

State Bar Metrics

July 2021



The State Bar of California



Overview

This report contains results for 57 State Bar metrics. The majority are reported for Q1 2021, while others are monthly metrics reported for the months of January through May 2021. Annual metrics based on the staff engagement survey are reported for 2020. One quarterly metric is reported for Q4 2020 because of its unique feature.

Of the 57 metrics reported, 43 have targets for accountability purposes. As detailed on pages 18–33, 23 of these metrics did not meet their targets.

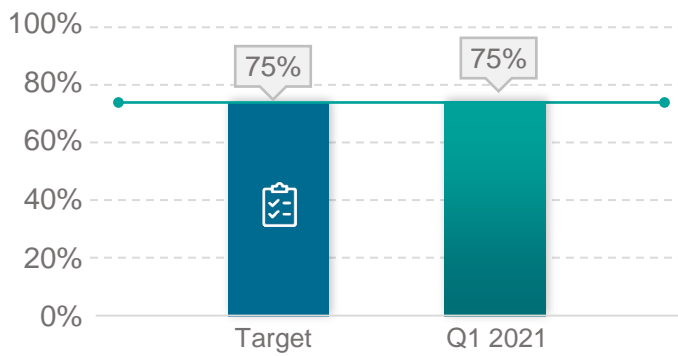
All data and metric names in this report supersede those previously reported.



Admissions

Complete processing of 75% of applications for the Provisional Licensure Program with two weeks of receipt of a complete application

A-4

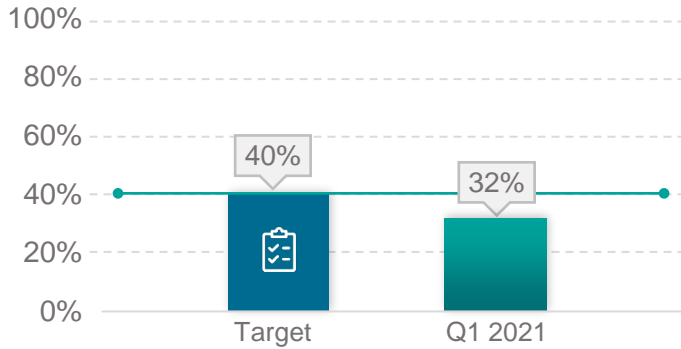




Attorney Regulation & Consumer Resources

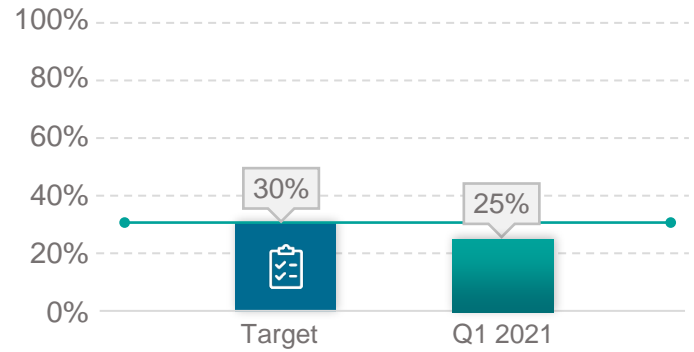
Less than 40% of
Resource Center calls
transferred out

ARCR-1A



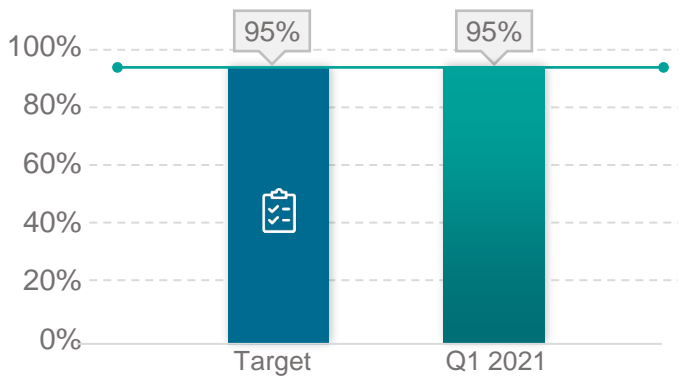
Less than 30% of calls
abandoned

ARCR-1B



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

ARCR-5





Communications

Number of social media followers

SCSE-2

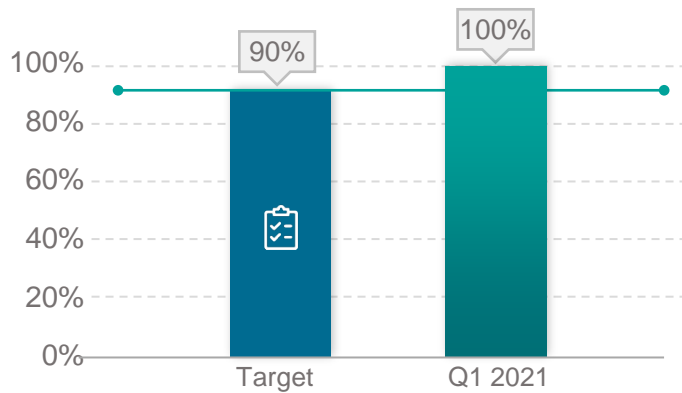
Time Period	Number
Q1 2021	44,771



General Services

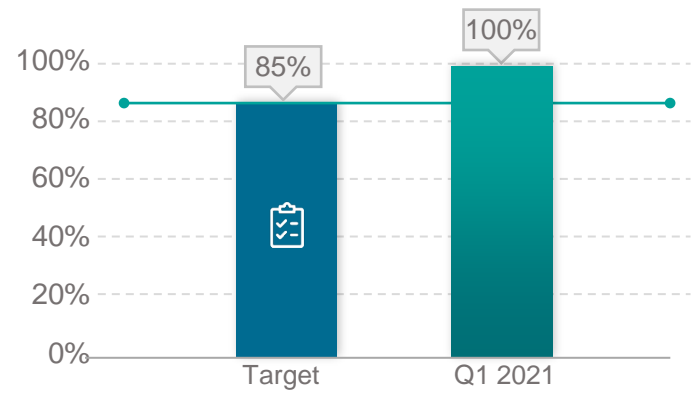
Process 90% Procurement Requisitions with 100% accuracy within three days

GS-1



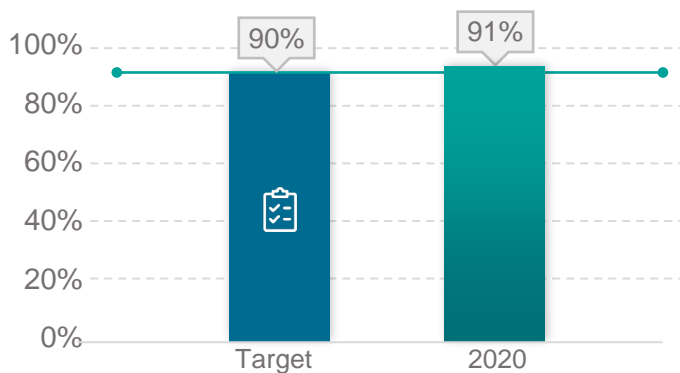
Process 85% of all facilities requests (not requiring parts/equipment ordering) within three business days or less

GS-2



90% of internal customers report a high level of overall satisfaction with services provided by General Services staff

GS-3



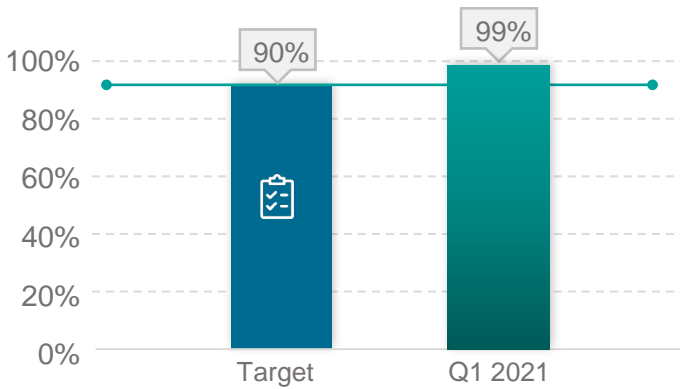
Note: This metric is drawn from the annual staff engagement survey what was administered in April 2021.



Information Technology

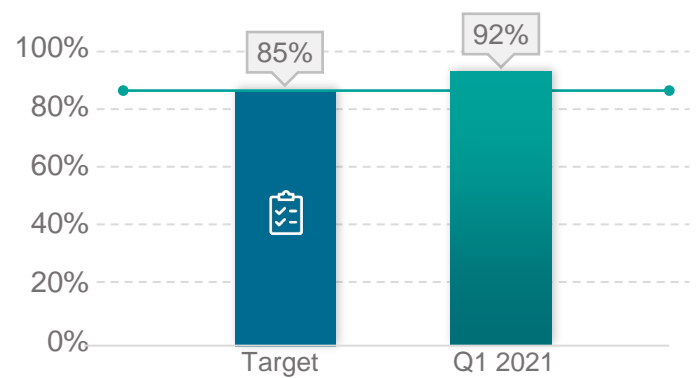
90% of stakeholders report a high level of overall satisfaction with new technology deployments

IT-1



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

IT-2

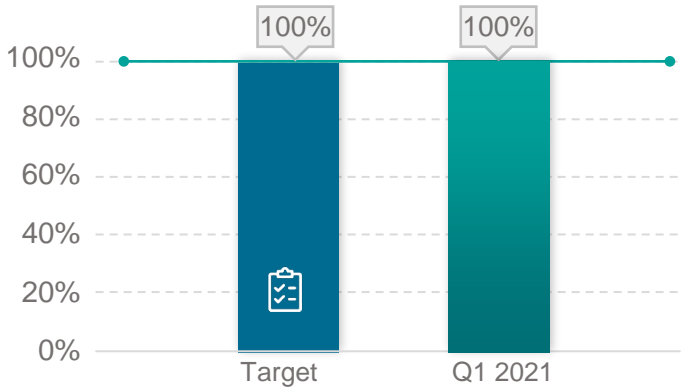




Lawyer Assistance Program

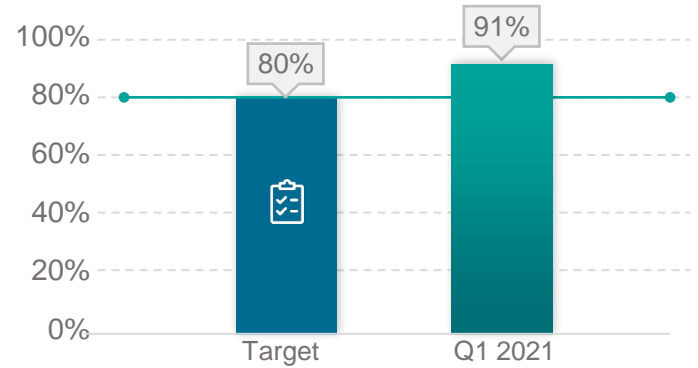
Respond to 100% of requests for presentations within two business days

LAP-2



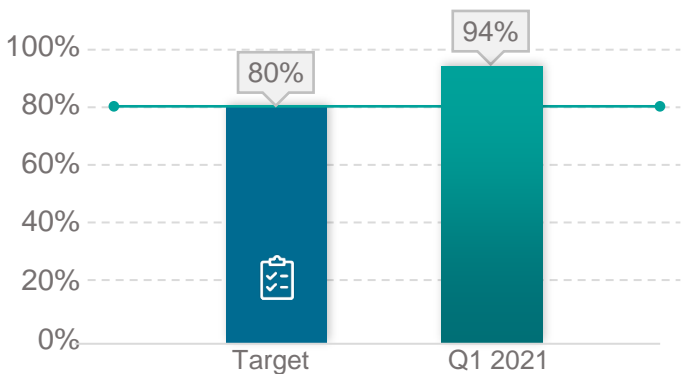
80% of survey participants report that the Lawyer Assistance Program addressed their goals

LAP-4A



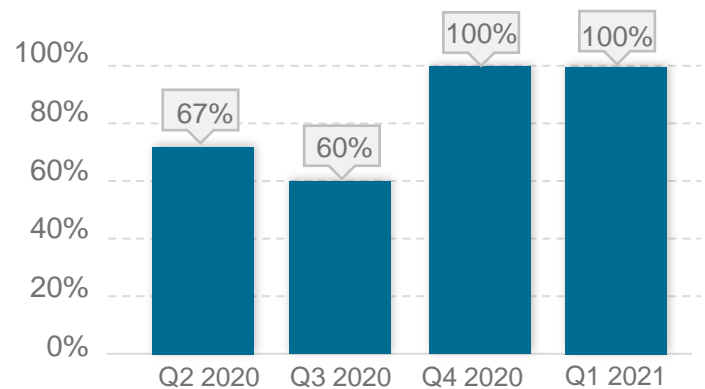
80% of survey participants report they are satisfied with their Lawyer Assistance Program experience

LAP-4B



Track successful completion rates for Alternative Discipline Program cases

LAP-5

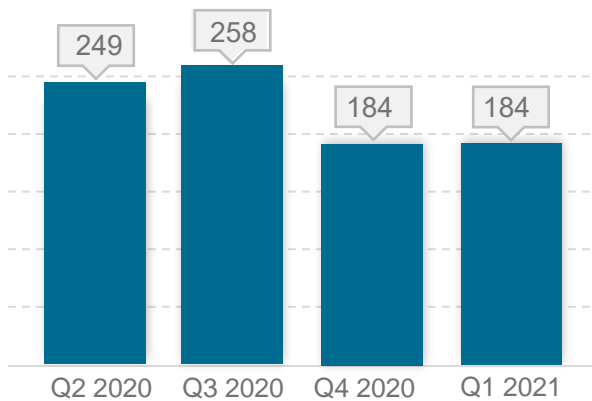




Office of Chief Trial Counsel

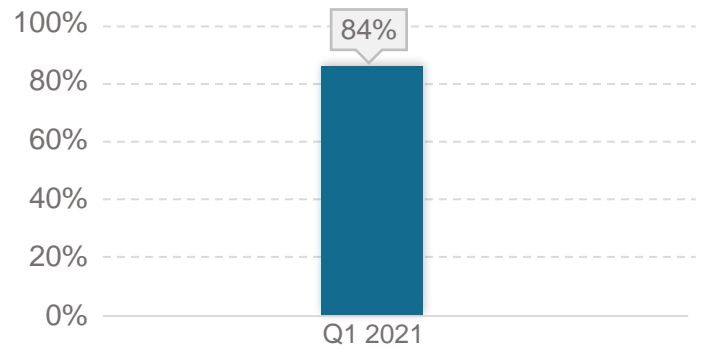
Decrease number of P-1 cases
in backlog for respondents
with active law licenses

OCTC-1



Resolve 100% of P2 cases
within 120 days*

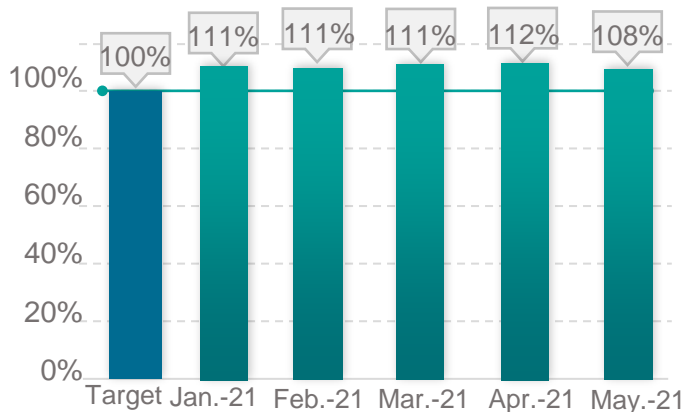
OCTC-2



Note: This metric's target is currently under review.

Maintain an annual caseload
clearance rate of at least 100%

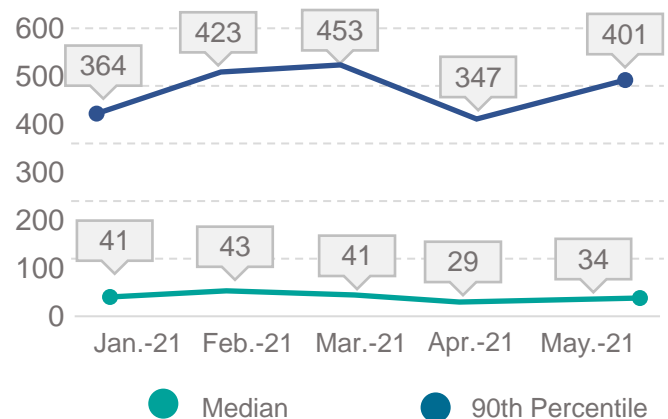
OCTC-3



Note: This metric is calculated using a 12 month rolling average to smooth out month to month fluctuations in caseload clearance rates.

Case disposition times
(OCTC)

OCTC-4A & OCTC-4B



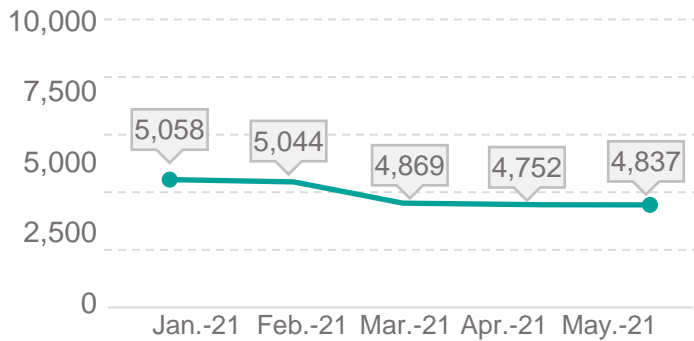
Note: This metric is measured by number of days.



Office of Chief Trial Counsel (continued)

Case inventory trends

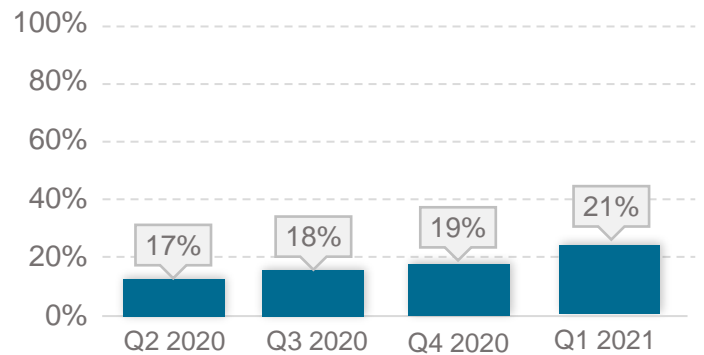
OCTC-6



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

Percent of respondents that retain representation

OCTC-7



Note: This is among cases closed in investigation or beyond.



Office of Access & Inclusion

Closely monitor IOLTA rates, including continued strategy around Leadership Bank program, to stabilize funding

OAI-1

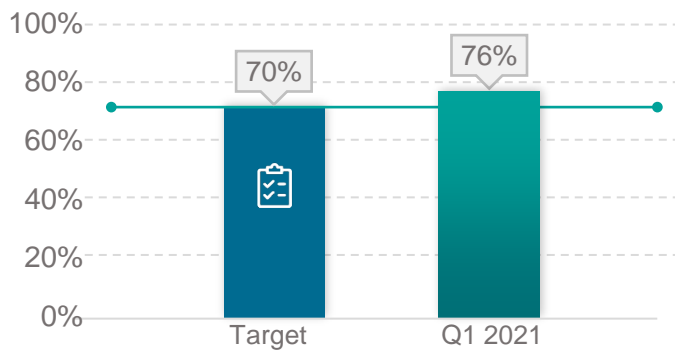




Office of Professional Competence

Mandatory e-learning courses: 70% of participants report these courses met their expectations

OPC-2B





Office of Research & Institutional Accountability

90% of all ORIA projects met project milestones

ORIA-1

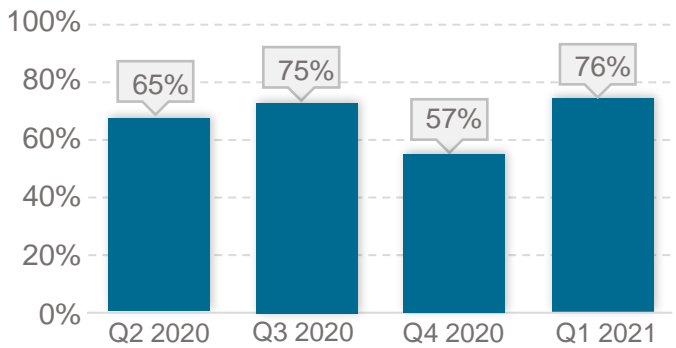




Probation

Track successful completion rates and reasons for noncompletion

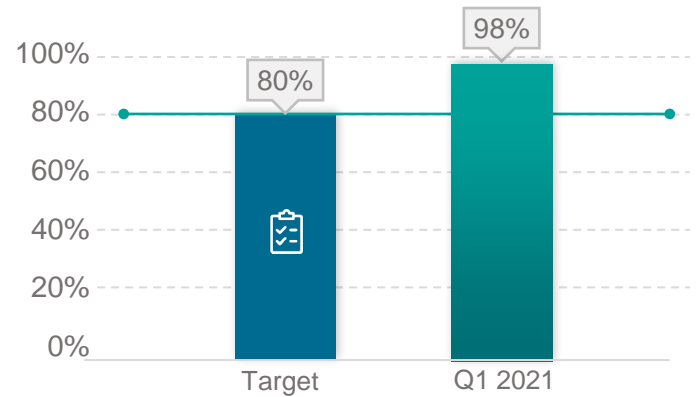
P-1



Note: Cases included are those which have conditions ordered to be completed in (1) rule 9.20 matters in which discipline has not yet been imposed (generally when interim suspension is ordered in criminal conviction referral matters); (2) reprovals; and (3) probation matters.

80% of courtesy reminder letters are provided to respondents within three weeks of case initiation

P-3





Recruitment & Retention

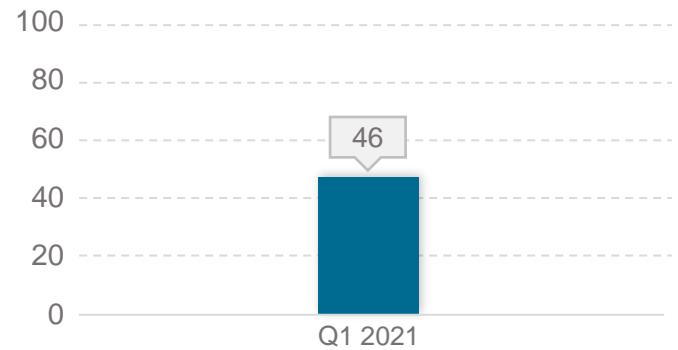
Average number of days to fill OCTC attorney positions

RR-3



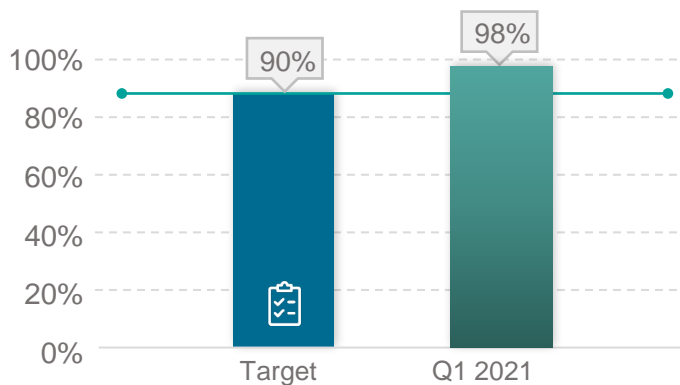
Average number of days to fill OCTC investigator positions

RR-4



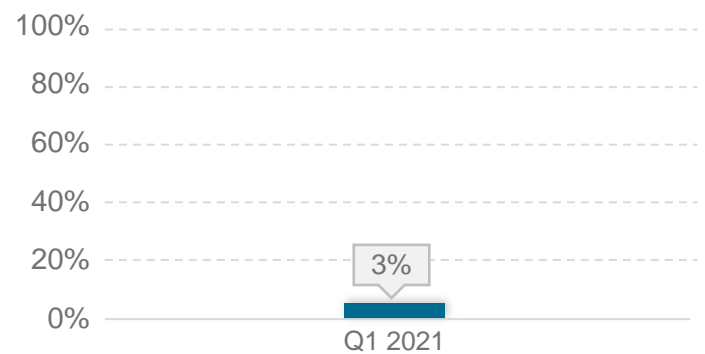
90% of participants report a high level of overall satisfaction with trainings

RR-6



Turnover rate among OCTC attorneys

RR-8





Recruitment & Retention

Turnover rate among OCTC investigators

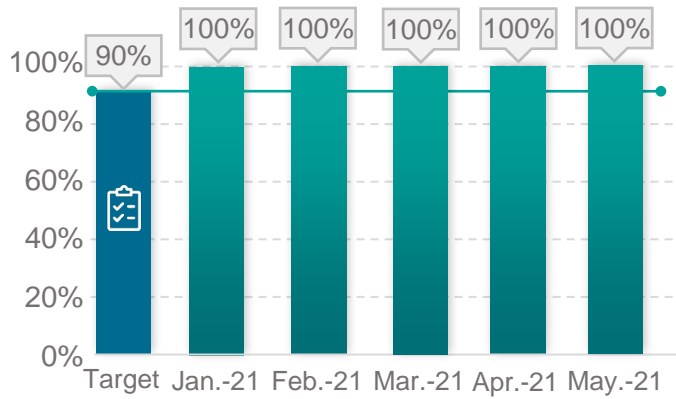




State Bar Court

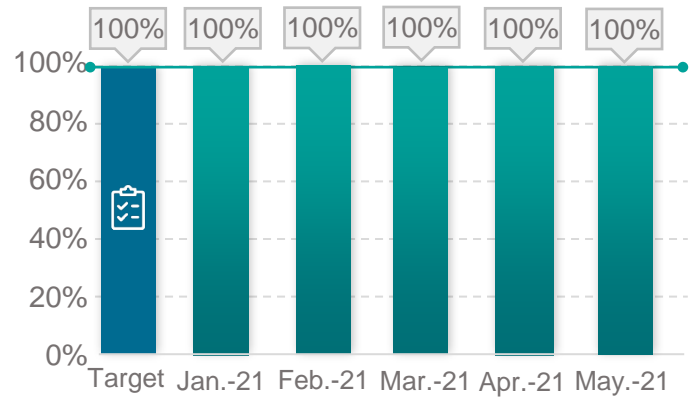
Review Department: 90% of cases to be processed within case type timeline

SBC-2C



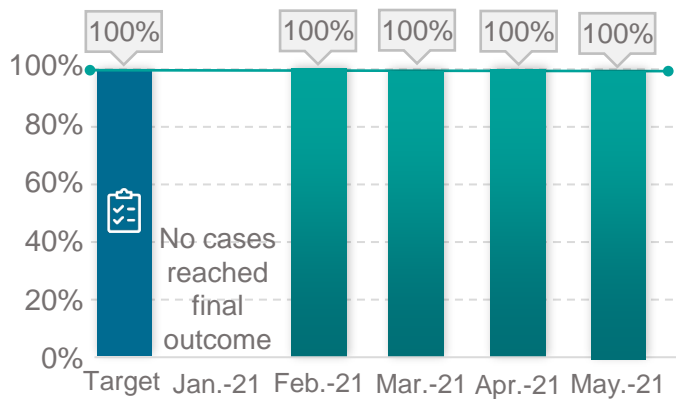
Review Department: 100% of cases to be processed within 150% of case type timeline

SBC-2D



Effectuations: 100% of cases to be processed within timeline

SBC-2E



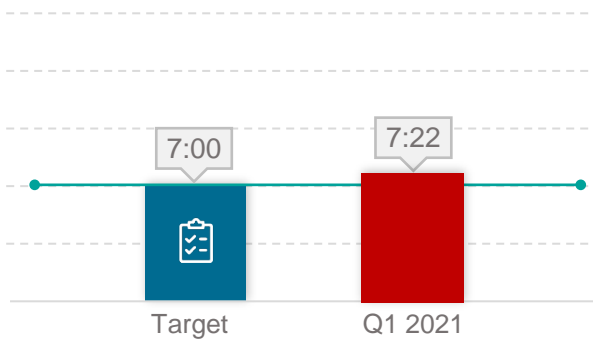


Metrics That Did Not Meet Targets

Attorney Regulation & Consumer Resources (ARCR)

Average call wait time is less than seven minutes

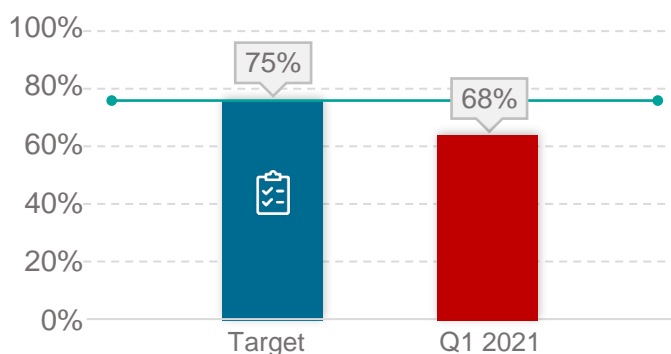
ARCR-1C



The call-center received nearly 40,000 calls in Q1 2021. The State Bar typically receives high call volume in January due to billing questions and MCLE compliance deadlines. Noncall center staff typically provide additional support during the month of January. Unfortunately, the current phone system does not allow non-call center staff to provide this support in the remote working environment. A new phone system will be deployed in August and it will allow for this. This metric's target was recently lowered from eight to seven minutes and staff are confident it will be met moving forward.

Process 75% of MCLE applications within 30 days of receipt

ARCR-3



ARCR processed 259 of the 382 MCLE applications within 30 days of receipt. Five percent of the applications received were missing information. This required resubmission and a second review, a process that takes longer than 30 days.

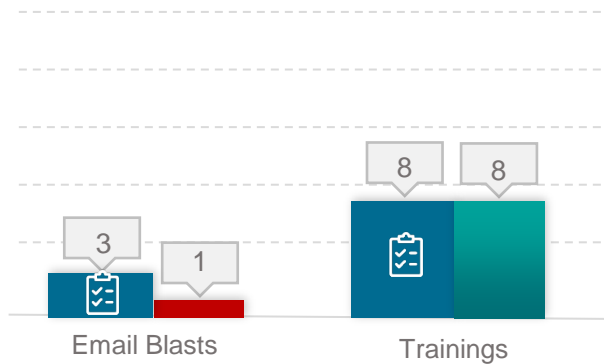


ARCR (continued)

For Q1 and Q2, 2021, send three email blasts and conduct eight trainings per quarter of the new MCLE provider management system for providers

ARCR-7

ARCR conducted eight trainings for MCLE providers and sent one email blast. As a result of minor technical issues with the system, now resolved, ARCR slowed the pace of emailing providers to ensure that the system issues were worked out before full deployment.

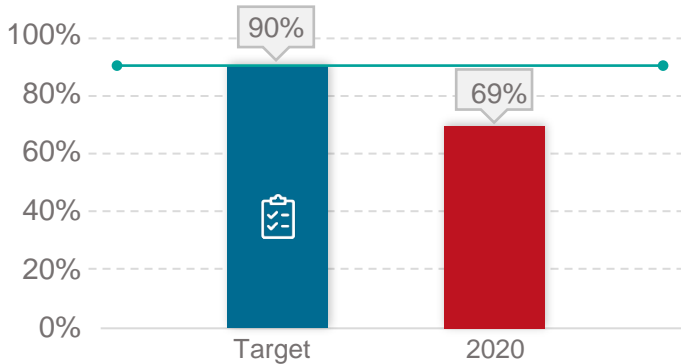




Communications

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

SCSE-1

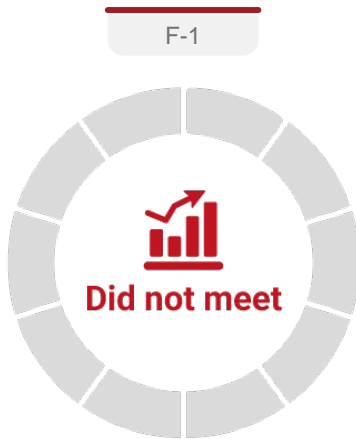


The employee engagement survey, administered in April 2021, collected data on this metric for the first time. While 69 percent of respondents reported satisfaction with internal communications, 24 percent indicated they had no opinion or were unsure. Only 7 percent indicated dissatisfaction with internal communications. The results are likely related to the uncertainty created by the pandemic. According to the leadership team, some employees have expressed a desire for long-term decisions that the agency had not been prepared to make regarding working arrangements post pandemic. That said, the results form a baseline for future improvements. Communications will work with the incoming executive director, the leadership team, and the Office of Recruitment & Retention to plan and implement measures to strengthen internal communications as the organization transitions to a post-pandemic work culture.



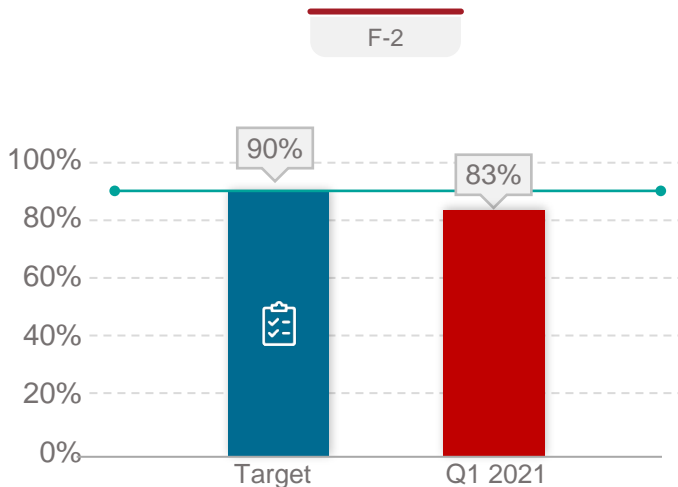
Finance

Provide fiscal year-to-date budget/actual analysis on a monthly basis to enable efficient financial management by client division/office and the executive director within 30 days of the end of the month



Entering fiscal year 2021, the Oracle financial system, which was implemented in March 2020, continued to experience data reporting issues. Problems with the system delayed the uploading of 2021 approved budget data into the general ledger and financial reporting modules until April 16, 2021. On June 16, 2021, the Q1 2021 budget/actual analysis reports were completed and sent three to divisions and offices for financial status review. The Office of Finance continues to solve problems associated with Oracle and expects to meet this metric by the end of Q2 2021.

Pay 90% of vendor invoices within 30 days of receipt by the State Bar offices



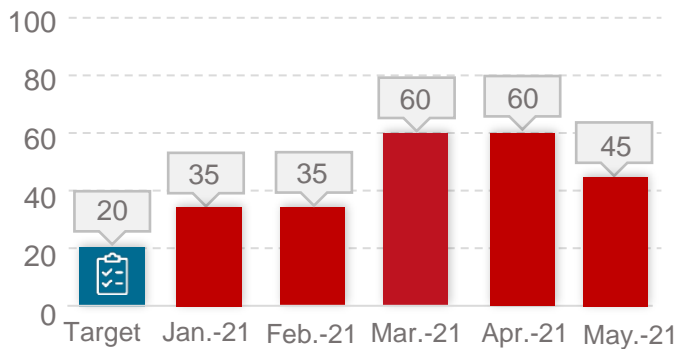
The average number of days from receipt of invoice by the offices of the State Bar to their submission to the Office of Finance has remained consistent: 17 days in Q1 2021 compared to 16 days in Q4 2020. In Q1 2021, the average number of days between the date offices submitted invoices to the Office of Finance to the date invoices were paid was 13 days. The Office of Finance processed 83 percent of invoices within 30 days of receipt by State Bar offices. The Office of Finance will continue working internally with divisions and offices on timely invoice submissions and to ensure divisions and offices understand the importance of timely approval of invoices to allow for prompt payment. Further, as a solution to ensure invoice payments are made more quickly than the current 13-day average, the Office of Finance will work to implement check runs twice a week rather than the current weekly check run.



Finance (continued)

Complete monthly adjusting journal entries and close the books timely and accurately within 20 business days of the end of the month

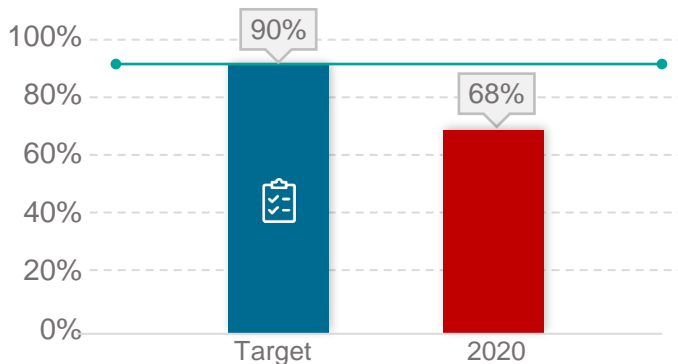
F-3



The timely financial close of the financial books monthly remains a priority in the Office of Finance. During the first quarter of 2021, the office experienced the departure of key financial reporting staff. These vacancies also delayed access of certain systems and financial information because some departing staff were the only ones with access. This, along with ongoing financial system issues, affected the timely monthly closing of the books. Management has since hired additional staff and is finalizing all access to all necessary systems and data. The office expects to meet this metric by the end of Q2 2021. In addition, to prevent having access to certain system and financial information, at least one other person will be cross trained to ensure there is another staff member with the necessary access and system information to complete the work.

90% of internal clients report a high level of overall satisfaction with services provided by finance staff

F-4



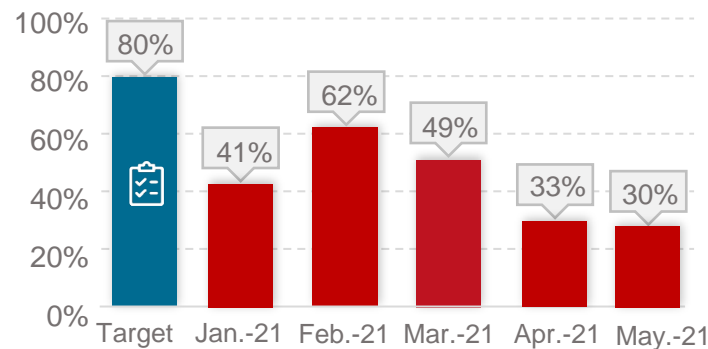
This metric is based on the annual staff engagement survey that was administered in early 2021. During the last 18 months, the Office of Finance has been challenged with Oracle financial system issues, key leadership staff turnover, retention of core management staff, and recruitment of professionals to fill vacant positions. Recently, the Office of Finance has successfully filled vacant positions and made progress on addressing staff performance issues. The Office of Finance continues to work with the IT team to improve the Oracle system performance and expects to meet this metric going forward.



Human Resources

Conduct 80% of performance evaluations by anniversary date or, for executives, the due date

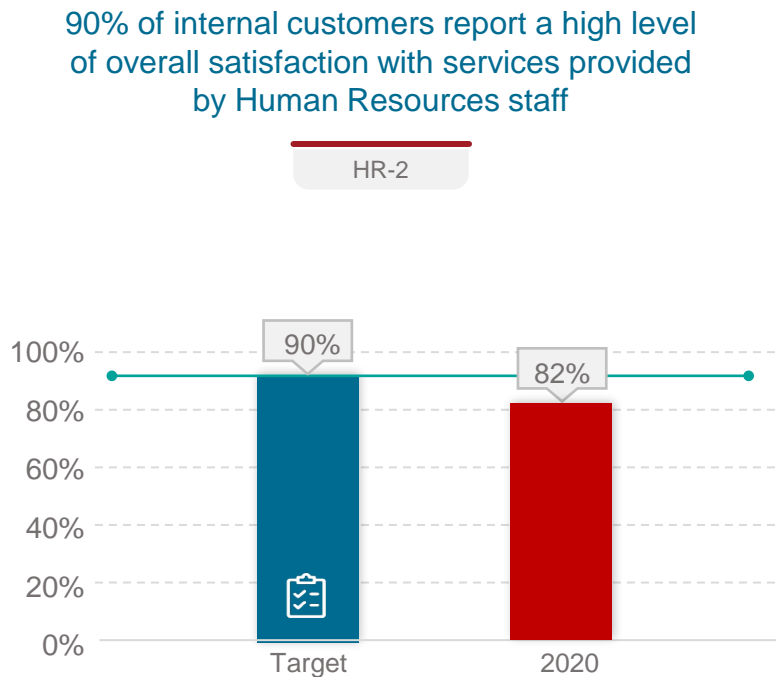
HR-1



Human Resources (HR) continues to work with office directors, managers, and supervisors to facilitate the timely completion of performance evaluations (PEs). The Memoranda of Understanding with the State Bar's represented staff includes a provision that, for administrative reasons, essentially provides a 60-day grace period after the PE due date. Although the target is completion of PEs by the due date, many managers and supervisors complete PEs during this 60-day period rather than by the due date. HR sends a monthly report to each office director showing PEs due within 60 days, as well as PEs that are overdue. HR also provides direct support and guidance to managers and supervisors in writing PEs when necessary. The importance of effective performance management will continue to be emphasized in training for supervisors and managers.



Human Resources (continued)



This metric is based on the annual staff engagement survey that was administered in April 2021. During 2020, the COVID-19 pandemic had a severe impact on many of HR's primary functions, and much of the office's focus was to ensure that the State Bar's workforce was healthy and safe by assisting managers with the transition to a remote workforce. HR also spent considerable time ensuring that the Coronavirus Aid, Relief, and Economic Security (CARES) Act's measures were implemented timely; and addressing other issues related to COVID-19, such as mandated quarantines, as they arose. These issues required considerable time and effort, which had a negative effect on HR's ability to serve the State Bar.

During this time, HR also saw the unexpected departure of staff in critical leadership positions, including the HR director and principal HR analyst overseeing the Employee & Labor Relations team. Although a new principal HR analyst was hired in summer 2020, the HR director role was not filled until November. The change in leadership also had a negative impact on HR's ability to serve the State Bar. As the pandemic appears to be subsiding and the HR team continues to fill critical positions, HR has been able to devote more time and resources to our primary HR functions and expects to see demonstrable improvement with this metric moving forward.

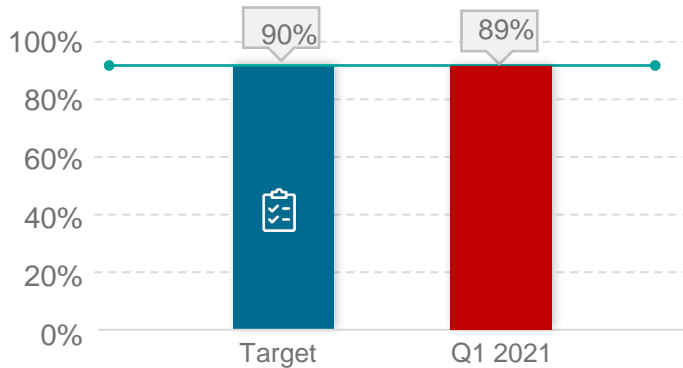
In March 2021, the HR team experienced an unexpected departure in a key leadership position. However, shortly thereafter, the leadership position was filled, and the results have been overwhelmingly positive. The HR office believes that this staffing change will help achieve more positive results during the next review period. Additionally, over the past several months, the HR team has been engaged in ongoing recruiting efforts, focusing on staff with subject matter expertise in areas that will supplement the current team's knowledge and experience. The HR Benefits and Operations team has, just recently, filled one of the final vacancies to be considered "fully staffed," while the Employee & Labor Relations team is currently seeking to fill one critical position that will greatly enhance the office's ability to serve the State Bar's needs.



Information Technology

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

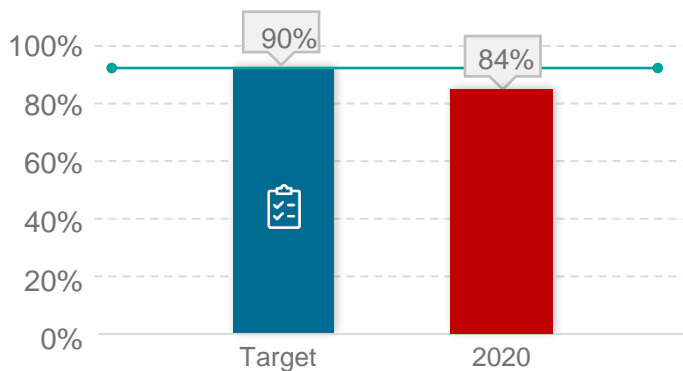
IT-3



The Office of Information Technology (IT) encountered delays on two projects slated for completion in Q1 2021. One project was delayed about six weeks due to an unexpected increase in the scope of work. A project associated with rule 2.2 required four additional weeks, including testing, due to the need to upgrade and improve old, redundant underlying code to accommodate the project's requested functionality.

90% of internal customers report a high level of overall satisfaction with services provided by IT staff

IT-4



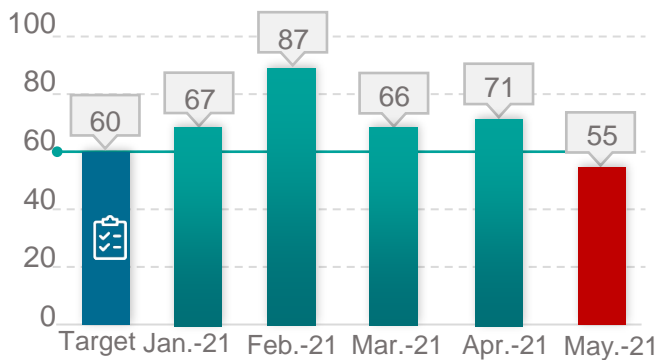
This metric is based on the annual staff engagement survey that was administered in April 2021. The year 2020 was a difficult year for many offices at the State Bar and IT in particular. In March 2020, IT was responsible for ensuring that all State Bar employees had the capacity to work remotely, 100 percent of the time. That monumental effort was successfully completed within a period of three weeks. The transition to remote work created an incredible demand on IT and its helpdesk. Staff supported users who did not have any telecommuting experience and were not accustomed to using video conference technologies. As a result, many problems took much longer to resolve, and some staff had to wait longer to get service and support. Another major event that had a major toll on IT resources was the Desktop Refresh project, which involved upgrading all State Bar users' PCs to laptops. This was especially challenging, as IT needed to deploy the new laptops remotely, which required working with users over Zoom. Despite having additional support, this process caused significant delays for the IT helpdesk.



Office of General Counsel

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

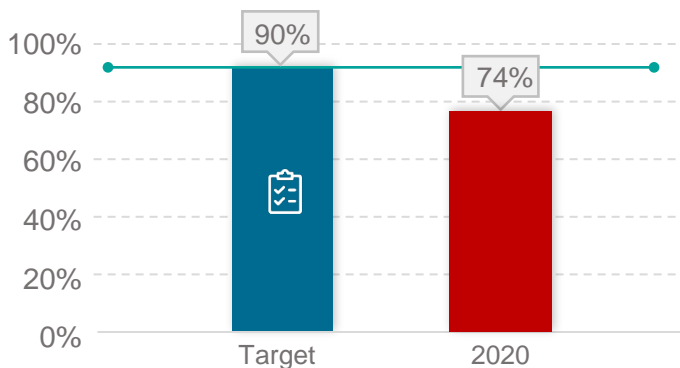
OGC-1



Due to staffing and assignment changes within the Office of General Counsel, the Complaint Review Unit resolved 55 cases in May 2021, five less than the target of 60 cases.

90% of clients report a high level
of overall satisfaction with
services provided by the
Office of General Counsel staff

OGC-2



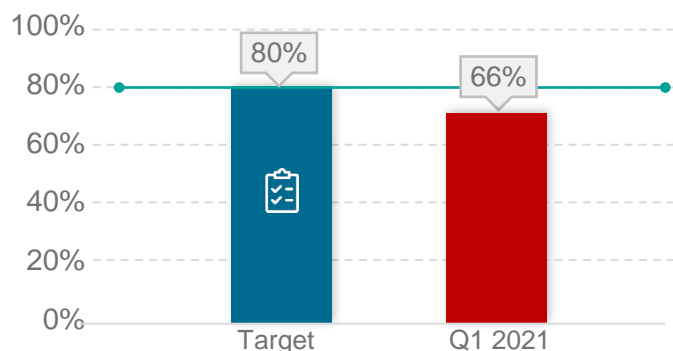
This metric is based on the annual staff engagement survey that was administered in early April 2021. The Office of Research and Institutional Accountability explored the results and discovered that over one quarter of the 60 staff members who indicated they were served by the Office of General Counsel selected the option of “Not sure /no opinion” when answering internal service satisfaction questions and that only four percent of staff indicated dissatisfaction with service. Research staff will conduct additional analyses to gain an understanding of why an unusually high share of respondents selected “Not sure/no opinion” for the purpose of refining future surveys.



Office of Professional Competence

80% of callers report a high level of overall satisfaction with the Ethics Hotline experience

OPC-1



Due to remote work, attorneys accessed the Ethics Hotline from March 2020 through June 2021 by filling out an online form requesting a call-back from staff. In an email confirming receipt of their call request, callers received a link to an Ethics Hotline satisfaction survey. A link to the survey is also available on the State Bar's ethics hotline webpage. A total of 10 callers participated in the Ethics Hotline satisfaction survey during Q1 2021. The 66 percent satisfaction rating is atypical as the benchmark for this metric has been consistently met. Two callers submitted "dissatisfied" ratings and one submitted a "neutral" rating. The survey form includes an open field for comments and staff reviewed comments provided by these three callers, all of whom described issues with the call delivery system.

The following issues were identified: (1) the State Bar's telephone system blocked the caller ID function which prevented callers from knowing that the Ethics Hotline was contacting them, thus causing a delay in connecting with callers; (2) a technical issue with the online call request form led callers to submit multiple forms resulting in duplicate call requests in the queue that delayed the processing of all call requests; and (3) this technical issue was compounded by the availability of the online call request form when the Ethics Hotline was closed (i.e., after hours, weekends, and holidays) which also led to some callers submitting repetitive requests.

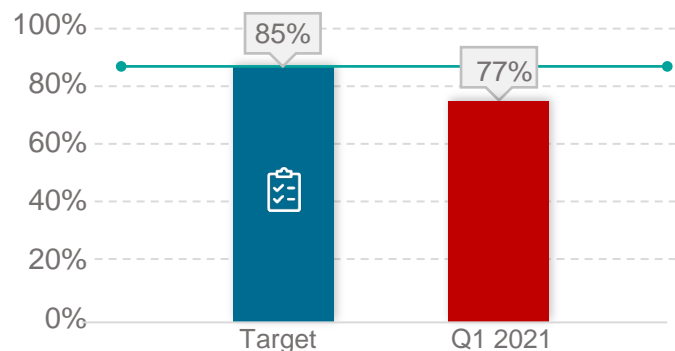
Most of these technical issues have been resolved by a change in the Ethics Hotline's call system that became operative on June 1, 2021. The Ethics Hotline has returned to a call center approach, where callers are placed in an automated queue and are routed to an available agent, eliminating the need for callers to complete an online form and await a call back from Hotline staff. The technical issues leading to duplicate call requests has also been resolved.



Office of Professional Competence (continued)

Voluntary e-learning courses: 85% of participants report these courses met their expectations

OPC-2A



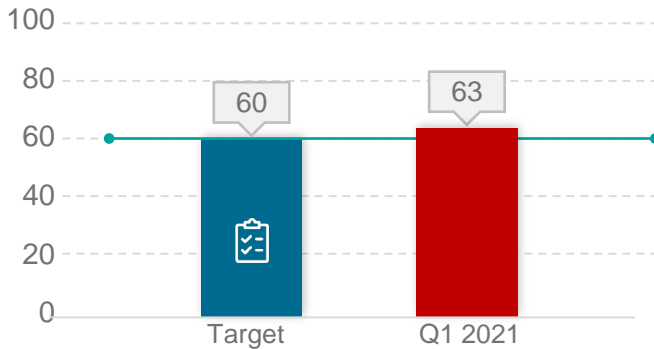
Currently there is one voluntary e-learning course available to all licensees on a complimentary basis — the New Rules of Professional Conduct course. In response to a satisfaction survey offered to participants following the completion of this e-learning course, a total of 748 licensees responded to the question of whether the course met their expectations. Based on the comments participants provided in the survey's open comment field, staff believe that this metric's rating is primarily due to the system's inability to allow learners to progress through the course at their own pace. The course settings that, for example, require the narrative audio to read all on-screen text in its entirety before allowing the learner to progress to the next screen are part of e-learning industry standards for ADA compliance. This results in some users perceiving the course to be unduly time consuming and tedious. OPC will discuss this issue with the e-learning vendor further, to determine if there are options that can be explored to implement changes that would balance the need for ADA compliance while also providing more flexibility for the learner to progress at their own pace in the development of any future courses. It is worth noting that the general impression of the New Rules e-learning course is favorable as reflected in the results for metric OPC-2B that exceeded its benchmark. The satisfaction survey also asks users to rate satisfaction with significant practical content in the course and 87 percent of the learners provided a rating of four or higher for this course.



Recruitment & Retention

Reduce average time to hire to 60 days or less

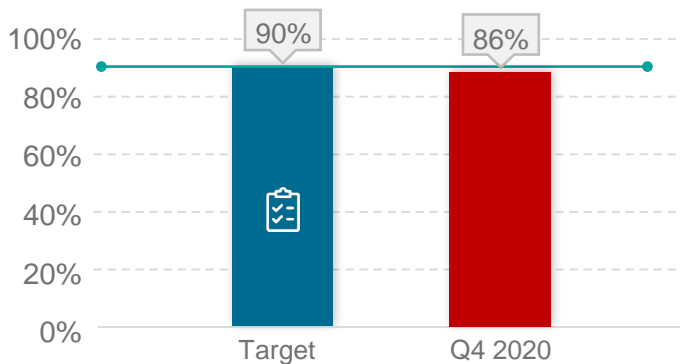
RR-1



In Q1 2021, the Office of Recruitment and Retention (R²) completed 33 hires. An analysis of these hires shows that one hire for the Office of Information Technology (IT) took 408 days to fill and impacted had an impact on the performance metric, compared with the other 32 hires, which took on average 53 days to fill. This hire was challenging because it required a candidate with six-plus years of Salesforce experience and five-plus years of customer relationship management industry experience. These highly sought-after skills, combined with the State Bar's salary structure, made it difficult to find candidates. The position was filled after R² conducted a "stay interview" with a recent hire and determined that this staff member met the requirements and skills for the role. R² recommended that IT interview the staff person, and based on a successful interview, they were promoted internally to the role.

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

RR-2



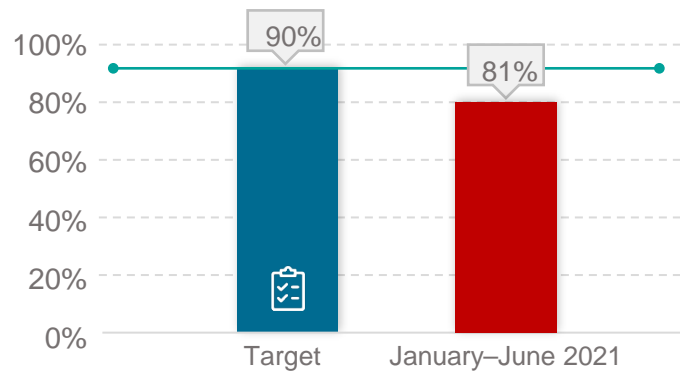
Because this metric is conducted 90 days after hire, it is always one quarter behind in reporting. R² conducted 12 stay interviews during Q4 2020 and were unable to conduct interviews for two staff members within the 90-day target. One new hire gave notice to depart the State Bar and declined to participate in a stay interview given the scheduled exit interview, while another new hire's schedule did not allow for the interview to be completed within 90 days of hire. One purpose of these interviews is to receive feedback from new hires. R² has determined, based on feedback from new hires who have been with the State Bar at least 90 days or more, to change the target to 110 days. The added benefit will be to allow new hires to be fully onboarded and allow more time to schedule interviews.



Recruitment & Retention (continued)

90% of participants report a high level of overall satisfaction with the Training and Development (T&D) Program

RR-5



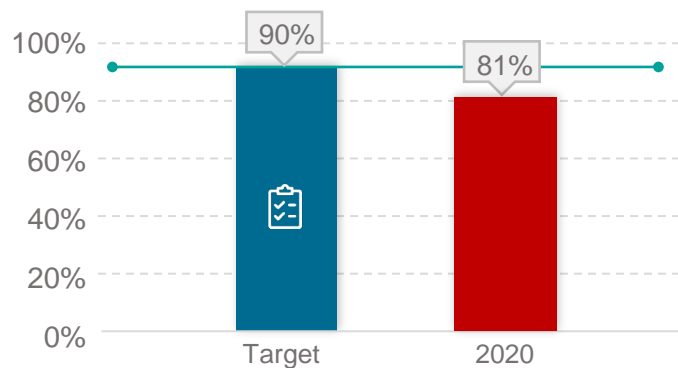
From January to June 2021, 10 staff members participated in the Training & Development Program. Among these, nine filled out a satisfaction survey and all but one survey respondent was satisfied with their experience with the program.



Recruitment & Retention (continued)

90% of internal customers report a high level of overall satisfaction with services provided by Recruitment and Retention staff

RR-10



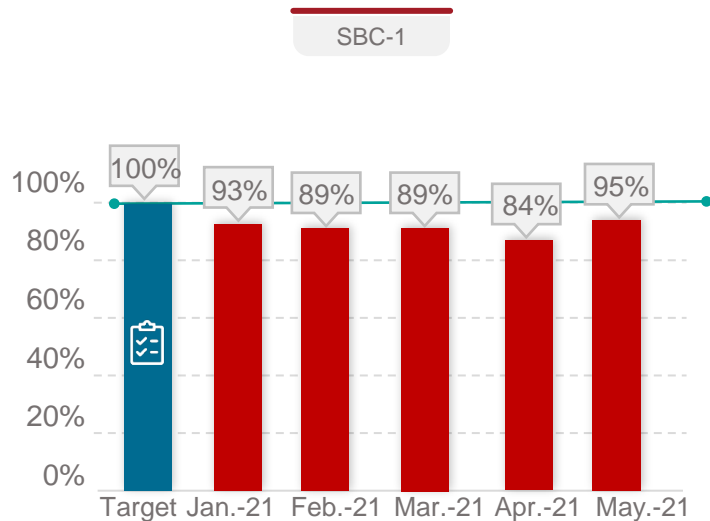
This metric is based on the annual staff engagement survey that was administered in early April 2021. As a result of the pandemic, the Office of Recruitment & Retention (R²) pivoted to recruit and onboard new hires remotely in March 2020. This included supporting managers as they conducted interviews remotely using Zoom, a new tool for many, finding open LiveScan sites and scheduling appointments to conduct required fingerprinting, finding immigration consultants to conduct employment eligibility verification, shipping computer equipment to new hires, and conducting new hire orientations via Zoom. In addition, various changes were made to the recruitment and onboarding processes including the implementing a new recruitment system, a new Information Technology support request/service system, and ongoing COVID-19 changes. As a result of these multiple challenges and changes, customer service levels were not as high as R² would have liked.

R² processes have grown more stable. Hiring managers are familiar with how to begin the recruitment process and employees know how search for and apply for openings using the new system. Resources such as online job aids and quarterly Recruitment Forums are now available. The office has also developed an efficient system to conduct interviews using Zoom. In-person orientations for new hires have resumed which has also removed several pandemic-related logistical challenges.



State Bar Court

Maintain an annual caseload
clearance rate of at least 100%



Note: This metric is calculated using a 12 month rolling average to smooth out month to month fluctuations in caseload clearance rates

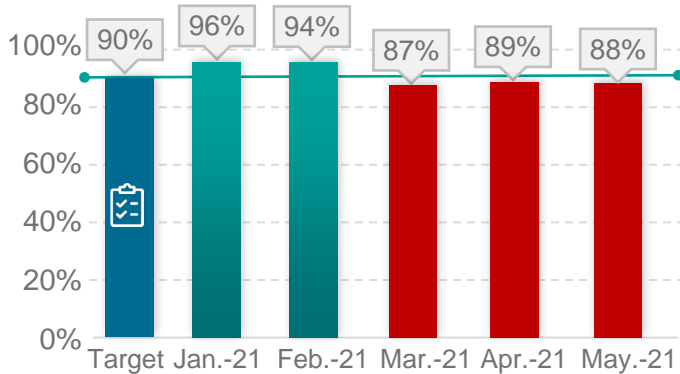
The annual caseload clearance rate is the average of the previous 12 months of monthly caseload clearance rates. The COVID-19 pandemic and related State Bar building closures to the public, beginning March 13, 2020, required the court to abate roughly 150 cases and resulted in a decline of the court's 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, unabated cases, and conduct conferences, trials, and oral arguments. The first remote event occurred on April 21, 2020, the first remote oral argument on June 17, 2020, and the first remote trial on July 8, 2020. 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.



State Bar Court (continued)

Hearing Department: 90% of cases to be processed within case type timeline

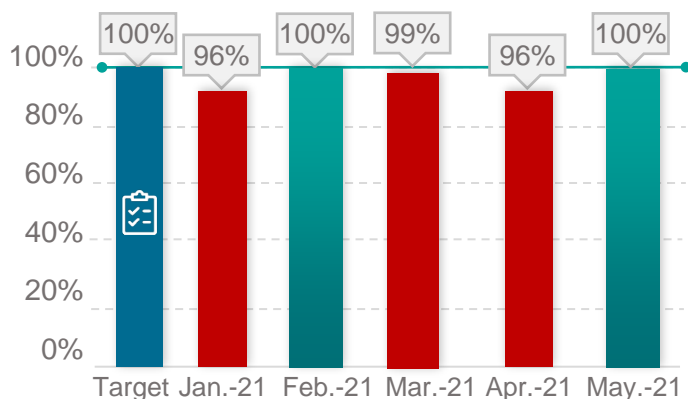
SBC-2A



The primary reasons for case processing delay in March - May 2021 included good-cause or stipulated continuances as requested by the parties. Two cases in March were delayed due to non-consecutive trial dates. Two cases in May were delayed due to non-consecutive trial dates, and further status conferences that were held; and in one case a default order was vacated which resulted in the default process restarting.

Hearing Department: 100% of cases to be processed within 150% of case type timeline

SBC-2B



The primary reasons for case processing delays included good-cause continuances as requested by the parties.



State Bar Metrics

Organized by office, the list below contains all metrics the State Bar will track and report in 2021. All metric IDs below supersede those previously reported.

ADMISSIONS

Metric Focus: Quality Control, Cycle Time, Cost Control

Metric ID	Name	Timing	Notes
A-1	Conduct initial review of 80% of Moral Character applications received within 90 days of receipt	Semiannually	
A-2	Reduce exam costs by 5%	Annually	
A-3A	Reduce time to grade the February Bar Exam from 11 weeks to 9 weeks by Q4 2021	Semiannually	
A-3B	Reduce time to grade the July Bar Exam from 16 weeks to 14 weeks by Q4 2021	Semiannually	
A-4	Complete processing of 75% of applications for the Provisional Licensure Program with two weeks of receipt of a complete application	Quarterly	

ATTORNEY REGULATION & CONSUMER RESOURCES

Metric Focus: Efficiency (Operational Management), Cycle Time

ARCR-1A	Less than 40% of Resource Center calls transferred out	Quarterly	Performance target will change to 38% after Q2 2021 with the goal of reaching 35% by Q1 2022.
ARCR-1B	Less than 25% of calls abandoned	Quarterly	
ARCR-1C	Average call wait time of less than seven minutes	Quarterly	

**ATTORNEY REGULATION & CONSUMER RESOURCES (CONTINUED)**

Metric ID	Name	Timing	Notes
ARCR-2	75% of participants completing phone system survey report a high level of overall satisfaction with their call center experience	Monthly and Quarterly	Reporting of this metric will be paused until Q3 2021. ARCR will implement a new phone system that will allow them to better evaluate overall satisfaction and get higher participation rates. (Results are generated from post call survey given to resource center callers.)
ARCR-3	Process 75% of MCLE applications within 30 days of receipt	Quarterly	
ARCR-4	Continue implementation of LLP online renewal with a goal of 90% LLPs completing online by Q4 2021	Annually	
ARCR-5	Fulfill 95% of requests for certificates of standing within five business days of receipt	Quarterly	
ARCR-6	Convert 20% of Law Corporations to a strictly online renewal process by Q3 2022	One-time	
ARCR-7	For Q1 and Q2, 2021, send three email blasts and conduct eight trainings per quarter of the new MCLE provider management system for providers	Quarterly	

BOARD SUPPORT JNE COMMISSION, AND APPOINTMENTS

Metric Focus: Efficiency (Operational Management)

BJA- 1	90% of Board of Trustees report a high level of overall satisfaction with quality of operational support provided	Annually	
BJA-2	100% of JNE candidates evaluated within 90 days	Semiannually	
BJA-3	Standardize public comment process (timelines, submission form/template, and style guides) by Q4 2021	One-time	

**CLIENT SECURITY FUND**

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

Metric ID	Name	Timing	Notes
CSF-1	Resolve at least 1,350 cases in 2021	Semiannually	
CSF-2	Decrease time to payout after final discipline by 5%	Annually	

FINANCE

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

F-1	Provide fiscal year-to-date budget/actual analysis on a monthly basis to enable efficient financial management by client division/office and the executive director within 30 days of the end of the month	Quarterly	This metric's title was recently updated for clarity and the reporting period was changed from quarterly to monthly.
F-2	Pay 90% of vendor invoices within thirty days of receipt	Quarterly	
F-3	Complete monthly adjusting journal entries and close the books timely and accurately within 20 business days of the end of the month	Monthly	This metric's title was recently updated for clarity.
F-4	90% of internal clients report a high level of overall satisfaction with services provided by finance staff	Annually	

GENERAL SERVICES

Metric Focus: Cycle Time, Quality

GS-1	Process 90% procurement requisitions with 100% accuracy within three days	Quarterly	
GS-2	Process 85% of all facilities requests (not requiring parts/equipment ordering) within three or fewer business days	Quarterly	

**GENERAL SERVICES (CONTINUED)****Metric Focus:** Cycle Time, Quality

Metric ID	Name	Timing	Notes
GS-3	90% of internal customers report a high level of overall satisfaction with services provided by General Services staff	Annually	
GS-4	Advance capital improvement projects per capital improvement plan by Q4 2021 including <ul style="list-style-type: none"> • Complete HVAC/Chiller project; • Execute contract for Generator project and prepare site for 2022 installation; • Execute contract for Elevator Modernization project for 2022–2024 phased upgrade 	One-time	

HUMAN RESOURCES**Metric Focus:** Cycle Time, Customer Satisfaction

HR-1	Conduct 80% of performance evaluations by anniversary date or, for executives, the due date	Monthly/Quarterly	
HR-2	90% of internal customers report a high level of overall satisfaction with services provided by Human Resources staff	Annually	

INFORMATION TECHNOLOGY**Metric Focus:** Efficiency, Customer Satisfaction

IT-1	90% of stakeholders report a high level of overall satisfaction with new technology deployments	Quarterly	
IT-2	Process 85% of all IT service requests (not requiring parts/equipment ordering or software development) within five business days or less	Quarterly	
IT-3	Complete 90% of planned major IT projects on schedule and on budget	Quarterly	
IT-4	90% of internal customers report a high level of overall satisfaction with services 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 within two business days	Quarterly	
LAP-3	Complete 10 law school presentations and 20 Bar Association/law firm presentations in 2020	Annually	
LAP-4A	80% of survey participants report that the Lawyer Assistance Program addressed their goals	Quarterly	
LAP-4B	80% of survey participants report they are satisfied with their Lawyer Assistance Program experience	Quarterly	
LAP-5	Track successful completion rates for Alternative Discipline Program cases (and reasons for termination)	Annually	This metric will be modified in 2021 after office completes strategic planning.

OFFICE OF ACCESS & INCLUSION

Metric Focus: Efficiency (Operational Management), Compliance

OAI-1	Closely monitor IOLTA rates, including continued strategy around Leadership Bank Program, to stabilize funding	Quarterly	
OAI-2	Issue report on law school retention by Q3 2021	One-time	
OAI-3	Provide commissioners meeting materials five to seven days in advance at least 80% of the time	Semiannually	
OAI-4	Issue 80% of monitoring visit and fiscal visit findings within 60 days	Semiannually	

**OFFICE OF CHIEF TRIAL COUNSEL****Metric Focus:** Cycle Time, Quality

Metric ID	Name	Timing	Notes
OCTC-1	Decrease number of P-1 cases in backlog for respondents with active law licenses	Quarterly	
OCTC-2	Resolve 100% of P-2 cases within 120 days	Quarterly	
OCTC-3	Maintain an annual caseload clearance rate of at least 100%	Monthly	
OCTC-4A	Case disposition: median	Monthly	
OCTC-4B	Case disposition: 90th percentile	Monthly	
OCTC-5A	Maintain current level of CRU reopens for reasons other than new evidence	Semiannually	
OCTC-5B	Maintain current level of Walker reopens	Annually	This metric will be reported as a percentage moving forward.
OCTC-5C	Decrease the number of random audit reopens for substantive reasons	Semiannually	
OCTC-6	Case inventory	Monthly	
OCTC-7	Percent of respondents that retain representation	Quarterly	This metric is based on closed cases of all types that reached the investigation stage.

OFFICE OF GENERAL COUNSEL**Metric Focus:** Cycle Time, Customer Satisfaction, Organizational Capability

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

Metric ID	Name	Timing	Notes
OPC-1	80% 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 these courses met their expectations	Quarterly	
OPC-2B	Mandatory e-Learning courses: 70% of participants report these courses met their expectations	Quarterly	
OPC-3	80% of all annual Lawyer Referral Service recertification applications processed within 60 days of receipt of a completed submission	Annually	
OPC-4	90% of requests for arbitration of attorney-client fee disputes are served on the responding attorney within 10 business days of receipt of a completed submission	Annually	

OFFICE OF RESEARCH & INSTITUTIONAL ACCOUNTABILITY**Metric Focus:** Efficiency (Operational Management)

ORIA-1	90% of all ORIA projects met project milestones	Quarterly	
ORIA-2	Publish 2nd annual diversity report card in online interactive dashboard format by Q2 2021	One-time	

**PROBATION****Metric Focus:** Outcomes; Efficiency

Metric ID	Name	Timing	Notes
P-1	Track successful completion rates and reasons for noncompletion	Quarterly	
P-2	Track rates of successful satisfaction of restitution orders	Annually	
P-3	80% of courtesy reminder letters are provided to respondents within three weeks of case initiation	Quarterly	

RECRUITMENT & RETENTION**Metric Focus:** Efficiency, Cycle Time, Organizational Capacity, Customer Satisfaction

RR-1	Reduce average time to hire to 60 days or fewer	Quarterly	
RR-2	Stay interviews are conducted for 100% of new hires within 90 days of hire	Quarterly	This metric's target will be changed to 110 days for 2021. The Q1 2021 result will be reported in November 2021.
RR-3	Average number of days to fill OCTC attorney positions	Quarterly	
RR-4	Average number of days to fill OCTC investigator positions	Quarterly	
RR-5	90% of participants report a high level of overall satisfaction with the Training & Development Program	Semiannually	

**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	Percent of internal hires	Annually	
RR-8	Turnover rate among OCTC attorneys	Quarterly	
RR-9	Turnover rate among OCTC investigators	Quarterly	
RR-10	90% of internal customers report a high level of overall satisfaction with services provided by Recruitment and Retention staff	Annually	

STATE BAR COURT**Metric Focus:** Efficiency, Time Cycle

SBC-1	Maintain an annual caseload clearance rate of at least 100%	Monthly	
SBC-2A	Hearing Department: 90% of cases to be processed within case type timeline	Monthly	
SBC-2B	Hearing Department: 100% of cases to be processed within 150% of case type timeline	Monthly	
SBC-2C	Review Department: 90% of cases to be processed within case type timeline	Monthly	
SBC-2D	Review Department: 100% of cases to be processed within 150% of case type timeline	Monthly	
SBC-2E	Effectuations: 100% of cases to be processed within timeline	Monthly	
SBC-3A	Number of petitions seeking review	Semiannually	
SBC-3B	Number of petitions granted	Semiannually	



STATE BAR COURT (CONTINUED)

Metric ID	Name	Timing	Notes
SBC-3C	Number of petitions denied	Semiannually	
SBC-3D	Number of remands	Semiannually	

COMMUNICATIONS

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

SCSE-1	90% of stakeholders report a high level of overall satisfaction with quality of internal communications	Annually	
SCSE-2	Number of social media followers	Quarterly	
SCSE-3	Expand communications engagement with Spanish-speaking audiences through a campaign involving paid social media placements and radio public service announcements	Annually	