



The State Bar *of California*

2025 Office of Public Trust Liaison Annual Report

June 11, 2026

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EXECUTIVE SUMMARY

The Office of Public Trust Liaison (OPTL) Annual Report highlights the office's 2025 work in furtherance of its mission to improve accessibility and accountability in the State Bar's discipline and admissions systems. Key accomplishments included the formal launch of the Attorney-Client Bridge Program (ACBP) in June 2025 with a public outreach campaign, development of a Spanish-language submission process for OPTL inquiries and ACBP submissions, and expanded support to the Division of Regulation and licensees to resolve questions related to the annual billing cycle. OPTL also took on the additional responsibilities of responding to letters from incarcerated individuals and being the primary point of contact for individuals who visit the State Bar's physical offices for assistance.

In 2025, OPTL saw a continued increase in the volume of requests for assistance, handling nearly double the number of Public Trust Liaison Inquiries (PTLIs) from 2024 and more than 2023 and 2024 combined. Significantly, OPTL ended the year with no pending inventory, having resolved all the inquiries throughout the year in which they were received.

Looking ahead to 2026, OPTL will continue advancing its core mission while partnering with internal stakeholders to identify matters that may be more effectively resolved through ACBP, including improving outcomes and reducing demands on the discipline system. OPTL will also assess technological enhancements, including the potential relaunch of an online chat feature to provide timely responses to common inquiries and improve accessibility for those seeking assistance. OPTL will continue its partnership with the Office of Strategic Communications and Stakeholder Engagement to increase awareness of the office; its services; and available resources for applicants, licensees, and members of the public. These outreach efforts remain an important component of OPTL's commitment to accessibility, transparency, and public service.

THE OFFICE OF PUBLIC TRUST LIAISON

The State Bar of California created the Office of Public Trust Liaison (OPTL) in 2023 to improve accessibility and accountability in the State Bar's discipline and admissions systems. State Bar reform recommendations highlighted the necessity for an independent ombuds function to improve communication and understanding between the complaint system and the public, whom the State Bar serves. The California State Auditor's 2022-030 audit identified the need for an independent oversight mechanism, as well as support for individuals needing assistance filing complaints and appeals. In response, the Board of Trustees approved funding to establish OPTL. The Board determined that, in addition to discipline-related issues, OPTL should handle admissions matters, given the large volume of complaints and concerns surrounding the admissions process. The [2023 OPTL Annual Report](#) provides additional information about the creation of OPTL.

In 2025, the office reached its highest service levels to date, managing a total inventory of 1,794 Public Trust Liaison Inquiries (PTLIs) and resolving all pending inquiries by year-end (see figure 1). Now in its third year of operation, OPTL has expanded its staff and scope, growing from an initiative with a single staff member into a multi-person office with dedicated programs, expanded responsibilities, and significant public visibility. Since its inception, the office has experienced sustained year-over-year growth in demand for services, reflecting the public's increasing awareness of and reliance on OPTL as a resource for assistance, information, and problem resolution.

OPTL comprises two departments: the Public Trust Liaison Contact Center (Contact Center) and Public Trust Liaison Special Programs (Special Programs). In 2025, Special Programs continued to develop and strengthen the Attorney-Client Bridge Program (ACBP), a voluntary and non-adversarial alternative to the formal complaint process that assists clients and attorneys in resolving disputes involving communication breakdowns and the return of client files. Following its initial launch in 2024, the program expanded in 2025 through increased staffing, broader public awareness efforts, and continued operational refinement. The program has continued to demonstrate its value as an early intervention model that helps resolve disputes efficiently without utilizing the formal discipline process through the Office of Chief Trial Counsel (OCTC). The [2024 OPTL Annual Report](#) provides more details regarding OPTL's expansion to address the increase in inquiries and the development of ACBP.

OPTL also oversees the Contact Center, which serves as an important pathway for the public, licensees, and applicants to obtain information and address concerns.

In both OPTL departments, the 2025 reporting period marked a broader evolution of OPTL's role within the State Bar, as the office assumed additional public-facing responsibilities and continued to build systems designed to improve access, responsiveness, and trust in State Bar services.

THE PUBLIC TRUST LIAISON CONTACT CENTER¹

The Contact Center serves as a critical foundation to OPTL’s core function by ensuring the public has a direct, accessible, and responsive entry point into the State Bar system. As the first point of contact for 77,235 callers in 2025, the Contact Center provides real-time assistance, issue identification, information sharing, and referral support to individuals, helping them navigate complex processes related to admissions, attorney discipline, stakeholder concerns, or general State Bar operations. This frontline engagement allows OPTL to identify patterns, emerging concerns, process barriers, and recurring themes directly from the public.

In 2025, the Contact Center launched a pilot self-help chatbot feature. The preliminary chatbot was removed after identifying the need for additional configuration and operational refinement, and it remains under consideration for future implementation.

PUBLIC TRUST LIAISON SPECIAL PROGRAMS

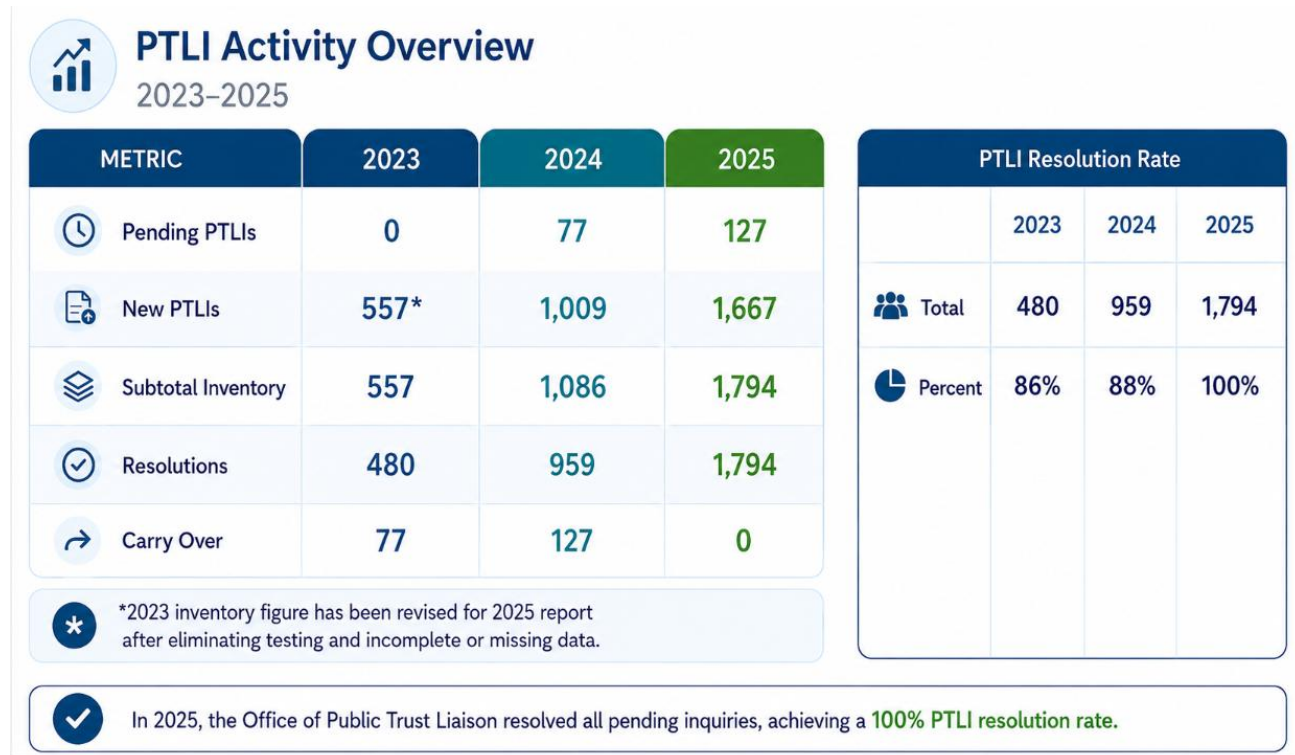
The Special Programs team receives information and referrals directly from the public as well as internal State Bar departments and offices. These referrals typically involve matters where additional review and assistance may help address concerns and support their resolution. The Special Programs team also assists individuals seek assistance from legislative offices, congressional representatives, or other elected officials regarding concerns related to State Bar processes or experiences. These inquiries are often routed to OPTL through the Office of Legislative Affairs, allowing OPTL to respond directly, provide status updates, clarify processes, and help facilitate appropriate follow-up. This partnership supports transparency, responsiveness, and public trust in the State Bar’s operations.

Collectively, through phone calls, emails, and other intake methods, such as State Bar office visits, OPTL manages a significant volume of inquiries spanning admissions, attorney discipline, procedural concerns, and general services.

For the first time since OPTL’s founding, the Special Programs team resolved every Public Trust Liaison Inquiry (PTLI) within the calendar year it was received. The office also handled the highest number of PTLIs to date—more than 2023’s and 2024’s PTLIs combined. In 2025, OPTL received 1,667 new inquiries. Combined with the 127 PTLIs carried over from 2024, OPTL managed a total inventory of 1,794 inquiries.

¹ The first two OPTL Annual Reports focused on Special Programs, which is more focused on the ombuds function. However, given the importance of the Contact Center’s work to address concerns before they are escalated to Special Programs or the partnering office that the issue relates to, this year’s report provides some highlights of the Contact Center’s important role.

Figure 1. Public Trust Liaison Inquiries Resolved: 2023–2025²

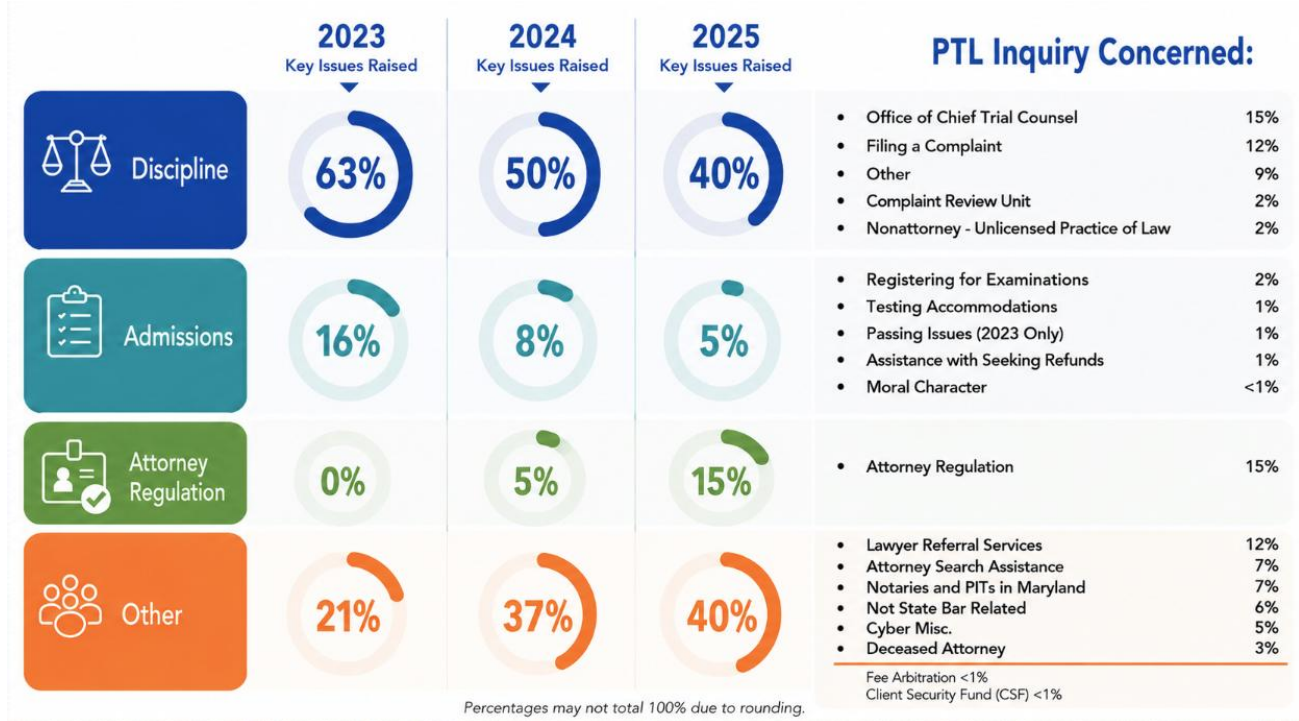


Areas of Inquiries and Yearly Submission Trends

Similar to 2024, the office saw a notable shift in the distribution of inquiry subjects in 2025. Discipline and admissions inquiries continued to see a decline proportionately to other inquiry types, and there was a marked increase in inquiries regarding “Other/Multiple Issues,” despite separately tracking attorney regulation inquiries outside of this category in 2025 (see figure 2).

² OpenAI’s GPT-4, a generative AI intelligence tool, was used to assist in the creation and revision of this report’s infographics. Staff have reviewed and verified all generated content, including data points, calculations, and visual representations and remain responsible for its content.

Figure 2. OPTL Key Issues Raised: 2023–2025



Attorney discipline matters, which accounted for 63 percent of the resolved inquiries in 2023 and 50 percent in 2024, decreased to 40 percent in 2025. Similarly, admissions-related inquiries dropped from 16 percent in 2023 and 8 percent in 2024 to 5 percent in 2025. Items relating to attorney regulation constituted 15 percent of all inquiries in 2025, compared with 5 percent in 2024. Inquiries categorized as “other” areas of the bar—addressing diverse topics beyond attorney discipline, admissions, and regulation—increased to 40 percent in 2025 from 21 percent in 2023 and 37 percent in 2024.

Areas of Concern

Although the distribution of inquiries shifted in 2025, there was an overall increase in the actual number of inquiries in each category because of the marked increase in inquiries overall—from 959 resolved in 2024 to 1,794 resolved in 2025. Discipline-related inquiries increased from 302 in 2023 and 479 in 2024 to 564 in 2025. Admissions-related inquiries also increased, with 76 inquiries in 2023, 75 in 2024, and 99 in 2025.

Attorney Discipline Inquiries

There were 729 resolved inquiries in 2025 centered on matters related to attorney discipline. Many inquiries focused on filing a complaint, requesting accessibility assistance with filing a complaint, difficulties communicating with assigned investigators, and checking the status of filed complaints.

Of these 729 attorney discipline PTLIs, OPTL received 53 inquiries concerning the Complaint Review Unit (CRU), with individuals seeking guidance on how to request a review of closed complaints and how to add information to existing files. Some witnesses complained about the closure of their CRU matters and inquired how to get further review of their complaints.

Admissions Inquiries

There were 99 admissions-related PTLIs resolved in 2025. Inquiries covered topics such as registration for examinations; law school requirements; using the online Applicant Portal; testing accommodations; requirements for provisionally licensed lawyers, Registered In-House Counsel, and those in the Multijurisdictional Practice Program; obtaining records; moral character eligibility; and new licensee regulation. There also were inquiries specific to the issues surrounding the February 2025 California Bar Exam. In many instances, OPTL was able to resolve the inquiry. For more complex matters, OPTL escalated the inquiries to the appropriate Admissions staff member for further assistance.

Attorney Regulation Inquiries

In 2025, OPTL, supporting the State Bar's Division of Regulation (DOR), saw an increase in attorney regulation inquiries, totaling 276 inquiries, or 15 percent of all PTLIs for the year. Specific inquiries related to the Attorney Annual Renewal process, including renewals for law corporations and limited liability partnerships; annual attorney regulation requirements such as Client Trust Account Protection Program reporting, State Bar rule 2.2 reporting, and annual fees; password resets; status changes; and Agency Billing. Less common matters included inquiries related to certificates of standing, oath cards, and ethical guidance, which were referred to the Ethics Hotline.

OPTL assisted several attorneys who struggled with the Attorney Annual Renewal process by offering one-on-one appointments. Staff became aware that a DOR PTIL was often accompanied by the same licensee submitting one or more Licensee Records and Compliance Inquiry forms directly to DOR. If OPTL staff resolved the PTIL, they also were able to successfully close any pending inquiry forms related to the same matter. For more complex matters, OPTL escalated requests to the appropriate DOR staff member for further assistance. In 2026, DOR will provide direct training to OPTL investigators so they may service all attorney regulation PTLIs.

OPTL also received multiple inquiries from attorneys who were self-reporting identity theft. In response to these inquiries and similar inquiries received in other State Bar offices, the State Bar issued communications to attorneys about identity theft risks and what to do if identity theft occurs and to consumers about how to verify an attorney's information on the State Bar website to avoid hiring an attorney imposter, in addition to updating its [Fraud Alert](#) webpage.

Other Inquiries

The “other” category comprises inquiries on topics outside of OPTL’s focus on admissions, discipline, and expanded attorney regulation. Forty percent, or 688, of total inquiries resolved in 2025 were related to help with the attorney search function, questions regarding the Mandatory Fee Arbitration Program or the Client Security Fund, a person’s general input on their disapproval of the State Bar, identity theft, requests for legal advice where the requester was referred to a certified Lawyer Referral Service, and many other inquiries that were not related to the State Bar or outside of the scope of OPTL.

Measuring Attorney Regulation Inquiries in 2026

Beginning in 2026, OPTL will enhance how attorney regulation PTLIs are tracked and reported. In 2025, attorney regulation matters were identified as a distinct category of inquiry, reflecting the growing demand from the legal community for assistance in this area. As the volume and complexity of these inquiries continue to increase, OPTL will implement a more refined reporting methodology to better capture trends, improve service delivery, and inform operational planning (see figure 3). This more detailed approach will allow the State Bar to better understand the specific needs of licensees contacting the office; identify recurring barriers in high-volume service areas; and support targeted improvements in communication, training, and self-service resources. It will also provide a clearer year-over-year picture of trends within attorney regulation inquiries, rather than treating all such matters as a single category.

Figure 3. Measuring Attorney Regulation Inquiries



Comparison of Resolution Times

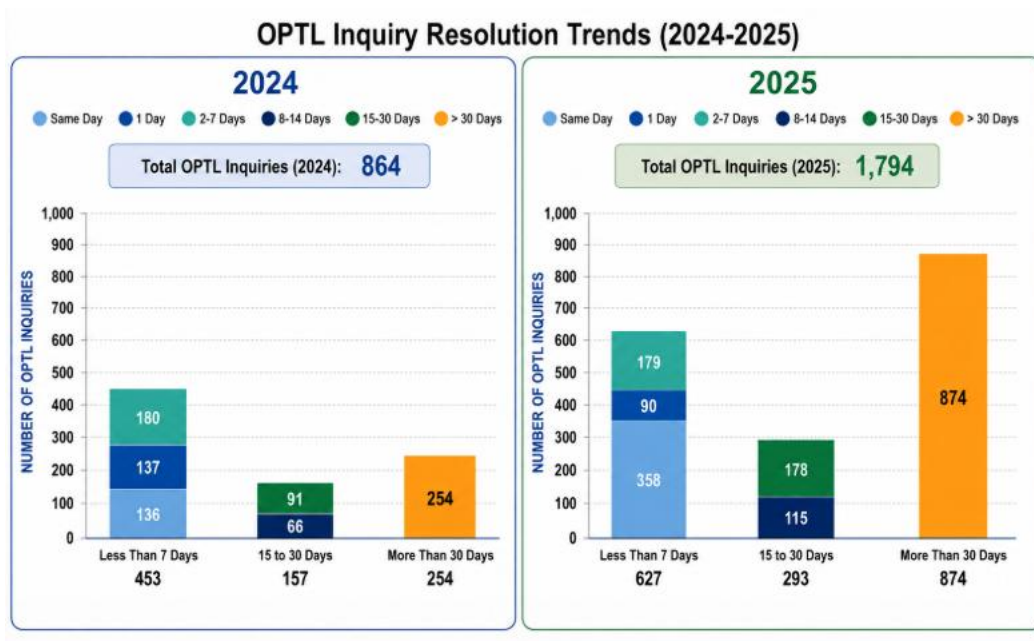
In 2025, OPTL experienced a modest decline in resolution times, driven in part by a significant increase in PTLI matters and the expansion of office responsibilities, including the formal launch of ACBP, responding to correspondence from incarcerated individuals, and assisting building visitors, as discussed in more detail later in this report. It is also important to note that resolution time frames are influenced by factors outside of OPTL’s control; matters submitted after business hours, particularly late on Fridays or during weekends and

holidays, are not reviewed until the next business day.

In 2025, the percentage of inquiries resolved on the same day slightly increased to 20 percent from 16 percent in 2024. Other resolution time frames also showed: Inquiries resolved within 2–7 days decreased from 21 percent in 2024 to 10 percent in 2025, and those resolved within 8–14 days were steady at 11 percent in 2024 and 10 percent in 2025. inquiries resolved within 15–30 days increased from 29 percent in 2024 to 49 percent in 2025. Figure 4 below shows the number of days to resolve inquiries in 2024 and 2025.

However, in 2025, 49 percent of tickets remained pending for more than 30 days, compared with 44 percent in 2023 and 29 percent in 2024. This was attributable to the increase in office responsibilities as previously described, as well as a higher share of inquiries that required coordination with partner offices or more individualized assistance. Despite these pressures, the office resolved all pending PTLIs by year-end, eliminating carryover inventory entering 2026.

Figure 4. OPTL Resolution Trends



OPTL Customer Satisfaction

Building on the steady improvements documented in prior years, customer satisfaction remained consistent in 2025. The office invested in additional staff and began fully utilizing a customer service platform to support improved case management and workflow tracking. With these investments, the data will trend toward higher customer satisfaction (*see figure 5*).

Figure 5. OPTL Customer Satisfaction Survey



A core objective of OPTL is to continuously refine its processes to better serve the public. In 2025, the office implemented a number of procedural modifications designed to improve accessibility, expand language access, and ensure that every individual who contacts the office receives meaningful assistance—regardless of their background, location, or circumstances. The office also made changes to its internal systems to further support its ability to serve the public.

Language Access and Equity

Recognizing the significant and growing volume of inquiries from Spanish-speaking individuals—a trend driven in part by the office’s ongoing outreach efforts with Spanish-language media—OPTL established an automated workflow to assign a bilingual investigator to all PTLI tickets submitted by Spanish-speaking applicants. The office also updated both the English and Spanish versions of the PTLI form and associated links on the OPTL webpage, and created standardized responses tailored to Spanish-speaking applicants to ensure consistent and appropriate communication. For applicants communicating in other languages, the office utilizes telephone translation services. For example, translation services were employed to assist a French-speaking applicant who would otherwise have been unable to fully communicate their inquiry.

Accessibility and Accommodation

OPTL took several steps in 2025 to ensure that individuals with disabilities or other barriers to access could fully participate in the inquiry process. Pursuant to the Americans with Disabilities Act (ADA), staff advised applicants with special needs of the process for requesting assistance from the Contact Center when filing a complaint. Additionally, the

office accommodated applicants located in different time zones—including international applicants—by conducting interviews via email, allowing individuals to engage on their own schedule without the barrier of real-time availability across time zones. The office also responded to PTLIs submitted by incarcerated individuals via U.S. mail, ensuring that individuals without Internet or phone access could still receive assistance.

Expanded Service and Intake

In 2025, OPTL broadened the circumstances under which it opens and services inquiries, reflecting its growing role as a central resource for the public. The office regularly opened and serviced PTLIs on behalf of current and former ACBP clients for matters unrelated to their submission, ensuring continuity of service for individuals already engaged with the office. OPTL also opened and serviced PTLIs from former PTLI clients and in response to escalations from partnering offices, strengthening interoffice coordination and ensuring that individuals referred by other State Bar departments received timely assistance.

For inquiries falling outside OPTL’s scope, staff made a concerted effort to ensure that individuals were not simply turned away but were provided with meaningful guidance. For example, an applicant seeking to file a complaint against a judge was informed that the matter was outside OPTL’s jurisdiction and was directed to the California Commission on Judicial Performance. For more complex matters—such as those involving intricate discipline or admissions issues—the office provided referrals to the appropriate partnering offices rather than closing the inquiry without resolution.

Tracking and Workflow Improvements

The office continued to streamline the way that it handles requests for help. In late 2024, staff moved all PTLI submissions into a single tracking system, which provides for the receipt and processing of inquiries, including a ticketing function. In 2025, OPTL continued to make refinements to the PTLI submission and tracking system to improve data collection and reporting. The office also expanded the system into other facets, including ACBP and programs that OPTL assumed responsibility for in 2025, such as responding to inmate letters and assisting building visitors. For example, OPTL modified the PTLI tracking platform to allow the selection of multiple categories for a single inquiry. Previously, tickets involving more than one area of concern were logged under a catch-all “multiple issues” designation, which limited the office’s ability to accurately analyze inquiry trends. Under the updated system, a single ticket can now be categorized across several issue areas simultaneously. This allows for more granular data to inform future recommendations and operational decisions.

Looking ahead, several initiatives are planned for implementation in 2026 to further strengthen customer satisfaction and build on the progress achieved in 2025. These efforts include working to increase survey response rates to ensure that a broader spectrum of stakeholder input is incorporated into future system refinements, developing template responses to positive messages that encourage satisfied inquirers to participate in surveys, and expanding the survey

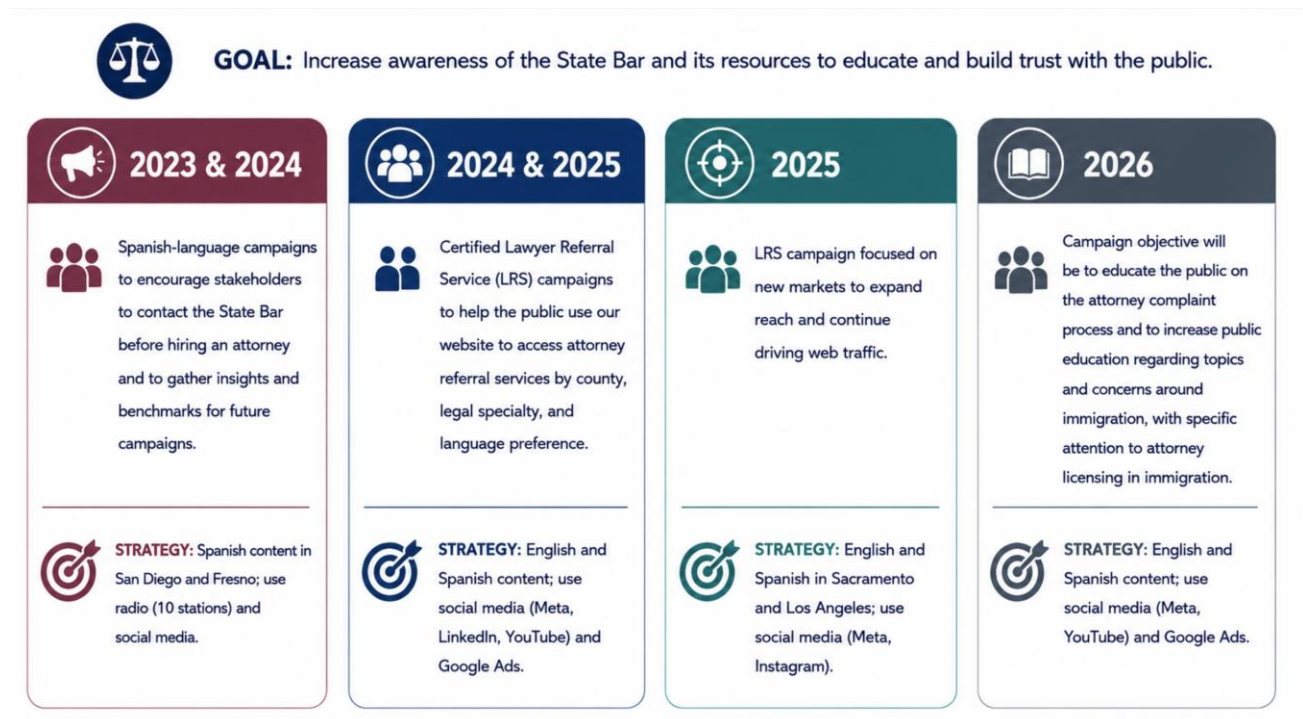
population by creating new surveys for individuals who visit the State Bar in person and clients with special needs who are served by OPTL.

External Outreach and Communication

External outreach and communication remain an important part of OPTL’s continued success. The Office of Strategic Communications and Stakeholder Engagement (SCSE) launched several public outreach campaigns in 2025, and the English and Spanish campaigns proved highly effective, with English driving broad awareness and Spanish generating strong engagement and interactions (see figure 6).

SCSE’s 2026 education campaigns will focus on the attorney complaint process. Additionally, OPTL will work with stakeholders to increase public education regarding topics and concerns around immigration, with specific attention to attorney licensing in immigration.

Figure 6. External Outreach and Communication



THE ATTORNEY-CLIENT BRIDGE PROGRAM

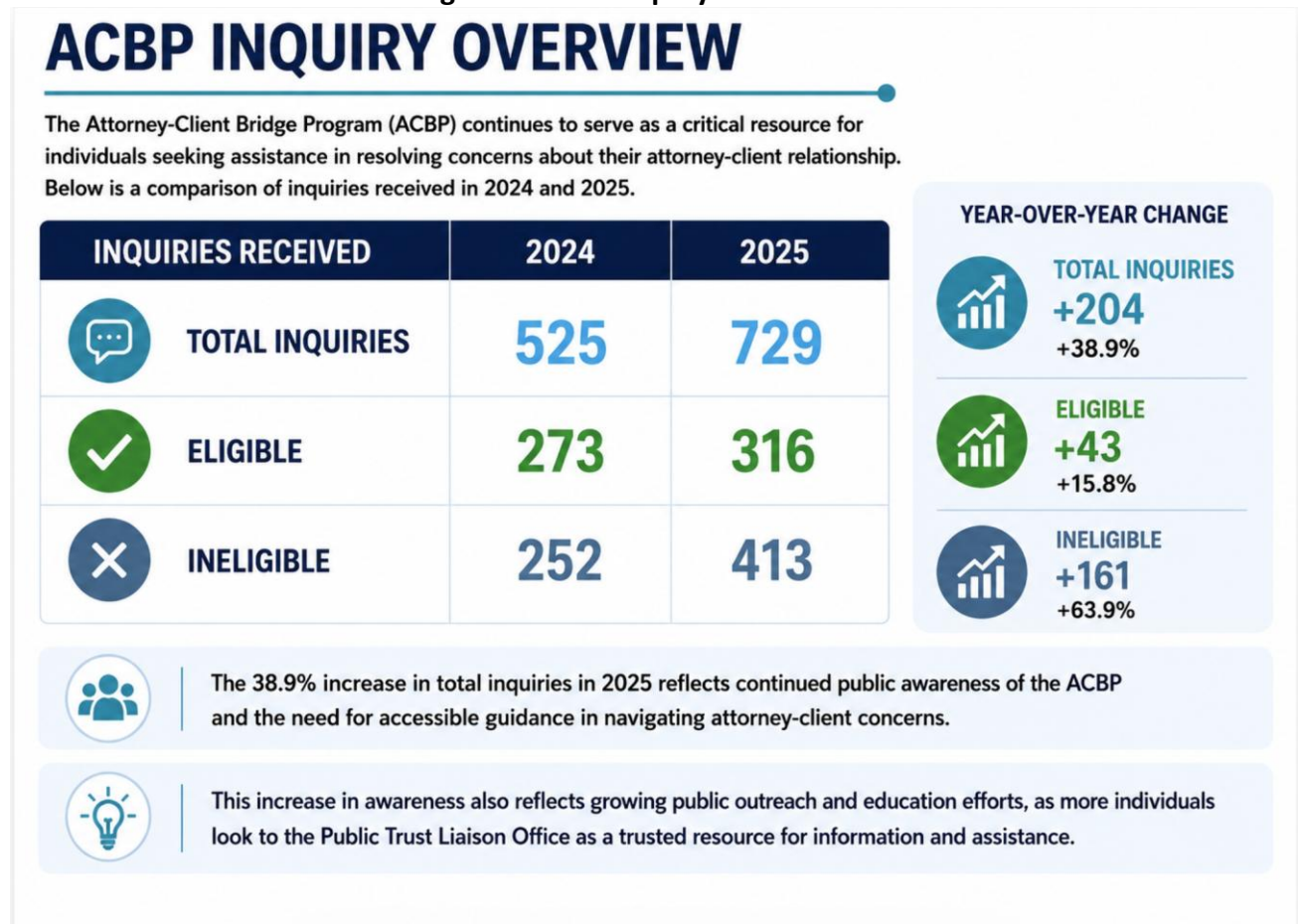
The [Attorney-Client Bridge Program](#) (ACBP) offers an alternative for clients and attorneys to avoid the [formal discipline process](#).³ ACBP resolves client issues related to an attorney’s failure to communicate or to return client files, both of which violate an attorney’s ethical

³ The Attorney-Client Bridge Program is one of three pilot diversion initiatives established pursuant to Business and Professions Code section 6140.14. See also Sen. Com. on Judiciary; Com. on Assem. Bill No. [3279](#) (2024 Reg. Sess.).

obligations. Participation is entirely voluntary, and clients have the option to pursue resolution of their issue through this program or file a complaint with the Office of Chief Trial Counsel (OCTC) to initiate the discipline process. The attorney also must actively agree to participate in ACBP. Submissions must come from the client or on behalf of the client through their new attorney and meet the program's other eligibility criteria.

ACBP was soft launched in March 2024 and formally launched in June 2025 with a public education campaign. In its first full calendar year as a program, there were 729 ACBP resolutions, including 703 resolved requests that were initiated in 2025 and 26 unresolved requests from 2024, leaving 46 outstanding requests at year-end. Since ACBP's launch, there have been 1,254 resolved requests (see figure 7).

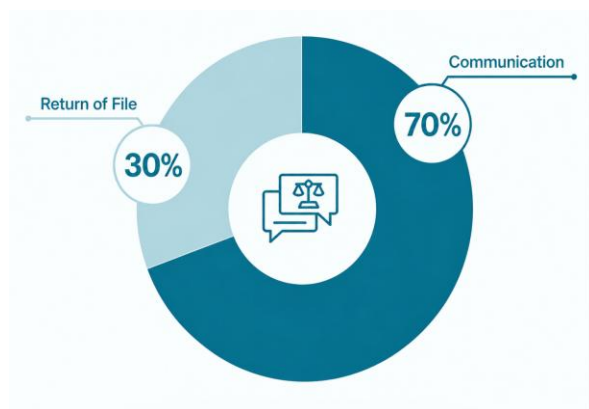
Figure 7. ACBP Inquiry Overview



ACBP Inquiries and Requests for Assistance

Out of 729 inquiries and requests for assistance in 2025, 316 were substantively addressed by ACBP, and 413 requests were deemed ineligible. Out of the eligible inquiries, 70 percent were attorney-client communication issues, and 30 percent were related to failure to return a file (see figure 8).

Figure 8. ACBP Requests for Assistance: 2025



For each request, investigators begin by interviewing the client to determine eligibility. When a request is deemed eligible, investigators follow up with the named attorney. As a result, every eligible request involves contact with the client and the attorney. Investigators make repeated attempts to reach all parties involved. Even when early attempts are unsuccessful, outreach continues, which often leads to a high number of contact efforts per request. Although ACBP strives to resolve all requests within 30 days, various extenuating circumstances can extend the resolution timeline. Above all, ACBP prioritizes successful completions and the prevention of formal disciplinary complaints with OCTC, even when doing so requires exceeding the 30-day target.

For example, in June 2025, a client requested assistance from ACBP to obtain a copy of their file. The former attorney was unexpectedly hospitalized and therefore unable to provide the file within the required timeline of 10 business days. As a result, the case required extended follow-up to ensure a successful completion, ultimately leading to a 56-day resolution time and 42 total contacts with the client and former attorney.

On the other end of the spectrum, some tickets are resolved well ahead of the 30-day target. For instance, in May 2025, a client requested communication assistance through ACBP. After the investigator interviewed the client, an introductory email was sent to the attorney. Within one hour, the attorney responded, agreed to participate, and reestablished contact with the client. This resulted in a resolution within just two days of the ticket submission and a total of 15 contacts with the client and attorney.

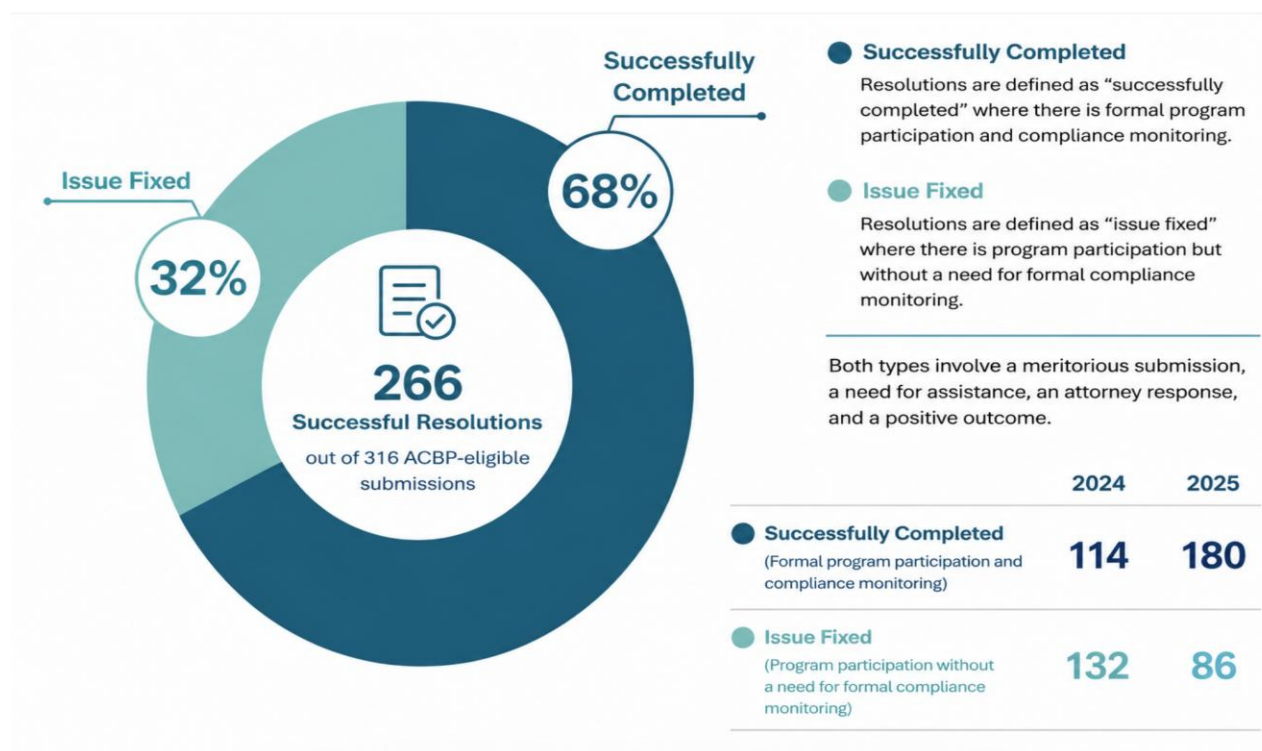
Another request type that frequently leads to a rapid resolution is the “issue fixed” category.

In these cases, a client submits a request for assistance, but when the investigator reaches out, the client reports that their communication or return of file issue has already been resolved without the need for ACBP involvement. In 2025, the 86 requests that were closed as “issue fixed” were resolved in an average of 10.52 days. Of these, 6 were completed within just a few hours, and 50 were resolved in under 10 days.

Eligible Inquiry Tickets

ACBP staff reviews all inquiries to determine eligibility for the program. In 2025, there were 316 eligible submissions and 413 ineligible submissions (see figure 9).

Figure 9. Eligible Inquiry Tickets: 2025



Within the 316 ACBP-eligible inquiry tickets, there were 266 successful resolutions, including 180 successful completions, compared with 114 in 2024, and 86 issue-fixed resolutions (described below), compared with 132 in 2024.

Figure 10 shows the average resolution times across all eligible ACBP inquiries, providing insight into OPTL’s efficiency across different resolution types. Overall, matters were resolved in an average of 13 days. Successful resolutions averaged 20 days, and within this category, successful completions averaged 25 days, and issue fixed averaged 11 days. Other resolution outcomes—including instances where participation was declined, responses were not received, or matters were otherwise terminated—averaged 9 days. These distinctions highlight the varying levels of complexity and engagement required across case types and

underscore OPTL’s ability to resolve matters efficiently while accommodating more time-intensive cases where appropriate.

Figure 10. Eligible Submissions Resolution Times: 2025

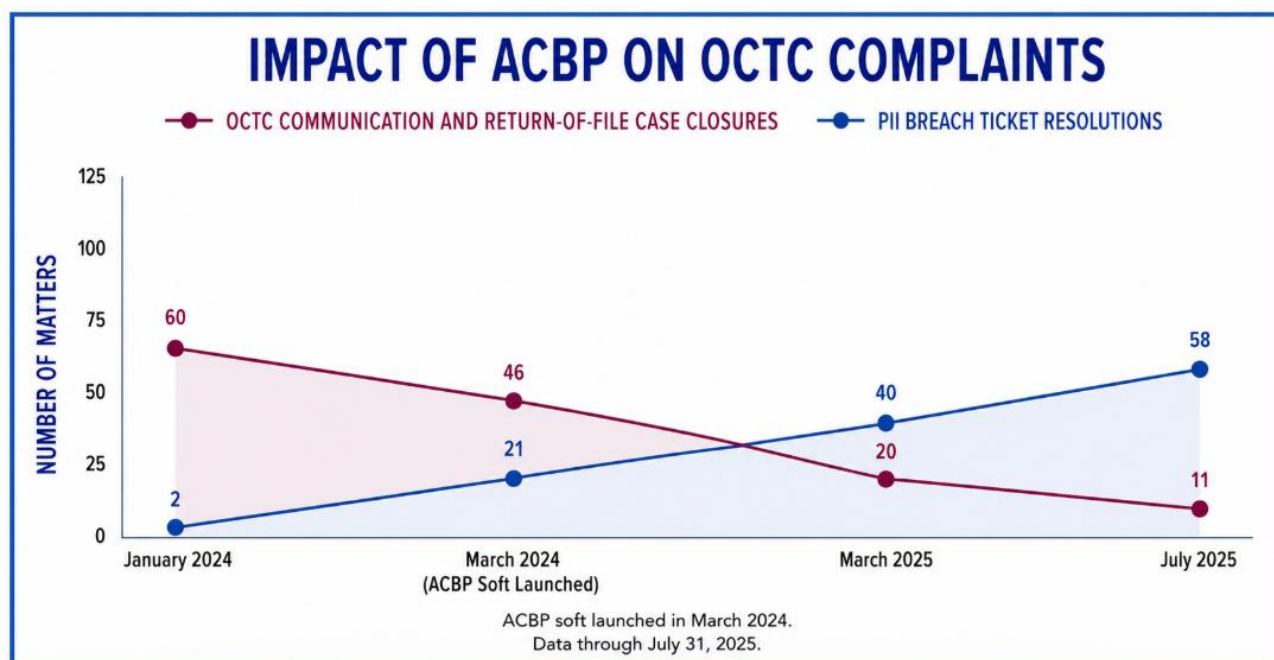
2025 Attorney-Client Bridge Program Request for Assistance – Ticketing		
	Resolutions	Days to Close (Average)
 All Tickets	729	13
 Eligible Tickets	316	22
 Ineligible Tickets	413	7
 Eligible Tickets – Favorable Outcome	266	20
 Successfully Completed	180	25
 Issues Fixed	86	11
 Ineligible Tickets to Eligible – Atty Failed to Participate	50	15

There were 50 requests deemed ineligible, including 8 ACBP matters in which the attorney declined to participate, 30 ACBP matters in which the attorney did not respond, and 12 attorneys who failed to successfully complete the program after agreeing to participate.

ACBP assisted in complaint submissions to OCTC against 12 attorneys. In five matters, the complaint was submitted after the attorney failed to respond to ACBP staff outreach; in five matters, the complaint was submitted because the attorney failed to complete their ACBP participation; and in two matters, the attorney was ineligible to participate in ACBP due to allegations of other potential acts of misconduct. ACBP assistance in complaint submission included interviewing the client, documenting their allegations, collecting supporting evidence, and drafting a disciplinary referral memorandum for submission to OCTC. OPTL is not a party to the complaint, and how OCTC ultimately resolves the referral is unknown to OPTL.

In 2025, sustained levels of ACBP resolutions continued to align with lower volumes of complaints about attorney communication and return-of-file issues in OCTC. The data continue to suggest that there is an inverse relationship between ACBP resolutions and OCTC complaints, and that ACBP is achieving its diversion objectives by reducing the volume of complaints received by OCTC concerning these attorney-client issues (see figure 11).

Figure 11. Impact of ACBP on OCTC



The response has been positive from both attorneys and clients, who appreciate the informal process and the opportunity to address concerns without resorting to disciplinary action.

2025 Improvements to ACBP

In 2025, following lessons learned from the initial months of the informal launch of ACBP, staff made several improvements to the program.

Examples include:

- Calling all applicants to discuss their ACBP submission, even if staff's initial review suggests an ineligible request (e.g., inactive attorney, complaint history between the client and attorney, no attorney-client relationship).
- Making improvements to assist Spanish-speaking applicants by creating ACBP forms and links in Spanish, establishing an automated workflow to assign the OPTL bilingual investigator to all ACBP submissions with Spanish-speaking applicants, and creating Spanish-language template responses.
- Utilizing a third-party interpreter to communicate with applicants in other languages or with accommodations.

- Accommodating applicants in different time zone areas/countries by conducting interviews via email (e.g., clients in Germany, Wales, and the Czech Republic).

In 2026, the Attorney-Client Bridge Program plans to explore additional attorney-client issues that could be resolved through the program, create additional [State Bar Stories](#) that promote the benefits of the program, and better educate the public about program eligibility to reduce the number of ineligible submissions.

NEW RESPONSIBILITIES FOR OPTL

In 2025, OPTL formally assumed responsibility for two additional programs in the State Bar: the Building Visitor Logs and Inmate Correspondence processes. Both serve important roles in documenting public interactions and facilitating access to State Bar services. The transition of these functions to OPTL reflects an intentional effort to centralize public-facing activities; enhance consistency in intake and tracking; and ensure that all points of contact align with OPTL's mandate of transparency, accessibility, and responsiveness. As these programs were not governed by prior-year operational parameters, 2025 represents the first reporting cycle in which the programs' scope, volume, and process considerations are being formally assessed and incorporated into OPTL's broader programmatic oversight.

Building Visitor Logs

The State Bar receives in-person inquiries to the physical offices in San Francisco and Los Angeles, which are consistently captured, tracked, and assessed as part of OPTL's broader intake and review framework. Building logs provide a structured mechanism to document walk-in interactions, many of which involve individuals who may face barriers to accessing services through traditional channels (see figure 12).

Figure 12. Building Visitor Logs from June 2024 to January 2026

BUILDING VISITOR LOGS		
June 2024 to January 2026:		
PURPOSE OF VISIT	VISITORS	% OF TOTAL
 Admissions	22	19%
 Client Security Fund	1	1%
 Executive Director	0	0%
 Fee Arbitration	0	0%
 OGC	2	2%
 OCTC	11	9%
 OPTL	0	0%
 Other	3	3%
 Attorney Search	0	0%
 Multiple Areas	2	2%
 LRS	0	0%
 Regulation	67	57%
 Regulation - Agency Filing	9	8%
LOGGED VISITORS	117	


SUMMARY

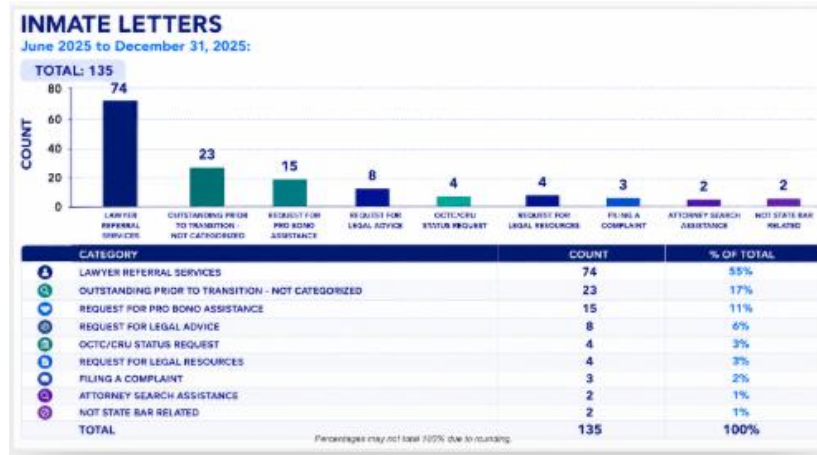
From June 2024 to January 2026, 117 building visitors were referred to OPTL; 115 visitors were serviced, and 2 remain pending.

Percentages may not total 100% due to rounding.

Inmate Correspondence

OPTL formally assumed responsibility for inmate correspondence, ensuring that communications from incarcerated individuals are consistently captured, reviewed, and addressed within a structured and equitable framework. These letters often reflect complex or sensitive concerns and come from individuals who may face significant barriers to accessing information or assistance through other channels (see figure 13).

Figure 13. Inmate Letters from June 2025 to December 2025



2026 RECOMMENDATIONS FOR STATE BAR IMPROVEMENT

To ensure OPTL's ongoing commitment to transparency and continuous improvement, below are the 2026 recommendations for organizational improvement. These annual recommendations are developed to guide enhancements based on inquiries to OPTL and trends observed across such requests.

Thematically, the recommendations continue to be focused on strategies and methods, which would improve communication and business process upgrades. Prior department recommendations and updates can be found in Appendix A.

Recommendation: Office of Chief Trial Counsel

OCTC should provide sufficient advanced notice to OPTL of significant policy changes to allow OPTL to coordinate responses on new inquiries and calls to the Contact Center prior to OCTC implementing the change.

Providing OPTL with sufficient advance notice of significant OCTC policy, procedural, or operational changes would support more effective coordination of public-facing communications and improve the overall user experience. Early notification would allow OPTL adequate time to prepare staff, develop consistent messaging, update guidance materials, and anticipate increases in inquiry volume related to the change.

Recommendations: Office of Admissions

The Office of Admissions should work toward providing sufficient advanced notice to OPTL of significant policy changes to allow OPTL to coordinate responses on new inquiries and calls to the Contact Center.

Providing OPTL with sufficient advance notice of significant Office of Admissions policy, procedural, or operational changes would support more effective coordination of public-facing communications and operations. Early notification would allow OPTL adequate time to prepare staff, update reference materials, develop consistent messaging, and anticipate potential increases in inquiries related to the change.

Advance coordination is particularly important for Admissions-related matters, as applicants often seek immediate clarification regarding deadlines, eligibility requirements, testing procedures, and policy updates. Without sufficient preparation time, changes may result in increased confusion, inconsistent responses, repeat contacts, and longer wait times for applicants and members of the public. A proactive communication and coordination process between Admissions and OPTL would help improve the user experience, support operational readiness, and ensure more timely and accurate responses to inquiries upon implementation of significant changes.

The Office of Admissions should develop a visual flowchart or timeline illustrating the

transition from “Applicant” to “Attorney” status following submission of the oath card, including anticipated processing stages, estimated time frames, and the corresponding State Bar office responsible for assisting at each phase of the process. The resource should also clarify when individuals should transition from contacting Admissions (ADM) to the Office of Attorney Regulation and Consumer Resources (DOR), along with other relevant support resources available during the transition period.

Providing a visual aid may help reduce confusion during a process that applicants frequently describe as unclear, particularly regarding when status changes occur and which office is responsible for handling questions at different stages. Increased clarity may improve the user experience, reduce misdirected inquiries and repeat contacts to the Contact Center, and support more efficient routing of applicant and attorney questions.

External Auditor

As part of the ombuds-type powers vested in OPTL, the office holds the authority to refer discipline cases to the external auditor program managed by the Office of Compliance within the Office of Executive Director. OPTL made no such referrals in 2025.

A LOOK AHEAD TO 2026

Service Improvements and Future Initiatives

In 2026, OPTL will continue partnering with the Office of Strategic Communications and Stakeholder Engagement to improve public access to information and resources available through the State Bar. These efforts will include evaluating inquiry trends, developing educational materials, and supporting communication initiatives designed to improve public understanding of State Bar processes and services.

OPTL will also continue tracking and evaluating inquiries related to attorney discipline, immigration-related concerns, assistance for building visitors, and correspondence from incarcerated individuals to identify opportunities for enhanced communication, improved service delivery, and greater accessibility.

As part of its ongoing commitment to improving the public experience, OPTL will continue exploring longer-term technology solutions and website enhancements, such as a webchat feature that may provide additional pathways for individuals to access information and assistance. Any future technology initiatives will be evaluated in conjunction with broader organizational priorities, available resources, and user needs.

CONCLUSION

The 2025 reporting period reflected OPTL’s continued growth and evolution, as the office expanded its programs, responsibilities, and public-facing services while responding to the highest inquiry volume in its history. Throughout the year, OPTL continued to strengthen its

role as an accessible and responsive resource for applicants, licensees, and members of the public seeking assistance navigating State Bar systems and processes. The office not only resolved all pending PTLIs by year-end but also continued refining internal workflows, improving language access and accessibility measures, and expanding collaborative engagement with partnering offices across the State Bar.

The continued development of ACBP also demonstrated the value of early, non-adversarial intervention as an alternative to the formal disciplinary process. The program's sustained growth, high rate of successful resolutions, and positive feedback from both attorneys and clients further support its role in promoting communication, reducing conflict, and advancing the State Bar's broader diversion and public protection efforts. At the same time, OPTL's assumption of additional responsibilities—including assistance for building visitors and inmate correspondence—reflects the office's expanding role in ensuring that individuals encountering barriers to access are still able to engage meaningfully with the State Bar.

The inquiries and trends observed during this reporting period also highlighted continued opportunities for process improvement, enhanced communication, and greater transparency across several State Bar functions. The recommendations included in this report are intended to support ongoing collaboration with partner offices and to further improve the public experience through clearer communication, enhanced operational coordination, and increased accessibility to information and resources.

Looking ahead to 2026, OPTL will continue building upon these efforts through expanded public education and outreach initiatives, enhanced stakeholder engagement, further development of ACBP, and the exploration of additional tools and technologies designed to improve accessibility and responsiveness. As demand for OPTL services continues to grow, the office remains committed to advancing transparency, procedural fairness, and public trust through thoughtful collaboration, data-informed process improvements, and responsive services to the public and legal community.

APPENDIX A

As part of last year's report, OPTL provided recommendations for improvements to OCTC and the Office of Admissions. Appreciation is extended to both offices for their dedication and collaborative efforts in enhancing their processes.

2024 Recommendations and 2025 Responses

2024 OPTL Recommendations	OCTC Response
Develop an easily accessible and electronically submittable form to streamline attorneys' self-reporting of criminal proceedings, as required under Business and Professions Code section 6068, subdivisions (o)(4) and (o)(5).	The State Bar's web-page was substantially revised this year. We are working with communications to add a new card on the legal professionals landing page called "Need to Self-Report" which will take the user directly to the mandatory reporting forms page, which includes a link to the fillable pdf for attorneys to report criminal proceedings. This new card, which should greatly facilitate access, should be in place by the end of next week. Now that the web page revision has been substantially completed, we will be working on designing an online reporting form as an alternative to several of the separate fillable pdf mandatory reporting forms now accessible through the website.
Improve the explanation of abatement procedures for investigations resolved in this manner.	Although there are limits on what we can disclose to a particular complainant about a complaint/investigation that does not arise from their own complaint. See Business and Professions Code 6086.1(b); State Bar Rule of Procedure 2302. We are currently in the process of reassessing our guidelines for and overall approach to abatement. As part of this process, within the constraints imposed on us by the confidentiality requirements, we will be revising our form letters to complainants in an attempt to improve the explanation of the abatement process and provide more information as to why a matter is being resolved in lieu of another proceeding or pending the results of another proceeding.
2024 OPTL Recommendations	Admissions
Enhance existing guidance on how applicants can inquire about moral character determinations or request updates on their application status	Moral Character Inquiry Guidance: Currently applicants are advised through several different communication tools to submit inquiries through the Applicant Portal, to moral.character@calbar.ca.gov , or to contact the Moral Character Person of the Day via phone. That guidance is provided on the website, in emails, and in FAQs which are posted. The Office of Admissions can add guidance to the Help Center accessible through the Applicant Portal that addresses the different methods applicants can use to contact the Office of Admissions regarding their Application for Determination of Moral Character. The PTL suggests that providing different avenues for communication (through the Applicant Portal, the moral character email address, or the person of the day) may be contributing to confusion. We can provide further guidance on this, but do believe that we are assisting the applicant by not limiting the ways to contact the State Bar. We will review verbiage in our FAQs, on the website, and elsewhere to provide greater clarity
Create a series of diagrams outlining the different pathways to becoming an attorney. These diagrams should include routes for applicants choosing ABA-approved law schools or California-accredited law schools, foreign-educated applicants, foreign-barred attorneys, out-of-state attorneys, and those pursuing the law office study program	Pathways to Licensure Diagrams: The Office of Admissions agrees with this recommendation, and it has been a goal of the office to provide visuals such as this to applicants. The plan to develop these visuals was halted while the office updated information on the applicable State Bar webpages, and the website migrated to the new version. Now that the new website has been launched, we will resume this project.