



# STATE BAR OF TEXAS STRATEGIC PLAN FY2014 & FY2015

## 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-numbered year. As further required by the Act, the State Bar will adopt performance measures based on the purposes and goals expressed in this strategic plan, and will implement procedures by which the performance outcomes can be measured and reported.

### Purpose

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.

### 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 37 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, listservs 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)).

### **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 about the Rule of Law and the role of judges, lawyers, and the public in the justice 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, increase the public's knowledge and understanding of:

- the rule of law;
- the judicial system;
- selection and compensation of members of the judiciary;
- lawyers' professional ethics;
- lawyers' standards of practice;
- attorney discipline procedures;
- the importance of jury service and the jury process;
- availability of the client security fund; and
- fee dispute resolution.

B. Promote the development of and participation in programs at all levels of education that encourage a more diverse population to select law as a profession.

C. Assist in efforts to better focus and increase resources by systematically identifying, prioritizing and timely addressing community needs for service, as well as developing appropriate services and programs to address the needs of under-served populations and low-income Texans.

D. Provide and expand opportunities for lawyers and judges to be involved in community service and education.

E. Enhance the public's and media's awareness of pro bono and volunteer work provided by lawyers, and lawyers' contributions both to the legal community and the public at large.

F. Identify those areas of law and of the legal system that impact large segments of the general population and provide the public with useful information and education concerning those areas.

G. Continue to identify and use new methods and technologies by which pro bono services training can be made accessible to more Texas lawyers.

H. Increase access to consumer legal information for the public, using new technology and media where possible to insure consumers are informed when making decisions regarding legal services.

I. Explore new ways to promote the Lawyer Referral and Information Service.

## **SERVICE TO MEMBERS**

### **Statement Of Purpose**

The State Bar of Texas seeks to provide all of 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 and in building and maintaining efficient, effective and productive law practices.

### **Goals**

A. Continue to monitor and study the future of the legal profession in Texas and implement appropriate services to help Texas lawyers adapt to and succeed in the ever-changing environment in which they practice law.

B. As the legal profession changes, work to adapt the role, function, and services of the State Bar. Increase and continue collaboration with law schools in the development of new services.

C. Facilitate increased use of State Bar services by Texas lawyers. Develop strategies to increase participation among all attorneys in State Bar elections. Increase awareness of the availability of various CLE options available from the State Bar, including low cost and free opportunities.

D. Develop and implement strategies to increase bar association involvement among all attorneys, focusing both on service to the bar and networking and career opportunities.

E. Continue to monitor and enhance the quality of current membership benefits as well as utilization of those benefits by Texas attorneys, and continue to examine the need for changes to the package of membership benefits offered by the State Bar.

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

G. Continue to monitor the evolving continuing legal education needs of Texas lawyers and develop new educational programs and resources to address those needs.

H. Continue to explore new and innovative methods and media by which to deliver continuing legal education to all State Bar members.

I. Increase services to and collaboration with State Bar sections, local bar associations, minority bar associations and specialty bar associations in Texas in an effort to improve and enhance the provision of services to all Texas lawyers.

J. Continue to monitor and increase services to and collaboration with Texas law schools in an effort to improve and enhance State Bar outreach to all students. Encourage and support the development of mentoring programs for young lawyers and law students by licensed attorneys. Continue to offer State Bar of Texas presentations at law schools. Encourage and support State Bar participation in law school programs that encourage diversity in the legal profession.

K. Inform Texas lawyers 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.

L. On the opening page of the For Lawyers section of [TexasBar.com](http://TexasBar.com), develop and implement a centralized FAQ for lawyers.

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

B. Educate the public and attorneys about pre-grievance dispute resolution through the Client-Attorney Assistance Program.

C. Educate the public and Texas lawyers about the State Bar grievance system and the Client Security Fund and continue to ensure there are sufficient funds for disbursement.

D. Review and recommend such improvements as may be necessary to ensure a fair and effective disciplinary system and dispute resolution procedure, and continue monitoring the diversionary program for impaired attorneys.

E. 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.

## ACCESS TO JUSTICE

### Statement of Purpose

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

### Goals

#### **A. Augment pro bono services –**

- Increase incentives for pro bono attorneys (e.g. CLE credit for pro bono participation; include attorneys who perform pro bono on referral lists for paying clients).
- Provide incentives for law firms and corporations to support pro bono participation.
- Continue to involve the Supreme Court of Texas in efforts to increase pro bono participation. Increase communication and outreach to attorneys and local bar and specialty bar associations regarding pro bono opportunities and available support services such as malpractice insurance for pro bono cases). Promote pro bono opportunities to State Bar sections, local bar associations, law firms, and corporations.
- Enhance the Emeritus Attorney Program.
- Identify and pursue methods to increase pro bono opportunities for government and transactional lawyers.
- Explore innovative methods to increase the availability of pro bono legal services in remote areas of the state.
- 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.
- 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. Build and support partnerships to increase legal services delivery –**

- Educate and engage non-legal professionals who can provide relevant resources, such as mediators and accountants.
- Help Texas law schools create and expand clinics, mentorship programs, and other efforts to increase legal services to the poor.
- Develop collaborative models for service delivery with other agencies providing services for similar populations.
- Provide local and specialty bar associations and State Bar sections with jump-start programs, basic toolkits, and mentoring opportunities.
- Help connect legal aid lawyers with lawyers in the public and private sectors. (e.g. the Dallas Volunteer Attorney Program).
- Enhance efforts to assist traditionally underserved or specialty populations (LGBT community, veterans, persons with disabilities).
- Increase available resources for limited English-proficiency, hearing-impaired, and visually-impaired populations.

- Continue to help local bar associations with response teams after natural disasters and other crises.
- Continue to support partners who provide high quality pro se information, education, and support materials for indigent persons.

**C. Increase the visibility of pro bono efforts and access to justice issues –**

- Improve measurement of and publicity for lawyer volunteer efforts
- Explore and implement new methods to increase awareness and understanding among Texas lawyers and the public about access to justice issues. (e.g. promote pro bono needs and opportunities at section and CLE events, share stories of people being helped).

## **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. Assess, enhance, and develop and review a biannual plan for the training and mentoring of new Board members and State Bar staff.
- B. 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.
- C. Review and improve processes for handling customer service requests, including tracking, analysis, and reporting.
- D. Identify and pursue appropriate technological solutions and protections to improve the State Bar's ability to perform its functions.
- E. Provide for the continued maintenance and ongoing assessment of improvements to the Texas Law Center and other facilities occupied by the State Bar in conjunction with the implementation of the State Bar's five-year Real Estate Strategic Plan.
- F. Continue the emphasis on diversity, quality, and efficiency 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 or to establish the best management practices observed by Texas state agencies and by bar associations of similar size and scope.

### **Goals**

- A. Identify and pursue methods to safeguard and improve the efficiency and effectiveness of managing the State Bar's financial resources.
- B. Conserve State Bar assets and forestall increases in member dues and fees, maximize services to the public and State Bar members, and support the infrastructure necessary to efficiently provide those services.
- C. Continue to develop and maintain a long-term financial plan for the State Bar of Texas to assure adequate reserves for both the general fund and other special capital funds.
- D. Ensure the best possible financial and internal audits, through competent financial staff and through Board oversight.
- E. Annually review the State Bar's financial and reporting requirements to ensure effective and efficient compliance with the State Bar Act.
- F. Improve communication between the State Bar staff and sections in all areas, including but not limited to financial management and reporting.