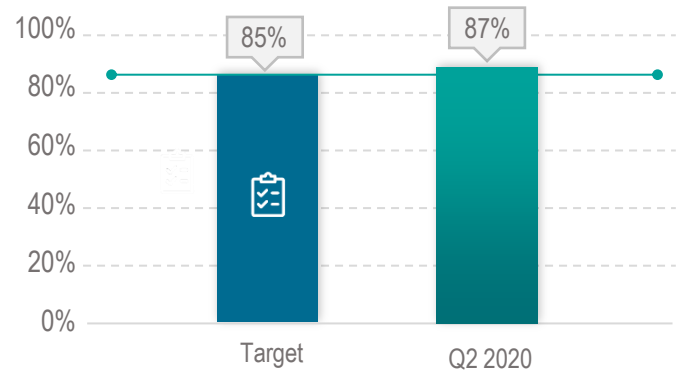
Mandatory e-Learning courses: 70% of participants report these courses met their expectations

OPC-2C

Note: The targets for metrics related to mandatory e-Learning (OPC-2C, OPC-2D were recently revised. Staff will monitor the results and adjust the targets as needed.

Mandatory e-Learning courses: 70% of participants report these courses contained significant content

OPC-2D

90% of all ORIA projects met project milestones

ORIA-1

Target Met

95% on-time distribution of discipline reports from Odyssey

ORIA-2

Target Met

90% of regular management reports and performance metrics are automated

ORIA-3

Target Met

Successful completion rates

P-1
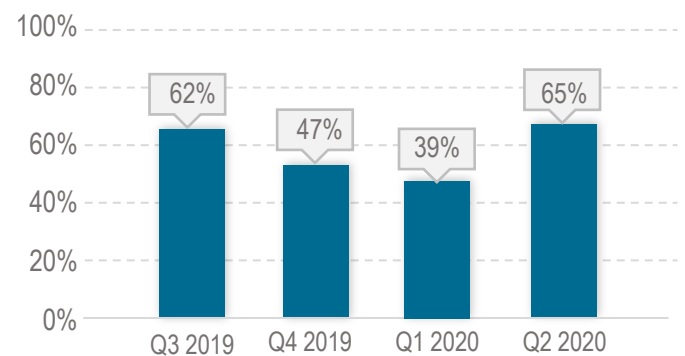
Note: Cases included are 9.20 matters without Supreme Court numbers, reproval, and probation cases which have conditions ordered to be completed.

Reduce average time to hire to 60 days or fewer

RR-1

100
80 — 60 days
60 ●──────────────────────● 51 days
40
20
0
Target   Q2 2020
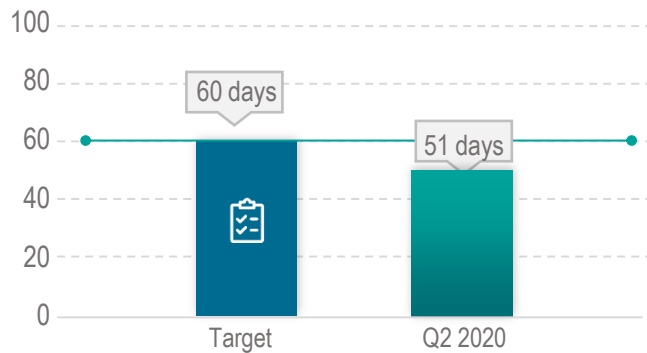
Stay interviews are conducted for 100% of new hires within 90 days of hire

RR-2

100% ●──── 100% ──────── 100% ────●
80%
60%
40%
20%
0%
Target   Q1 2020
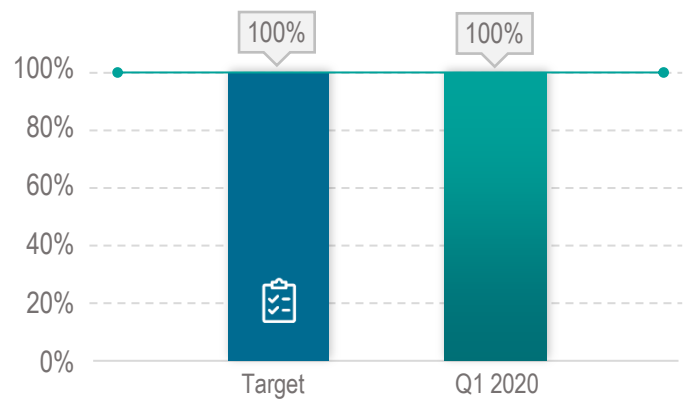
Reduce average number of days to fill attorney positions

RR-3

129 days
100 ●────────────────────────●
80
60 — 54 days
40
20
0
2018
(Baseline)   Q2 2020
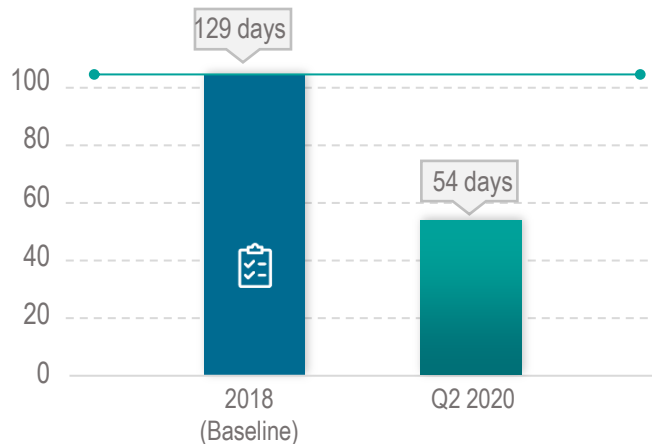
Reduce average number of days to fill investigator positions

RR-4

100
80
60 ●──── 60 days ──────────●
40   31 days
20
0
2018
(Baseline)   Q2 2020
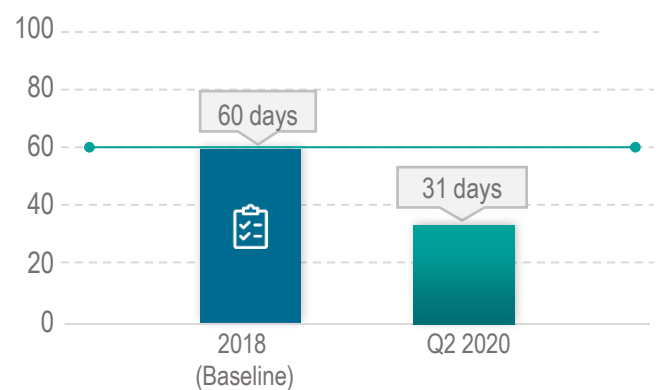
90% of participants report a high level of overall satisfaction with trainings

RR-6

Reduce turnover rate among attorneys

RR-8
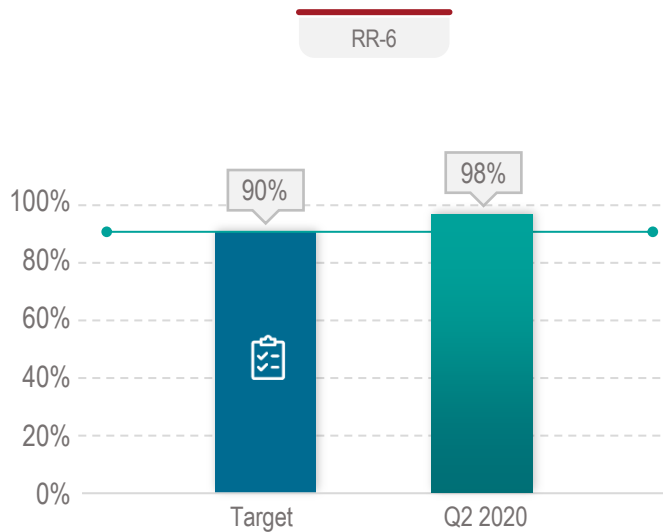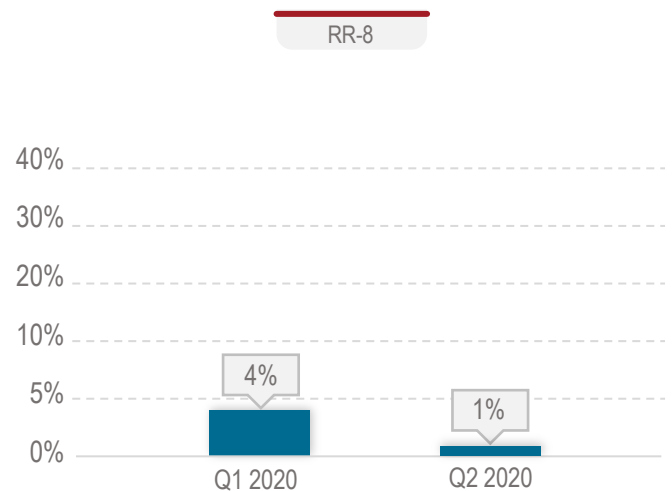
Note: This metric has an annual target and will be reviewed for accountability purposes at the end of 2020. Quarterly turnover rates are reported for information only.

Reduce turnover rate among investigators
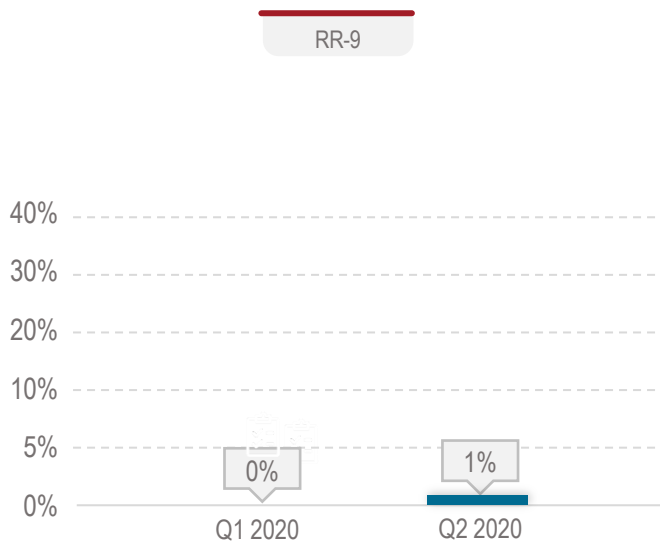
RR-9

Note: This metric has an annual target and will be reviewed for accountability purposes at the end of 2020. Quarterly turnover rates are reported for information only.

90% of Hearing Department cases reach final outcome within timeline requirements

SBC-2A

All Hearing Department cases reach final outcome within 150% of timeline requirements

SBC-2B
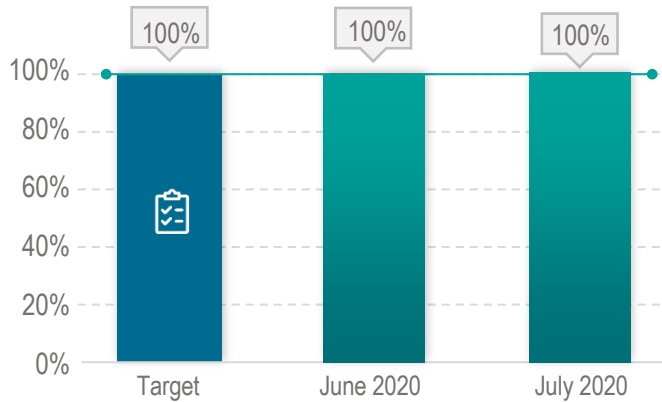
100%   100%   100%

| | Target | June 2020 | July 2020 |

All effectuation cases processed within established timeline requirements

SBC-2E

100%   100%   100%

| | Target | June 2020 | July 2020 |
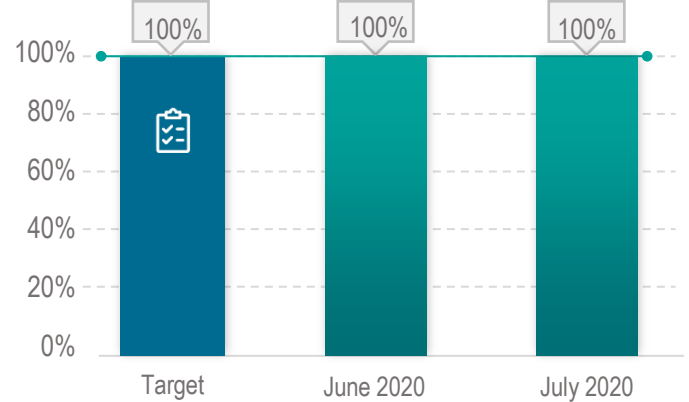
Case disposition times (State Bar Court)

SBC-3A & 3B

1,020

198   306   273

| | June 2020 | July 2020 |

● Median   ● 90th Percentile
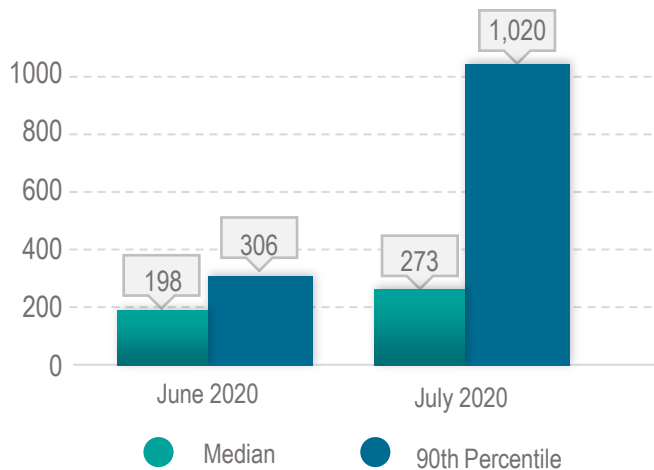
Note: This metric is measured by number of days.

Metrics That Did Not Meet Targets

The following pages list the nine metrics that did not meet their targets in any of the time periods analyzed. Accompanying each metric is a narrative that provides context for the results.

Less than 40% of Resource Center calls transferred out

ARCR-1A
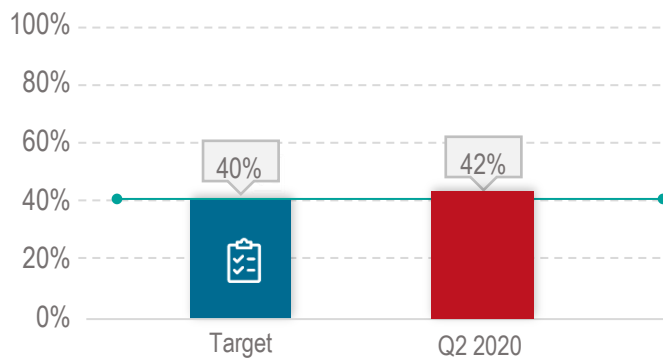
Note: The Resource Center received 46,436 calls in Q2 2020.

The Resource Center received many calls related to the Bar Exam during Q2 2020, particularly as they related to pending Supreme Court decisions. As such, these calls required transferring. In addition, calls tend to be more complicated at this time in the fee cycle and are more likely to be transferred. For example, many callers seek waivers, extensions, or other exceptions, and claim the State Bar has committed an error, all of which require escalation.

Finally, ARCR had staffing issues during Q2 2020. Two experienced call center staffers were internally promoted to other positions within ARCR in the last quarter and two staffers took leaves of absence. This had a short-term negative effect on the call center's ability to address all types of calls as new staffers and temporary employees were trained.

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

F-1

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.

Pay 90% of vendor invoices within 30 days of receipt

F-3

100%
80%
60%
40%
20%
0%

90%

61%

Target   Q2 2020
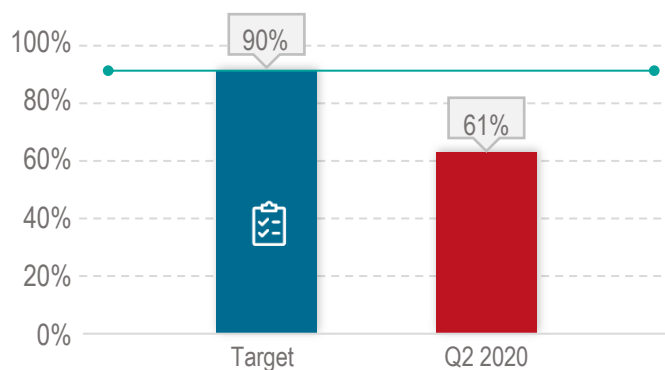
The Office of Finance paid 61 percent of invoices within 30 days of the invoice date. COVID-19 has impacted the timeliness of offices submitting invoices to Finance. For example, the average number of days between the invoice date and the date submitted to Finance was 34 days, with the median being 24. 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 percent of invoices within 30 days of receiving them from offices. The average number of days from submission to Finance to payment was 12 days.

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

F-4

Goal Not Met

As with F-1, this metric was not met due to delays with implementing a new system. Monthly reports have since been circulated to State Bar offices. Once the format is finalized, Finance does not anticipate any further delays and expects to meet this metric in the future.

Process performance evaluations within 30 days of due date

HR-1

100%

75%

| | Target | Q2 2020 |
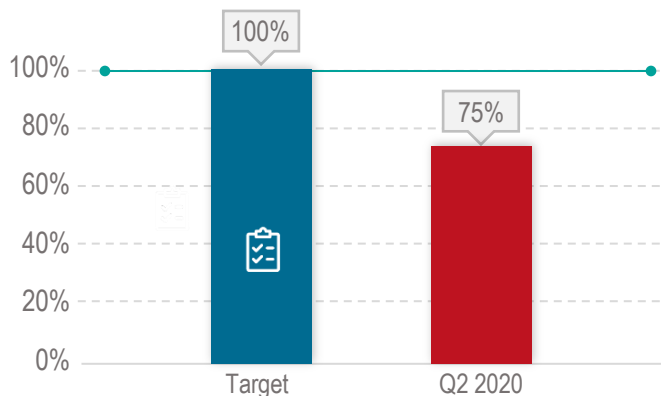
Human Resources is engaging in key initiatives to ensure greater understanding of the importance of performance evaluations (PE) and management to employee engagement, including the redesign of the Performance Management process.

- HR sends 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 State Bar has successfully carried out the majority of its functions during this time, the abrupt transition and the adjustment period that followed contributed to a delay in some administrative processes, including the timely completion of performance evaluations.

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

IT-2
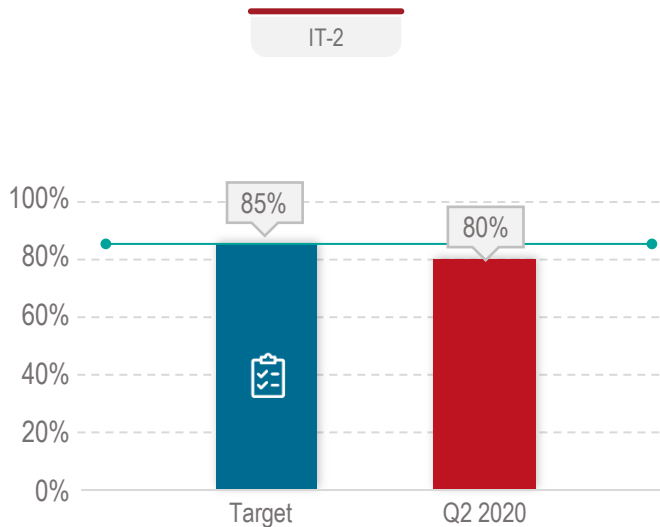
The preparations and execution for supporting a full remote workforce due to COVID-19 caused the priorities to shift for the entire IT organization, and in the process, a few incidents and service requests may have slipped. During the same period, and in order to provide support to our full remote workforce, we introduced a new support system, Zendesk. 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.

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

IT-3
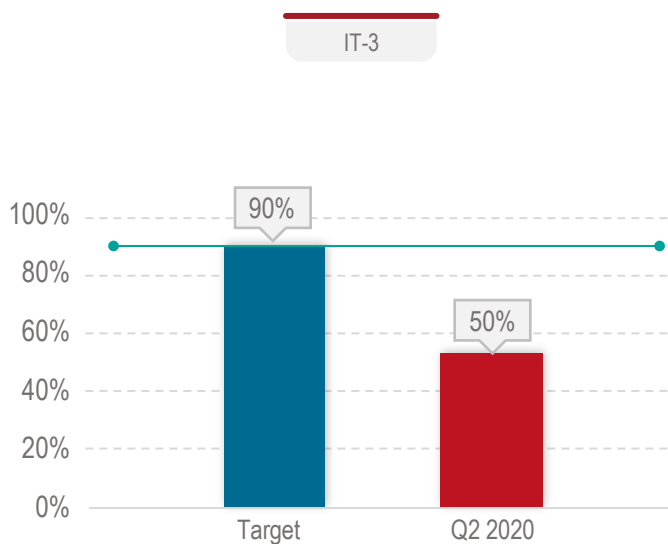
IT completed two projects during this reporting period and one of them was delayed. This was caused by several factors; the primary one related to the transition of the Oracle project from the vendor to the Internal Team (IS3) and the complications around completing the transition, which caused the project that was next in the pipeline to be delayed.

E-Learning courses: 85% of participants report that courses met their expectations

OPC-2A
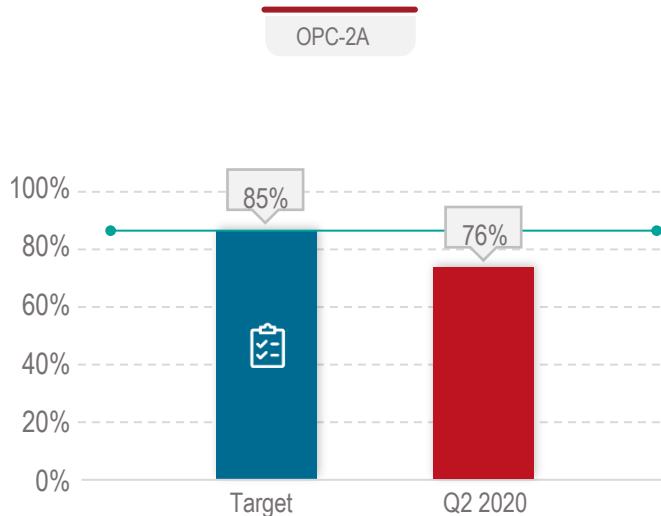
Based on the comments provided in the open comment field of the survey form, we believe that the lower "overall" satisfaction ratings are the result of course functionality issue experienced by some users. Courses are delivered on an internet-based application and can be periodically affected by users' internet browsers, browser settings, and the operating systems of the many devices participants use to take the E-Learning course.

These issues are not experienced by the majority of users. However, those who encounter these issues are more likely to submit a satisfaction survey and this negative experience influences their overall experience, even if their rating of the course content was favorable. Staff will continue to analyze survey responses to learn more about what changes may be made to improve participants' experiences.

Maintain State Bar Court annual caseload clearance rate of at least 1.0
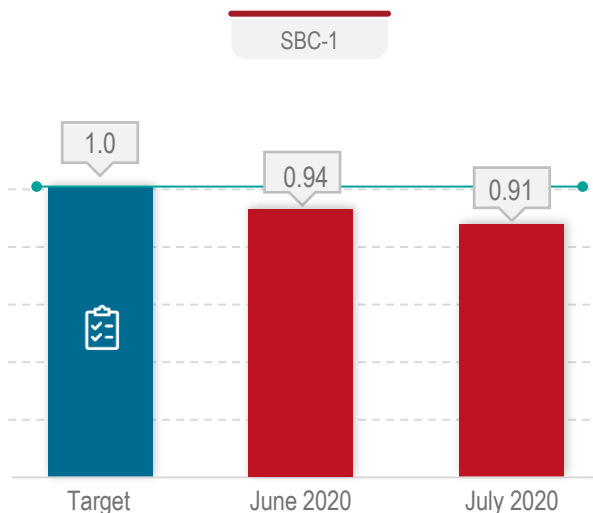
SBC-1

Note: This metric is calculated using a 12-month rolling average to stabilize month-to-month fluctuations in caseload clearance rates. For example, the May 2020 annual caseload clearance rate reflects the average monthly caseload clearance rates of August 2019 through July 2020.

Beginning March 13, 2020, the COVID-19 pandemic and related State Bar building closures to the public required the court to abate roughly 150 cases and resulted in a decline of the court's caseload clearance. During the building closures, following the acquisition of Zoom licenses, the State Bar Court began extensive training to permit the Court to conduct remote events, unabate cases, and conduct conferences, trials, and oral arguments. The first remote event occurred on April 21, the first remote oral argument occurred on June 17, and the first remote trial was held on July 8.The remote appearances program continues today, which has allowed the State Bar Court to limit the number of employees needed to come into the office full-time and allowed the court to keep courtrooms closed. The court has also implemented new practices to comply with interim rule 5.26.1 and accept and file electronic submissions. The court expects the caseload clearance rate to remain irregular for the next several months while the court recovers from the State Bar building closure and related case abatements.

Metric Updates

Organized by office, the list below contains all metrics the State Bar is currently tracking. To clarify timing and meaning, edits to the "Metric Name and Performance Target" column, if any, are reflected in strikethroughs. All metric IDs below supersede those previously reported.

ADMISSIONS

Metric Focus: Quality Control, Cycle Time, Cost Control

Metric ID	Name	Timing	Notes
A-1	Implement 100% of Board of Trustees ~~Appendix I~~ Appendix I adopted reforms	Quarterly	This metric is on track for ~~for~~ completion in 2020 and will ~~and will~~ be reported when ~~when~~ completed.
A-2	Conduct initial review of 80% of Moral ~~Character~~ Character applications received within 60 days of ~~days of~~ receipt	Semiannually~~y~~	
A-3	Reduce exam costs by 5% by Q4 2020	Annually	

ATTORNEY REGULATION & CONSUMER RESOURCES

Metric Focus: Efficiency (Operational Management), Cycle Time

Metric ID	Name	Timing	Notes
ARCR-1A	Less than 40% of Resource Center calls transferred out	Quarterly	
ARCR-1B	Less than 30% of calls abandoned	Quarterly	
ARCR-1C	Average call wait time of fewer than eight minutes ~~minutes~~	Quarterly	
ARCR-2	75% of participants completing phone system ~~system~~ survey report a high level of overall ~~overall~~ satisfaction with their call center experience	Monthly and Quarterly	
ARCR-3	Process 75% of MCLE applications within 30 days ~~within 30 days~~ of receipt	Quarterly	
ARCR-4	Continue implementation of LLP online renewal ~~renewal~~ with a goal of 90% LLPs completing ~~completing~~ online by Q4 2020	One-time	
ARCR-5	Fulfill 95% of requests for certificates of standing ~~standing~~ within five business days of receipt ~~receipt~~	Quarterly	
ARCR-6	Convert 20% of Law Corporations to a strictly ~~strictly~~ online renewal process by Q3 2020 ~~2020~~	One-time	

BOARD SUPPORT JNE COMMISSION AND APPOINTMENTS

Metric Focus: Efficiency (Operational Management)

Metric ID	Name	Timing	Notes
BJA-1	90% of stakeholders report a high level of overall overall satisfaction with quality of operational operational support provided	Annually	
BJA-2	100% of JNE candidates evaluated within 90 days 90 days	Semiannually y	

CLIENT SECURITY FUND

Metric Focus: Customer Satisfaction, Efficiency, Cost Control, Cycle Time

Metric ID	Name	Timing	Notes
CSF-1	Provide status update to 100% of applicants at applicants at least twice per year	Semiannually y	
CSF-2	Ensure timely, accurate budget allocations for allocations for reimbursements	Annually	
CSF-3	Develop and monitor annual benchmarks for for number of cases to be resolved based on on annual budget and pending inventory by Q2 by Q2 annually	Annually	
CSF-4	Develop and monitor target for time to payout after payout after final disposition based on resource resource availability by Q2 annually	Annually	
CSF-5	Develop and monitor annual benchmarks for cases for cases resolved by staff to monitor caseload caseload clearance rate, caseload inventory, and inventory, and improvements in efficiency after after transitioning Tentative Decisions to staff staff	Annually	

FINANCE

Metric Focus: Fiscal Management/Operational Efficiency, Quality, Cycle Time

Metric ID	Name	Timing	Notes
F-1	Provide accurate, timely and informed budget, budget, projections to enable efficient financial financial planning by client division/office and the and the Executive Director	Quarterly	
F-2	Reduce number of billing-related phone calls from calls from attorneys to ARCR by 10%	Quarterly	

FINANCE (CONTINUED)

Metric ID	Name	Timing	Notes
F-3	Pay 90% of vendor invoices within 30 days of days of receipt	Quarterly	
F-4	Process 100% of monthly financial statements statements accurately and on time, within 20 days 20 days of the end of the month	Monthly	Due to the fiscal calendar this this metric is reported for the the months of June through through December.
F-5	90% of internal clients report a high level of overall of overall satisfaction with services provided by provided by finance staff	Annually	

GENERAL SERVICES

Metric Focus: Cycle Time, Quality

GS-1	Process 90% of procurement requisitions with with 100% accuracy within three days	Quarterly	
GS-2	Process 85% of all facilities requests (not requiring requiring parts/equipment ordering) within three or three or fewer business days	Quarterly	
GS-3	Complete 90% of capital improvement projects on projects on the annual capital improvement plan improvement plan	Annually	
GS-4	Process all capital improvement projects within within budget	Annually	
GS-5	90% of internal customers report a high level of level of overall satisfaction with services provided provided by General Services staff	Annually	

HUMAN RESOURCES

Metric Focus: Cycle Time, Customer Satisfaction

(*Note*: Metrics related to staffing are now under the Recruitment and Retention office.)

HR-1	Process performance evaluations within 30 days of 30 days of due date	Monthly/ Quarterly	
HR-2	90% of internal customers report a high level of level of overall satisfaction with services provided provided by Human Resources staff	Annually	

INFORMATION TECHNOLOGY

Metric Focus: Efficiency, Customer Satisfaction

Metric ID	Name	Timing	Notes
IT-1	90% of stakeholders report a high level of overall overall satisfaction with new technology deployments	Quarterly	
IT-2	Process 85% of all IT service requests (not (not requiring parts/equipment ordering or software software development) within five or fewer fewer business days	Quarterly	
IT-3	Complete 90% of planned major IT projects on projects on schedule and on budget	Quarterly	
IT-4	90% of internal customers report a high level of level of overall satisfaction with services provided provided by IT staff	Annually	

LAWYER ASSISTANCE PROGRAM

Metric Focus: Utilization, Customer Satisfaction, Outreach

Metric ID	Name	Timing	Notes
LAP-1	Increase intakes by 10%	Annually	
LAP-2	Respond to 100% of requests for presentations presentations within two business days	Quarterly	
LAP-3	Complete 20 law school presentations and 10 Bar and 10 Bar Association/law firm presentations presentations	Annually	
LAP-4A	80% of survey participants report that the Lawyers Lawyers Assistance Program addressed their their goals	Quarterly	
LAP-4B	80% of survey participants report they are satisfied satisfied with their Lawyers Assistance Program Program experience	Quarterly	
LAP-5	Track successful completion rates for Alternative Alternative Discipline Program cases	Quarterly	

OFFICE OF ACCESS & INCLUSION

Metric Focus: Efficiency (Operational Management), Compliance

Metric ID	Name	Timing	Notes
OAI-1	Monitor bank compliance with agreed-upon interest upon interest rates	Quarterly	
OAI-2	Develop detailed operational plan for Legal Legal Services Trust Fund & Access to Justice Justice Commissions based on BOT decisions in decisions in January 2019, with a target goal for goal for implementation of 100% of identified identified changes by Q4 2021	One-time	
OAI-3	Roll out 75% of identified data reporting and and collection improvements by Q2 2019 for for changes involving State Bar only, and by Q3 by Q3 2019 for changes impacting data collection collection by legal services programs for collection collection beginning 2020	One-time	This metric will be put on hold hold and revisited in 2021. 2021.

OFFICE OF CHIEF TRIAL COUNSEL

Metric Focus: Cycle Time, Quality

Metric ID	Name	Timing	Notes
OCTC-1	Minimize number of Priority 1 (P1) cases in in backlog	Monthly	
OCTC-2	Ensure Priority 2 (P2) cases are processed in an processed in an expedited fashion	Monthly	
OCTC-3	Maintain annual caseload clearance rate of 1.0 or of 1.0 or higher	Monthly	
OCTC-4A	Case Disposition: Median	Monthly	
OCTC-4B	Case Disposition: 90th Percentile	Monthly	
OCTC-5A	Maintain current level of CRU reopens for reasons reasons other than new evidence	Monthly	
OCTC-5B	Maintain current level of Walker reopens	Semiannually y	
OCTC-5C	Decrease the number of random audit reopens for reopens for substantive reasons	Semiannually y	
OCTC-6	Case Inventory Trends	Monthly	

OFFICE OF GENERAL COUNSEL

Metric Focus: Cycle Time, Customer Satisfaction

Metric ID	Name	Timing	Notes
OGC-1	Complete/resolve an average of 60 Complaint Review Unit (CRU) cases per month	Monthly	
OGC-2	90% of clients report a high level of overall satisfaction with services provided by the Office of General Counsel staff	Annually	

OFFICE OF PROFESSIONAL COMPETENCE

Metric Focus: Outreach/Access, Customer Satisfaction

OPC-1	75% of callers report a high level of overall satisfaction with the Ethics Hotline experience	Quarterly	
OPC-2A	Voluntary e-Learning courses: 85% of participants report that courses met their expectations	Quarterly	
OPC-2B	Voluntary e-Learning courses: 85% of participants report that courses contained significant practical content	Quarterly	
OPC-2C	Mandatory e-Learning courses: 70% of participants report that courses met their expectations	Quarterly	
OPC-2D	Mandatory e-Learning courses: 70% of participants report that courses contained significant practical content	Quarterly	

OFFICE OF RESEARCH & INSTITUTIONAL ACCOUNTABILITY

Metric Focus: Efficiency (Operational Management)

Metric ID	Name	Timing	Notes
ORIA-1	90% of all ORIA projects met project milestones milestones	Quarterly	
ORIA-2	95% on-time distribution of discipline reports from reports from Odyssey	Monthly	
ORIA-3	90% of regular management reports and performance metrics are automated	Quarterly	

PROBATION

Metric Focus: Outcomes

Metric ID	Name	Timing	Notes
P-1	Track successful completion rates and reasons for reasons for noncompletion	Quarterly	
P-2	Track rates of successful satisfaction of restitution restitution orders	Annually	

RECRUITMENT & RETENTION

Metric Focus: Efficiency, Cycle Time, Organizational Capacity, Customer Satisfaction

Metric ID	Name	Timing	Notes
RR-1	Reduce average time to hire to 60 days or fewer fewer	Quarterly	
RR-2	Stay interviews are conducted for 100% of new of new hires within 90 days of hire	Quarterly	Because this metric cannot be cannot be calculated until 90 90 days after the last day of a of a quarter, this metric's Q1 Q1 2020 result is recorded in recorded in this report. Q2 2020 Q2 2020 will be reported in in November 2020.
RR-3	Reduce average number of days to fill attorney attorney positions	Quarterly	
RR-4	Reduce average number of days to fill investigator investigator positions	Quarterly	
RR-5	90% of participants report a high level of overall overall satisfaction with the Training & Development program	Semiannually y	

RECRUITMENT & RETENTION (CONTINUED)

Metric ID	Name	Timing	Notes
RR-6	90% of participants report a high level of overall satisfaction with trainings	Quarterly	
RR-7	Increase share of internal hires	Annually	
RR-8	Reduce turnover rate among attorneys	Quarterly	
RR-9	Reduce turnover rate among investigators	Quarterly	

STATE BAR COURT

Metric Focus: Efficiency, Time Cycle

Metric ID	Name	Timing	Notes
SBC-1	Maintain an annual caseload clearance rate of at least 1.0 or above	Monthly	
SBC-2A	90% of Hearing Department cases reach final outcome within timeline requirements	Monthly	
SBC-2B	100% of Hearing Department cases reach final outcome within 150% of timeline requirements	Monthly	
SBC-2C	90% of Review Department cases reach final outcome within timeline requirements	Monthly	Metrics SBC-2C and SBC-2D are not reported as there were no new cases for the months of June and July.
SBC-2D	100% of Review Department cases reach final outcome within 150% of timeline requirements	Monthly	.
SBC-2E	All effectuation cases processed within established timeline requirements	Monthly	
SBC-3A	Case disposition: median	Monthly	
SBC-3B	Case disposition: 90th percentile	Monthly	

STATE BAR COURT (CONTINUED)

Metric ID	Name	Timing	Notes
SBC-4A	Number of petitions seeking review	Semiannually	
SBC-4B	Number of petitions granted	Semiannually	
SBC-4C	Number of petitions denied	Semiannually	
SBC-4D	Number of remands	Semiannually	

COMMUNICATIONS

Metric Focus: Outreach (Brand Image, Public Perception), Customer Satisfaction

SCSE2	90% of stakeholders report a high level of overall satisfaction with quality of internal communications	Annually	