



Devon & Somerset Law Society

Statement of Strategic Vision, Values and Business Plan 2012 - 2015

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.2)
3. Look back at our 2009 – 2012 Strategic Plan. (p.4)
4. Describe where we are now; the Current Position at the start of 2012. (p.5)
5. Demonstrate what we will offer; Current Services & Activity 2012 – 2015. (p.6)
6. Declare where we want to go; Strategic Direction 2012 – 2015 in three phases - short, medium and Long-term. (p.10)

1. Formulation of the Plan

This plan was formulated by a Working Group of the Society having canvassed the views of the membership, and it has been formally approved and adopted by the Committee. The Working Group comprised the following:-“

David Turner *President*

David Bowen *Vice-President*

Paul Dyson *Junior Vice-President*

Tony Spiers *Hon. Secretary*

Richard Adams *Hon. Treasurer*

Rod Mole *Law Society Council Member*

Charles Cooper *Committee Member*

Tony Steiner *Executive Director*

Andrew Friedman *Director, Professional Associations Research Network*

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.

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 you 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
 - Ask for and listen to the views of others
 - Recognise when others need help and offer them support
 - Celebrate success

d. *Commitment to Equality & Diversity*

- We will value fairness, equality and diversity in all its 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. 2009 – 2012 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 its own premises and has now divested itself of any obligations to its former leased offices at Renslade House. 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 what is planned to be an annual visit to Westminster. Its main commercial activities of Training and Recruitment have been consistently supported by members. It has also formed a strategic partnership with the College of Law to provide an online training resource.

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.

4. Current Position at the start of 2012

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 1100 solicitor members. 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 (post currently vacant). The Administrator and Executive Director have been in post for 22 and 17 years respectively and possess considerable expertise and knowledge of the Society's activities and members.

Income is derived primarily from three sources: Membership Subscriptions (£37,000 in 2011), Training Courses (£132,000 in 2011) and Recruitment Agency Services (£80,000 in 2011). Small losses were incurred in 2009 and 2010 – in 2010 this was wholly attributed to the costs of the purchase and relocation to Aston Court. 2011 saw a return to profit with a small pre-tax surplus of £7,261. Many DASLS members work in small and medium size 'High Street' practices. 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 be a consolidation of law firms in the High Street.

5. Current Services & Activity 2012 – 2015

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 make contact 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.

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 has also helped larger member firms by providing in-house training events.

The Society continues to offer a Professional Skills Course in partnership with BPP Law School 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.

A strategic partnership has been formed with the College of Law to provide online training services at competitive rates. We will continue to promote this service.

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. 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.

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 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 9 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 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 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 & 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. A hard copy is sent to each office where DASLS members work. 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

www.dasls.com provides:

- Comprehensive current vacancy listings with registration facility for updates
- 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.

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. In 2011 it hosted a very successful Practice Management Conference, the format of which will be repeated in 2012.

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 2012 - 2015

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.
- In addition, the difficult economic climate seems set to continue for the near future. Also the continuing and predicted decline of other law societies will reduce the chances of those moving into the DASLS area joining it.
- More competition from outside providers of training and recruitment services aimed at lawyers in the Devon and Somerset region may also occur.

In the light of these perceived threats, the option of 'staying where we are' is not considered prudent. The plan over the next three years is therefore to invest resources to generate higher membership primarily in Somerset and at the same time to develop DASLS services and its appeal to certain under-represented groups. Building on these policies in the first part of the next 3-year period, the plan then calls for controlled expansion of DASLS services into adjoining regions.

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 on raising membership in Somerset based on improved and more accessible services. The planned developments are based on the filling of the third staff member position as well as a further part-time (0.5 fte) staff position.

The top priorities for use of this resource are to enable the Executive Director 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):

- Affinity deals, which are reduced price services and products based on discounts offered by suppliers to large groups of low risk customers. For example x% off at major retailers or medical insurers.
- Instant membership: by no longer requiring a proposer and seconder. This will eventually 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

- Make it easier both to join and to buy things by allowing online joining and buying
- 1 free hour of CPD per year to all members (which would likely to be a lecture at the AGM)
- Prize giving and a local admissions ceremony as an alternative to travelling up to London

We will focus as a priority on the following groups:

- a. Young lawyers**
- b. Women**
- c. In house lawyers**
- d. Affiliate members**

- a. Young lawyers**

The Society will form a 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. Women**

DASLS Committees are unrepresentative of the membership profile especially in respect of the number of women participating. We wish to change this.

Appealing to women in general and especially to young women may or may not involve a separate subcommittee. Whether it does or does not, several things can be done to raise the appeal of DASLS to women, such as:

- a survey on female issues
- organising all female social events
- connecting with other relevant organisations such as the Association of Women Solicitors

A high priority will be to encourage charismatic individual(s) and to design processes at DASLS which are more transparent.

- c. In-house lawyers**

A separate group for in-house lawyers will be established. Work on this is in progress already.

d. Affiliate Members

Affiliate members are defined as “Practising barristers, senior academics [those with both a first and second degree] and those who become partners in or are employed at a senior level by firms of solicitors whose (other) solicitor partner(s) are members of DASLS”. This category of membership will continue to be promoted and affiliates will be encouraged to participate in the Committee and sub-Committees.

These initiatives will be pursued in the next 12 to 18 months, but may not come to full fruition until the next 2 to 3 years.

In addition to the above, certain procedural changes are proposed which will maintain the momentum of DASLS development throughout the next 3 years. These are:

- A commitment to carry out some strategic work at each meeting of the main Committee.
- To review this plan at the end of each year, rather than waiting 3 years.

Medium term (second part of the 3 year plan)

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.

We will also explore the needs of the various sub-groups of Affiliate Members such as Barristers and Practice Managers and identify services and events that will be attractive to them.

Long term (for consideration after 3 years looking towards the next 5 to 10 years)

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 is a possible long term aim. Whether to pursue this will depend on what transpires in the next few years. In particular, if the predicted consolidation and concentration of law firms into larger units deepens considerably, it may be prudent to consider this strategy to secure the long term future of DASLS.

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.