



# The State Bar of California

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## **OPEN SESSION AGENDA ITEM 40-1 NOVEMBER 2023**

**DATE:** November 16, 2023

**TO:** Members, Board of Trustees

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

**SUBJECT:** Progress Update on the 2022–2027 Strategic Plan

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### **EXECUTIVE SUMMARY**

The Board of Trustees adopted the 2022–2027 State Bar Strategic Plan at its meeting on March 24–25, 2022. The plan can be found [here](#). Staff developed two operational plans to support the implementation of the Strategic Plan. The operational plans were presented to the Board at its meeting on January 19-20, 2023. This item serves as a progress update on the implementation of the Strategic Plan and its operational projects.

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### **BACKGROUND**

The State Bar Board of Trustees is responsible for setting the strategic direction of the organization. It executes this responsibility in part through the adoption of strategic plans every five years; these plans are revisited annually to see if any amendments or modifications are needed.

### **DISCUSSION**

The Strategic Plan is organized around four goals. Each goal has multiple implementation steps. The Strategic Operational Plan (SOP) ensures all objectives are achieved by outlining specific activities that will be taken to advance each step outlined in the Strategic Plan.

The Core Operational Plan (COP) addresses the organization's infrastructure or backbone needed to support Strategic Plan success, namely services provided by Human Resources, Information Technology, and other administrative offices. The SOP and COP can be found as Attachments A and B of the January 2023 [board agenda item](#) on this topic.

Staff regularly update the status of operational plan activities; progress is tracked and reported in dashboard format. With respect to Q2, 2023, the most recent update period, 33 and 38 percent of SOP and COP activities were completed on time, while the remaining projects are in progress or not yet started. Highlights of completed, delayed, and in progress projects are provided below. Detailed information can be found in the [SOP](#) and [COP](#) dashboards.

#### **KEY ACCOMPLISHMENTS INCLUDE**

- Implemented State Bar rule 2.11 and increased the rate of compliant payments/reduced the use of overtime and/or contractors during the billing period;
- Zero-based discretionary accounts reviewed annually and continued efforts to identify operational savings;
- Explored expansion of the T&D program to assess the feasibility of waiving educational requirements or extending the duration of T&Ds to help employees meet minimum qualifications for higher-level positions;
- Tracked and published State Bar staff demographic data by office and classification and State Bar-wide;
- Submitted a final Blue Ribbon Commission report and recommendations to the Board of Trustees and Supreme Court;
- Explored the feasibility of expanding the Mindsets in Legal Education Initiative to first-year law student examinees;
- Redesigned public comment invitation procedure to incorporate plain language review, a toolkit of options for general public outreach on invitations of broad public relevance, metrics reporting as part of comments compilation/analysis; and
- Implemented practice management support activities outlined in the multiyear preventative and proactive regulation work plan.

Some projects scheduled for completion in Q2 2023 have yet to commence and/or advance to timely conclusion due to factors including overambitious project planning, lack of resources, and changing project scope.

#### **Examples of Projects Not Started**

- Implement the Public Trust Liaison's consumer education plan;
- Implement a plan to grow an influencer network of attorneys on social media; and
- Develop new case processing standards for Complaint Review Unit (CRU) cases to include prioritization and related time standards).

#### **Examples of Projects in Progress But Not Timely Completed**

- Analyze (1) 10-year trends in inactive attorney data to identify any demographic patterns and (2) inactive attorney survey data to establish a baseline; and
- Explore expansion of the Training and Development (T&D) program to increase T&D opportunities for administrative staff and to publicize and set expectations for supervisors and managers to encourage staff to participate.

Staff modified the SOP and COP during the first quarter of 2023 to reflect the board-adopted budget. In January 2023, the number of IT projects in the plans totaled over 110 for 2023. Pursuant to post-budget modifications the number of IT projects in the plans was revised downwards significantly; today, the number of IT projects in the plans totals 28 for 2023.

Additional modifications or updates to the operational plans will be considered after the Board's January 2024 planning session.

### **FISCAL/PERSONNEL IMPACT**

None

### **AMENDMENTS TO RULES**

None

### **AMENDMENTS TO BOARD OF TRUSTEES POLICY MANUAL**

None

### **STRATEGIC PLAN GOALS & IMPLEMENTATION STEPS**

Goal 1. Protect the Public by Strengthening the Attorney Discipline System

Goal 2. Protect the Public by Enhancing Access to and Inclusion in the Legal System

Goal 3. Protect the Public by Regulating the Legal Profession

Goal 4. Protect the Public by Engaging Partners

### **RECOMMENDATIONS**

None

### **ATTACHMENT LIST**

None