



## **Devon & Somerset Law Society** **Statement of Strategic Vision, Values and Business Plan – 2015-2018**

**In this statement we propose to deal with the following:-**

1. Describe how this plan was created. *(p.1)*
2. State our vision and Values; Supporting Solicitors in Practice. *(p.1)*
3. Look back at our 2012-2015 Strategic Plan. *(p.4)*
4. Describe where we are now; the Current Position at the end of 2014. *(p.5)*
5. Demonstrate what we will offer; Expected Services & Activity 2015-2018. *(p.6)*
6. Declare where we want to go; Strategic Direction 2015-2018 in three phases - short, medium and long-term. *(p.10)*

### **1. Formulation of the Plan**

This plan agreed by way of an update of the 2012-2015 Strategic Plan following review by the Vice President's Committee. It was the view of the Committee that the previous Strategic Plan had broadly stood the test of time.

### **2. Supporting Solicitors in Practice**

DASLS aims to be the leading local law society in England and Wales. It encourages and supports innovation, integrity and leadership in the legal profession and provides a strong focus for lawyers in the region.

DASLS places great importance on effective communication, and on ensuring that we have sound processes through which the views and feedback of all involved in the Society on matters affecting their working lives and our business can be considered.

As a membership service organisation, we exist to look after our Members and to further their interests. The following activities have been identified as the core services that DASLS seeks to provide:

- a. To support and protect the character, status and interest of the legal profession
- b. To advertise and promote the skills and services of solicitors generally, and Members of this Society in particular
- c. To promote and facilitate legal education
- d. To provide a recruitment service
- e. To provide a platform to encourage and promote the social interaction of the Members with each other
- f. To assist Members with complaints and conciliation
- g. To represent the views of the Members and lobby on their behalf
- h. To collate and assist with the provision of practice management information
- i. To provide support to individual members in times of need.

### **Our Values**

- a. **Members First**
- b. **Integrity in all we do**
- c. **Co-operate to Achieve**
- d. **Commitment to Equality & Diversity**
- e. **Environmental Awareness**
- f. **Responsibility to our Community**

These values determine how we behave and the working environment we enjoy. These are demonstrated in our actions:

- a. **Members First**
  - We seek to understand the needs of each Member, both as an individual and (where appropriate) as part of the firm for which he or she works
  - We will focus on their needs, every time they contact us or we contact them
  - We take every opportunity to build beneficial relationships
  - We re-think DASLS role, with Members at its centre
  - We look for fun in what we do
- b. **Integrity in all we do**
  - We will be open and honest
  - We treat others as they would like to be treated
  - We aim to give balanced, constructive feedback
  - We always observe confidentiality
  - We trust others
- c. **Co-operate to Achieve**
  - We work together to achieve common goals
  - We share good ideas
  - We ask for and listen to the views of others
  - We recognise when others need help and offer them support
  - We celebrate success

**d. *Commitment to Equality & Diversity***

- We will value fairness, equality and diversity in all our dealings, as a provider of services, an employer and a representative of the profession.
- We are committed to eliminating discrimination on the basis of gender, age, disability, race, religion, sexuality or social class.
- We aim to provide accessible services, delivered in a way that respects the needs of each individual.
- We aim to embed these values into every day practice, policies and procedures so that equality and diversity becomes the norm for all.

**e. *Environmental Awareness***

- DASLS recognises the need to minimise its impact on the local, regional and global environment.
- We will take any reasonable steps to achieve this
- We will work with the Legal Sector Alliance to help DASLS members combat their own environmental impact.

**f. *Responsibility to our Community***

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

### **3. 2012 – 2015 Strategic Plan**

The Strategic Plan that has guided DASLS during this period was written following the merger of the Devon and Somerset Societies. In spite of the poor economic climate the Society has maintained its strong membership levels and bolstered its services over this time.

One of the plan's primary aims was to establish better channels of communication between the Society and its members. Work in this area has included the introduction of a fortnightly e-bulletin (Buzz) and an annual survey of members. Firm visits have also been undertaken by the Executive Director.

DASLS has acquired and continues to operate from its own premises. The new office suite provides space for continued expansion.

The Society has continued to develop its activities with renewed interest in lobbying and representation culminating in an annual visit to Westminster. Its main commercial activities of Training and Recruitment have been consistently supported by members.

DASLS has further developed its style of communication with improved formatting of publicity and a greater use of e-mail. From 2012 the bi-monthly Newsletter has been redesigned and circulated electronically.

Solicitors employed in house within public and commercial organisations have been given greater prominence in the Society with the formation of a DASLS In-House Lawyers' Group.

DASLS held its inaugural Admissions Ceremony in 2012 and this function is now held annually in early November.

In the same period, DASLS has also introduced 2 annual Management Conferences.

#### **4. Current Position at the end of 2014**

Devon & Somerset Law Society is one of the foremost local law societies in England and Wales. Despite the difficult economic climate of recent years its membership remains strong with around 1,050 solicitor members (albeit a small reduction from 1,100 in 2011 and with an all-time high of 1,120 in December 2008). It has a strong reputation at Chancery Lane and internationally through its twin bars and membership of the Federation of European Bars.

It owns its premises at Pynes Hill Exeter and retains a significant cash reserve. It supports three members of staff; Executive Director, Administrator and Executive Assistant. The Administrator and Executive Director have been in post for 25 and 20 years respectively and possess considerable expertise and knowledge of the Society's activities and members.

Income is derived primarily from three sources: Membership Subscriptions (£38,600 in 2014), Training Courses (£167,400 in 2014) and Recruitment Agency Services (£87,000 in 2014). Over the past 3 years DASLS has operated a small pre-tax surplus on its activities. Many DASLS members work in small and medium size 'High Street' practices. At the other end of the scale there are a number of practices employing 400 or more staff and partners. The coming decade offers many challenges and opportunities for the legal profession. The introduction of Alternative Business Structures heralds new providers of legal services. Many commentators believe that there will continue to be a consolidation of law firms across the board.

Remaining useful and relevant to all members is a constant challenge particularly perhaps for those employed in the larger firms.

## **5. Expected Services & Activity 2015 – 2018**

The Society engages in a broad range of activities offering benefits and services to its members. This activity is supported by the Committee and will continue to be developed in the life of this strategic plan.

### ***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.

A network of Parliamentary Liaison Officers briefs local MPs on matters of interest to the Society. It is intended to continue to engage with members of the House of Lords.

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, together with The Association of South Western Law Societies.

### ***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. It will help larger member firms by providing in-house training events.

The Society continues to offer a Professional Skills Course once 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 good calibre speakers to the area. The programme will be improved and expanded on a demand-led basis in the light of changing CPD requirements.

### ***Recruitment Agency***

The recruitment agency is a significant provider of legal staff in the region.

It is offered to members at the highly competitive rate of 12% + VAT of an employee's first year's 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 have been difficult. It is expected that the market will ease over the next three years as the country comes out of recession.

### ***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 10 DASLS qualified mediators.

Take-up of mediation services is low. The Mediation Sub-Committee will continue to work to develop this activity and promote the benefits of mediation.

### ***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 fewer 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 Dinners in Somerset and Devon form the cornerstone of this aspiration. The Committee will continue to support this initiative and encourage greater support for these events. During the next period it is intended to commence an annual Awards Dinner.

The Social Sub-Committee will arrange ad-hoc events including sporting and other competitive opportunities as a part of the DASLS Challenge Cup.

The Challenge Cup is a fun tournament of (usually) six competitive events held over a twelve month period. Law Firms or other groups of DASLS members may enter as many events as they choose, and different people may enter each event, depending on individual preferences. A league table is maintained and points awarded at each event with the Cup being awarded to the team with the most points after the final event.

### ***Newsletter & Buzz***

The Newsletter is published six times a year and is one of the principal ways by which the Society communicates with members. Where possible it is sent by e-mail to members. 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 has been resisted in favour of an easy to read and relevant magazine. It is thought that members prefer this style.

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

Buzz is a fortnightly e-bulletin. It is circulated to all members that have provided their e-mail address. It provides notice of events and activities that will be of interest to members as well as signposting matters concerning professional practice. It has been well received by members and will continue to be developed.

### ***Website & Online Communications***

The DASLS website was redesigned and launched at the end of 2013. The new site allows DASLS far greater control of content with all areas capable of amendment by the administrative team. Included on the site are:

- Comprehensive current vacancy listings from DASLS recruitment agency with registration facility for updates
- Full Training programme and downloadable course information and booking forms
- Each member firm has its own page area with the option of displaying its logo and searchable description of the practice
- Updated Social Page with Challenge Cup Rankings
- Search facility for DASLS member firms
- Search for a solicitor link to The Law Society's website
- Resource area with helpful materials, ad hoc downloads for DASLS events and consultations
- Member application forms to complete online
- Help and information about making a complaint about a solicitor
- Help & Support for Solicitors in difficulty
- Latest News and Useful links
- Junior Lawyers' Division page
- Back catalogue of Newsletters from March 2003
- Database of members able to offer International Services
- Photo Gallery

### ***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.

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. 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. It now hosts a very successful Practice Management Conference and a Compliance Conference annually.

Since 2013 DASLS has partnered with The Law Society Management Section to produce a comprehensive Performance Benchmarking Survey providing local statistics against a backdrop of national trends.

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.

### ***Committee & Sub-Committees***

The main Committee forms the Board of Directors and meets four times a year. Much of the day to day work of the Society is done through the nine sub-committees all of which are well supported:

- Contentious Business
- Education & Training
- In-House Lawyers' Group
- 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.

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.

## 6. Strategic Direction 2015 - 2018

This strategic plan is informed by the view that while DASLS is doing well, particularly compared with other local law societies, serious threats to its sustainability can be predicted for the future:

- Competition from new non-traditional legal services providers is likely to exacerbate the already noticeable trend towards fewer employers paying subscription fees for their lawyer employees, especially the fees of younger people in the larger firms.
- It is also likely to speed up the trend towards larger firms providing legal services.
- There will be continued competition from outside providers of training and recruitment services aimed at lawyers in the Devon and Somerset region may also occur.
- The removal of a formal Regulatory requirement for an annual minimum number of hours of continuing Professional Education.

In the light of these perceived threats, the plan over the next three years is to invest resources in the services that genuinely appeal to the Membership and the organisations that they work for recognising that there is a trend towards corporate membership for the nature of services that DASLS intends to provide.

### *Short term (first part of the 3 year plan)*

The plan in the short term (12 to 18 months) is to concentrate efforts on the Devon and Somerset areas and particularly to maintain the engagement of the larger firms. This may be in conjunction with the introduction of corporate subscription.

It is intended that the Executive Director should continue to visit and meet representatives of solicitors' firms in as wide an area as possible and to encourage greater membership. With the coming of new legal service providers, employer engagement is seen as particularly important for the long term sustainability of DASLS, but actions must be taken now to reduce the risks and take advantage of the opportunities that this change will involve.

In addition we will concentrate on extending the benefits we can offer to members, and indeed make it easier for them to become members. This may include (among other possibilities):

- Instant membership: by no longer requiring a proposer and seconder. This will require an amendment to the byelaws, but in the short term these items can be left off the form presented to individuals, and the proposing and seconding can be done centrally. This process is to be streamlined.
- Make it easier both to join and to buy things by allowing online joining and buying.
- Prize giving and a local admissions ceremony.

We will continue to focus as a priority on all potential membership groups including those under-represented including young lawyers and in-house lawyers.

**a. Young lawyers**

The Society will maintain the strategic partnership with the Junior Lawyers' Division to offer a programme of activities aimed at young lawyers to include:

- ethics
- employer relations
- confidence support
- young lawyer section of the website
- availability of training contracts
- university connections
- international and other links

**b. In-house lawyers**

A separate group for in-house lawyers has been established. We will continue to organise an In-House Lawyers' Conference annually.

We will continue to review the different membership categories in light of the changing legal landscape.

***Medium term (second part of the 3 year plan) and Long term (for consideration after 3 years looking towards the next 5 to 10 years)***

The plan is to move towards expanding the market for DASLS services, particularly recruitment services, beyond the Devon and Somerset region. This would help to raise the profile and influence of DASLS as well as raising finance and contributing to the sustainability of DASLS. Some form of integration with some or all of the other law societies in the South West, which may eventually lead to a South West Law Society continued to be a possible long term aim.

***Financial Planning***

Upon advice from the Treasurer the Committee sets a budget for the coming financial year with income projections. It remains the Committee's view that the Society should operate within its annual income and will continue to plan accordingly on a year on year basis.

However, after review of the past three years' performance, and review of DASLS' objectives, it is considered that care should be taken to respect the roles of The Law Society (national) and DASLS (local). While it is possible for DASLS to operate its commercial operations further afield in support of its member services, it is important not to lose the essence of "local" and retain our appeal to the local membership. Too much expansion risks disenfranchisement.