



The State Bar of California

2022–2027 Strategic Plan

WE PROTECT

THE PUBLIC



Protect the Public through...

- 01** Strengthening the Attorney Discipline System
- 02** Enhancing Access to, and Inclusion in, Legal System
- 03** Regulating the Profession
- 04** Engaging Partners

Foundational Principle

The State Bar is committed to advancing diversity, equity, and inclusion with respect to both its own operations and the legal profession itself.



Goal 1

P

rotect the Public by Strengthening the
Attorney Discipline System: Administer an
attorney discipline system that is efficient,
accountable, and transparent

VISION

The State Bar discipline system is, and is
recognized as, effective, fair, and timely



Diversity, Equity, and Inclusion

Continue to address any racial, or other, disparities in the attorney discipline system

Policy and Systems Change

Respond to emerging issues regarding attorney misconduct and promote solutions to increase public protection

Effectiveness

Adopt new case processing standards and improved operational practices to focus resources on cases posing the most significant risks of harm and reduce the backlog of unresolved disciplinary cases

Consumer Focus

Assist the public in navigating the complaint process and seeking fair, appropriate, and timely resolution

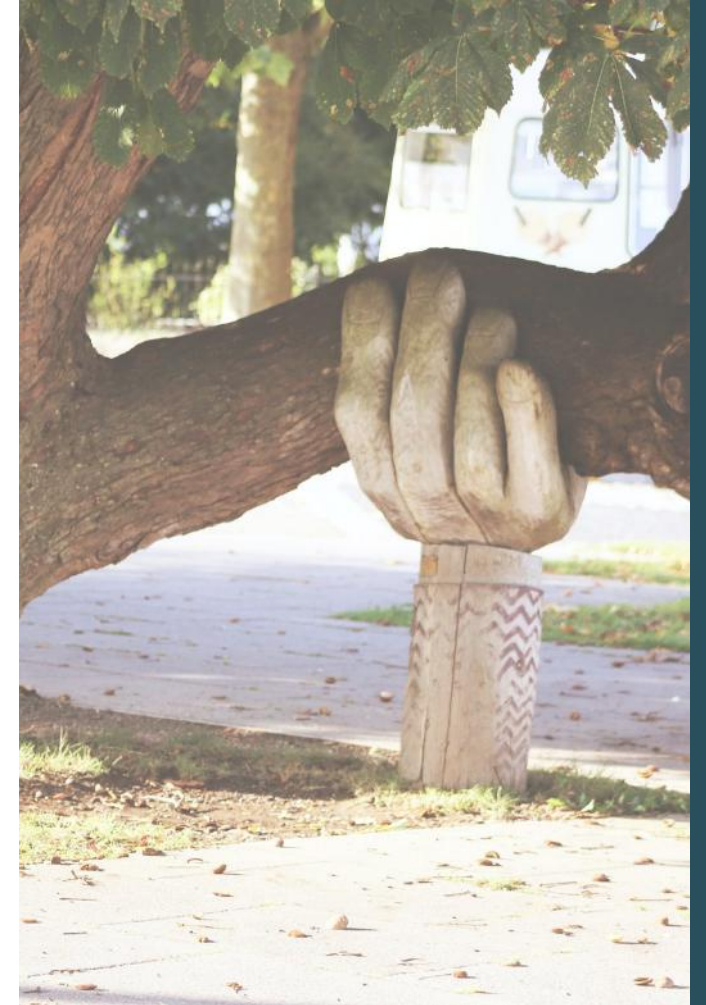
Strategies



Strategy

Support accountability in the attorney discipline system through the development and implementation of new case processing standards that ensure complaints are processed in a timely manner; evaluate and report performance against the case processing standards

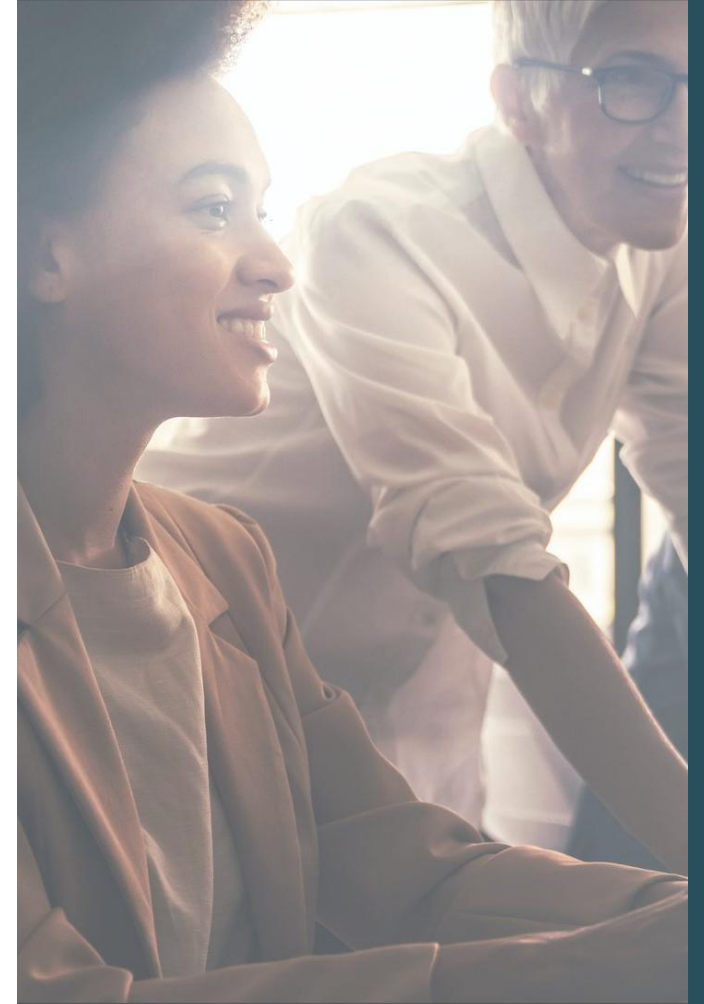
Effectiveness





Operational Activities

- Develop new case processing standards as outlined in SB 211
 - SME assisting in development has recommended a new RPC to address respondent's counsel who intentionally delay State Bar disciplinary proceedings





Goal 2

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rotect the Public by Enhancing Access to and Inclusion in the Legal System: Increase access to the legal system through outreach and education, improved access to legal advice and services, and a legal profession that reflects the diversity of California's communities

VISION

All California residents have access to high quality, affordable, and culturally competent legal advice and services



Diversity, Equity, and Inclusion

Support the law school to profession pipeline to foster a diverse legal profession representative of California's communities, particularly as related to race, ethnicity, and socio-economic status

Policy and Systems Change

Identify and advocate for innovative policy and regulatory reforms needed to increase access to legal services, particularly by disenfranchised, underserved, and rural communities

Effectiveness

Increase representation through the State Bar's existing regulatory and oversight authority including special admissions and pro bono practice programs

Consumer Focus

Increase public education, outreach, and awareness to close the knowledge gap and connect consumers to relevant legal resources

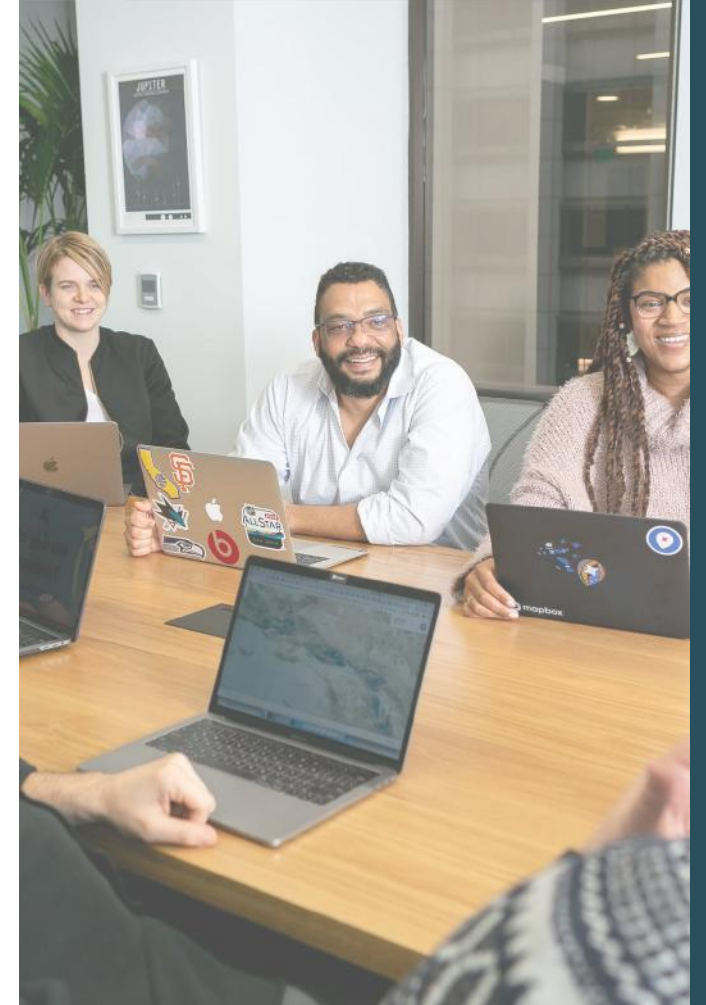
Strategies



Strategy

Incentivize and support licensees and law firms to increase the number of pro bono hours provided to underserved groups

Effectiveness



Operational Activities

- Develop a pro bono policy for State Bar attorneys
- Track numbers of pro bono hours provided by CA attorneys annually
- Identify strategies for increasing the number of pro bono hours provided by CA attorneys





Strategy

Keep abreast of the legal services market and how changes in the market impact individual consumers

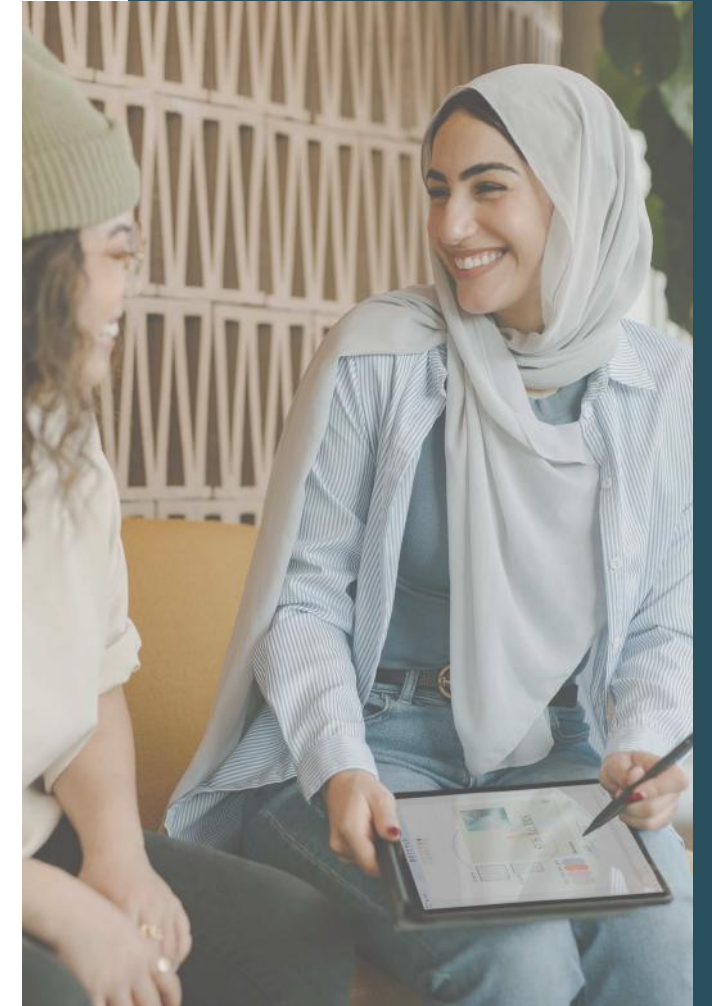
Consumer Focus





Operational Activities

- Conduct focus groups with LRS administrators, local bar associations and affinity bar associations to understand programming and potential regulatory barriers to offering referrals to clients seeking legal services
- Prepare a public comment proposal for revisions to the State Bar rules pertaining to LRS certification to require data gathering and reporting and establishing access to affordable legal services as a goal of the program
- Conduct an analysis of legal market trends focused on understanding both the "people" law and business markets

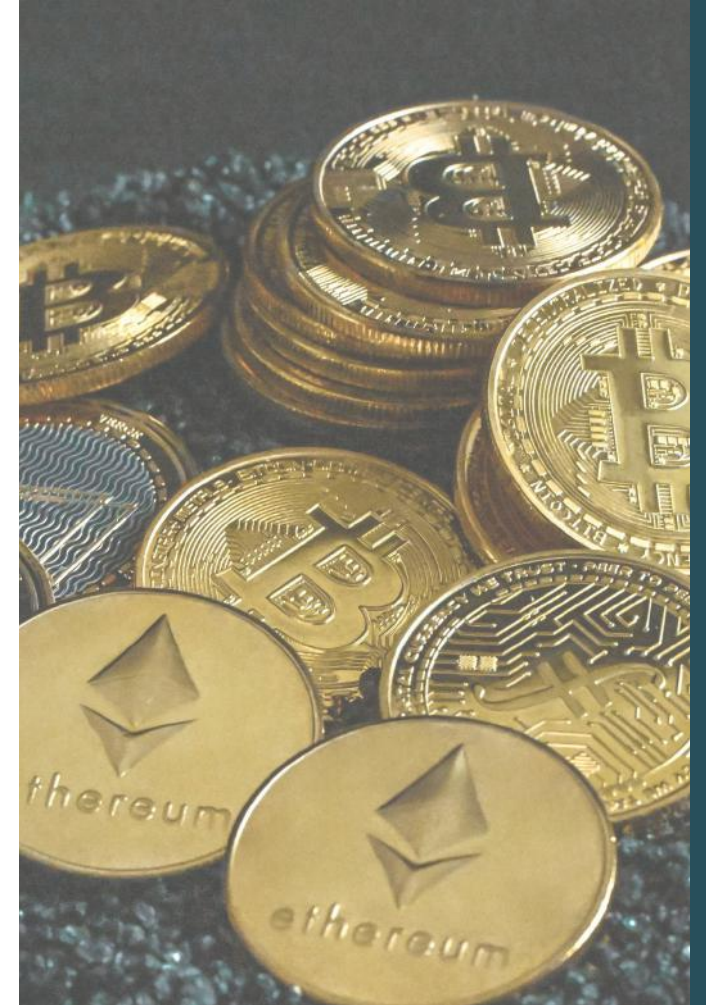




Other Related Activities

Understand and develop recommendations regarding:

- Cryptocurrency
- Practice in the Metaverse
- Alternative legal services providers (ALSPs)
- Legal tech



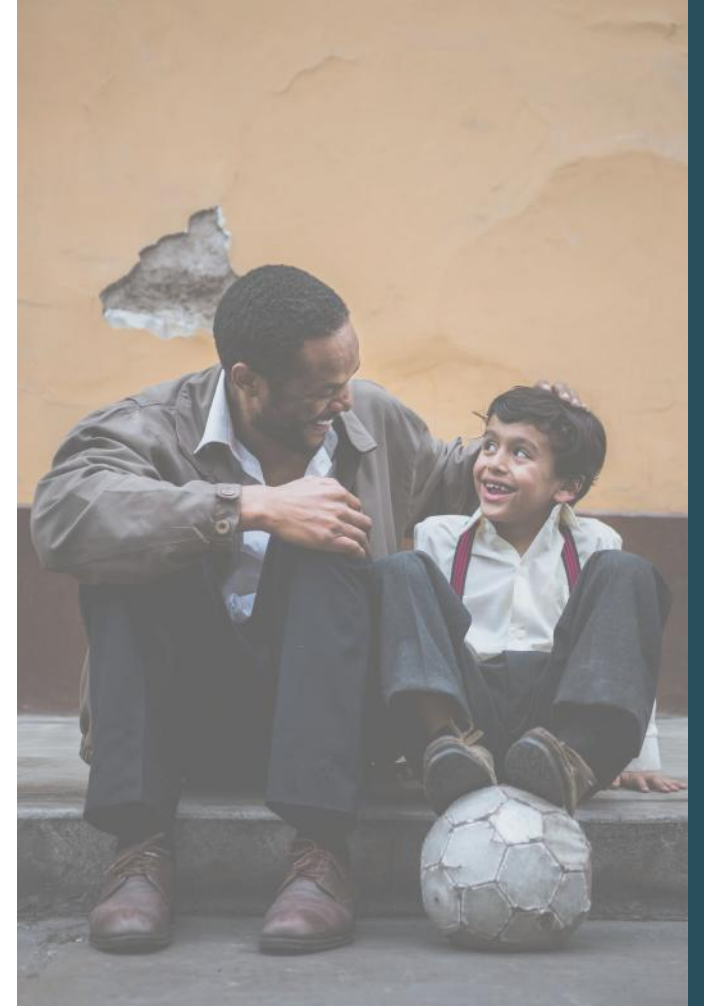


Strategy

Create a policy foundation for regulatory reform to increase access to affordable legal advice and services



Policy & Systems Change





Operational Activities

- Keep abreast of ways in which other jurisdictions are innovating to increase access to legal services and produce periodic reports on these efforts
 - Regulatory sandboxes
 - Paraprofessionals and UPL





Goal 3

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rotect the Public by Regulating the Legal Profession: Promote the ethical and competent practice of law and prevent misconduct by providing education, resources, and support for the legal profession

VISION

State Bar licensee exemplify excellence and personal responsibility in the practice of law



Diversity, Equity, and Inclusion

Support retention, development, and advancement of a diverse legal profession, with a focus on preventative measures to address disproportionate complaint and discipline rates

Policy and Systems Change

Explore and implement regulations to address and deter actions that pose significant risks of public harm

Effectiveness

Use data to identify attorneys most at-risk of misconduct complaints and to develop the resources and supports needed to prevent misconduct

Consumer Focus

Develop and deploy self-assessment modules, minimum continuing legal education (MCLE), practice tools, and other resources to support attorneys in continued education, professional development, and the competent practice of law

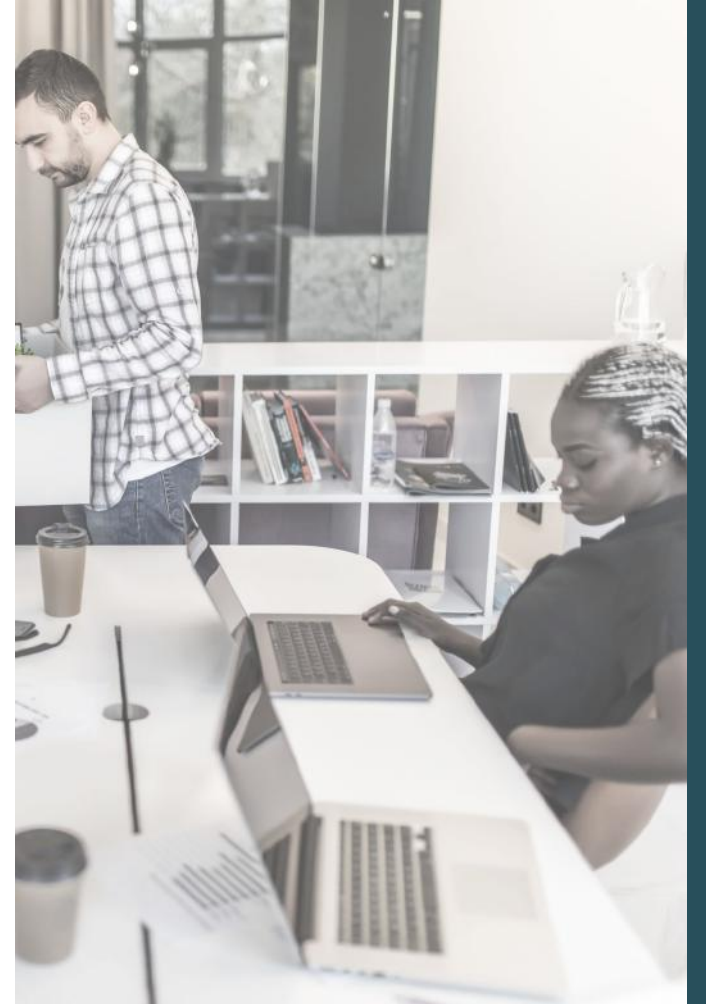
Strategies



Strategy

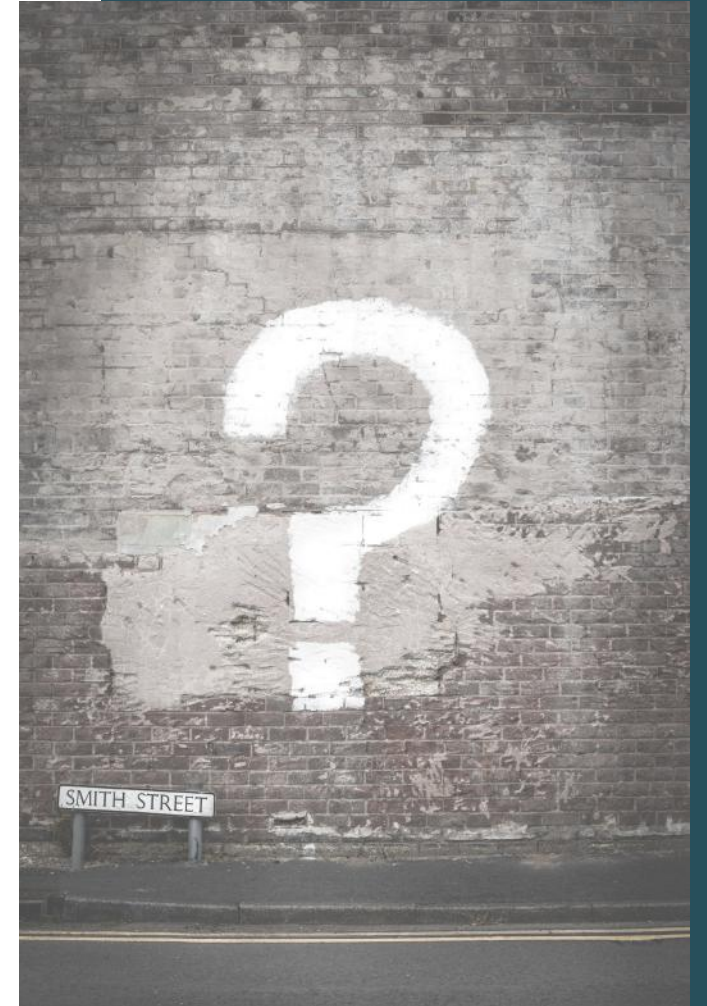
Identify competency related factors that drive disparate voluntary departures from the legal profession by race and gender

DEI



Operational Activities

Ensure that the inactive survey includes questions regarding competency issues

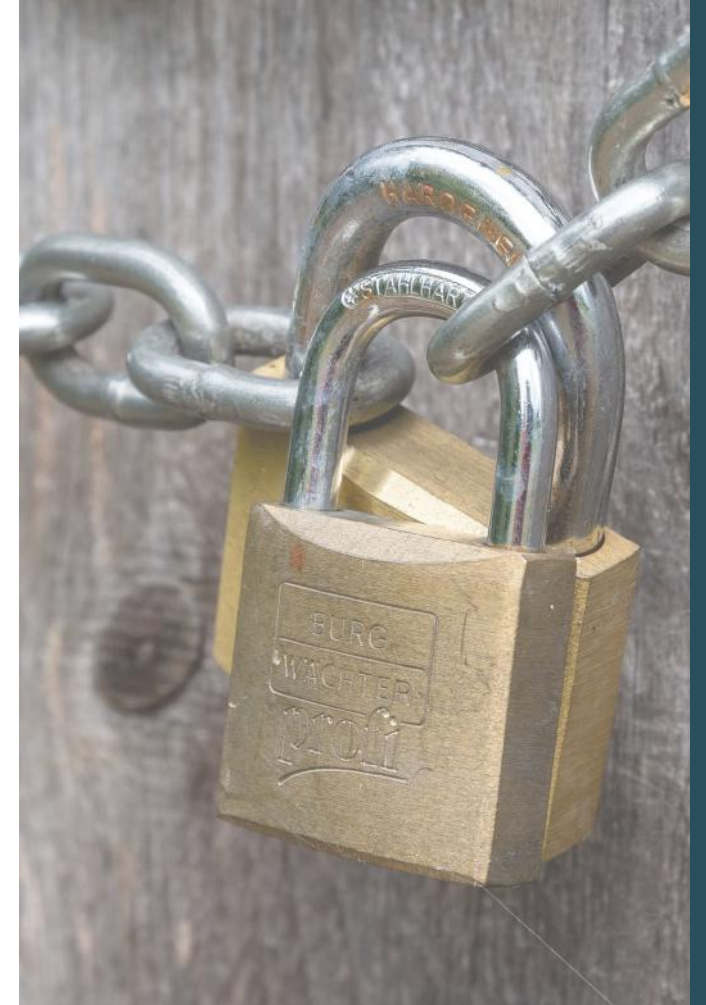




Strategy

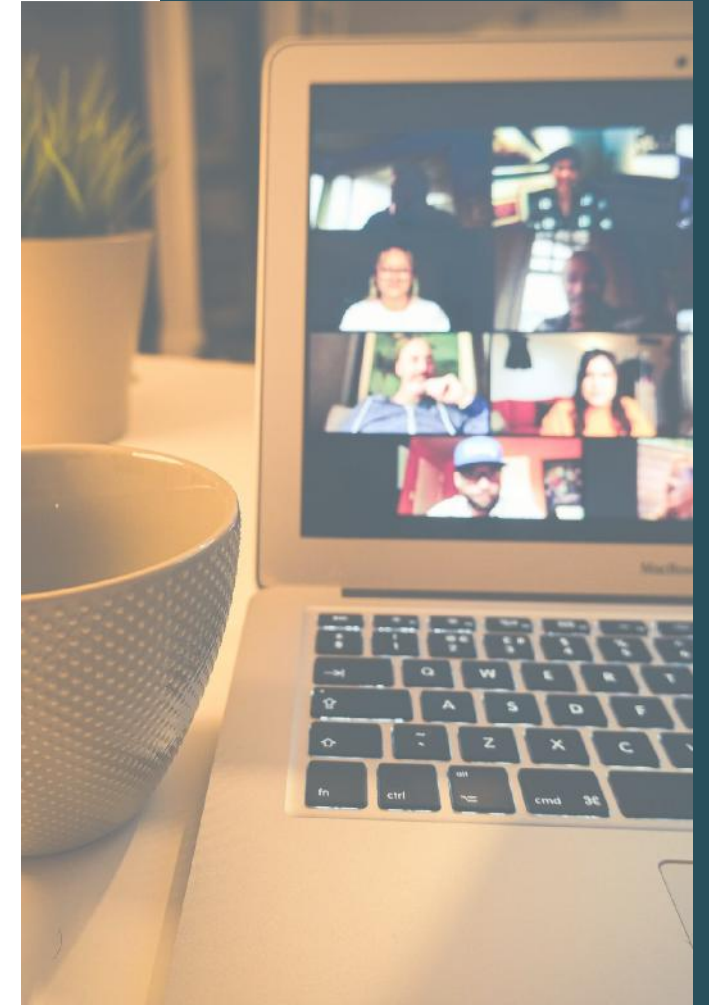
Implement the Client Trust Account
Protection Program

Policy & Systems Change



Operational Activities

- Establish the State Bar Division of Regulation to house the CTAPP
- Implement CTAPP licensee reporting requirements
- Enforce licensee noncompliance with CTAPP licensee reporting requirements





Other Related Activities

Revisit Model Rule 8.3 the rule that requires a lawyer to report misconduct by another lawyer to the State Bar if that conduct raises a “substantial” question about that lawyer’s honesty or fitness to practice.





Goal 4

P

rotect the Public by Engaging Partners: Engage partners and stakeholders to enhance public protection and restore the State Bar's credibility, reputation, and impact

VISION

Partners and stakeholders are actively involved in and supportive of the State Bar's public protection initiatives, achievements, programs, and services



Diversity, Equity, and Inclusion

Ensure that communications materials and resources are accessible to California's diverse communities

Policy and Systems Change

Partner with stakeholders to increase public protection and attorney regulation through legislation and policy change

Effectiveness

Increase public trust and consumer awareness by demonstrating competence, consistency, and transparency

Consumer Focus

Establish collaborative relationships with community and consumer facing organizations and engage partners in collaborative workgroups

Strategies



Strategy

Enhance visibility and accessibility to State Bar meetings

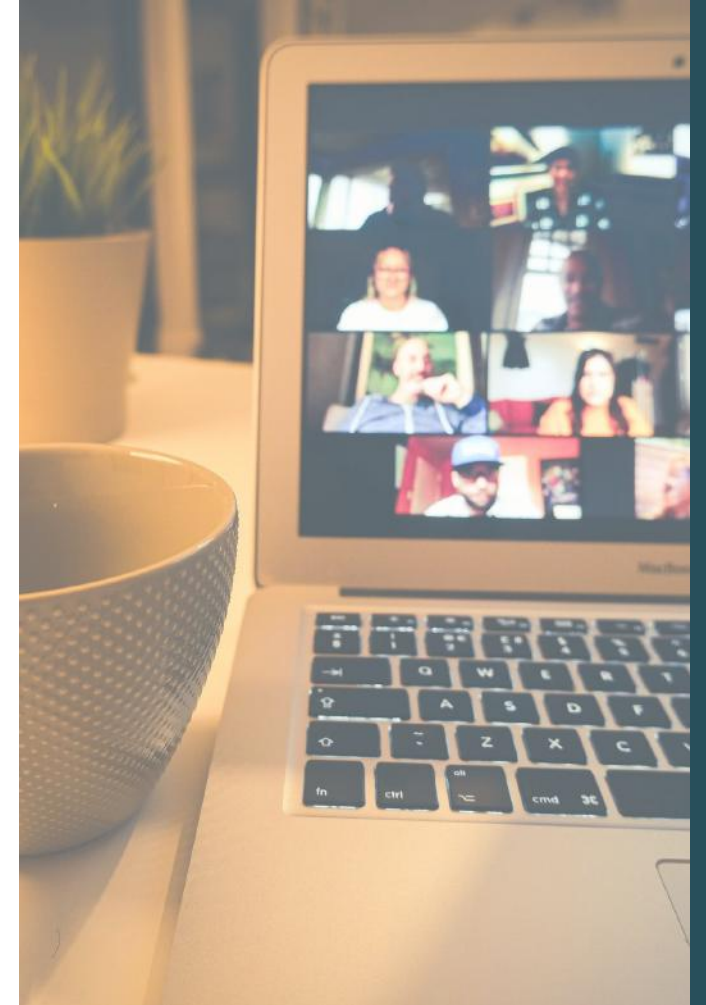
Effectiveness





Operational Activities

- Monitor other bodies' handling of remote proceedings and determine if additional changes needed to State Bar or State Bar Court processes
- Implement two meetings/year in person, subentity and ad hoc body email addresses, and track public participation
- Improve and promote guidelines for public participation at meetings
- Revisit ADA accessibility for remote/hybrid meetings, develop consistent agencywide guidelines
- Deploy new agenda management system which will enable easier to access agendas and meeting materials and meeting calendars

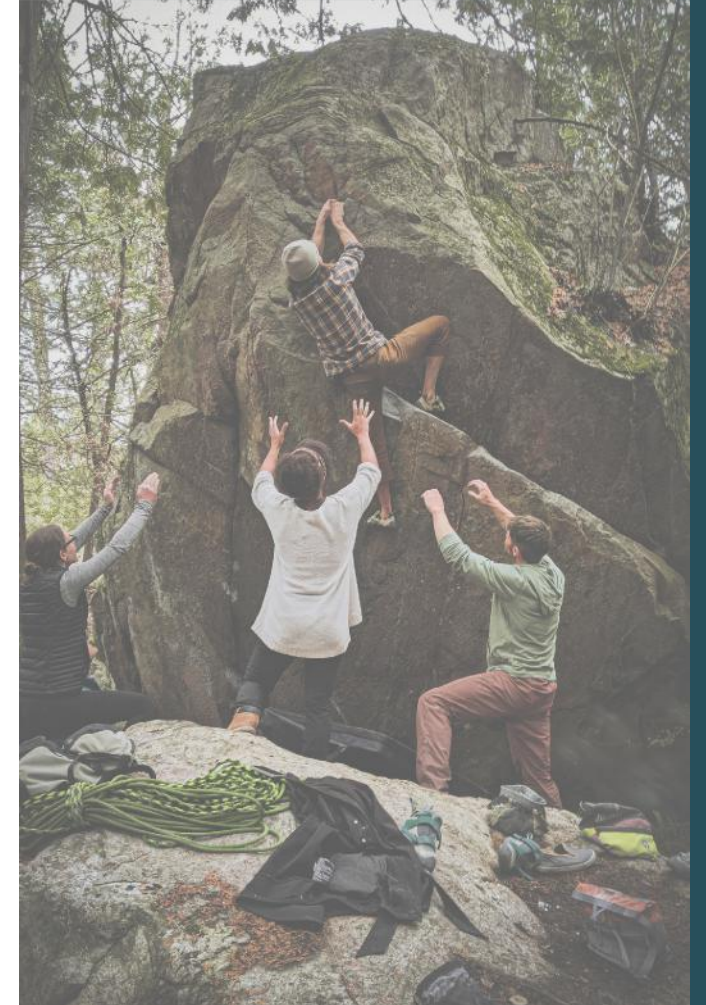




Strategy

Serve as an incubator for innovation, share successes and best practices, and support implementation efforts in other organizations

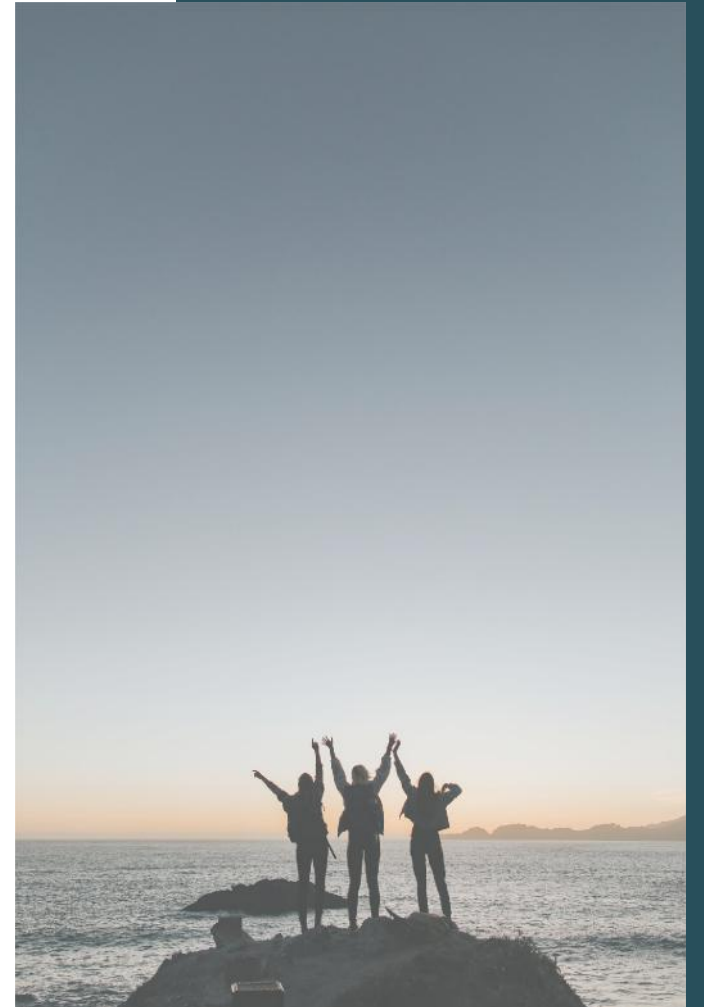
Effectiveness





Operational Activities

- Create innovation center on website and/or on citizen engagement platform
- As part of program/event planning for the 100th anniversary, develop event or recognition related to innovation





Strategy

Demonstrate transparency and, within constraints imposed by law, maximize disclosure in public communication

Consumer Focus

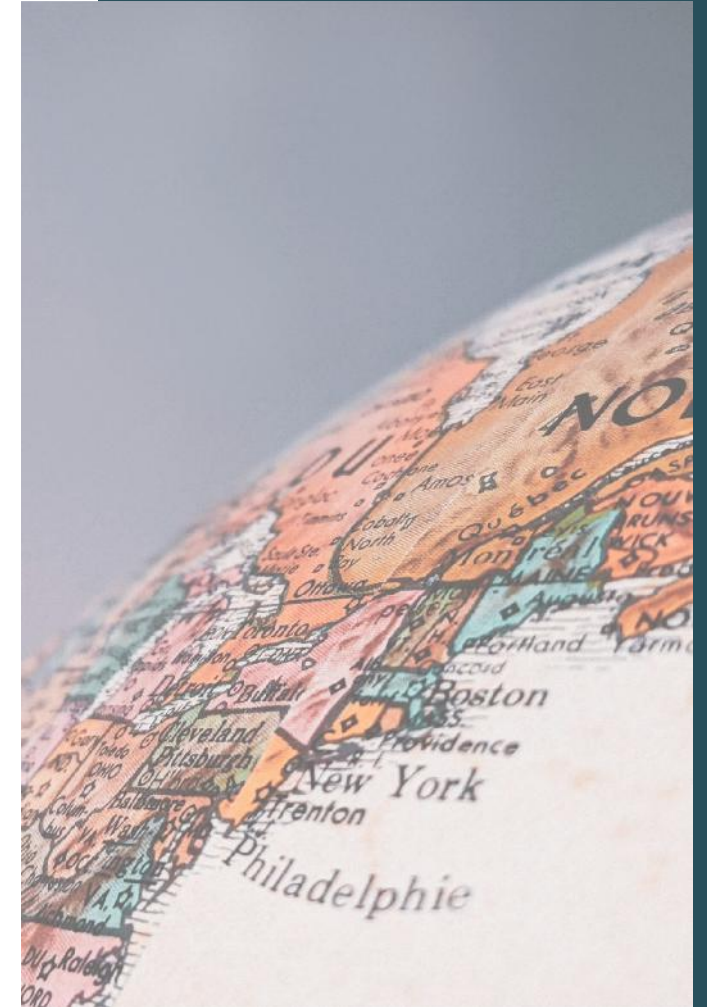




Strategy

Expand multilingual content and outreach

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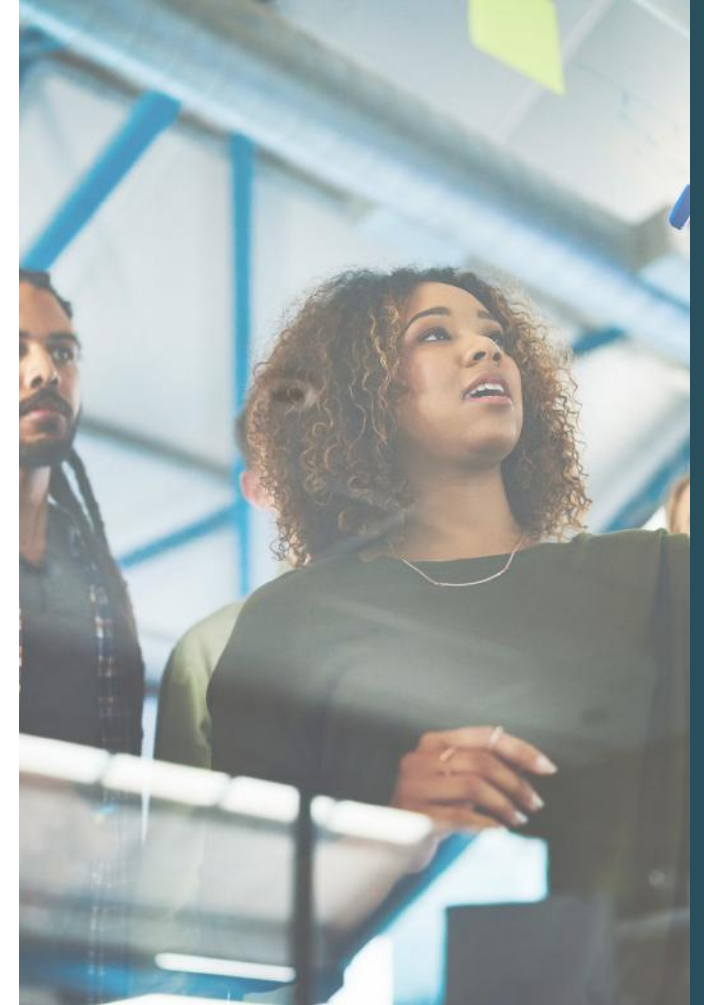




Strategy

Increase the number and variety of stakeholders to include affinity bar associations and a broad range of organizations invested in the mission of the State Bar

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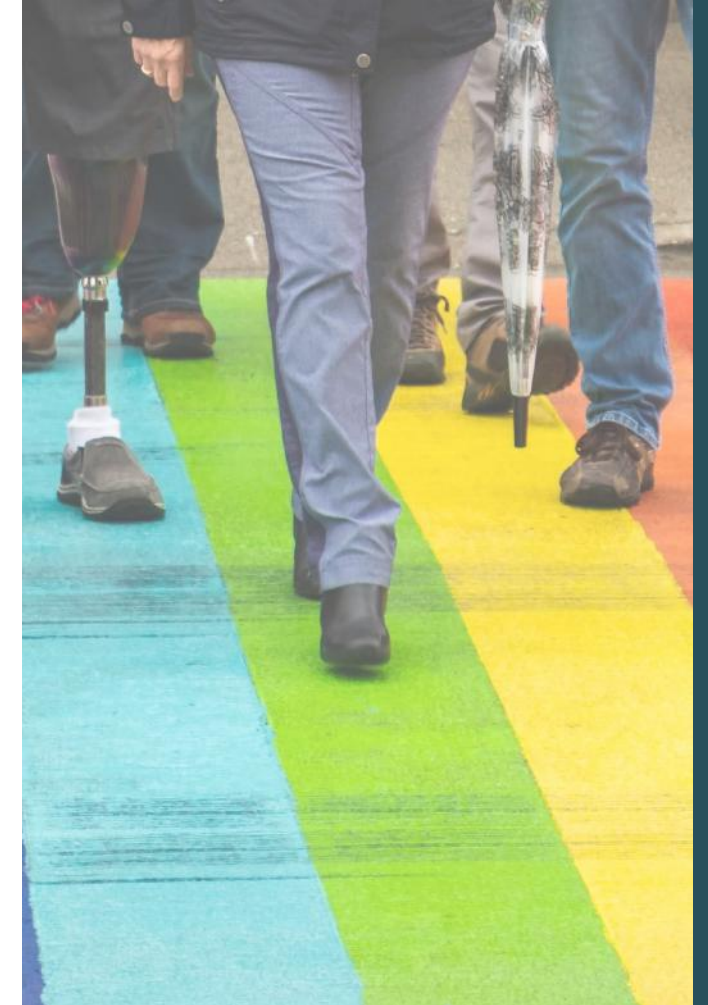


Strategy

Engage diverse voices in the development and evaluation of State Bar policy



DEI





Operational Activities

- Expand outreach on subentity appointment opportunities to support long-range goal of diversifying subentity members
- Redesign public comment invitation procedure to incorporate plain language review, toolkit of options for general public outreach on invitations of broad public relevance, metrics reporting as part of comments compilation/analysis
- Redesign Leadership Bank Program to include additional criteria such as social responsibility and diversity, equity, and inclusion goals
- Implement changes to Leadership Bank Program

