

State Bar of Texas Performance Measures, 2023-2028

Strategic Plan as adopted January 27, 2023, Performance Measures as proposed for adoption June 21, 2023.

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>Build public understanding, trust, and confidence in the Rule of Law, the administration of justice, and the legal profession.</p>	<p>A. Use multiple platforms and channels to be a trusted source to 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>	<p>1. Measure the distribution of SBOT consumer legal information and resources and information across printed, multi-media, social media, and other digital platforms.</p> <p>2. Measure traffic and growth to SBOT consumer facing websites and social media sites, including site visits and downloads.</p> <p>3. Measure the training of public school teachers by the SBOT Law Related Education (LRE) Department:</p> <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. <p>4. Measure the number of presentations by volunteer attorneys and judges in public schools that use teaching presentations materials prepared by TYLA.</p> <p>5. Measure the number of presentations made for events such as Career Technology and Constitution Day.</p>
<p>Support community, public, and pro bono service among members.</p>	<p>A. Continue to connect lawyers, judges, and law students in community service opportunities and public education regarding the legal system.</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>	<p>6. Measure the participation and use of TYLA produced public service materials, including website downloads.</p> <p>7. Measure local bar and partner participation in Texas Lawyers for Texas Veterans, including box distribution and the number of clinics held.</p> <p>8. Measure calls and referrals made through the LRIS.</p> <p>9. Measure new release and media stories focused on member pro bono and public service.</p> <p>10. Measure disaster assistance hot line calls, Disaster Assistance manual updates and distribution, disaster web pages created, and disaster web page analytics.</p>
<p>Collaborate with local, specialty, and diversity bar associations.</p>	<p>A. Provide resources that support public and community outreach.</p> <p>B. Develop and promote legal careers across all levels of education, particularly among diverse students.</p> <p>C. Support local bars by communicating available resources from the State Bar.</p>	<p>11. Measure local bar participation in TYLA-sponsored public outreach initiatives.</p> <p>12. Measure participation in career & technology fairs and other such events.</p> <p>13. Measure website views and downloads of starter kit materials</p>

Service to the 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 members 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, and • free and low-cost offerings.
	B. Continue to educate members on law practice management tools, technology, and succession planning.	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.
	C. Continue to promote civility and members' fulfillment of their ethical obligations and adherence to the Texas Lawyer's 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.
Cultivate an inclusive culture that honors diversity and equity across the spectrum of members' experiences.	A. Continue to support initiatives regarding diversity, equity, and inclusion.	8. 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. 9. Measure analytics of trends for access to diversity information and resources on the website and other electronic venues.
	B. Promote diversity and inclusion in section and committee leadership.	10. Measure the number of attorneys, law firms, and legal departments participating in the Texas Minority Counsel Program and Texas Minority Attorney Program. 11. Measure attendee satisfaction with the Texas Minority Counsel Program and Texas Minority Attorney Program. 12. Measure diversity of leadership throughout the SBOT, including trends.
	C. Recognize and address the needs of rural practitioners.	13. Measure the number of attorneys in rural areas receiving free or reduced cost CLE 14. Measure the number of resources provided to practitioners in areas not supported by local bars

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<p>Help members to achieve professional satisfaction and success</p>	<p>A. Continue to support and promote TLAP and wellness initiatives.</p> <p>B. Provide a range of member benefits that help members to practice more efficiently, economically, ethically, and with civility.</p> <p>C. Assist members with balancing career and life decisions from law school through retirement.</p>	<p>15. 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 number of educational outreach presentations, • distributed publications, • view of TLAP videos, and • traffic to www.tlaphelps.org <p>16. 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>17. Measure member participation in vendor discount member benefits, including usage trends.</p> <p>18. Monitor the use www.afterthebarexam.com resources and the number of State Bar presentations made at law schools.</p> <p>19. Measure the number of custodian attorney designations received by the State Bar and the use of succession planning resources.</p> <p>20. Measure the number of career-life balance programs provided.</p>
<p>Make it easy for members to engage and participate.</p>	<p>A. Connect through personal outreach and targeted communications.</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>21. Measure trends in click-through rates, opt-outs, and analytics with targeted communications by channel, if applicable.</p> <p>22. Measure member satisfaction with customer service.</p> <p>23. Measure member satisfaction with the State Bar.</p> <p>24. Measure presentations, and other methods of collaborative targeted outreach.</p> <p>25. Measure participation in trends in State Bar elections.</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. Ongoing review and recommendation regarding 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 process so that they feel they are treated fairly.	7. Measure and monitor the Client-Attorney Assistant 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.	
	C. Create more educational opportunities for the public and lawyers to understand and navigate the grievance system.	11. Measure attendance and views of CLEs. 12. Measure distribution of pamphlet and other legal resources. 13. Measure number of non-attorney attendees at CLEs.

Access to Justice		
The State Bar of Texas ensures access to justice for all.		
Strategic Goals	To address this goal the State Bar will	Performance Measures
Promote pro bono service and awareness	<p>A. 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 report 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.

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	<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 number of applicants • 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>B. Encourage alternative dispute resolution and alternative delivery.</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 low-income Texans to ensure access to justice.</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>17. Monitor and identify changes to rules and regulations that increase access to justice.</p>

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Sound Administration and Resources The State Bar of 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.
	B. Continue to develop a staff training, development, and mentoring plan.	2. Measure satisfaction and efficacy of internal training programs and opportunities.
	C. Continue to consider and, where appropriate as determined by the executive director, support the inclusion of flexible work options.	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.
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.
	B. Commit to having difficult conversations.	7. Measure board engagement and satisfaction with an annual board evaluation. Benchmark year-over-year experience of board members against established best practices criteria.
	C. Ensure appropriate apportionment of State Bar districts for balanced representation.	8. Measure the number of contested races for district director.
	D. Create leadership pathways, particularly for underrepresented members.	
	E. Create metrics to measure success.	
	F. Engage in continuous feedback and Board education.	
Innovate in communications and program administration.	A. Invest in technology that facilitates efficiency and enhances the delivery of public and member services.	9. 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 and newly licensed lawyers to promote awareness and engagement.	10. Measure how many newly licensed lawyers join sections after licensure
	B. Build on collaborative opportunities with local, voluntary, and specialty bar associations, schools, universities, law schools, and community partners.	11. Measure participation at the Local Bar Leaders' Conference and at local outreach activities such as presidential or executive director appearances at local bar events.
	C. Partner with the Bench to engage in collaborative problem-solving.	
	D. Educate legislators and elected officials on pertinent issues.	12. Measure the adoption of SBOT and section proposed affirmative legislation.
Build member and public awareness of resources and services.	A. Continue to implement targeted, multi-channel outreach.	13. 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	Performance Measures
Deploy best practices in financial management.	A. Continue to protect against risks, events, or financial disruptions by maintaining adequate insurance and financial contingency planning.	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 and cyber 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 assess technology needs for serving members, the public, and staff and budget for such needs to be funded from the State Bar's general fund.	
	E. 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.
	F. Ensure financial and internal audits are unqualified.	5. Monitor and report on results of annual internal controls audit.
	G. 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 all stakeholders on financial management and reporting.	
	B. Increase member and public understanding of the Bar's finances.	