



THE STATE BAR OF CALIFORNIA

180 HOWARD STREET
SAN FRANCISCO, CALIFORNIA 94105-1639
TELEPHONE (415) 538-2000

Title of Report: Measures To Implement Strategic Plan
Statutory Citation: Business and Professions Code section 6140.12
Date of Report: February 15, 2013

Business and Professions Code section 6140.12 (added Stats. 2011, ch. 417, § 47) requires that the State Bar of California's Board of Trustees complete and implement a five-year strategic plan to be updated every two years and that each year by February 15, the State Bar president's report to the Supreme Court, the Governor, and the Senate and Assembly Committees on Judiciary on the measures the board has taken to implement the strategic plan and those measures the board will need to take in the remaining years of the strategic plan. The following summary of the State Bar president's report is provided under Government Code section 9795.

The report enumerates measures the board has taken to implement the strategic plan, including acquisition of a new case management system for the Office of Chief Trial Counsel, purchase of the 845 S. Figueroa building in Los Angeles, and reorganization of the prosecution process so that a single team is responsible for all of the steps in the prosecution of a case, from investigation to trial.

The report also enumerates measures the board expects to take in the future to implement the strategic plan, including preparing the 845 S. Figueroa building for occupancy; acquisition and implementation of new systems for the State Bar Court, Admissions, and Member Records & Billing; modernizing the bar's San Francisco office layout; and expanding its process re-engineering beyond the Office of Chief Trial Counsel to the remainder of the discipline system and to the bars' non-regulatory functions.

The full report is available at: <http://www.calbar.ca.gov/AboutUs/Reports.aspx>.

A printed copy of the report may be obtained by calling 916-442-8018.



**THE STATE BAR
OF CALIFORNIA**

PATRICK M. KELLY
PRESIDENT

February 15, 2013

Honorable Chief Justice and Associate Justices
The Supreme Court of California
350 McAllister Street
San Francisco, CA 94102-4797

Honorable Jerry Brown
Governor, State of California
State Capitol, First Floor
Sacramento, CA 95814

Honorable Noreen Evans
Chair, Senate Committee on Judiciary
State Capitol, Room 4085
Sacramento, CA 95814

Honorable Bob Wieckowski
Chair, Assembly Committee on Judiciary
State Capitol, Room 4016
Sacramento, CA 95814

Dear Chief Justice Cantil-Sakauye, Governor Brown, Senator Evans and Assemblyman Wieckowski:

Purpose

I submit this report pursuant to Business and Professions Code §6140.12, which requires that "...the president shall report to the Supreme Court, the Governor, and the Senate and Assembly Committees on Judiciary on the measures the board has taken to implement the strategic plan and shall indicate the measures the board will need to take in the remaining years of the strategic plan to address the projected needs contained in the plan."

The Strategic Plan

The State Bar Board of Trustees (the "Board") adopted the Five-Year Strategic Plan (2012-16) on February 10th, 2012. The plan calls for three major operational initiatives:

- a. Information technology modernization and enhancement
- b. Modernization and improvement of physical facilities
- c. Operational process re-engineering

"To Improve the Justice System and Assure a Free and Just Society Under the Law"

It also calls for the examination of several possible policy initiatives to strengthen the regulation of the legal profession and expand access to justice.

The following summarizes the measures the Board has taken in 2012 to implement the strategic plan.

Information Technology Initiative

1. After a competitive RFP process, the State Bar selected and purchased a modern, commercial off-the-shelf case management system for the Office of Chief Trial Counsel. The system implementation process was launched in November.
2. The State Bar issued an RFP for a case management system for the State Bar Court as well, and the evaluation process is now underway.
3. The State Bar also began the process of gathering requirements and preparing an RFP for the replacement of the systems used by the Office of Admissions.

Physical Facilities Initiative

1. The State Bar has purchased the office building at 845 S. Figueroa in Los Angeles and is currently preparing it for occupancy. The building will house the State Bar's Los Angeles operations after the expiration of its lease at the AT&T Center.
2. The State Bar has engaged a property management firm to manage operations and capital improvement projects at its 180 Howard Street headquarters in San Francisco. This was an important step toward long-needed maintenance and improvement projects at the 180 Howard building.
3. The State Bar has reviewed its operations in Los Angeles to determine whether any activities should be relocated to San Francisco to reduce costs or improve efficiency. As a result, the bar has consolidated the Admissions Moral Character unit in San Francisco, relocating two positions. The review also concluded that the costs and risks associated with relocating the Admissions Operations unit, which is responsible for the logistics of the bar exam, would outweigh the benefits by a significant margin. Similarly, it concluded that shifting discipline system staff to San Francisco would not be beneficial.

Process Re-Engineering

1. In 2012, the Office of Chief Trial Counsel restructured its entire approach to prosecuting cases so that, today, each case is handled by a single team from beginning to end. This has eliminated time-consuming hand-offs and provided clear accountability for the handling of each case.
2. The Office of Admissions, in collaboration with the Office of Budget and Performance Analysis, has undertaken a comprehensive project to document and review all of the major business processes in the Admissions area. This project is now in its final phases.
3. The Office of Information Technology has reorganized itself into an industry-standard three-part structure, with units for Operations, Applications, and Project Management.

Additional Measures to be Taken

To fully implement the strategic plan, the Board expects to do the following:

1. Complete the implementation of the case management system in the Office of Chief Trial Counsel.
2. Select and implement a case management system for the State Bar Court.
3. Select and implement a new system or platform for Admissions.
4. Select and implement a new member records and billing system.
5. Complete tenant improvements at the 845 S. Figueroa building and move in.
6. Update the physical layout of the bar's offices in San Francisco to facilitate collaboration and eliminate outdated "silos."
7. Complete the process review in Admissions and implement any process improvements which may be feasible prior to the implementation of the new Admissions system.
8. Extend the process review effort to encompass the discipline system beyond the Office of Chief Trial Counsel, including the State Bar Court and the Office of Probation, and to the non-regulatory functions of the State Bar, such as Education and Legal Services.

With Kind Regards,



Patrick M. Kelly
President
The State Bar of California

cc: Beth Jay, Principal Attorney to the Chief Justice of the Supreme Court of California
Nancy McFadden, Executive Secretary, Office of the Governor
June Clark, Deputy Legislative Secretary, Office of the Governor
Benjamin Palmer, Chief Counsel, Senate Judiciary Committee
Drew Liebert, Chief Counsel, Assembly Judiciary Committee