



PUBLIC TRUST LIAISON





Why a Public Trust Liaison?



State Bar reform recommendations dated back to the 1990's identified need for ombuds-type function



Recent State Audit identified same need:

- *"It [the State Bar] closes the majority of cases without discipline. Although it allows complainants to appeal its decisions to close complaints, relatively few complainants do so. Thus, it appears that individuals may need additional assistance in filing complaint and appeals. One option for assisting complainants with these actions would be to establish an independent ombudsperson for attorney discipline."*



Repeated complaints about discipline and admissions functions reflect need for new systemic approach

Role of the Public Trust Liaison



- ✓ Ensure that members of the public, applicants for admission, legal consumers, attorneys, and other constituents are able to meaningfully voice their complaints
- ✓ Assist constituents in identifying resources to help them solve the problems they are experiencing
- ✓ Develop tools to assist consumers in filing complaints with the State Bar
- ✓ Prepare an annual report outlining the types of concerns raised by consumers and organizational response
- ✓ Make recommendations for policy and operational reforms to address systemic issues identified
- ✓ Develop and oversee a plan for the State Bar's public education work designed to empower both legal consumers and the general public with knowledge about their rights
- ✓ Initial focus will be on discipline and admissions functions. Scope of the role may expand to include other areas within the organization.



- ✗ Draft attorney discipline complaints
- ✗ Act as an advocate or representative in any matter
- ✗ Intervene or participate in any pending disciplinary matter or any formal process for the resolution of complaints
- ✗ Overturn, reverse, or modify a finding or decision regarding any complaint
- ✗ Make binding decisions or mandate policies

PUBLIC TRUST LIAISON



Reporting structure

- ED and dotted-line to Audit Committee



Relationship to External OCTC Auditor

- Referrals to external audit



Relationship to Whistleblower Policy and Other Personnel Policies



Recruitment Underway

