



# The State Bar *of California*

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## **OPEN SESSION AGENDA ITEM 703 SEPTEMBER 2021**

**DATE:** September 23, 2021

**TO:** Members, Board of Trustees

**FROM:** Leah T. Wilson, Executive Director

**SUBJECT:** Strategic Plan Report

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### **EXECUTIVE SUMMARY**

Pursuant to Business and Professions Code section 6140.12, the Board of Trustees is required to develop and implement a five-year Strategic Plan. The Board last adopted a five-year plan in 2017 and will need to adopt a new strategic plan next year covering the period 2022–2027. The five-year planning process presents a tremendous opportunity for the Board to put a lasting imprint on the future of the State Bar. This agenda item poses key questions that might inform the Board’s planning efforts and provides a high-level overview of the timeline for that work.

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### **BACKGROUND**

The Board of Trustees adopted a five-year strategic plan in 2017; the 2017–2022 plan was formally updated in March 2020. Progress on achieving strategic plan objectives is reported annually as part of the Board’s planning session, as well as at least one other time per Board year. The last update on the plan was provided in May 2021, and reflected completion of all objectives as related to two of five goal areas, and significant progress on all others:

Strategic Plan Goals & Objectives	Reported September 2020
Goal 1: Transition to “New State Bar”	All objectives completed
Goal 2: Timely, Fair Admissions, Discipline, Regulatory System	8 of 16 objectives completed; 8 in progress
Goal 3: Fiscal and Operational Management of the State Bar	8 of 12 objective completed; 4 in progress
Goal 4: Access, Diversity, and Inclusion	9 of 17 completed; 8 in progress
Goal 5: Communication and Education	All objectives completed

Since that time, further progress has been made on in progress objectives though not all have been completed as of the date of this report.

## DISCUSSION

In 2022 the Board of Trustees will have a unique opportunity to shape the future direction of the State Bar through the process of creating and adopting a new five-year Strategic Plan for the organization. Our mission derives from statute and will not change as part of this effort:

*“The State Bar of California’s mission is to protect the public and includes the primary functions of licensing, regulation, and discipline of attorneys; the advancement of the ethical and competent practice of law; and support of efforts for greater access to, and inclusion in, the legal system.”*

However, the Board will have an opportunity to articulate a vision for how the State Bar is to execute this mission across its myriad domains. In doing so, you will have to grapple with important and foundational questions about our organizational identity and role. These questions might include:

- Are we caretakers of an historic institution, concerned primarily with ensuring that we continue to do our core work efficiently and effectively?
- Are we forward-leaning regulators who understand that nimble and smart regulatory tools will both protect the public and increase access to legal services? And, related: Do we see ourselves as having a role in the creation of articulated tiers of legal service providers, akin to what has been in place in medicine for decades?
- Will we lean in to the use of artificial intelligence and data analytics to free up staff resources, increase the speed and accuracy of decision-making, and enable us to identify problematic patterns of licensee conduct early and comprehensively?
- Will we focus on effectiveness, tackling, for the first time, discipline system recidivism head on?

- Will we make the investments necessary to eliminate manual processes such that we can fully transition to becoming a knowledge workforce, with all of the resultant analytical power that such a transition suggests?
- Will we keep diversity, equity, and inclusion (DEI) work front-and-center, for, by example, assessing the DEI impact of all of our initiatives and affirmatively deciding not to do things that exacerbate racial disparities in any of the systems we oversee or fund?

As your executive director, I often think about these questions through the lens of an even larger one: What does it mean to be the largest state bar in the country, in a state that is *bigger* than all but 35 countries in the world? For me, the answer to that question must be that we are leaders not followers, that we are visionary, we are bold, and that we innovate. I so look forward to learning what it means to all of you.

To that end, our strategic planning process will kick off in October. To facilitate this effort, I will be establishing a Strategic Plan Working Group (SPWG) comprised of key staff, interested Board members, and our strategic planning consultant. The SPWG will provide input and guidance regarding the overall planning process and interim deliverables.

While the process will not be finalized until the SPWG has had an opportunity to weigh in, the broad outlines of the approach will include:

- Gathering Input [October – December]
  - Board members: individual interviews
  - Staff: meetings
  - Judiciary Committee members: interviews with selected members
  - Supreme Court liaison: interview
  - Public: social media survey
  - State Bar subentities: survey
  - State Bar licensees: survey
- Assessing the Input [December – January]
  - What does it tell us about where we are?
  - What does it tell us about where we want to go?
- January 2022 Planning Session
  - Board to develop strategic plan goals
  - Board to begin drafting plan objectives
- March 2023 BOT Meeting
  - Board to adopt new five-year strategic plan including goals and objectives

I will reach out to you following the September meeting to solicit your interest in serving on the SPWG.

**FISCAL/PERSONNEL IMPACT**

None

**AMENDMENTS TO RULES OF THE STATE BAR OF CALIFORNIA**

None

**AMENDMENTS TO BOARD OF TRUSTEES POLICY MANUAL**

None

**STRATEGIC PLAN GOALS & OBJECTIVES**

Goal: 3. Improve the fiscal and operational management of the State Bar, emphasizing integrity, transparency, accountability, and excellence.

**RECOMMENDATIONS**

None

**ATTACHMENT LIST**

None