

Strategic Plan as adopted January 22, 2021, Performance Measures approved by the Performance Measures and Strategic Planning Subcommittee on June 14, 2021.

Service to the Public

The State Bar of Texas serves the public through education and community outreach.

Strategic Goals	To address this goal the State Bar will	Performance Measures
<p>Foster public understanding about the Rule of Law and the role of judges, lawyers, and the public in the justice system.</p>	<p>A. Use multiple platforms and channels to educate the public about the law and legal system and lawyers' role, particularly among diverse and non-English-speaking communities.</p> <p>B. Educate the public about the role and importance of an independent judiciary.</p>	<ol style="list-style-type: none"> 1. Measure the distribution of SBOT consumer legal information and resources and information across printed, multi-media, social media, and other digital platforms. 2. Measure traffic and growth to SBOT consumer facing websites and social media sites, including site visits and downloads. 3. Measure the training of public school teachers by the SBOT Law Related Education (LRE) Department: <ul style="list-style-type: none"> • number of courses provided to teachers, • number of teachers trained, • total number of students who receive civics education from LRE-trained teachers, • traffic to the Law Focused Education, Inc. (LFEI) website and related social media: • degree of satisfaction with such services among participants. 4. Measure the number of presentations by volunteer attorneys and judges in public schools that use teaching presentations materials prepared by the TYLA. 5. Measure the number of presentations made for events such as Career Technology and Constitution Day.
<p>Support community, public, and pro bono service among members.</p>	<p>A. Continue to facilitate participation by lawyers, judges, and law students in community service and public education activities.</p> <p>B. Increase awareness of lawyers, judges, and law students' contributions to improving access to justice and rendering pro bono service.</p> <p>C. Promote public awareness of SBOT public service, consumer education, and crisis and disaster assistance resources.</p>	<ol style="list-style-type: none"> 6. Measure the participation and use of TYLA-produced public service materials, including website downloads 7. Measure local bar and partner participation in Texas Lawyers for Texas Veterans, including box distribution and the number of clinics held. 8. Measure calls and referrals made through the LRIS. 9. Measure news release and media stories focused on member pro bono and public service. 10. Measure disaster assistance hot line calls, Disaster Assistance manual updates and distribution, disaster web pages created, and disaster web page analytics.
<p>Collaborate with local, specialty, and diversity bar associations.</p>	<p>A. Provide resources that support public and community outreach.</p>	<ol style="list-style-type: none"> 11. Measure local bar participation in TYLA-sponsored public outreach initiatives.

State Bar of Texas Performance Measures, 2021-2026

	B. Develop and promote legal careers across all levels of education, particularly among diverse students.	12. Measure participation in career & technology fairs and other such events.
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Service to Members The State Bar of Texas provides its members with superior services.		
Strategic Goals	To address this goal the State Bar will	Performance Measures
Equip member to deliver high-quality legal services to their clients.	A. Continue to provide first-rate, innovative, accessible, and affordable CLE.	1. Measure trends in attendance at and participation in TexasBarCLE <ul style="list-style-type: none"> • webcasts, • online seminars and trainings, • video seminars and trainings, • live seminars and trainings, and • forums and public programs, • free and low-cost offerings. 2. Measure “just in time” program offerings addressing emerging issues as responsive to member needs. 3. Measure Section educational and LPM programming. 4. Measure the sales of books and course materials. 5. Measure the number of CLE scholarships given to members. 6. Measure customer satisfaction.
	B. Continue to educate members on law practice management tools and technology.	
	C. Continue to guide members in fulfillment of their ethical obligations and adherence to the Texas Lawyers Creed and Rules of Professional Conduct.	7. Measure and track the dissemination of ethics information and resources to members of the State Bar, including information and resources regarding aging issues.
	D. Monitor and assist members with adapting to evolving trends in the practice of law and the implications of post-pandemic practice, including technology.	8. Measure programs, articles, and resources devoted to emerging topics and issues.
Cultivate an inclusive culture that honors diversity and equity across the spectrum of members’ experiences.	A. Continue to support initiatives and recommendations of the Task Force on Diversity, Equity, and Inclusion.	9. Measure trends in diversity, including age groups, among State Bar sections, committees, divisions, and other State Bar entities, and compare those trends to those seen among the State Bar membership. 10. Measure analytics of trends for access to diversity information and resources on the website and other electronic venues.
	B. Ensure diversity and inclusion among the leadership of State Bar Sections and Committees.	11. Measure the number of attorneys, law firms, and legal departments participating in the Texas Minority Counsel Program and Texas Minority Attorney Program.

State Bar of Texas Performance Measures, 2021-2026

		<p>12. Measure attendee satisfaction with the Texas Minority Counsel Program and Texas Minority Attorney Program.</p> <p>13. Measure diversity of leadership throughout the SBOT, including trends.</p>
	<p>C. Recognize the needs of rural practitioners.</p>	<ul style="list-style-type: none"> •
<p>Help members to achieve professional satisfaction and success</p>	<p>A. Continue to support and promote TLAP and wellness initiatives.</p>	<p>14. Monitor the use of the Texas Lawyers Assistance Program (TLAP) by measuring:</p> <ul style="list-style-type: none"> • others' consultations, • the degree of satisfaction with such services among the participants, • the numbers of educational outreach presentations, • distributed publications, • views of TLAP videos, and • traffic to www.tlaphelps.org.
	<p>B. Provide a range of member benefits that help members to practice more efficiently, economically, and ethically.</p>	<p>15. Measure and track the dissemination of information about State Bar member services and benefits, including information given to local, minority, and specialty bar associations. Measurements should include the number of published materials and presentations by State Bar leadership and staff, as well as data gathered through satisfaction surveys.</p> <p>16. Measure member participation in vendor discount member benefits, including usage trends.</p>
	<p>C. Assist members with career planning from law school through retirement.</p>	<p>17. Monitor the use of www.afterthebarexam.com resources and the number of State Bar presentations made at law schools.</p> <p>18. Measure the number of custodian attorney designations received by the State Bar and the use of succession planning resources.</p>
<p>Meet members where they are, to engage.</p>	<p>A. Assist members in navigating the impact of the pandemic on their practices.</p>	<p>19. Measure information dissemination and participation in any pandemic-response programs</p>
	<p>B. Collaborate with sections, law schools, and national, local, diversity, and specialty bar associations to build awareness and participation among members.</p>	<p>20. Measure presentations, and other methods of collaborative targeted outreach.</p> <p>21. Measure participation trends in State Bar elections.</p>
	<p>C. Connect through personal outreach and targeted communications.</p>	<p>22. Measure trends in click-through rates, opt-outs, and analytics with targeted communications.</p> <p>23. Measure member satisfaction with customer service.</p>

Protection of the Public The State Bar of Texas protects the public.		
Strategic Goals	To address this goal the State Bar will	Performance Measures
Regulate the conduct of lawyers fairly and uniformly throughout the State.	A. Increase knowledge of professional, ethical standards among lawyers and the public.	1. Measure trends professionalism and ethics communications efficacy using web and electronic communications analytics.
	B. Review and recommend improvements to the disciplinary system, regulatory framework, and dispute resolution procedures.	2. As required by the State Bar Act, track statistics regarding grievance matters, including, but not limited to <ul style="list-style-type: none"> the number and final disposition of complaints filed, dismissed, and investigated by the State Bar, statistics regarding barratry, and information regarding disciplinary trends.
	C. Build lawyers' understanding, trust, and confidence in the disciplinary system.	3. Measure member confidence in the disciplinary system in member surveys.
Promote high ethical standards and professionalism.	A. Cultivate a culture of professionalism and civility through education and awareness.	4. Measure the number of hours of professionalism and ethics programming and publications, including those offered by sections.
	B. Provide practical tools and resources that address day-to-day ethical issues.	5. Measure calls to State Bar Ethics Helpline, trendlines and member satisfaction with the utility of the service.
	C. Create peer-to-peer connections.	
	D. Present risk management, client communications, and other grievance prevention information and programming.	6. Measure participation in preventative programming across the Bar, including LPM and client relations programming.
Educate the public and lawyers about lawyer regulation, grievance system, UPL, and Client Security Fund	A. Manage client expectations about the grievance process so they feel they are treated fairly.	7. Measure and monitor the Client-Attorney Assistance Program: <ul style="list-style-type: none"> the number of contacts the program receives, the number of dispute resolutions conducted by the program, the number of referrals by the Chief Disciplinary Counsel's Office to the program, and the degree of satisfaction with the program by those accessing its services.
		8. Track Client-Attorney Assistance program adjustments in response to analysis and feedback. 9. Monitor the Client Security Fund program by measuring the number: <ul style="list-style-type: none"> of eligible applications considered, the number of eligible applications approved, and the total amount of grants made. 10. Measure efforts to publicize the Client Security Fund to eligible recipients and to discourage theft of clients' funds by their attorneys.

	B. Ensure an accessible and transparent process.	
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Access to Justice The State Bar of Texas ensures access to justice for all.		
Strategic Goals		To address this goal the State Bar will
Promote pro bono service and awareness	A.	<p>Encourage pro bono service among members by providing accessible training and opportunities, incentives, and recognition.</p> <ol style="list-style-type: none"> 1. Measure voluntary reporting of pro bono service, benchmark and monitor trends. 2. Measure the number of lawyers participating in legal aid and pro bono programs and on the Pro Bono Survey. 3. Measure voluntary dues contributions to access to justice, including total dollar amounts and number of individual contributions. 4. Measure the number of providers participating in in the Texas Legal Services Network Malpractice Insurance Program. 5. Measure the number of active participants in the Westlaw Legal Research Network. 6. Measure the number of calls interpreted, documents translated, and different languages spoken to assist organizations participating in the Language Access Fund. 7. Measure the number of responses to prison inmate inquiries. 8. Measure the number of presentations on access to justice issues made to attorney groups. 9. Measure the number of legal services and pro bono staff who participate in LAD training events and CLE programs. 10. Measure and monitor members of the in Pro Bono College. 11. Measure the number of referrals: <ul style="list-style-type: none"> • made to callers and email requests, • click-through rates for online referral directory, • distribution of the referral directory. 12. Measure participation in: <ul style="list-style-type: none"> • LRAP, • TexasBarCLE & Legal Access Division tuition waiver program, • Legal Services Intern Program. 13. Measure the number of sections with: <ul style="list-style-type: none"> • Pro bono activities, • Access to justice related grants • Other related programs.

State Bar of Texas Performance Measures, 2021-2026

	<p>B. Support the Texas Opportunity and Justice Incubator and community lawyering.</p>	<p>14. Measure the success of Texas Opportunity and Justice Incubator (TOJI):</p> <ul style="list-style-type: none"> • the amount of attorney and volunteer participation, • the amount of attorney and volunteer/mentor participation, • the number of TOJI-created resources shared with the State Bar membership at large, • and the number of pro bono and modest means hours provided by TOJI cohorts. <p>15. Measure and track utilization of online disaster preparation and recovery resources:</p> <ul style="list-style-type: none"> • Hotline Calls, • Public information dissemination, • Disaster manual updates, • Website views.
<p>Address the systemic issues that impede access to the justice system.</p>	<p>A. Support funding for the courts and legal services.</p>	<p>16. Monitor state and federal access to justice funding fluctuations to anticipate and be prepared to respond to potential decreases for programs that support access to justice.</p>
	<p>B. Encourage alternative dispute resolution and alternative delivery.</p>	<p>17. Monitor and identify changes to rules and regulations that increase access to justice.</p>
	<p>C. Leverage and evaluate the use of technology to facilitate the delivery of services.</p>	
	<p>D. Work with the bench to address administrative issues, including access to records and disparate access to technology.</p>	
	<p>E. Promote the independence of the judiciary and support a diverse bench.</p>	
	<p>F. Support resources for pro se litigants.</p>	

Sound Administration and Resources The State Bar Texas will administer its activities and services with a high level of efficiency and professionalism according to Texas state agencies' best practices and bar associations of similar size and scope.		
Strategic Goals	To address this goal the State Bar will	Performance Measures
Maintain a professional, high-quality, diverse, and inclusive staff and collaborative culture.	A. Safeguard resources to support staff retention, development, and training.	1. Measure, track and benchmark statistics regarding staff retention and attrition, including qualitative analysis of employee satisfaction. Measure retention among diverse staff. 2. Measure satisfaction and efficacy of internal training programs and opportunities. 3. Measure employee satisfaction, particularly with the post-pandemic return to the office. 4. Measure the number of customer service complaints received by the State Bar and the satisfactory resolution of those complaints. 5. Measure customer service satisfaction across member-facing entities.
	B. Continue to develop a staff training, development, and mentoring plan.	
	C. Evaluate the implications for the post-pandemic work environment and remote work.	
Engage in best practices in Board governance.	A. Promote a culture of inclusivity where all voices are respected and heard, and legacy barriers are removed.	6. Measure efforts to create pathways to leadership by tracking entry points such as local and diversity bars and sections. 7. Measure board engagement and satisfaction with an annual board evaluation. Benchmark year-over-year experience of board members against established best practices criteria.
	B. Commit to having difficult conversations.	
	C. Ensure appropriate apportionment of State Bar districts for balanced representation.	
	D. Create leadership pathways, particularly for underrepresented members.	
	E. Create metrics to measure success.	
	F. Engage in continuous feedback.	
Innovate in communications and program administration.	A. Invest in technology that facilitates efficiency and enhances the delivery of public and member services.	8. Measure and benchmark the efficacy of targeted communications and marketing efforts, including reducing the number of opt-outs and driving the number of opt-ins for discretionary publications such as the Daily News Briefing
Cultivate relationships that further the State Bar's mission.	A. Connect with the Sections to promote awareness engagement.	9. Measure participation at the Bar Leaders' Conference and at local outreach activities such as presidential or executive director appearances at local bar events.
	B. Build on collaborative opportunities with local, voluntary and specialty bar associations and community partners	
	C. Partner with the Bench to engage in collaborative problem-solving.	10. Measure the adoption of SBOT and section proposed affirmative legislation.
	D. Educate legislators and elected officials on pertinent issues.	

State Bar of Texas Performance Measures, 2021-2026

Build member and public awareness of resources and services.	A. Continue to implement targeted, multi-channel outreach.	11. Measure the efficacy of targeted communications through downloads, web analytics, and social media analytics – including trend lines and comparisons.
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Financial Management The State Bar of Texas conducts its fiscal affairs using the best practices of Texas state agencies and bar associations of similar size and scope.			
Strategic Goals	To address this goal the State Bar will		
Deploy best practices in financial management.	A.	Assess and plan for COVID 19-related impact to bar finances and adjust accordingly.	1. Measure the sufficiency of operating and capital reserves relative to contingencies using financial forecasting.
	B.	Safeguard and improve the efficiency and effective management of financial resources.	2. Maintain targeted reserves in keeping with best practices of integrated bars State agency guidelines.
	C.	Conserve and grow assets by efficiently and effectively delivering member and public services.	3. Measure program efficiency and ROI.
	D.	Continue to develop and maintain a long-term financial plan that assures adequate reserves for the general fund and the other capital funds.	4. Monitor and report on the results of annual financial audit for the current fiscal year.
	E.	Ensure financial and internal audits are unqualified.	5. Monitor and report on results of annual internal controls audit.
	F.	Review financial and reporting requirements to ensure compliance with the State Bar Act.	
Exercise competent and transparent financial administration and board oversight.	A.	Improve communication between the Bar staff and the sections on financial management and reporting.	
	B.	Increase member and public understanding of the Bar's finances.	