



The State Bar of California

# May 2024 Strategic Plan Modifications

**WE PROTECT**

**THE PUBLIC**



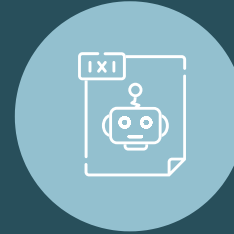
# Strategic Plan Updates

March 2024



**Board approved condensing various implementation steps**

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**Specific concerns regarding AI and cybersecurity were identified**

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**Board approved changes to Goals 1-4**

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**Staff directed to work with designated Board members to finalize**

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**Board considered new Goal 5 around technology**



## 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 in the categories of Effectiveness; Consumer Focus; Diversity, Equity, and Inclusion; and Policy and Systems Changes to 58





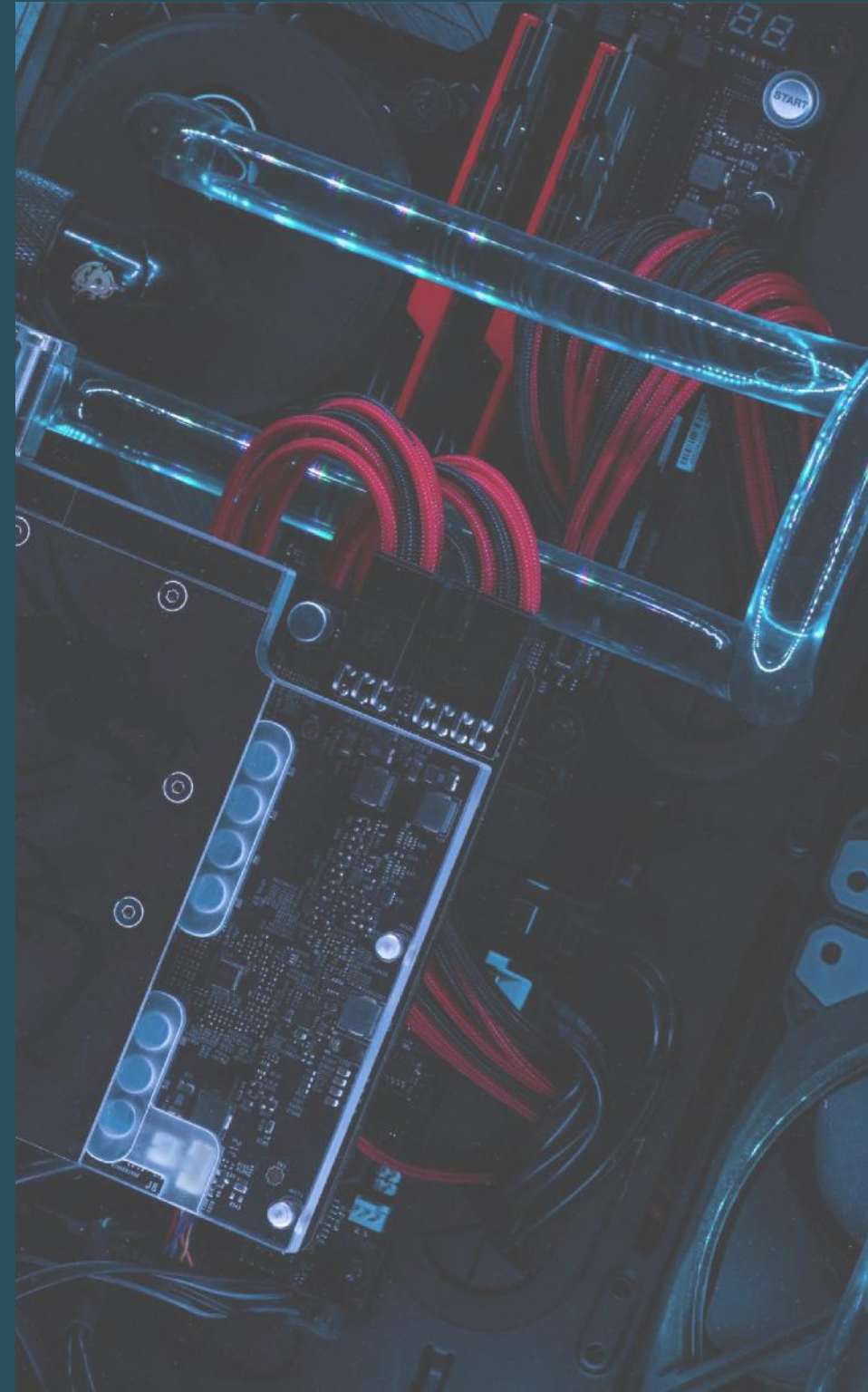


# Goal 5

**P**rotect the Public through Innovative Use of Technology and Responsible Data Management: Strategically invest in **and implement** technology infrastructure, **cybersecurity, and next-generation tools and systems** to increase the efficiency and effectiveness of the State Bar.

## VISION

The State Bar embraces **innovative technologies that enhance the ability to fulfill its mission**; maintains a **secure, dynamic, and responsive data infrastructure**; and safely enhances technology experiences for the public and staff. **The State Bar adopts artificial intelligence tools for clear business purposes, while adhering to stringent security, confidentiality, and ethics protocols governing use.**



# 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; adopt a robust, organization-wide data governance framework; 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; finalize artificial intelligence guardrails for secure and ethical State Bar-wide use.



## 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

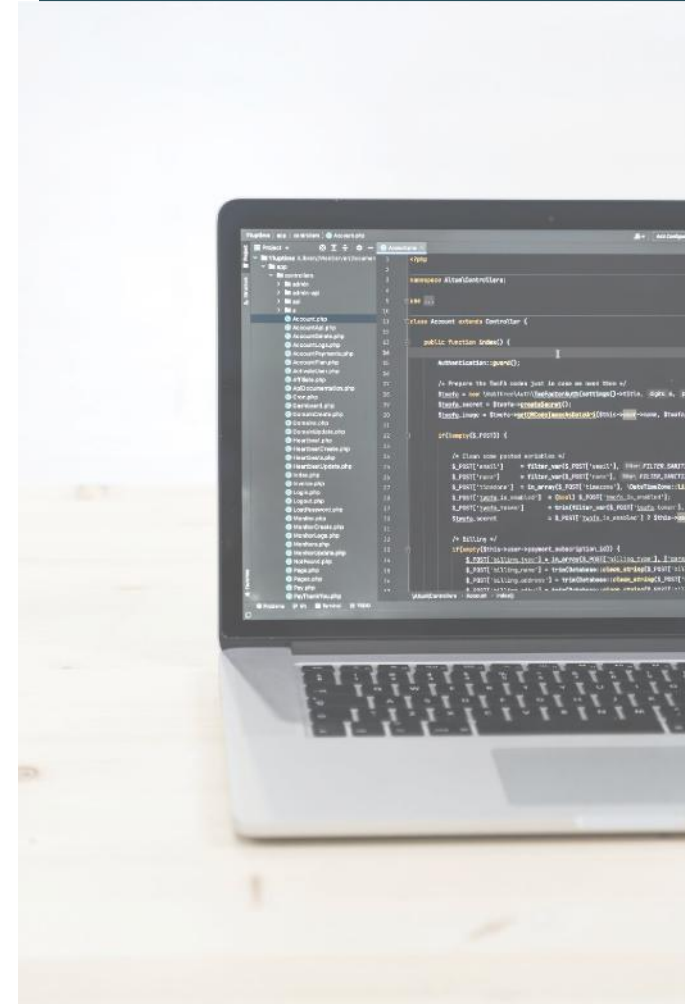




## Strategy

- Increase access to State Bar **data governance framework**.
- 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 **in light of the significant** non-personnel expenditures on IT.
- **Develop robust guardrails for the use of artificial intelligence at the State Bar.**

## Policy and Systems Change

