



**STATE BAR OF TEXAS  
PERFORMANCE MEASURES**

**Based on FY2020-FY2021 Strategic Plan**

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**INTRODUCTION**

As required by Texas Government Code, Chapter 81, the State Bar has adopted the following performance measures as part of its FY2020-FY2021 Strategic Plan. Performance measures data is collected through:

- random, statistical, and point of service surveys of State Bar members and the public to determine the use and effectiveness of, and satisfaction with, State Bar services;
- tracking activity on State Bar websites and social media;
- data collected by departments of the State Bar indicating use of its programs, publications, and services by members and the public; and
- internal oversight of performance.

The collection and publication of performance details listed below is intended to support the State Bar's commitment to transparency and openness regarding its operations.

**SERVICE TO THE PUBLIC**

**Strategic Plan Statement Of Purpose**

The State Bar of Texas serves the public by: 1) educating the public on the Rule of Law and the role of judges, lawyers, and the public in the legal system; 2) helping lawyers provide the highest quality legal and community service; and 3) working for equitable access and participation in all aspects of the justice system by diverse groups within our society.

**Performance Measures**

1. Measure the distribution by the State Bar of information regarding legal issues of interest to the public via
  - printed materials;
  - multimedia; and
  - online methods.
  
2. Measure traffic to State Bar websites and social media sites containing consumer legal information, including
  - the number of visits to web pages; and
  - downloads of articles and pamphlets.

3. Measure the training of public school teachers by the Law Related Education (LRE) department of the State Bar and related projects, including

- the number of courses provided to teachers;
- the number of teachers trained;
- the total number of students who receive civics education from LRE-trained teachers;
- the amount of traffic to the Law Focused Education, Inc. (LFEI) website and related sites and social media; and
- the degree of satisfaction with such services among the participants.

4. Measure the number of presentations by volunteer attorneys and judges in public schools that use teaching and presentation materials prepared by the Texas Young Lawyers Association.

5. Measure activities of Texas Lawyers for Texas Veterans by

- the number of veterans' clinics provided by TLTV partners; and
- the number of "clinic in a box" packages distributed to local clinics.

6. Measure the number of people who receive referrals through the Lawyer Information Referral Service.

7. Measure the utilization of resources provided by TYLA to serve the public through community service and education.

## **SERVICE TO MEMBERS**

### **Strategic Plan Statement of Purpose**

The State Bar of Texas seeks to provide its members superior services (including continuing legal education, online resources, publications, networking and leadership opportunities, and member benefits) to assist them in offering ethical, high-quality legal services; in establishing and maintaining efficient, effective, and productive law practices; in serving their communities; and in winding down their practices.

### **Performance Measures**

1. Measure trends in attendance at and participation in TexasBarCLE

- webcasts;
- online seminars and trainings;
- video seminars and trainings;
- live seminars and trainings; and
- free and low-cost offerings.

2. Measure the sales of books and course materials.

3. Measure the number of CLE scholarships given to members.
4. Measure trends in diversity and 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 as a whole.
5. 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.
6. Measure and track the dissemination of information and resources to older members of the State Bar, including information and resources regarding aging issues. Monitor and publish demographic statistics related to the aging lawyer population.
7. Measure the number of member benefits provided to Texas attorneys and attorneys' use of those benefits.
8. Measure traffic to the "Ten Minute Mentor" resource offered online.
9. Measure the number of attorneys, law firms, and legal departments participating in the Texas Minority Counsel Program and Texas Minority Attorney Program.
10. Measure attendee satisfaction with the Texas Minority Counsel Program and Texas Minority Attorney Program.
11. Monitor the use of [www.afterthebarexam.com](http://www.afterthebarexam.com) resources and the number of State Bar presentations made at law schools.
12. Monitor and assess the State Bar's disaster recovery resources for members and the public.
13. Monitor the use of the Texas Lawyers Assistance Program (TLAP) by measuring
  - the number of lawyer contacts and cases and concerned-others consultations;
  - the degree of satisfaction with such services among the participants; and
  - The numbers of
    - educational outreach presentations;
    - distributed publications;
    - views of TLAP videos; and
    - traffic to [www.tlaphelps.org](http://www.tlaphelps.org).
14. Measure participation in State Bar elections.
15. Measure the success of Texas Opportunity and Justice Incubator (TOJI):
  - 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.

16. Measure the number of custodian attorney designations received by the State Bar and the use of succession planning resources.

## **PROTECTION OF THE PUBLIC**

### **Strategic Plan Statement of Purpose**

The State Bar of Texas works to protect the public through its powers to regulate the conduct of lawyers and by promoting high ethical standards and professionalism, which are applied fairly and uniformly throughout the state.

### **Performance Measures**

1. Monitor the Client Attorney Assistance Program by measuring
  - 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.
2. As required by the State Bar Act, track statistics regarding grievance matters, including, but not limited to
  - the number and final disposition of complaints filed, dismissed, and investigated by the State Bar;
  - statistics regarding barratry; and
  - information regarding disciplinary trends.
3. Monitor the Client Security Fund program by measuring the number of
  - eligible applications considered;
  - the number of eligible applications approved; and
  - the total amount of grants made.
4. Measure efforts to publicize the Client Security Fund to eligible recipients and to discourage theft of clients' funds by their attorneys.
5. Measure the use of the State Bar Ethics Hotline.

6. Measure the number of continuing legal education ethics offerings and publications offered by

- TexasBarCLE; and
- TexasBarBooks.

## **ACCESS TO JUSTICE**

### **Strategic Plan Statement of Purpose**

The State Bar of Texas works to ensure access to justice for all.

### **Performance Measures**

1. Measure the number of legal aid referrals made by the State Bar to members of the public seeking low-income or free legal assistance and to inmates seeking legal advice, in the form of letters, email, and telephone inquiries.

2. Measure the numbers of legal aid and pro bono attorneys using support resources, including

- legal research tools;
- the Malpractice Insurance Network;
- the joint TexasBarCLE and Legal Access Division tuition waiver program;
- CLE presentation resources;
- the Student Loan Repayment Assistance Program;
- the Legal Services Intern Program;
- the Communication Access Fund;
- Legal Access Division annual training programs; and
- the distribution of the *Justice For All Calendar* in English, Spanish, and Vietnamese.

3. Monitor efforts by State Bar sections to help attorneys provide pro bono legal services by measuring the number of sections that have

- pro bono initiatives;
- access to justice-related grants;
- CLE scholarships;
- law student internships; and
- other related programs.

4. Measure the number of lawyers and law students participating in

- pro bono initiatives;
- grants;
- CLE scholarships;
- law student internships; and
- other related programs.

5. Assess statewide pro bono contributions by measuring
  - the number of pro bono hours voluntarily reported by Texas attorneys annually, through a statistically valid, bi-annual pro bono survey;
  - voluntary dues contributions for access to justice by total dollar amounts;
  - the number of attorneys contributing; and
  - the number of pro bono contributions by non-lawyer professionals.
6. Monitor the outreach and education of attorneys on access to justice issues by measuring the number of presentations made to attorney groups.
7. Measure the use of pro bono legal clinic resources, such as toolkits, provided by the Legal Access Division and the Texas Access to Justice Commission.
8. Monitor state and federal access to justice funding fluctuations to anticipate and be prepared to respond to potential decreases in federal and state funding of pro bono and legal aid programs.
9. Assess the State Bar's efforts to assist in mitigating the impact of any such funding decreases in state and federal access to justice funding.
10. Monitor publicity received for attorney volunteer efforts in Texas.
11. Measure the traffic to and usage of the Legal Access Division websites:
  - [probonotexas.org](http://probonotexas.org);
  - [texas.freelegalanswers.org](http://texas.freelegalanswers.org); and
  - [texaslawhelp.org](http://texaslawhelp.org).
12. Measure participation in the New Opportunities Volunteer Attorney (NOVA) Pro Bono Program.
13. Record the types of services and the numbers of hours of legal services provided to low-income and modest means persons by participants in the Texas Opportunity and Justice Incubator (TOJI).
14. Measure the utilization of online disaster preparation and recovery resources on [texasbar.com](http://texasbar.com) and [texasbarcle.com](http://texasbarcle.com)

## **SOUND ADMINISTRATION AND RESOURCES**

### **Strategic Plan Statement of Purpose**

The activities and services of the State Bar shall be administered at a high level of efficiency and professionalism, in conformance with best practices observed by Texas state agencies and by bar associations of similar size and scope.

### **Performance Measures**

1. Measure the number and effectiveness of training programs provided to State Bar staff over the course of the fiscal year.
2. Measure and track statistics regarding staff retention and attrition.
3. Measure the number of customer service complaints received by the State Bar and the satisfactory resolution of those complaints.
4. Monitor the implementation of a disaster preparedness plan to assure continuity of State Bar administration and services in the event of any disaster affecting the State Bar, and measure its effectiveness by conducting periodic testing of that plan and assessing the results of such tests.
5. Subject to legal restrictions, monitor and measure the ethnic and gender demographic make-up of the State Bar staff.

## **FINANCIAL MANAGEMENT**

### **Strategic Plan Statement of Purpose**

The State Bar shall conduct its fiscal affairs in conformance with the best management practices observed by Texas state agencies and by bar associations of similar size and scope.

### **Performance Measures**

1. Measure the amount and adequacy of State Bar funds dedicated to reserves.
2. Monitor and report on the results of the annual financial audit for the current fiscal year.
3. Monitor and report on the results of the annual internal control audit for the current fiscal year.
4. Measure the success of cost-saving measures implemented by the State Bar.



### **Expenditure Protest Policy**

The purpose of the State Bar of Texas is to engage in those activities enumerated at §81.012 of the State Bar Act. The expenditure of funds by the State Bar of Texas is limited both as set forth at §81.034 of the State Bar Act and in *Keller v. State Bar of California*, 496 U.S. 1 (1990). If any member feels that any actual or proposed expenditure is not within such purposes of, or limitations on, the State Bar, then such member may object thereto and seek a refund of a *pro rata* portion of his or her dues expended, plus interest, by filing a written objection with the Executive Director. The objection must be made in writing, addressed to the Executive Director of the State Bar, P.O. Box 12487, Austin, TX 78711, and postmarked no later than NINETY (90) days after the conclusion of the challenged activity.

Upon receipt of a member's objection, the Executive Director shall promptly review such objection together with the allocation of dues monies spent on the challenged activity and, in consultation with the President, shall have the discretion to resolve the objection, including refunding a *pro rata* portion of the member's dues, plus interest. Refund of a *pro rata* share of the member's dues shall be for the convenience of the Bar, and shall not be construed as an admission that the challenged activity was or would not have been within the purposes of or limitations on the State Bar.