

STATE BAR OF TEXAS BUSINESS TECHNOLOGY PLAN

2019 Executive Summary

OVERRIDING PRINCIPLES:

- 1) *Business vision must drive the application of technology.*
With all of the potential applications of technology, the organization's desired business outcome is the deciding factor for which projects to undertake- therefore, a comprehensive Strategic Plan is crucial to the effective development and implementation of a technology plan.
- 2) *Technology is an enabler of business vision.*
While technology provides a "means to an end", it is also a spring-board for entertaining new ideas and strategies that impact the business vision of the organization.
- 3) ***The Technology Plan is a "Living" Document.***
The contents of this document are not static and will be reviewed and updated regularly to adjust to **changes in the State Bar's strategic** direction. All aspects of the plan are subject to the availability of resources.

GENERAL TECHNOLOGY ASSESSMENT:

The State Bar has come a long way since FY 2001. It has established standardized computing infrastructure, software, and strategic technology planning processes. This has enabled it to make substantial strides in service delivery to both the members and the public. Key areas for focus include:

- Keep Technology Infrastructure Up To Date and Secure
- Improve Service Delivery & Operational Efficiency
- Improve/Expand Online Service Delivery Capability
- Improve staff knowledge, efficiency, and service Through Automation

THE TECHNOLOGY PLAN:

- **Describes the State Bar's current state of technology**
- Identifies IT Objectives Grouped by Strategic Focus Area
- Identifies Anticipated Technology Trends
- Establishes Guidelines for Technology Deployment
- Emphasizes Security of Information Resources
- Emphasizes Linking of IT Initiatives to State Bar Strategic Plan
- Defines Capitalization Guidelines & Technology Fund Structure
- Identifies Technology Goals For the Next Three Years

CURRENT SYSTEMS

- Microsoft Windows/Intel (Wintel) based desktop systems
- Local area network / metro area network / wide area network
- Microsoft Windows/Intel (Wintel) based virtual application/web servers
- Mix of enterprise-wide and department-specific applications

STATE BAR OF TEXAS STRATEGIC FOCUS AREAS

- Service to the Public
- Service to Members
- Protection of the Public
- Access to Justice
- Sound Administration & Resources
- Financial Management

INFORMATION TECHNOLOGY STRATEGIC FOCUS AREAS

- Improvement of technology infrastructure
- Improvement of business systems
- Leveraging e-business opportunities
- Maintaining Security and Compliance

UNDERLYING IT STRATEGIC GOALS

- Provide stable and secure information processing
- Provide rapid resolution of technology related problems
- Provide flexible IT infrastructure
- Stay abreast of new technologies and trends
- Assist in the technology training and education of staff and members

PLAN IDENTIFIES TECHNOLOGY TRENDS IN THE FOLLOWING AREAS

- Hardware/application technology continues to cycle rapidly
- Consumer-Driven Information Technology
- Continued emphasis on multiple tier, open systems, with Internet-based delivery
- Proliferation of Cloud Services and Virtualization
- Continued growth in converged delivery of voice, video and data transmission
- Growing demand/availability of lower-cost, high speed transmission bandwidth
- Consumer Expectation of mobile and contextual content delivery
- Consumer reliance on social media and presence aware devices and applications
- Expansion of breach/malware risks driving new privacy & security standards, compliance regulations, monitoring, intrusion detection/prevention

PLAN DEFINES GUIDELINES FOR DESKTOP/MOBILE, WORKGROUP/ENTERPRISE AND NETWORK DEPLOYMENT

- Limited number of configurations
- Select industry standard components/interfaces
- Allow for future expansion and upgrade
- Standardize upon the Windows and Intel platforms (WINTEL)
- **Utilize "tier-1" providers to ensure availability of parts**, support and maintenance
- Evaluate commercial off the shelf products prior to undertaking custom development
- Standardize upon products for which worker skills are generally available

PLAN EMPHASIZES SECURITY OF INFORMATION AND ACCESS

- Improve ability to monitor and detect security events
- Improve ability to block or prevent intrusions and unauthorized access
- Preventive security through education and managed security services

PLAN DEFINES PROCEDURES FOR TECHNOLOGY INITIATIVES

- Development of a business case including business requirements (link to strategic plan), vision of the solution, scope of the initiative, cost/benefit and performance criteria
- Department/division review
- Executive management team review
- Technology Oversight Subcommittee

PLAN DEFINES CAPITALIZATION GUIDELINES AND A TECHNOLOGY FUND STRUCTURE AND USE

- Establish regular replacement of technology assets based upon expected useful life
- Technology Fund maintained by annual General Fund contributions
- Project budgets established and monitored by Technology Oversight Subcommittee

PLAN DEFINES TECHNOLOGY OBJECTIVES FOR THE NEXT THREE YEARS

- Infrastructure replacements to include Virtualization, backup and desktop equipment
- Multiple website property changes and improvements
- Replacement of key systems such as Advertising Review
- Enhancements to multiple business systems
- Increased security and monitoring to protect member data.
- Additional Business Continuity Services and testing.

Section 7- Technology Plan Implementation

7.1 Three Year Summary

The general goals in the following sections represent a roadmap over the three-year planning horizon. An overall summary is as follows:

7.1.1 FY 2019 / 2020

The primary investment focus for FY 2019/20 will touch on all Strategic Focus Areas. This includes infrastructure projects such as redesign of virtual server environment, including consideration of hybrid private/public cloud, renewal of enterprise software licensing with Microsoft, replacement of aging network equipment, and various audiovisual upgrades to the Texas Law Center. With regard to business systems, the bar intends to complete its deployment of a new management system for the Advertising Review process. E-business initiatives include minor improvements to the Texasbar.com web property, as well as upgraded Firm Billing, Online Payment, and email delivery features for members. Finally, with regard to security and business continuity the Bar will be investigating additional managed security services and renewal of various continuity services contracts. Lastly, there are various ongoing educational programs planned for staff.

7.1.2 FY 2020 / 2021

For FY 2020/21, many initiatives will be continuations from the prior year. This includes infrastructure updates to desktop, server and network hardware and software. In addition, the current virtual server environment, as well as backup systems will be due for replacement during this fiscal cycle. This may include conversion to remote hosting facilities for the next iterative upgrade to the enterprise server infrastructure. Based upon the prior year requirements gathering and business process analysis, replacement of the Client Attorney Assistance software system or other systems will be considered. It is anticipated that improvements to Texasbar.com will be evaluated based upon feedback from the first complete year of online-only dues collection. Lastly, the bar will perform routine testing of its continuity and security systems, as well as continuing to educate staff.

7.1.3 FY 2021 / 2022

In FY 2021/22, Infrastructure projects will revolve around the routine capital replacement programs for hardware and software, barring any major technical changes in the market that might force other initiatives. The bar will also be evaluating desktop virtualization for the next cycle of desktop replacements.

Please note that while desired technology objectives are highlighted here and targeted for specific fiscal year periods, this timeline is subject to change. Some or all objectives may be added, realigned or dropped dependent upon operational or financial factors, or by board direction. It should also be noted that some objectives appear in multiple fiscal years. This is largely due to the fact that many objectives are expected to span one or more fiscal periods; or be implemented in a phased approach in more than one fiscal year; or represent an objective that is ongoing in nature.

7.2 Technology Goals List

This section contains those technology objectives that are targeted for current three year planning cycle. These are grouped by Strategic Focus Area as defined in Section 2.5.

7.2.1 Strategic Focus Area #1: Infrastructure

<i>Renew Microsoft Volume Licensing for server, desktop, and office suite software</i>
<i>Replace Desktop computers and regional server equipment for State Bar Offices based on asset life cycle.</i>
<i>Replace printers and scanners based upon asset life cycle.</i>
<i>Replace server VMware virtualization infrastructure. Evaluate on-premise vs. off-premise infrastructure and well as hybrid public/private cloud services.</i>
<i>Replace backup storage technology to better support virtualization infrastructure, improve recoverability, and enhance backup speeds.</i>
<i>Replace network switching infrastructure in Texas Law Center to maintain support and improve security.</i>
<i>Evaluate replacement of current Law Center PBX system, call center software with VOIP based technology.</i>
<i>Expand and improve availability of wireless access in SBOT facilities.</i>
<i>Replace/upgrade meeting room technology and audio visual equipment in Texas Law Center.</i>

7.2.2 Strategic Focus Area #2: Business Systems

<i>Upgrade various systems to current vendor levels.</i>
<i>Replace Advertising Review Information Management System</i>
<i>Evaluate Replacement of Client Attorney Assistance Program (CAAP) Case management system</i>
<i>TexasbarCLE improvements to include email communications selection, upgraded security, and additional functionality for Event manager and online services.</i>
<i>TexasbarBooks improvements, to include better accounting/customer billing integration</i>

Migrate Client Security Fund application to fully integrate into Justware and eliminate additional third party application.

Improve automated reconciliation processes for Attorney Compliance systems to reduce staff workload, decrease security risk and increase productivity.

Evaluate increased use of telephone API integration to increase staff call-center efficiency.

7.2.3 Strategic Focus Area #3: E-Business

Provide new email communications management features for Texasbar.com

Provide improved online reporting design and workflow for Advertising Review system.

Provide online payment capability for Advertising Review

Provide improved payment processing for submission of annual dues and donations.

Provide online submission and fee payment for Advertising Review requests

Provide improved markup and review capability and improved workflow for Advertising Review process with increased ability to collaborate with members.

Provide improved Firm Billing process for law firms.

7.2.4 Strategic Focus Area #4: Security, Continuity and Compliance

Evaluate and contract for additional Managed Security services to safeguard member data.

Renew hot site services to support all state bar facilities in the event of emergency or disaster.

Conduct roundtable Security and Business Continuity Tests, and onsite tests to validate various security and recovery scenarios.

Investigate cloud/remote hosting facilities to reduce facility footprint and energy consumption requirements

Expand use of document indexing and retrieval systems/ services

Evaluate new systems to improve Texas Law Center security.

<i>Implement new email encryption and private (DLP) information detection software</i>
<i>Continue regular external security penetration testing for key sites/networks to meet PCI DSS requirements</i>
<i>Conduct security awareness classes for staff, educating a re-familiarizing them with required security policy and procedures.</i>
<i>Utilize managed phishing to evaluate vulnerabilities and address staff education issues.</i>