



The State Bar of California

March 2024 Strategic Plan Modifications

WE PROTECT

THE PUBLIC





Strategic Plan Modifications, Staff Recommendations

- Adopt Strategic Plan Goal 5 to reflect the State Bar's investment in technology infrastructure
- Increase number of implementation steps from 50 to 55
- Nonsubstantive language edits for clarity
 - Grouped similar implementation steps together to better reflect shared work



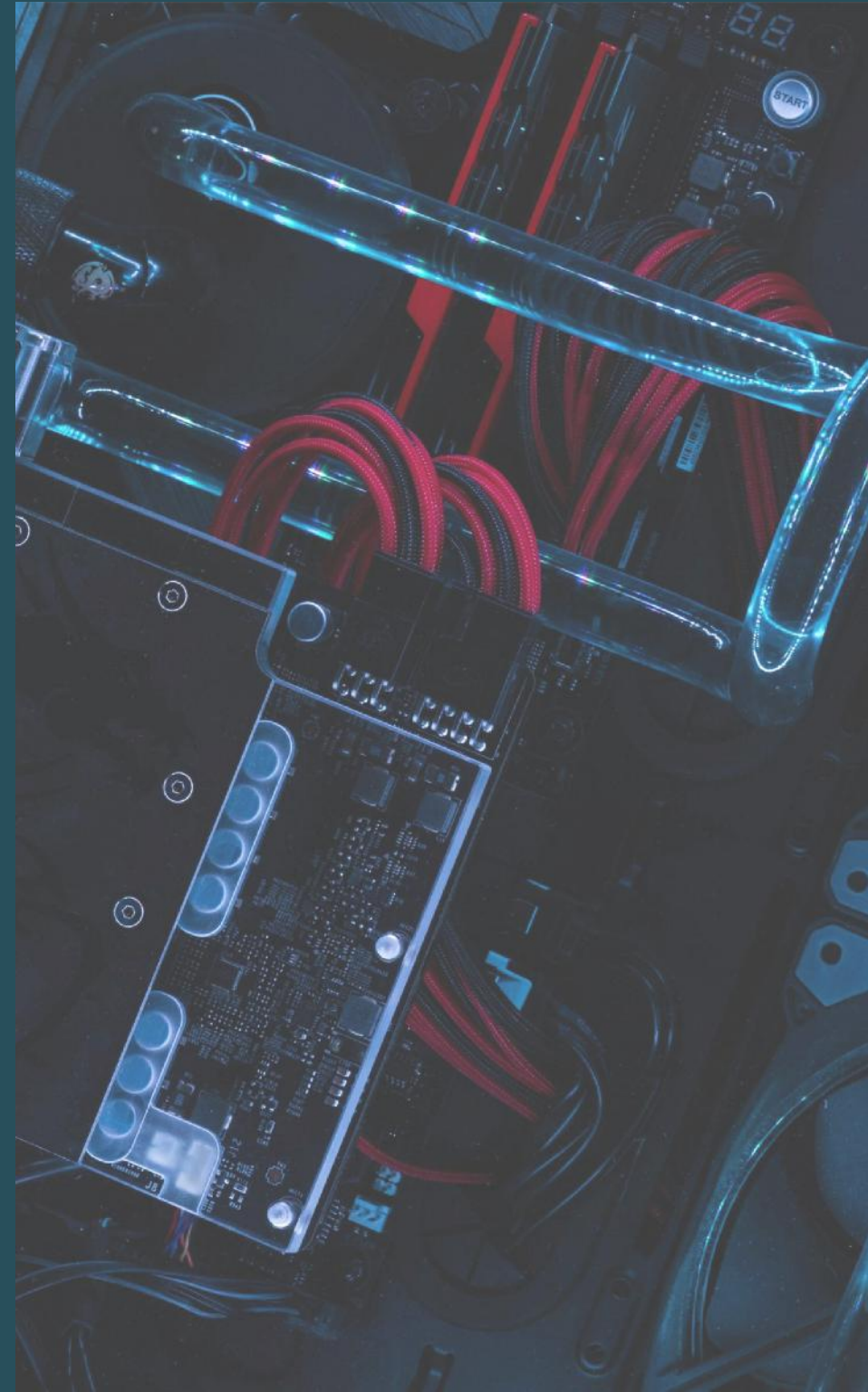


Goal 5

Protect the Public through Innovative Use of Technology and Responsible Data Management: Strategically invest in technology infrastructure, tools, systems, and human resources to ensure efficient, secure service delivery that meets the needs of licensees, applicants, and the public.

VISION

The State Bar embraces proactive and innovative technology solutions that enhance our ability to fulfill our mission; maintains a dynamic, responsive, and secure technology and data infrastructure; and safely enhances technology experiences for the public and staff.



Strategies

Effectiveness

Operate mission-critical State Bar systems and applications effectively and securely; maximize capabilities and use of existing systems and applications while protecting sensitive data; identify and adopt new applications to increase efficiency and effectiveness.

Consumer Focus

Make State Bar data and performance outcomes transparent, and improve online experiences with State Bar platforms.

Diversity, Equity, and Inclusion

Design and plan for inclusive, accessible technology; identify and mitigate disparate impact in technology tool adoption.

Policy and Systems Change

Create a responsive, fiscally sound IT organization with sufficient capacity and capability to serve the needs of the State Bar and those who rely on it.



Strategy

- Systemically assess and document the interdependencies of IT systems and infrastructure to efficiently, safely, and effectively deploy technology.
- Develop a mature IT security infrastructure.
- Boost adoption of information technology tools and resources to increase operational efficiency and effectiveness.
- Identify and provide staff training required to increase knowledge of capabilities of current systems and applications.

Effectiveness

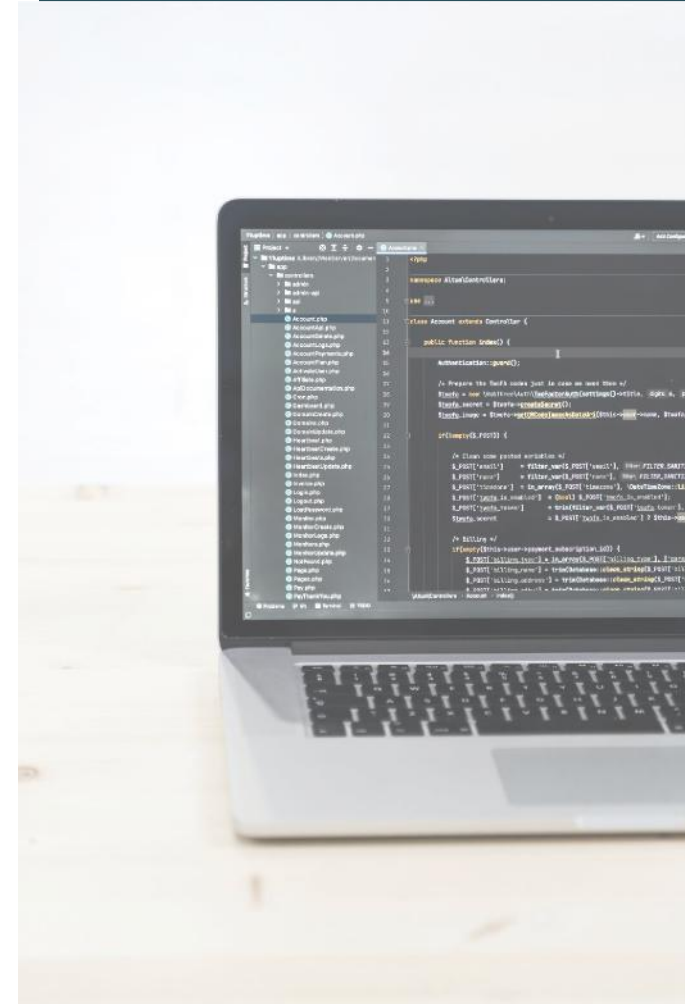




Strategy

- Increase access to State Bar data and performance outcomes.
- Design and implement a data governance framework.
- Implement website redesign and other technology initiatives to improve usability and transparency.

Consumer Focus





Strategy

Plan, select, and implement technological innovations with an eye toward inclusion and accessibility.

Diversity, Equity, and Inclusion





Strategy

- Secure appropriate funding levels to staff an IT organization that serves the needs of the State Bar.
- Engage in consistent, robust fiscal oversight given the large percentage of non-personnel expenditures that IT costs comprise.

Policy and Systems Change



Strategic Plan Modifications

Propose condensing 7 implementation steps

GOAL	STRATEGY	IMPLEMENTATION STEPS
Goal 3	Consumer Focus	Implement the Office of Professional Competence's 5-year plan for preventative education e-learning and self-assessment modules. [Basis for change: Condense; activities fit under current Goal 3, Consumer Focus Implementation Step 2] Position the State Bar as a trusted resource; and increase proactive interactions with licensees beyond admitting attorneys into the profession, collecting fees, and monitoring MCLE compliance ensure that licensees are aware of how the work of the Bar supports the competent and ethical practice of law. [Basis for change: Incorporate language from three merged implementation steps under Goal 3] Create a licensee resource page on the State Bar website to provide information and tools on emerging topics and issues including mental health, financial literacy, and navigating imposter syndrome in the workplace. [Basis for change: Condense; activities fit under current Goal 3, Consumer Focus Implementation Step 2]
	Diversity, Equity, and Inclusion	Support attorneys from disenfranchised and underserved communities who may experience unique practice management and other challenges. [Basis for change: Condense; activities fit under current Goal 3, Consumer Focus Implementation Step 2]
Goal 4	Effectiveness	Ensure that licensees are aware of the work of the State Bar and how the bar supports competent and ethical practice. [Basis for change: Condense; activities fit under Goal 3, Consumer Focus Implementation Step 1]
	Consumer Focus	Create and sustain partnerships with other organizations, entities, and stakeholder groups. Build a robust, diverse, and mission-oriented network of partners. [Basis for change: Merged with Goal 4, Diversity, Equity, and Inclusion Implementation Step 2; condense language]
	Diversity, Equity, and Inclusion	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. [Basis for change: Merged with Goal 4, Consumer Focus implementation step 1; improve language clarity]

Strategic Plan Modifications

Substantive Language Edits

GOAL	STRATEGY	IMPLEMENTATION STEPS
Goal 1	Diversity, Equity, and Inclusion	Identify and implement strategies to address other disparities in discipline rates and outcomes, including those related to solo and small firm practitioners. [Basis for change: Limit the scope of the implementation step to research; implementation is covered under Goal 2, Diversity, Equity, and Inclusion, Implementation Step 3]
Goal 2	Effectiveness	Update and modernize Revise the bar admissions requirements to be more relevant to the practice of law, in alignment with the recommendations of the Blue Ribbon Commission on the Future of the Bar Exam: to eliminate unnecessary barriers to admission, or to implement changes to the bar examination or other pathway to licensure approved by the Supreme Court. [Basis for change: Clarify updated authority to approve changes; minor wording edits]
	Consumer Focus	Continue to analyze data points to identify the root potential causes of inequities in accessing legal services to <u>inform policy recommendations to</u> and reduce the access to legal services gap. [Basis for change: Clarified the implementation step is related to research and informing policy]
	Diversity, Equity, and Inclusion	Identify data-supported practices that promote retention and advancement of a diverse and inclusive legal profession, <u>including strategies that support solo and small-firm practitioners</u> , and share those practices through toolkits and other resources. [Basis for change: Clarify focus of activities]
Goal 3	Policy and Systems Change	Identify the benefits and risks of lawyer use of technology in the practice of law, including generative AI, and explore and implement regulations for appropriate use. [Basis for change: Add new implementation step]

Strategic Plan Modifications

Minor Language Edits

GOAL	STRATEGY	IMPLEMENTATION STEPS
Goal 2	Diversity, Equity, and Inclusion	Increase the numbers of diverse attorneys in the legal profession by encouraging through diversity pipeline programs that support aspiring attorneys in graduating from law school and passing the bar exam. [Basis for change: Minor wording edit]
		Engage DEI leaders and other stakeholders to encourage legal employers to set and publicly commit to measurable diversity, equity, and inclusion goals through the State Bar DEI- Diversity Leadership Seal Program. [Basis for change: Minor wording edit]
Goal 4	Effectiveness	Enhance visibility of and accessibility to State Bar public meetings. [Basis for change: Minor wording edit]