

6.3 Update Regarding 2022–2027 Strategic Plan Progress



# The State Bar of California

---

## **OPEN SESSION**

### **AGENDA ITEM**

**6.3 SEPTEMBER 2024**

### **BOARD OF TRUSTEES**

**DATE:** September 19, 2024

**TO:** Members, Board of Trustees

**FROM:** Donna S. Hershkowitz, Chief Mission Officer  
Elizabeth Nolan, Lead Program Analyst, Office of Compliance

**SUBJECT:** Update Regarding 2022–2027 Strategic Plan Progress

---

### **EXECUTIVE SUMMARY**

The Board of Trustees adopted the 2022–2027 State Bar Strategic Plan at its meeting on March 24–25, 2022. In May 2024, after discussions at its January and March meetings, the Board amended the Strategic Plan to adopt a fifth strategic goal, reflecting the State Bar’s commitment to and significant investment in information technology infrastructure and cybersecurity as well as to address emerging questions about uses of artificial intelligence. The current version of the plan may be found [here](#).

Staff developed two operational plans to support the implementation of the Strategic Plan. This item serves as a progress update on the implementation of the Strategic Plan and corresponding operational projects over the first 2.5 years of the plan.

---

### **RECOMMENDED ACTION**

Informational item only.

### **DISCUSSION**

The Strategic Plan is organized around five 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. In 2024, in light of the adoption of Goal 5 that focuses on information technology and cybersecurity, most of the IT projects in the COP were moved to the SOP. Projects are assessed by State Bar office leadership on an ongoing basis to determine progress, delays, and implementation status; project status statistics are aggregated twice annually to report to the Board.

### **Summary**

- Of the 95 projects currently in the strategic operational plan with due dates through the end of quarter three 2024, 82 percent are complete and 18 percent are in progress.
- Of the 34 projects currently in the core operational plan with due dates through the end of quarter three 2024, 82 percent are complete, 12 percent are in progress, and 6 percent are not started.

Highlights of projects that have been completed or made progress toward completion since the previous update to the Board in January 2024 are included below.

### **Newly completed activities**

- Complete the contracted IT organizational assessment
- Submit the SB 40/April 2024 reports with sufficient justification for a fee increase
- Assess need for additional funding based on: (a) new case processing standards which account for increased efficiency in OCTC; (b) results of reportable action/Client Trust Account pilot; and (c) any other newly mandated activities
- Assess existing processes for case management within the Client Security Fund, establish target timelines and prioritization guidance for processing cases
- Deploy new agenda management system which will enable easier access to agendas, meeting materials, and calendars

### **“In progress” activities**

- Develop an action plan for State Bar IT transformation based on assessment of new CIO
- Revise inactive attorney survey
- Analyze the impact of archiving closed complaints
- Assess multilingual content best practices (beyond Google Translate) and website analytics for high-traffic, consumer-focused webpages to inform multilingual strategies after website redesign
- Complete updated study on racial disparities in attorney discipline
- Implement Public Trust Liaison’s consumer education plan

For additional information, including major accomplishments to date, please reference the links under the “Previous Action” section of this document.

## **PREVIOUS ACTION**

[2022-2027 Strategic Plan: Review and Approval of New Goal 5](#)  
[Progress Update on the 2022-2027 Strategic Plan, January 2024](#)  
[Progress Update on the 2022-2027 Strategic Plan, November 2023](#)  
[Progress Update on the 2022-2027 Strategic Plan, January 2023](#)  
[Discussion of Amendments to 2022-2027 Strategic Plan](#)

## **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

Goal 5. Protect the Public through Innovative Use of Technology and Responsible Data Management

## **RESOLUTIONS**

None

## **ATTACHMENTS LIST**

- A. Strategic Operational Plan 2022–2027 Dashboard Summary: Projects with Due Dates through Q3 2024
- B. Core Operational Plan 2022–2027 Dashboard Summary: Projects with Due Dates through Q3 2024

Strategic Operational Plan 2022–2027 Dashboard Summary: Projects with Due Dates through Q3 2024



**Strategic Operational Plan 2022-2027 Dashboard**  
Updated: 8/23/24

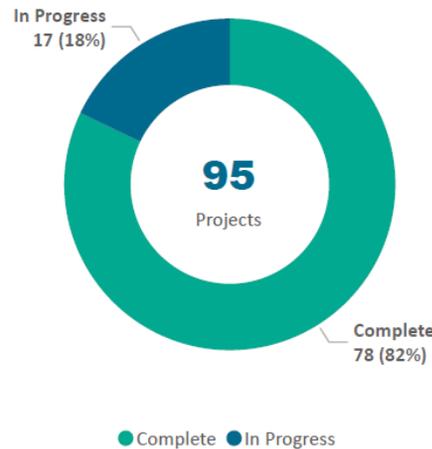
Submit feedback to [elizabeth.nolan@calbar.ca.gov](mailto:elizabeth.nolan@calbar.ca.gov)

Projects by Year	Office
Multiple selections	All
Project Status	Deadline
Multiple selections	Multiple selections
Strategic Plan Goal	Implementation Step
All	All

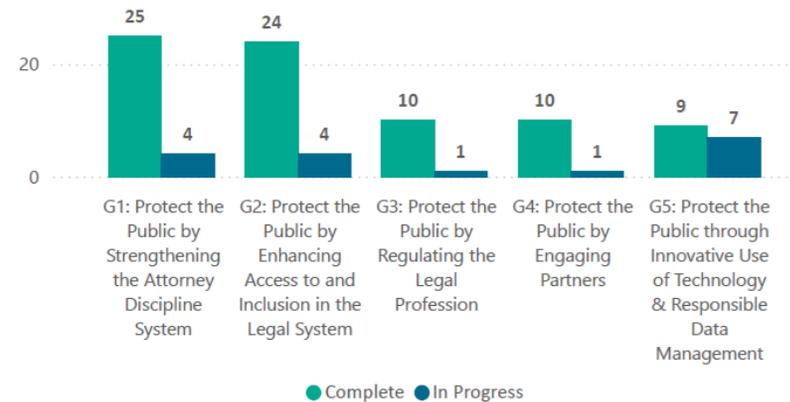
Use the filters in the gray box above to change your data view. Projects can be filtered by year, office, project status, deadline, implementation step, and Strategic Plan goal. Use the "See Detail" button for additional project detail. Use the "Clear All Filters" button to reset filters.

[See Detail](#) [Clear All Filters](#)

Operational Projects 2022/2023/2024



Projects by Goal



Core Operational Plan 2022–2027 Dashboard Summary: Projects with Due Dates through Q3 2024



**Core Operational  
Plan 2022-2027  
Dashboard  
Updated: 8/16/24**

Submit feedback to [elizabeth.nolan@calbar.ca.gov](mailto:elizabeth.nolan@calbar.ca.gov)

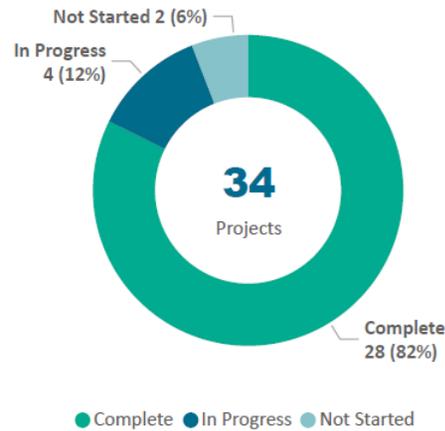
Projects by Year	Office
Multiple selections	All
Project Status	Deadline
All	Multiple selections
Strategy	
All	

Use the filters in the gray box above to change your data view. Projects can be filtered by year, office, project status, deadline, and operational strategy. Use the "See Detail" button for additional project detail. Use the "Clear All Filters" button to reset filters.

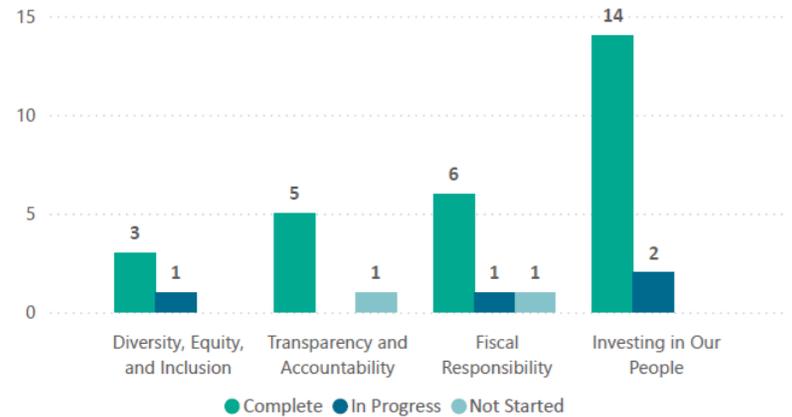
See Detail

Clear All Filters

Operational Projects 2022/2023/2024



Projects by Operational Strategy





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

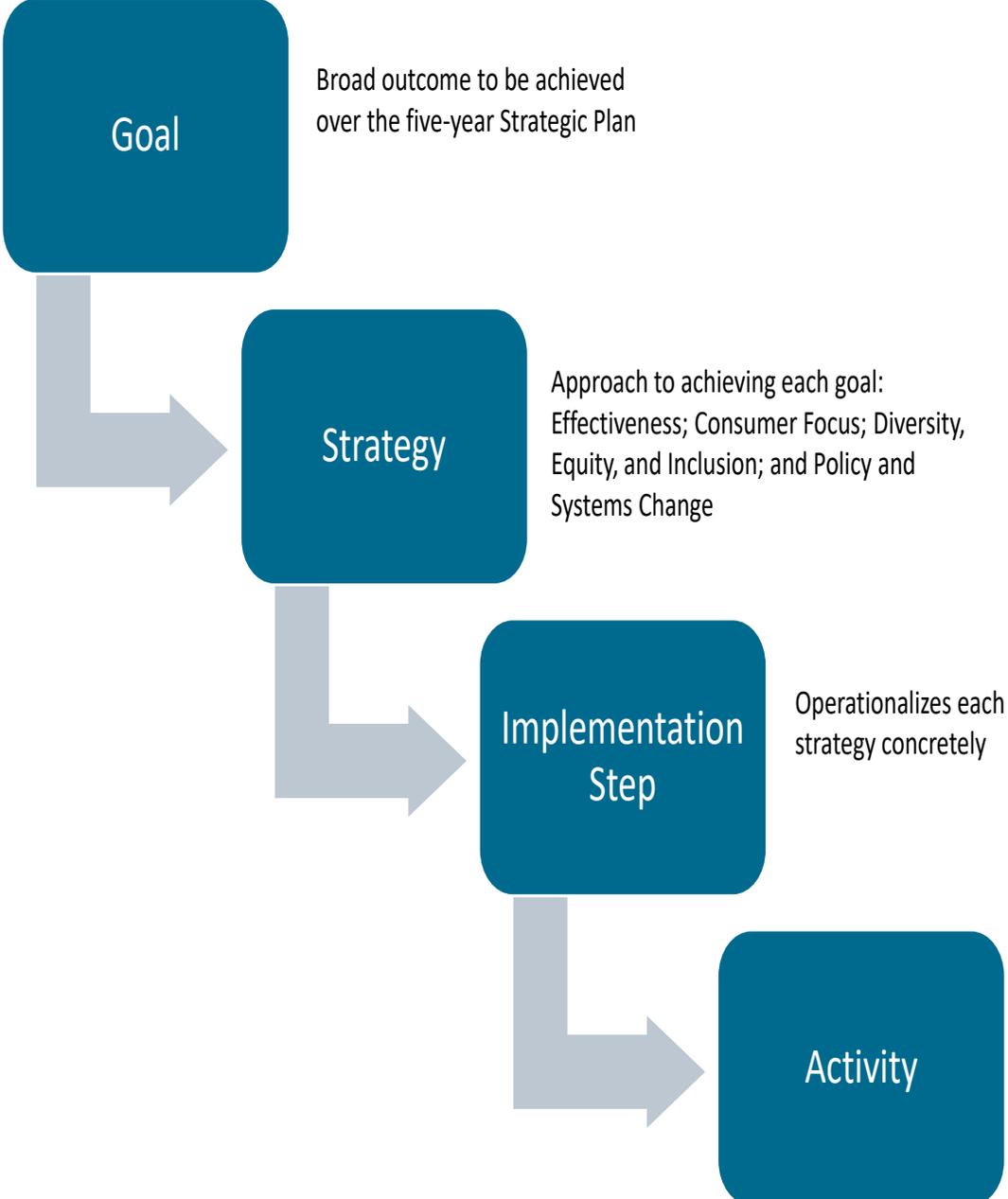
- The 2022–2027 State Bar Strategic Plan outlines the five-year priorities for the organization and has five goals centered on protecting the public.
- Two operational plans created based on the Strategic Plan:
  - Strategic operational plan: ensures Strategic Plan objectives are achieved, by outlining 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**



# Overview of Operational Plans

**Figure 2. Strategic Operational Plan Components**



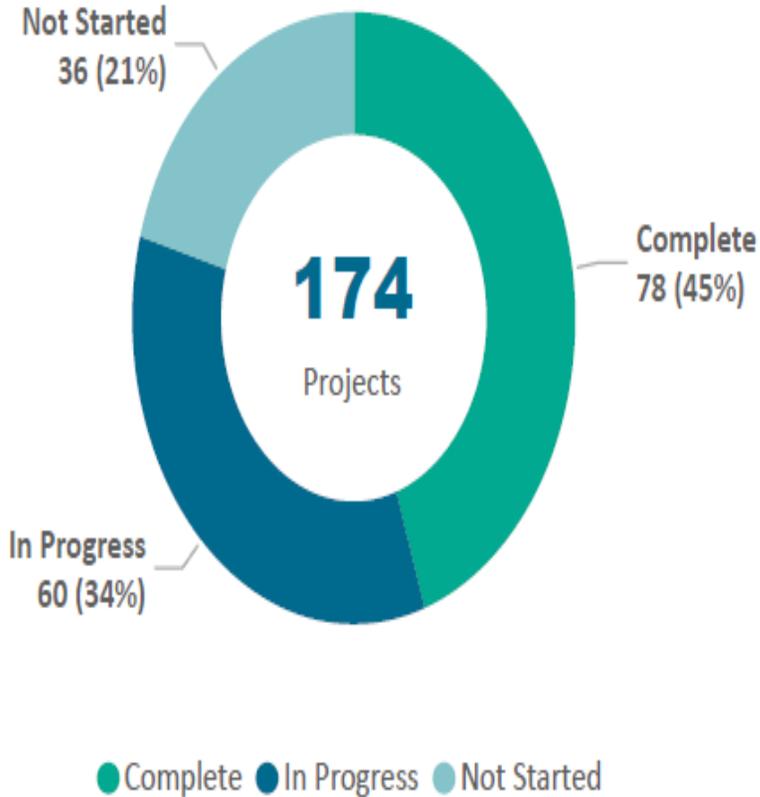
**Figure 3. Core Operational Plan Components**



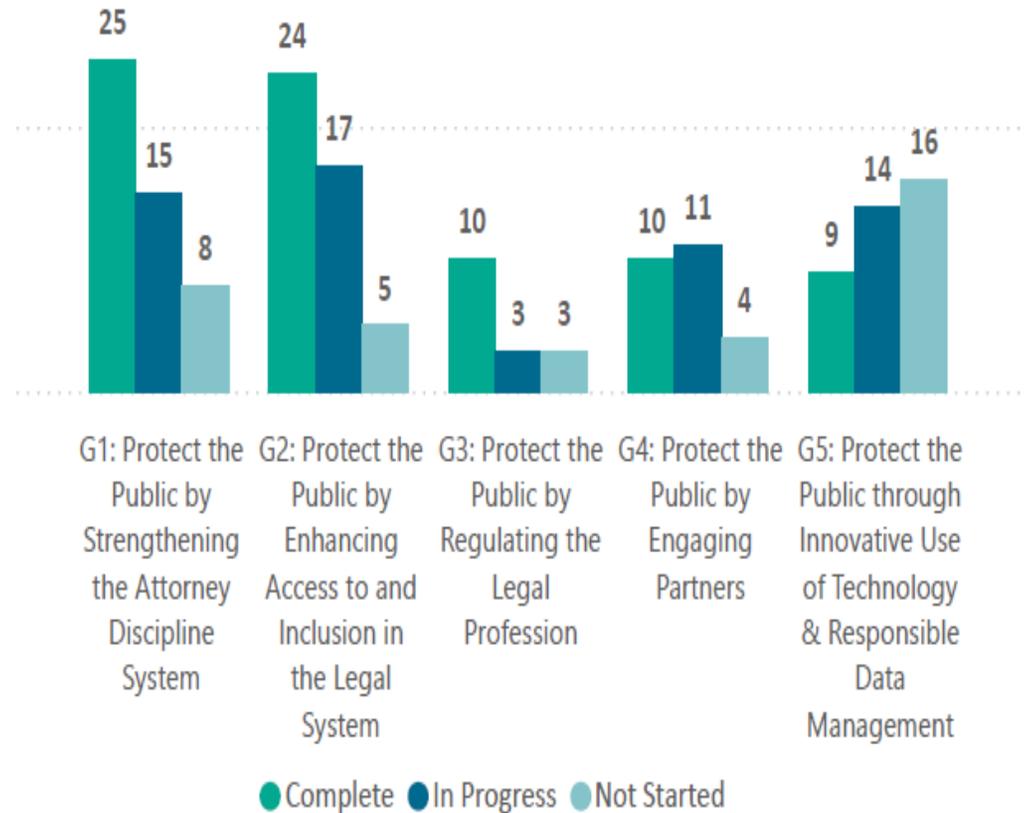
# Overall Progress – Strategic Operational Plan

## Operational Activities

2022/2023/2024/2025/2026/2027



## Operational Activities by Goal

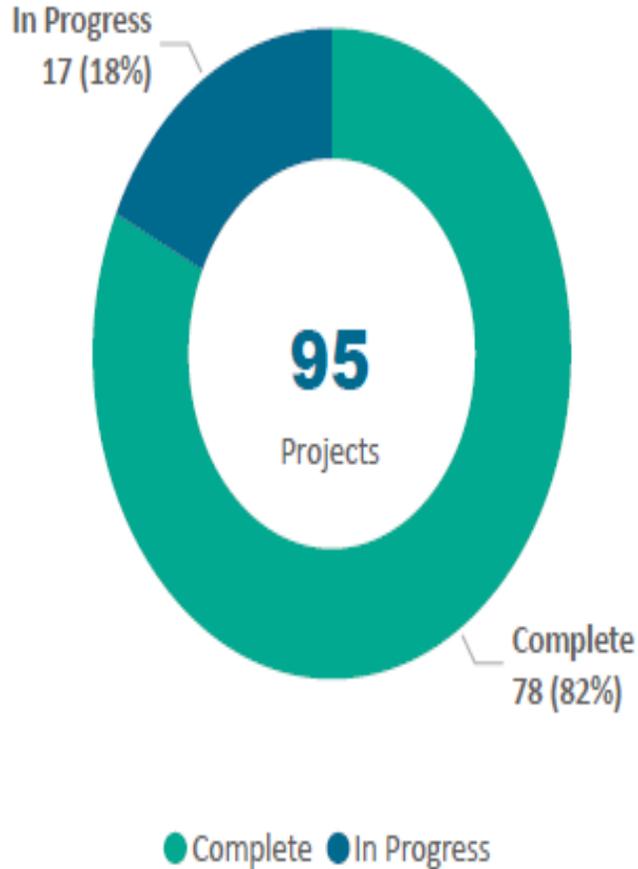


**Overall, 79% of strategic operational activities have been started or completed.**



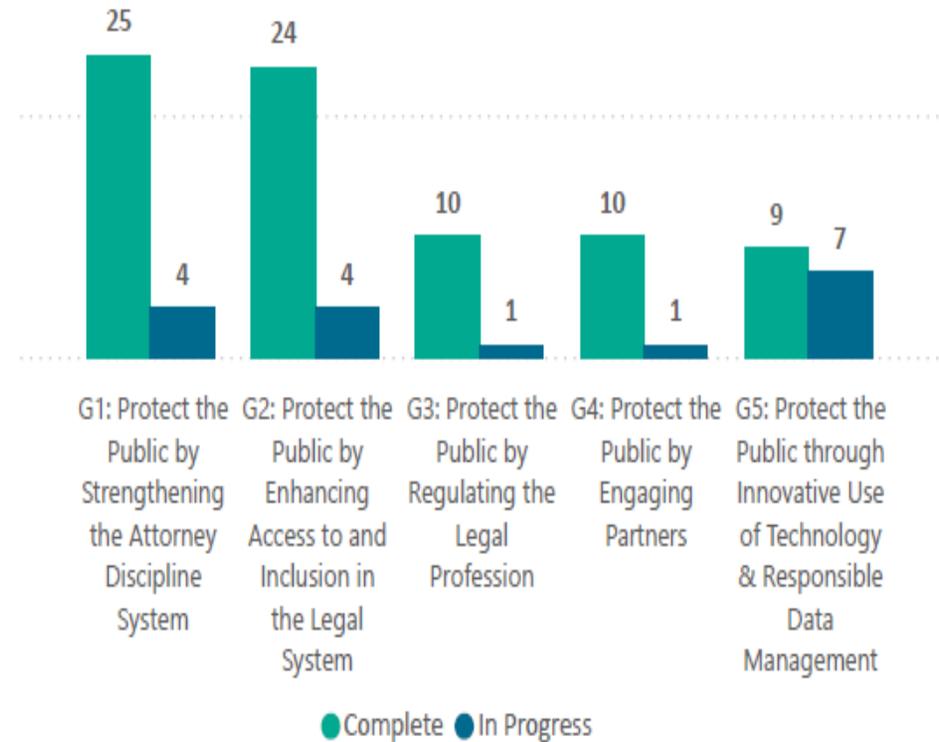
# Progress through Q3 2024 – Strategic Operational Plan

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

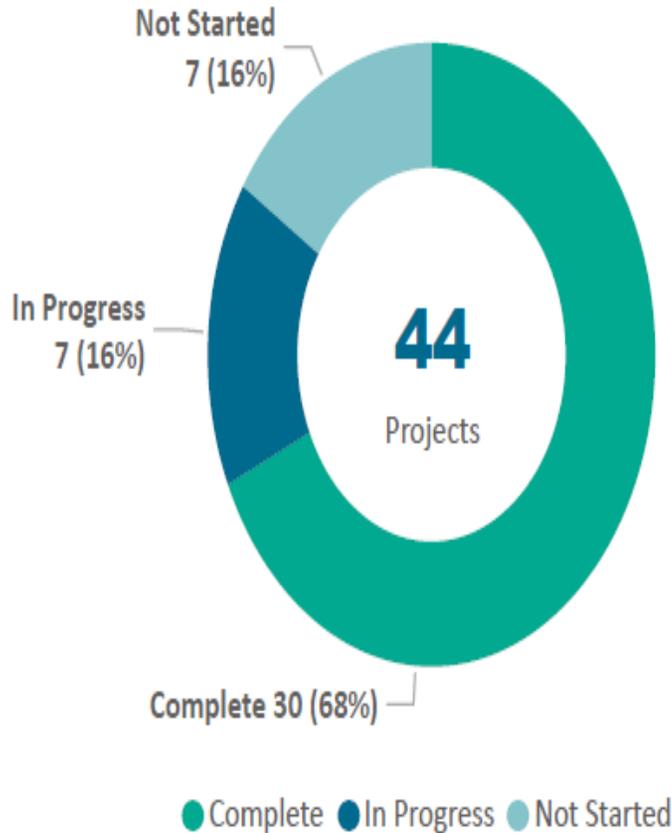


Most operational activities occur within Strategic Plan goals 1 and 2.



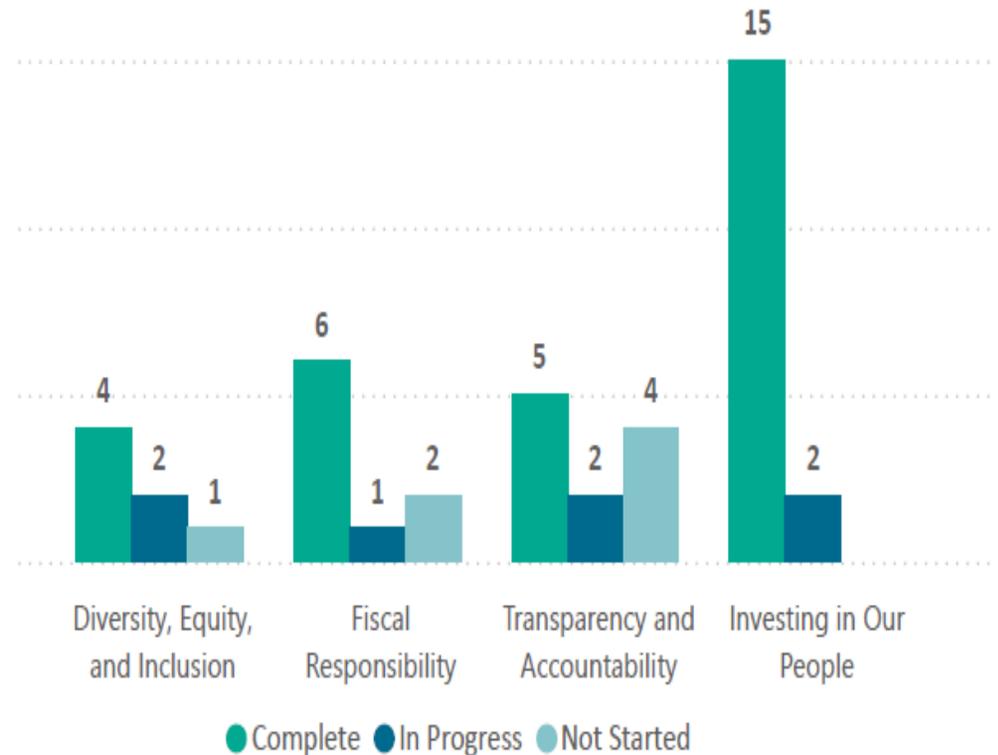
# Overall Progress – Core Operational Plan

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



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

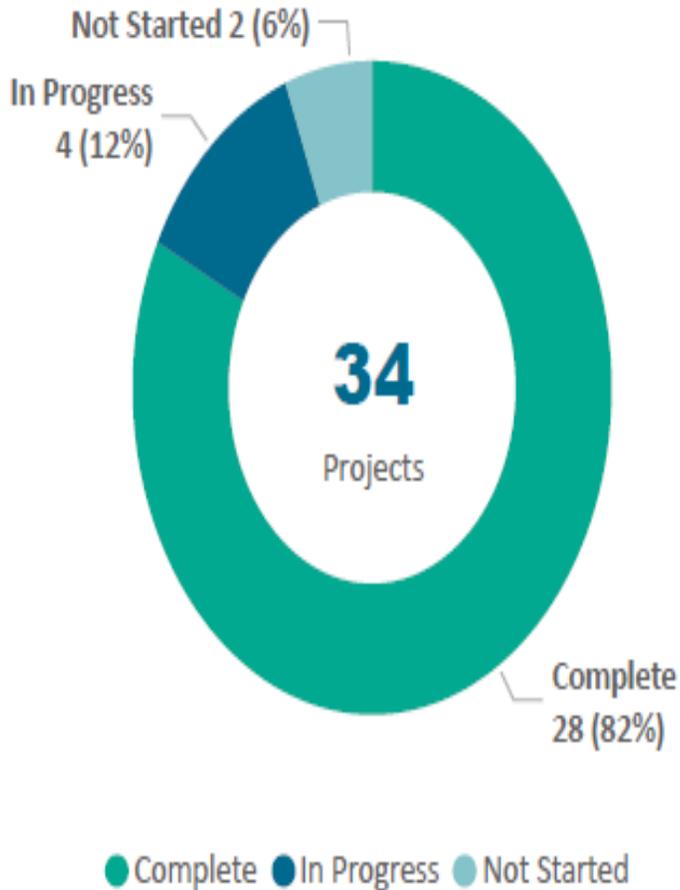
## Projects by Operational Strategy



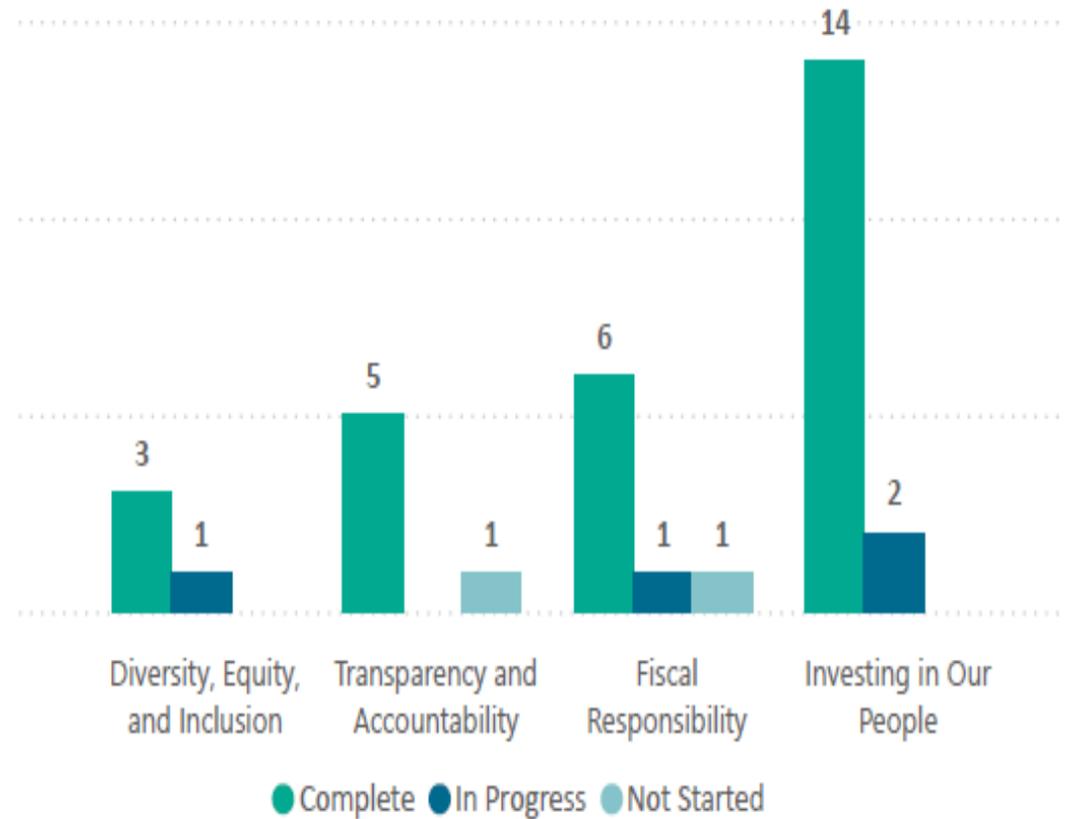
Most core operational activities align with the "Investing in Our People" strategy.

# 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?

