

## **Executive Summary**

The 2009 – 2012 Strategic Plan sets out the broad aims and objectives of the Devon & Somerset Law Society (DASLS) as it enters its 201<sup>st</sup> year. It is written against a background of change in the legal profession and economic uncertainty.

DASLS is widely regarded as one of the leading local law societies in England & Wales. As a result of the last plan the Devon and Somerset Societies have merged to become DASLS with increased benefits and services for members. This provides a firm base for proposed further geographical expansion.

The plan recognises that the larger Society needs to do more to engage with its members and introduces an annual membership survey. It also examines membership options for all professionals who work in the legal profession, whether or not they are admitted solicitors.

Premises are reviewed. There is no pressing need to purchase freehold offices but suitable buildings will be considered on merit.

Much has changed since the Governance and Constitution of the Society was last considered in any detail. Changes will be required to accommodate the ambitions of this plan and a full review is provided.

Part 2 reviews the Society's activities including the Training Function and Recruitment Agency. It acknowledges the need to work with The Law Society and other bodies when dealing with national issues. There is a review of mediation and emphasis on the need to communicate better with members with incremental improvements to the Newsletter and Website.

All other existing services and Sub-Committees are supported and new benefits are to be sought particularly considering group purchase arrangements and lifestyle provisions.

The Society's duty to the community is accepted and the plan seeks to provide practical support when appropriate.

## **Introduction**

This plan has been developed as the Society celebrates its bicentenary and sets out the principal aims and objectives for the three years commencing 2009. It follows consultation with a specially convened group of Committee Members with support from the permanent staff and The Law Society. See Schedule 1.

It was subsequently drafted and considered. The final version was approved by the Committee on 23 September 2008.

The plan does not seek to micro manage existing services which themselves are constantly reviewed and developed. It retains the Society's commitment to supporting solicitors in practice and deals with macro issues such as the scope of membership, core activities and further expansion.

The previous plan referred to a time of unprecedented change in the legal profession. This period continues following the Legal Services Act 2007 and increased regulation and monitoring by the Solicitors' Regulation Authority following the separation of The Law Society's functions.

Additionally, at the time of drafting, the UK economy is suffering a downturn. This is impacting on solicitors especially those who are reliant on property transactions. The Society will need to remain flexible to respond to the needs of its members in these changing times.

## **Current Position**

Devon & Somerset Law Society is one of the leading local law societies in England & Wales. It has active Committees, a strong infrastructure with good administrative support, well supported income generating services and healthy reserves.

In the years 2005 – 2008 Devon & Exeter Law Society became Devon & Somerset Law Society following the successful merger with the Somerset Society. At the same time the geographical restriction for membership in the constitution was lifted<sup>1</sup>. Its turnover increased from £328k to an anticipated £500k in 2008. In this period membership rose from 860 to 1100.

Members now benefit from improved local training opportunities; over seventy courses were held in 2008. The recruitment agency has continued to offer a quality service placing more than sixty candidates a year with member organisations.

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<sup>1</sup> To allow membership for solicitors in Somerset, the Devon & Exeter Law Society passed a resolution on 17th September 2007 removing the requirement that members should live or work in the County of Devon.

The newly formed Social Sub-Committee has been active organising new opportunities for members to network with colleagues and has encouraged more young solicitors to take part in the Society's activities.

The International Relations Sub-Committee provides increased links and networking opportunities across Europe and beyond and has been actively supporting lawyers in Zimbabwe.

The Society supports those involved in the management of law firms sponsoring forums for debate and provision of valuable comparison surveys. It responds to the various consultations from The Law Society, SRA and other bodies through its committees who endeavour to keep members up to date with developments in their specialist areas of practice.

It has increased its staff to four based at Renslade House, Exeter.

## **PART 1 – MEMBERSHIP & MANAGEMENT**

### **Membership**

The strength of the Society comes from its members. The Committee would like to have greater engagement with the membership as a whole. It appreciates that it is not possible, or practical, for all members to actively take part in meetings but it will take an annual survey of members to get additional feedback and comments on the Society's activities and direction.

Membership is currently restricted to admitted Solicitors. There is a category of Associate Membership offered free of charge to Trainee Solicitors. An associate member does not have voting rights.

Legal Executives, Barristers, Paralegals, Practice Managers / Directors, CEOs, Accountants, IT, HR & Marketing Professionals and Secretaries employed in a legal environment have a stake in the future of the legal profession. They need support, training and other services. They also make a valuable contribution; there is representation from the Bar on the Education & Training Sub-Committee and non-solicitor Practice Directors sit on the Practice Management Sub-Committee.

The Committee believes that the Society should engage fully with this extended group. Special practice area groups such as The Society for Trust and Estate Practitioners and The Law Society's Management Section already allow membership to non-solicitors. The Committee will extend a form of membership beyond the existing solicitor base. This will require amendment of the Society's constitution.

By doing so the Society and its members will be able to draw upon additional and diverse talents.

### **Geographic Scope**

The 2005 – 2008 strategic plan put forward the case for expansion:

*"There are powerful arguments to the effect that merging with one or more of those neighbouring societies would confer benefits upon not only the existing members of the Society, but also those from such neighbours. There are certain unit costs associated with the running of any organisation (premises, staff, etc). ... Those benefits could be conferred upon all members of any enlarged Society and, insofar as economies of scale could be gained from combining efforts, the cost per member of the provision of services, for which those unit costs are essential, should diminish.*

*"Also, the range of services on offer could be expected to expand, and a number of those services will be ones which are currently only purchasable from commercial suppliers at significantly greater cost. For example, an increased potential audience would make it feasible to offer more specialist training and conference opportunities, where currently the numbers likely to respond would not yield sufficient income to attract top-drawer presenters. Likewise, the numbers of candidates capable of being attracted to the recruitment service would be likely to grow, as the employment opportunities would expand.*

*"Further, it is suggested that a Society with an increased membership would command more attention in representative functions. Both in relation to a new-style Law Society, and with regard to direct representation of the profession to the public in the South-West, the more people whom the Society can speak for, the more powerful its voice. Such an ability to represent the profession authoritatively will be all the more important in an era when firms will be competing with businesses with sophisticated PR machinery at their call.*

*"The Committee accepts that against this, however, are ranged a number of factors. Firstly, it is suggested that the Society would to an extent lose its identity and its cohesion, if its boundaries are significantly widened. (That might not be the case with a lesser accretion to the Society's area, e.g. if there were to be a merger with Plymouth.) Secondly, it is believed that it is possible for some expansion in the areas of training etc to be achieved through greater use of the concept of joint ventures which has already been piloted. Lastly, the effect of the poor transport infrastructure within the region has to be considered: busy practitioners are always reluctant to travel for any length of time.*

*“One factor which the Committee do not however consider to be significant is the idea that there might be local issues which could only be addressed by a smaller body. It is thought that, although there may be issues which affect certain sizes of firm more than others; or certain types of work more than others; there are few which would affect, say, practitioners from mid-Devon differently from those in mid-Somerset.*

*“The Committee’s conclusion is that there are likely to be significant advantages to members, both existing and new, from some measure of geographic expansion. These benefits will be reflected both in all members getting more for their subscriptions, and in the Society’s ability to speak on their behalf. To this end the Society should actively seek out ways of operating more closely with its neighbours.”*

The Committee believes that the successful merger with Somerset has conferred these benefits upon both Devon and Somerset members and intends to approach other neighbouring Societies with a view to further mergers; specifically with all or some of Plymouth, Dorset and Cornwall to create a strong Regional Society.

### **Premises**

The Administration occupy leased premises in Exeter of around 800 sq. ft. consisting of an open plan office and a small meeting room. The offices are held on a ten year lease expiring in mid 2012. A break clause is exercisable towards the end of 2008.

Whilst there are no ancillary facilities for members’ use the offices are sufficient for existing staff.

After investigation it is not thought that the provision of additional space to accommodate a training suite would be viable. The Society runs events in different locations within its area and would not get full use of an extra facility. It does not wish to establish itself as a conference centre as this would detract from its core objectives.

It has long been an objective for the Society to acquire its own freehold premises and to which end reserves have been accumulated. This is not considered an immediately pressing requirement. Should a suitable building be identified the Committee will consider the proposal on its merits. In the meantime the accumulated reserves will continue to be carefully invested and give the Society the flexibility to pursue suitable projects.

### **Governance**

The Society’s constitution was drafted in 1926. Since that time the Society has grown a successful Commercial arm and developed its activities and Committee structure. Moreover there have been a number of resolutions and this plan proposes further changes to the Society’s Constitution.

The Committee will, in consultation with the membership, undertake a full review of the existing constitution and structure of governance. It will submit its conclusions to the membership for approval at an AGM / EGM.

## **PART 2 - ACTIVITIES**

The Society engages in a broad range of activities offering benefits and services to its members:

- Lobbying & Representation
- Education & Training Programme
- Recruitment Agency
- Provision of Mediation Services
- Social Activities including Annual Dinner
- Newsletter every two months
- Website
- Complaints Conciliation
- International Networking
- Practice Management
- Sub-Committees
- Corporate Social Responsibility
- Other Member Benefits

### **Lobbying & Representation**

This is a core activity. The Society actively engages with The Law Society, SRA and when possible government responding to consultations on matters that affect the legal profession.

It has a network of Parliamentary Liaison Officers who brief local MPs on matters of interest to the Society.

The Committee recognises that its influence on national government is limited and will seek to co-ordinate its efforts with those of other local law societies and The Law Society when appropriate.

### **Education & Training**

The Education & Training Sub-Committee and Practice Management Sub-Committee plan a comprehensive programme of courses throughout the year in various locations across Devon & Somerset producing an income of £164k. with a gross profit of £98k in 2007. It has also helped larger member firms by providing in-house training events.

The Society also offers a Professional Skills Course for Trainee Solicitors twice a year at a local venue. It is actively monitoring proposals by the SRA to reform the way that Solicitors are educated in the future and will keep members advised of developments and where possible provide advice and support.

This is a key service for members and provides one of the principal income streams to support the Society's other activities. It is offered at very competitive rates to members and has been able to attract more calibre speakers to the area. It is thought that more members will want to use this service as the costs of travel and value of time increases in the current climate. The programme will be improved and expanded on a demand led basis.

### **Recruitment Agency**

The recruitment agency is a significant provider of legal staff in the region placing more than sixty candidates in each year. Fees in 2007 totalled £147k.

It is offered to members at the highly competitive rate of 12% + VAT of an employee's first pa salary. Non members pay 18% which is less than the average Commercial agency figure of between 20 and 25%.

A successful partnership with Plymouth Law Society has enabled the Society to work with firms in that City. This has established some good contacts in Plymouth and a growth of support for other services from Plymouth solicitors.

It is accepted that the recruitment market can be volatile and current market conditions dictate a fall in revenue for the time being. The Committee believes that this provides an opportunity for the Recruitment Agency. The agency will be able to continue to provide a high quality service through the economic downturn reinforcing its position as a leading recruiter for the area.

### **Mediation Services**

The Society is a member of the Civil Mediation Council and is accredited by them to train mediators. It has trained some of its members in Time Limited Mediation and currently has 13 DASLS qualified mediators. Its principal source of work for mediators was the Court based Small Claims Mediation service which also served as a training ground.

In 2008 the Court Service employed its own in-house mediator bringing to an end the Court based mediations. The Society now attracts mediation work from the National Mediation Helpline (2 mediations in 2008 at the time of writing) and others referred to the Society by its members (10 in the last twelve months).

The Society is an acknowledged pioneer in Time Limited Mediation and is called upon to advise lawyers in other jurisdictions.

The lack of mediation work is a concern and in the absence of the Small Claims scheme the Society is unable to provide sufficient opportunities to train new mediators.

A review of the Society's role in the provision and training of mediators will be undertaken.

### **Social Activities**

A central theme of the Society's activity is to provide opportunities for members to network with one another. Legal practice has changed to the extent that there are few opportunities to meet colleagues from other firms and disciplines. The Society is committed to providing a range of events that enable members of all ages to meet with one another on an informal basis.

The Annual Dinner is the cornerstone of this aspiration and has enjoyed a resurgence in recent years with the introduction of quality professional entertainment and speakers. The Committee will continue to support this initiative and encourage greater support for this event.

The Social Sub-Committee will arrange other ad-hoc events including sporting and other competitive opportunities as a part of the DASLS Challenge Cup. The Cup will be awarded to the winning firm at the Annual Dinner.

## **Newsletter**

The Newsletter is published six times a year and is one of the principal ways by which the Society communicates with members. It is sent in hard copy form to all members and can be e.mailed on request. It is also published on the Society's website.

Its style remains less formal than mainstream publications. A heavy advertising presence and self promoting editorials have been resisted in favour of an easy to read and relevant magazine. It is thought that members prefer this style and are generally more likely to read it if received in hard copy.

The appearance and content have improved in recent years but there remains a need to get better contributions and content especially from members.

The editorial team will continue to develop the appearance of the Newsletter. Members will be asked to comment on the style and distribution of the Newsletter as part of the Annual Survey.

## **Website & Online Communication**

[www.dasls.com](http://www.dasls.com) provides:

- Comprehensive current vacancy listings
- Full Training programme and downloadable course information and booking forms
- Search facility for DASLS member firms by area with e.mail and website links
- Search for a solicitor link to The Law Society's website
- Ad hoc downloads for DASLS events and consultations
- Downloadable member application forms
- Help and information about making a complaint about a solicitor
- Useful links
- Back catalogue of Newsletters from March 2003
- Database of members able to offer International Services

All items can be quickly accessed from the home page. It has been redeveloped on three occasions to accommodate the growing needs of the Society and to keep the number of clicks needed to access items to a minimum. It is anticipated that a further development will be needed during the life of this strategic plan.

The Society has also established an online community using [www.facebook.com](http://www.facebook.com). A link will be provided from the [www.dasls.com](http://www.dasls.com) home page and discussion groups amongst DASLS members will be encouraged to use this facility.

## **Complaints Conciliation**

The Complaints Conciliation Scheme is one of the free services offered to members. It has been a welcome initiative to many members who have included reference to the scheme in their client care materials. This is particularly valuable to Sole Practitioners who need to have some independent route of referral of complaints.

Since the last plan was written the publicity literature has been re written and redesigned with the assistance of a Law Society grant. Further promotions to CABx and other complaints referral sources have been made.

The numbers of complaints remain relatively low and the service is not burdensome on the Society's administration or the Past Presidents who have volunteered to be complaints officers. Use of the scheme needs continued monitoring; any significant increase would require further consideration of the impact on resources.

## **International Networking**

The International Relations Sub-Committee is a particularly active Committee. DASLS is a member of the Federation of European Bars (FBE) and has twinning arrangements with a number of European Bars. Additionally there has been support for Zimbabwean lawyers and officers have supported other Law Society international issues. This activity has considerably raised the profile of the Society and provided members with an international referral network. The Committee will continue to forge appropriate international friendships that can be of benefit to members.

## **Practice Management**

The Society may be unique having a Practice Management Sub-Committee. It seeks to assist and encourage practices to use good management and systems to improve efficiency and service. It arranges training events, the supply of benchmarking information and opportunities for debate and networking. These services have been a key driver for membership by the Somerset firms and the Sub-Committee's work will be encouraged and expanded where appropriate.

## **Sub-Committees**

There are eight Sub-Committees that support the Committee:

- Contentious Business
- Education & Training
- International Relations
- Mediation
- Non-Contentious Business
- Practice Management
- Social
- Vice President's

It cannot be overstated how important the work of these Committees is to the active life of the Society. They respond to consultation papers, pursue new initiatives and support the membership through their work. Particular examples are referred to elsewhere in this plan.

There are many members who give their time freely without reward to support the profession in this way. The Committee will continue to encourage all members to participate where they can.

## **Corporate Social Responsibility**

The Committee recognises that the Profession owes its existence to the communities that support it. It acknowledges that many of its members give of their time and expertise without personal gain. It will seek to support practical initiatives that enhance the environment and communities in which it operates.

## **Other Member Benefits**

The enlarged Society gives the Committee the opportunity to seek new purchasing and lifestyle services for its members. It may be able to secure group indemnity insurance policies or discounts on luxury goods and services.

The Committee will seek to grow the benefits available to members both in practice and as individuals.

## Schedule 1

Alec McNeill	President
James Cross	Vice President
Rebecca Parkman	Junior Vice President
Rod Mole	Law Society Council Member
Tony Spiers	Honorary Secretary
Richard Adams	Honorary Treasurer
Chris Hart	Former President
Monique Bertoni	DASLS Administrator
Charlotte Lythgoe	DASLS Executive Assistant
Tony Steiner	DASLS Membership Services Manager
Anne Godfrey	Director of Law Society Services