

**Adopted by Board of Directors April 2007**



# **STATE BAR OF TEXAS STRATEGIC PLAN**

## **INTRODUCTION**

### **Overview**

State Bar Act, Section 81.0215 requires the State Bar to develop a comprehensive, long-range strategic plan. In each even-numbered year, the Bar must draft a plan covering a five-year period beginning with the next odd fiscal year. The plan must include measurable goals and must set forth a system of “performance measures” tied to the goals, which are based on results and outcomes of operations and services. The performance measures must be reported to the Supreme Court each year and must be published in the *Texas Bar Journal*.

From the perspective of the State Bar Board of Directors, the overall goals of the plan and performance measures are: (1) to provide guidance to State Bar leadership and staff in daily decisions, and (2) to encourage integration into State Bar operations of simple methods of assessment, tracking, and reporting that facilitate the redrafting effort every two years and that minimize disruption and expense.

### **Nature of this Document**

The State Bar is committed to keeping this Strategic Plan at the forefront of all decisions and activities of the Board of Directors and of the Bar as a whole. As an evolving and dynamic set of goals and direction, the Strategic Plan will be reviewed by the Board regularly to ensure its relevancy and timeliness. Changes will be made as evolving circumstances dictate. At a minimum, this Plan will be reviewed and revised every other year as required by the State Bar Act.

All decisions and activities of the Board and the staff of the State Bar must comport with the specific goals of this Strategic Plan. The annual budget of the State Bar will be developed and adopted only after careful consideration of the Plan’s directives to ensure Bar-wide compliance with and furtherance of the State Bar’s goals and objectives.

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## Implementation

The State Bar will utilize all of its resources to implement the following goals. An operational plan and performance measures based upon these goals will be developed and reported. In developing the implementation plan, the State Bar will work through:

- The members of its governing body, including its officers and directors.
- The Texas Young Lawyers Association, including its officers and directors.
- Its extensive network of volunteers, including its 44 sections, 3 divisions and 38 volunteer committees.
- Programs, activities and initiatives implemented and executed by its staff and volunteers.
- Its relationships and working partnerships with related entities, including local, minority and specialty bar associations.
- Polls and surveys of its members and the public to determine what services are needed and desired and how best to deliver them.
- Presentations, speeches and public forums.
- Continuing Legal Education seminars.
- Other conferences, including its Annual Meeting.
- Press releases and articles disseminated to and through news media.
- Emails, listserves and facsimiles to its members.
- Websites, including its own ([www.texasbar.com](http://www.texasbar.com), [www.texasbarcle.com](http://www.texasbarcle.com), [www.tyla.org](http://www.tyla.org)), and the websites of related entities such as the Texas Access to Justice Commission ([www.texasatj.org](http://www.texasatj.org)), the Texas Access to Justice Foundation ([www.teajf.org](http://www.teajf.org)), Law Focused Education, Inc. ([www.texaslre.org](http://www.texaslre.org)) and the Texas Center for Legal Ethics and Professionalism ([www.txethics.org](http://www.txethics.org)).

## Measurement of Performance

Consistent with legislative directives, the State Bar has adopted detailed performance measures based on its last strategic plan. For this strategic plan, and strategic plans to follow, the staff will develop appropriate performance measures. These performance measures will be reviewed and adopted by the Board and incorporated into the strategic plans. As required by the State Bar Act, the State Bar will report its performance measures and their outcomes to the Supreme Court and to the *Texas Bar Journal* for publication. Data will be collected and outcome reports promulgated through the following means:

- Random, statistical surveys of State Bar members and the public to determine the utilization and effectiveness of, and the satisfaction with the services the State Bar provides.
- Tracking of “hits” on the various websites used to convey information and educate the public.
- Data collected by departments of the State Bar indicating utilization of its programs, publications, public service videos and services by its members and the public.
- Internal oversight of measures of performance.

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## **Compliance with the State Bar Act**

The State Bar of Texas is governed by the State Bar Act (Texas Government Code, Chapter 81). Contained within that statute are the purposes of the State Bar and a number of specific requirements with which the State Bar must comply. The State Bar considers these requirements of the utmost importance in its operation and has implemented policies and procedures to ensure compliance. Because these requirements and the conforming operations of the State Bar are established and on-going, they are not expressly specified in the following strategic goals.

## **STATE BAR MISSION**

The mission of the State Bar of Texas is to support the administration of the legal system, assure all citizens equal access to justice, foster high standards of ethical conduct for lawyers, enable its members to better serve their clients and the public, educate the public about the rule of law and promote diversity in the administration of justice and the practice of law.

## **STATE BAR STRATEGIC GOALS**

### **SERVICE TO THE PUBLIC**

#### **Statement Of Purpose**

The State Bar of Texas serves the public by: 1) educating the public on the American system of justice and the role of judges and lawyers in the 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.

#### **Goals**

A. Through education, the dissemination of information and outreach to students at all levels of education, increase the public's knowledge and understanding of:

1. the rule of law;
2. the judicial system;
3. selection and compensation of members of the judiciary;
4. lawyers' professional ethics;
5. lawyers' standards of practice;
6. attorney discipline procedures;
7. availability of the client security fund; and
8. fee dispute resolution.

B Promote an increase in diversity in middle school, high school and college programs that encourage a more diverse population to select law as a profession.

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C. Assist in efforts to better focus and increase resources by systematically identifying, prioritizing and timely addressing (1) community needs for service, and (2) under-served populations and low-income Texans for public programs and assistance with legal services.

D. Provide and expand opportunities for lawyers and judges to be involved in community service and education and enhance the public's and media's understanding and acknowledgment of pro bono and volunteer work provided by lawyers, and lawyers' contributions both to the legal community and the public at large.

E. Enhance support of educational and informational efforts to address specific areas of law or segments of public needs such as juvenile crime, living trust scams, and child support enforcement.

### **SERVICE TO MEMBERS**

#### **Statement Of Purpose**

The State Bar of Texas serves its members by providing continuing legal education and other services that: 1) promote ethical, efficient and quality legal services; 2) promote the administration of justice; 3) enhance the public's perception of Texas lawyers; and 4) increase diversity in the legal profession.

#### **Goals**

A. Study the future of the legal profession in Texas and identify and pursue methods for creating new initiatives and improving current programs and activities to better serve the lawyers of Texas.

B. Increase availability and utilization of State Bar member services and benefits and involvement in Bar activities by its members, with particular focus on underserved groups and members of the Bar by disseminating information concerning these services through the Texas Bar Journal, the State Bar websites, State Bar section newsletters and CLE seminars.

C. Increase the types of membership benefits, including health and life insurance, merchant discounts and other benefits as appropriate, and continually examine the need for changes in membership benefits

D. Work to increase diversity among the membership of the State Bar, including its Sections, Committees, Divisions and other entities.

E. Identify and implement new and creative continuing legal education topics for State Bar members and explore new, additional methods and media to deliver continuing legal education effectively to all State Bar members.

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F. Increase collaboration with and services to State Bar sections, local bar associations, minority bar associations and specialty bar associations in Texas to improve and enhance outreach and services to, and continuing legal education for State Bar members.

G. Increase the amount and quality of information given to local, minority and specialty bar associations in Texas regarding the services the State Bar currently has available for their use.

H. Obtain input from local, minority and specialty bar associations in Texas regarding the direct services they need or desire from the State Bar, and work toward delivering these, and other beneficial services to these associations.

I. Increase collaboration with and services to Texas law schools to improve and enhance State Bar outreach and services to their students, with particular focus on minority students.

J. Increase the dissemination of information to State Bar members about the State Bar's activities and initiatives to improve the public's perception of and confidence in the Texas justice system, lawyers and judiciary.

### **PROTECTION OF THE PUBLIC**

#### **Statement of Purpose**

The State Bar works to protect the public through its powers to regulate the conduct of lawyers and by promoting ethics and professionalism.

#### **Goals**

A. Review and, if necessary, improve voluntary mediation and dispute resolution procedures to attempt to resolve allegations of attorney misconduct that are classified as inquiries or are classified as complaints that are subsequently dismissed.

B. Educate the public and Texas lawyers about the State Bar grievance system and the Client Security Fund by disseminating information and explore ways to increase available funds for disbursement.

C. Review and, if necessary, improve the State Bar's model fee dispute resolution procedure used by local bar committees and associations or other organizations as a model for a fee dispute resolution program.

D. Increase lawyers' understanding of, knowledge of and compliance with professional ethical standards and disciplinary rules for Texas attorneys through education and the dissemination of information.

E. Review and recommend improvements, as necessary, to ensure a fair and effective disciplinary system including a diversionary program for impaired attorneys.

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F. Review and enhance the efficiency and effectiveness of State Bar programs and services to protect the public.

### **ACCESS TO JUSTICE**

#### **Statement of Purpose**

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

#### **Goals**

A. Increase coordination with key partners, including the Texas Access to Justice Commission, the Texas Access to Justice Foundation and legal services providers, to improve and enhance access to justice in Texas.

B. Increase the understanding and knowledge of Texas lawyers and the public about access to justice issues.

C. Identify and pursue additional methods to increase sustainable long-term financial support from public and private sources to be utilized for access to justice goals.

D. Expand recognition for pro bono work and improve the number and quality of lawyer training opportunities to better enable them to provide pro bono services.

E. Identify and pursue methods to help increase opportunities for government and transactional lawyers to participate in pro bono activities.

F. Improve measurement and publication of lawyer volunteer efforts in serving the poor.

G. Identify areas of unmet legal needs and focus additional resources in those areas.

H. Identify and pursue methods to assist Texas law schools in the creation and expansion of clinics and other efforts to increase legal services to the poor.

I. Identify and pursue methods to assist State Bar sections, local bar associations and specialty bar associations in the creation and expansion of pro bono programs and in encouraging their members to provide pro bono services.

J. Work in collaboration with key partners to increase the availability and utilization of effective high quality pro se information, education and support materials.

K. Identify and pursue appropriate incentives to attorneys to provide pro bono or reduced fee legal services.

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## **SOUND ADMINISTRATION & RESOURCES**

### **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.

### **Goals**

- A. Improve the training of new Board members and State Bar staff.
- B. Identify and pursue methods of enhancing opportunities for the public to provide comments and suggestions to the State Bar and the Board.
- C. Review, and if advisable, develop a plan and system for deciding if and when to reapportion State Bar districts to better reflect and represent the geographical distribution of State Bar members.
- D. Review and enhance the receipt of and response to issues and complaints regarding State Bar customer services.
- E. Identify and pursue appropriate technological solutions to improve the State Bar's ability to perform its functions.
- F. Implement and monitor the State Bar's five-year Real Estate Strategic Plan, and financially manage its implementation in such a way as to avoid undertaking any indebtedness or imposing any special dues assessment on State Bar members in order to realize its success.
- G. In conjunction with the implementation of the State Bar's five-year Real Estate Strategic Plan, work to renovate the Texas Law Center in order to better accommodate the State Bar's Austin operations.
- H. Work to increase the diversity within all levels of the staff of the State Bar.

## **FINANCIAL MANAGEMENT**

### **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.

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### **Goals**

A. Identify and pursue methods to improve the efficiency and effectiveness of managing the State Bar's financial resources.

B. Identify and pursue methods to conserve State Bar assets and forestall increases in member dues for as long as possible while providing appropriate services to the public and State Bar members and supporting the infrastructure necessary to efficiently provide those services..

C. Develop a long-term financial plan that sets goals for how long the State Bar should wait before seeking a membership dues increase.

D. As a top priority, and through competent financial staff and thorough Board oversight, ensure the best possible financial audits every year.

E. Through the Board Audit & Finance Committee, annually review the State Bar's financial and reporting requirements to ensure effective and efficient compliance with the State Bar Act.