



The State Bar of California

2022-2027 Strategic Plan Progress Update

Donna Hershkowitz, Chief Mission Office

Elizabeth Nolan, Lead Program Analyst, Office of Compliance

Board of Trustees Meeting, September 19–20, 2024

Overview of Operational Plans

- The 2022–2027 State Bar Strategic Plan outlines the five-year priorities for the organization and has five goals centered on protecting the public.
- Two operational plans created based on the Strategic Plan:
 - Strategic operational plan: ensures Strategic Plan objectives are achieved, by outlining activities that advance each Strategic Plan goal and implementation step.
 - Core operational plan: priority areas of organizational infrastructure required to support Strategic Plan success

Figure 1. 2022-2027 Strategic Plan Goals

Protect the Public by
Strengthening the
Attorney Discipline
System

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

Protect the Public by
Regulating the Legal
Profession

Protect the Public by
Engaging Partners

Protect the Public
through Innovative Use
of Technology and
Responsible Data
Management



Overview of Operational Plans

Figure 2. Strategic Operational Plan Components

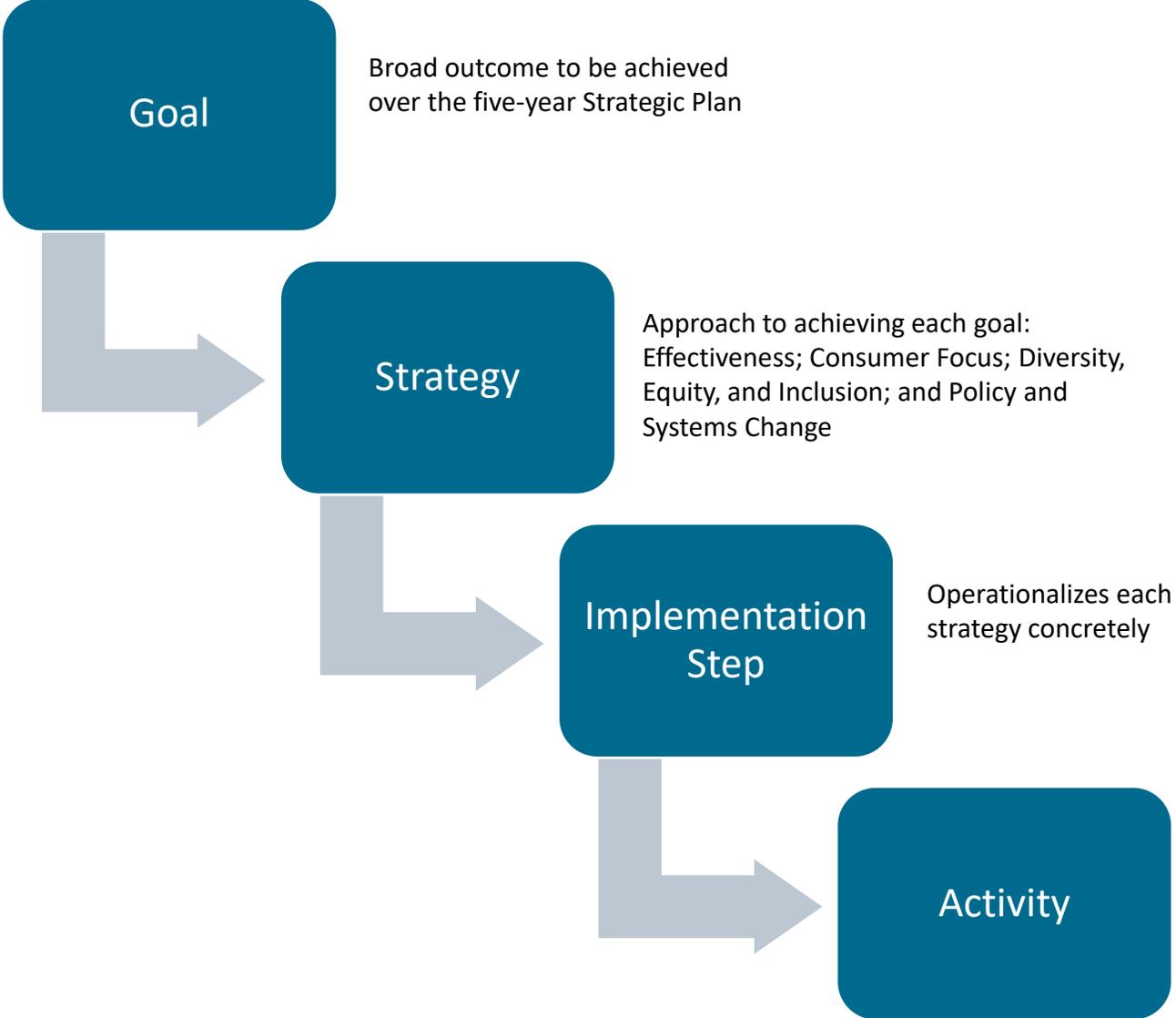
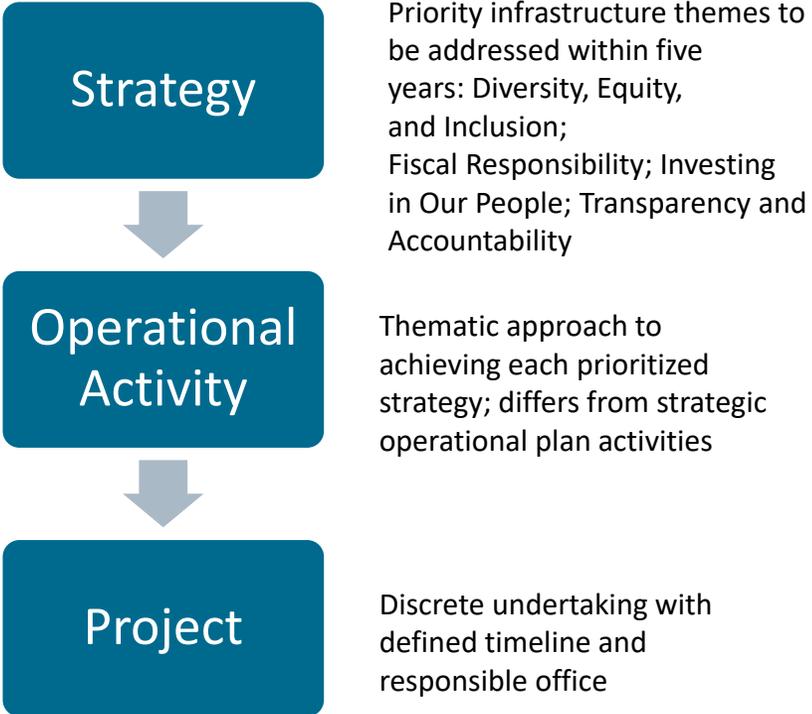
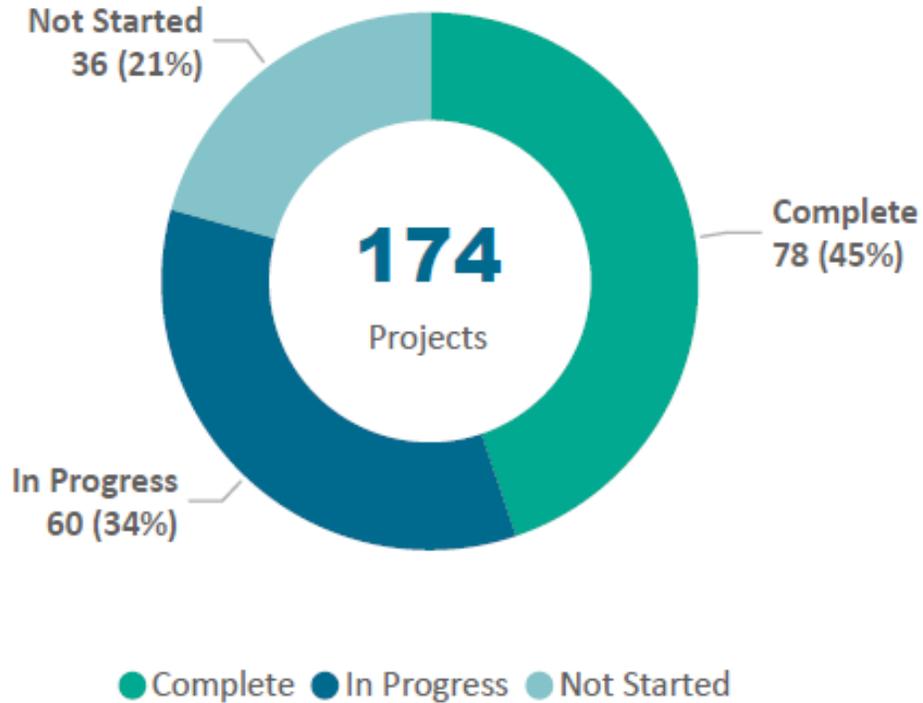


Figure 3. Core Operational Plan Components

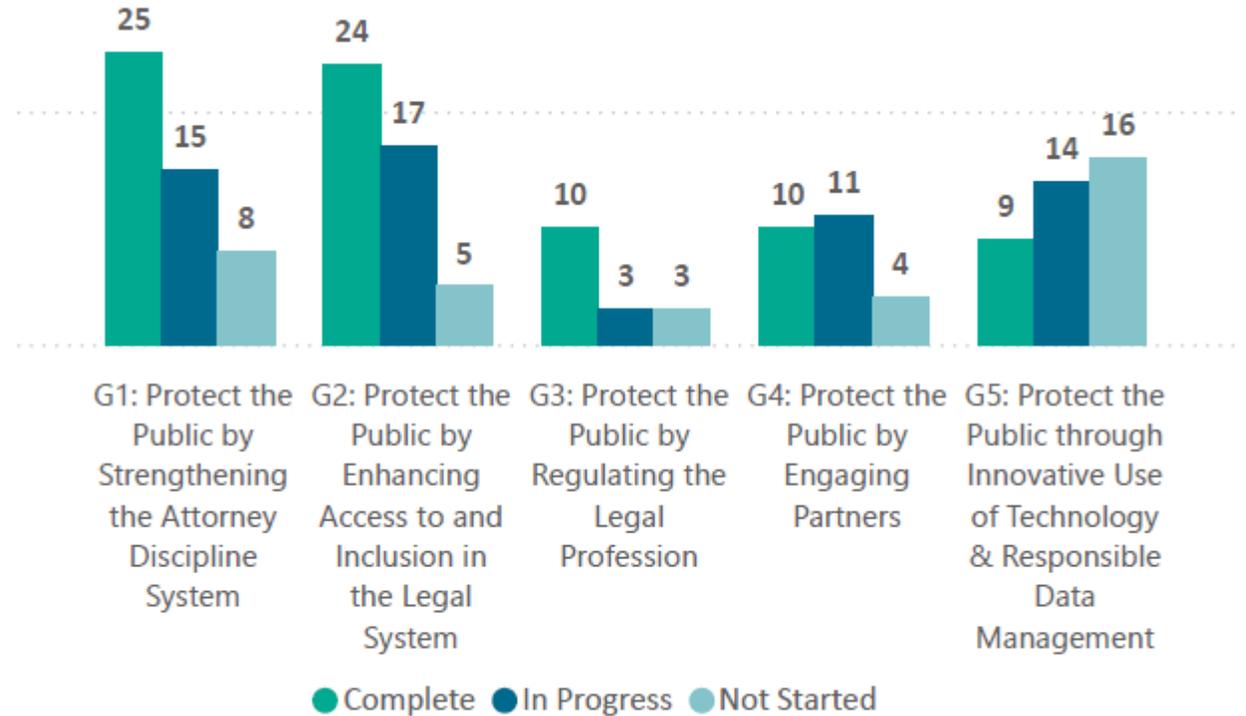


Overall Progress – Strategic Operational Plan

Operational Activities
2022/2023/2024/2025/2026/2027



Operational Activities by Goal

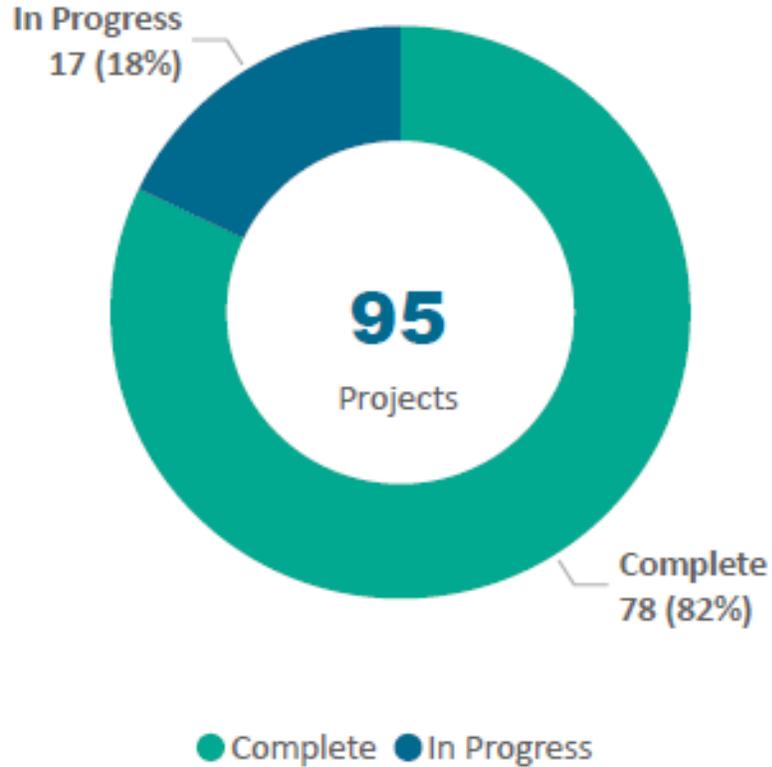


Overall, 79% of strategic operational activities have been started or completed.



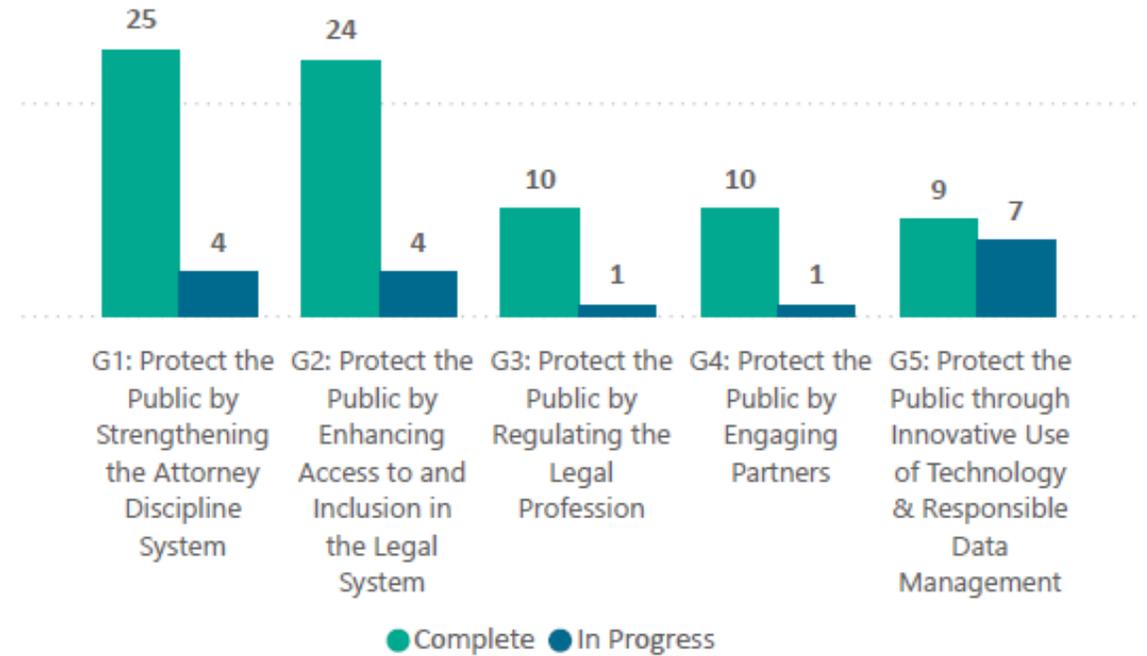
Progress through Q3 2024 – Strategic Operational Plan

Operational Activities: 2022 through Q3 2024



55% of all strategic operational plan activities are scheduled for completion between 2022 and Q3 2024.

Operational Activities by Goal

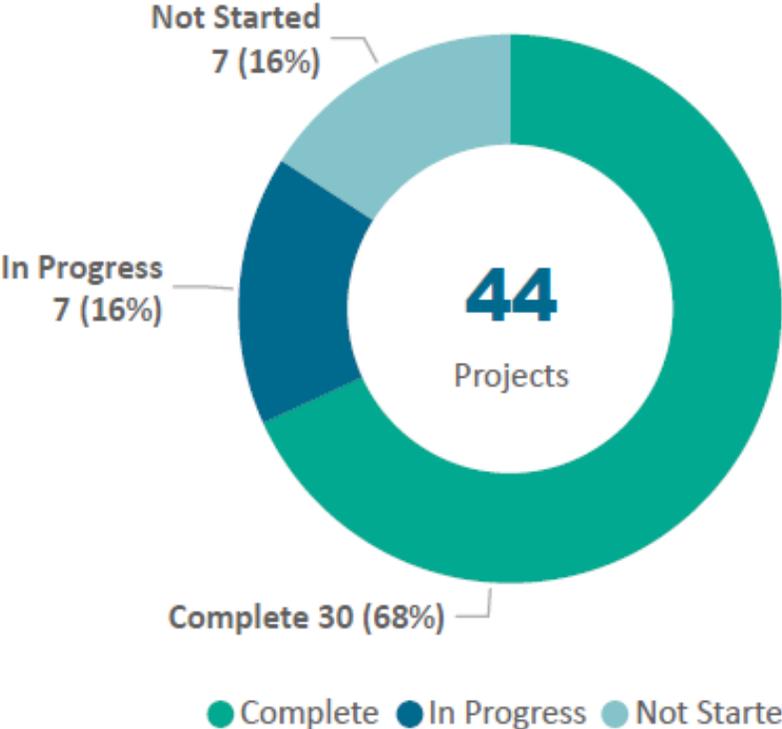


Most operational activities occur within Strategic Plan goals 1 and 2.



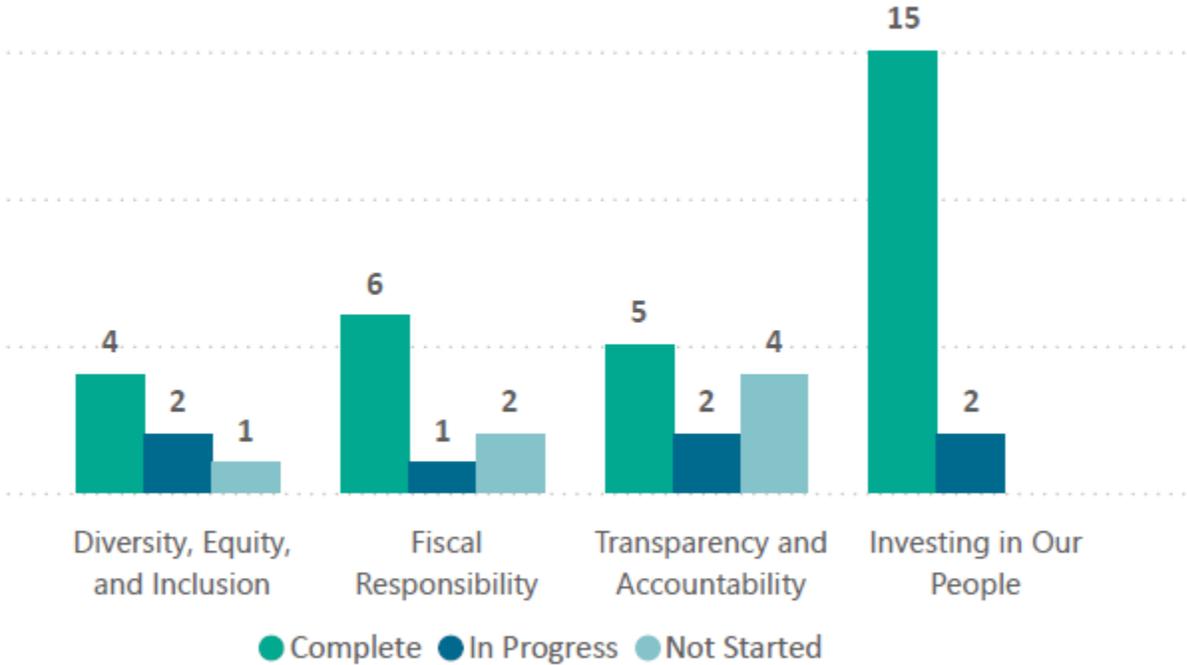
Overall Progress – Core Operational Plan

Operational Projects 2022/2023/2024/2025/2026/2027



Overall, 84% of core operational activities have been started or completed.

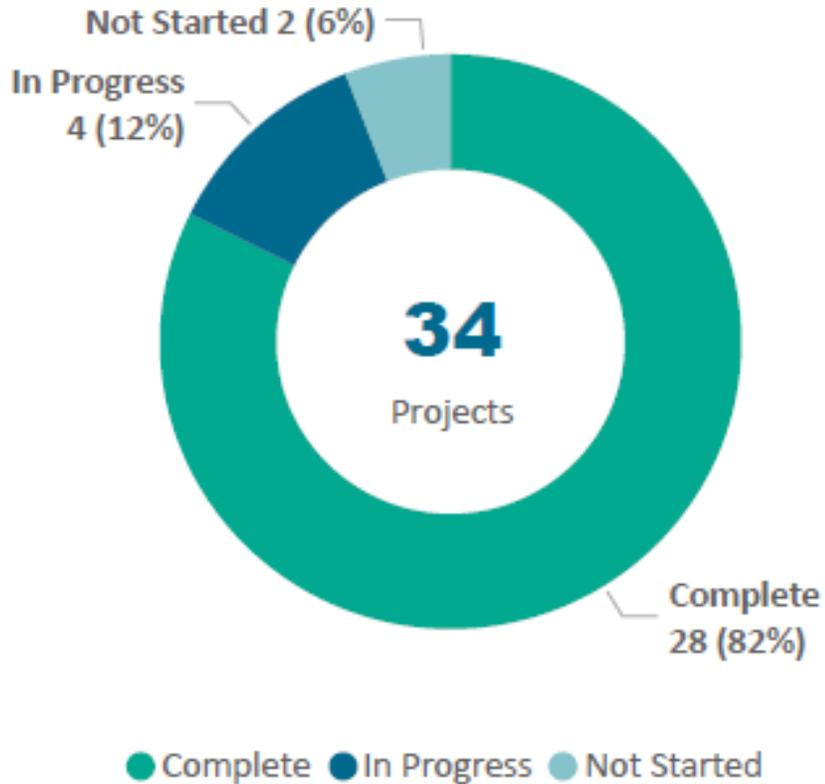
Projects by Operational Strategy



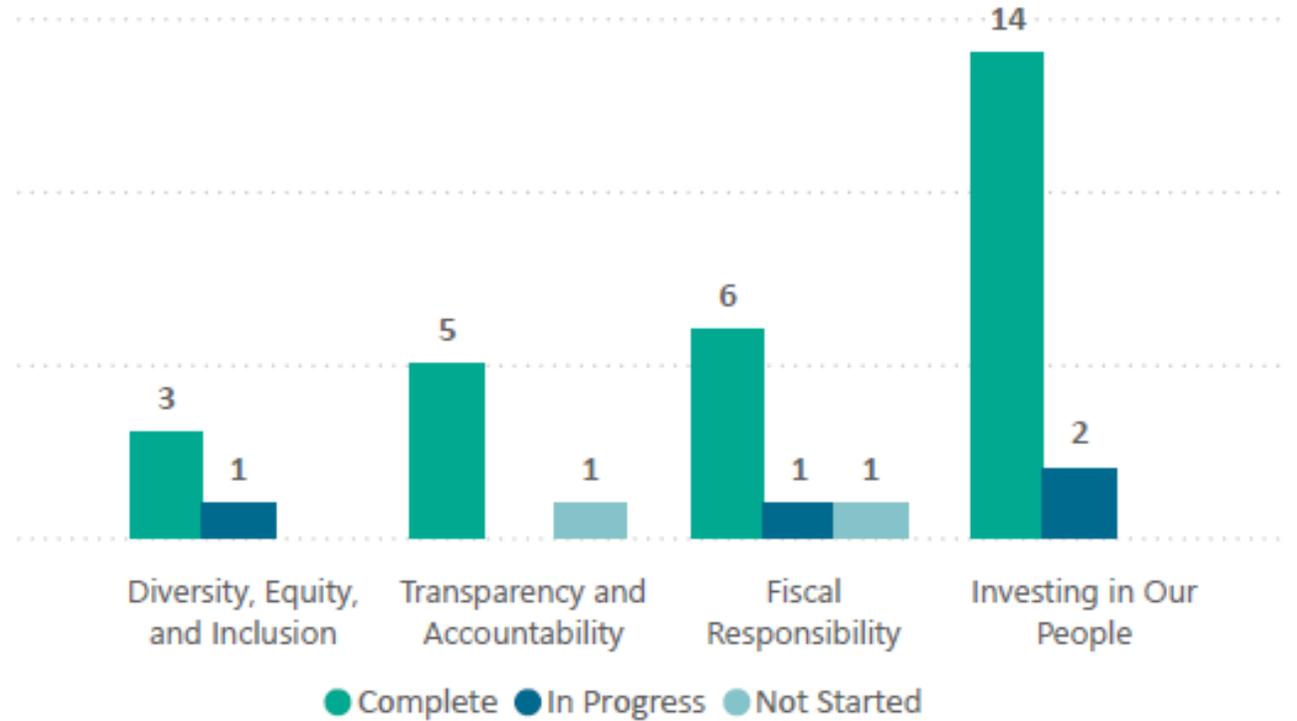
Most core operational activities align with the "Investing in Our People" strategy.

Progress through Q3 2024 – Core Operational Plan

Operational Projects 2022/2023/2024



Projects by Operational Strategy



77% of all core operational plan activities scheduled for completion in 2022-2024



Questions?

