

Devon & Somerset Law Society – Strategic Plan 2023

Introduction

This plan has been developed at a time when new social and economic challenges have emerged, fuelled by the Russian invasion of Ukraine and the subsequent cost of living pressures. Whilst DASLS is not immune from the impact of this, the Committee believe there is a new opportunity to put DASLS back at the centre of members' professional lives, especially those that have joined the profession in recent years.

The UK's exit from the European Union has been completed and in-person activities have begun to be supported following the Covid-19 pandemic. It is expected that many meetings will continue 'virtually' as being convenient for members across the large DASLS area.

DASLS office at Aston Court has been let on a short lease providing a useful additional income and a significant saving of business rates and service charges. The permanent staff work from their respective homes meeting when needed, often using member's offices. This is proving successful and appreciated by the current incumbents.

DASLS reserves have been impacted by the Covid 19 pandemic although retains a healthy balance and is optimistic of its day-to-day activities breaking even in 2022.

The Committee believes DASLS is in good shape. Most firms of solicitors have thrived throughout the pandemic and continue to do so. Whilst the future is uncertain, DASLS works to support and promote a healthy and respected profession in the south west region.

Executive Summary

DASLS remains a strong and vibrant local law society. It has navigated the constraints of the Covid 19 pandemic and is ready to embrace the challenges of the working environment that has emerged. In that time some personnel changes have occurred, and its operation has moved from a central base to remote working arrangements.

This plan recognises that the way DASLS members work and engage have changed. Remote meetings are now commonplace and greater reliance is placed on digital means of communication. Whilst there is some desire to have traditional 'in-person' events, many DASLS meetings now take place using Zoom or Teams.

DASLS role as a representative body remains one of its central functions. With the support it receives from the County Societies Group and its neighbour societies in the South West it will continue to develop its relationship with the Law Society, the SRA and where appropriate other professional, national and international bodies. It is hoped to reinvigorate professional networking opportunities.

The Committee has observed a reduction in member engagement with fewer participants in social and professional activities. It is determined to reverse this trend, and to encourage younger members of the profession to participate. It will work with the Junior Lawyers Division and invest in improved digital channels and data management to allow lawyers to communicate with DASLS and each other.

Our Sub-Committees are the lifeblood of DASLS work. Attendance at traditional meetings is not viable for many members. It is intended that new digital channels will open up discussion for those that have specific interests especially in different areas of practice that will help inform the Sub-Committees of issues that members are interested in.

Promotion of the profession remains at the heart of DASLS. Planning has commenced for a high-profile Awards programme in 2023 with supported publicity. Likewise, plans are in place to continue with the Admissions Ceremonies.

Education & Training continues to be a key service and a mixed programme of face to face and virtual seminars is anticipated with a focus on larger conference events when possible. Help with recruitment will continue as an advertising offer that has proved popular with members.

Wherever possible DASLS is keen to provide members to meet both professionally and socially. The Challenge Cup programme of competitive social events has commenced, and it is hoped that the Social Sub-Committee can thrive and provide opportunities to meet for those who wish to.

The DASLS Newsletter is printed twice a year and appears to be well received. Members are encouraged to contribute news and articles of interest. Our email bulletin that is circulated every two or three weeks will also continue. A refresh of the website will be undertaken.

The Committee are committed to supporting solicitors in the region and will endeavour to ensure that its support is relevant to those in large commercial practices, high street firms or practise on their own account. In House Lawyer members are growing in number and the Committee will support them through the DASLS In House Lawyers' Group. Likewise, the Practice Management Sub-Committee will continue to provide its support.

DASLS Commercial Partners remain important stakeholders in activities and the Committee will continue to work with them for mutual benefit.

2015-2018 & 2021 Strategic Plan

The 2015-2018 strategic plan sought to reinforce and grow those areas of activity most valued by DASLS members and address some of the expenditure and time heavy activities that were less used. Whilst key areas of the plan have been addressed this latest review has identified challenges that we continue to work on especially in respect of larger firms, young lawyers, and social media.

The 2021 plan was developed to deal with the issues raised by the global pandemic. The issues raised remain important.

Position at October 2022

DASLS continues to be a strong and highly respected local law society. It has good relationships with the national Law Society and the SRA which have been bolstered by its leading role with the County Societies Group. The current membership is 1224 solicitor members; this is a reduction from around 1287 in October 2021. There has been a small increase of Affiliate Members from 441 to 461.

DASLS office at Pynes Hill has been let on a two year term with an option to take a third year. At the time of writing the tenant has advised that they wish to assign or surrender the lease and the executive are working with them to find a mutually beneficial outcome.

Following the retirement of Monique Berton *Administrator* in April 2022, Tony Steiner was appointed as Chief Executive and Kelly Baker recruited as Executive Administrator. Both work full time and are supported by the Honorary Secretary and Honorary Treasurer.

The main income streams are subscriptions, training, recruitment advertising and rental income. Numbers attending training events have decreased. Neither online nor in-person seminars are proving particularly successful at the current time. It is hoped that this will improve over the next twelve months combined with the introduction of new conference events that have had better support.

The current database is an old access version created around 2007. Whilst it still works it is not supported. Investigations are being made to replace this with an affordable cloud based solution that can offer additional features for members including access to their own record and communication preferences. Membership engagement has decreased through the pandemic and whilst digital community platforms such as LinkedIn are used it is believed this could be significantly improved.

Cash reserves currently stand at around £190,000. Arrangements have been made for repayment to DASLS by instalments of a debt arising from the 2020 Legal Awards event of around £52,000.

Services & Activity

DASLS purpose is to offer support to solicitors and their colleagues particularly in the Devon & Somerset area. It provides a broad range of activities which continue to evolve as the working environment changes. In setting out DASLS strategy the working group have reviewed the various services and opportunities proposing changes where it has been thought necessary.

Governance

The main Committee constitutes the Board of Directors. It is chaired by the President who also leads the Executive Committee.

The Presidency changes annually. Each President can develop their professional profile through DASLS growing local and national profile.

The Presidency is both personally and professionally rewarding. There are opportunities to influence national policies and rules, develop new skills, engage with international lawyers, and promote the brand of solicitor.

The College of Past Presidents is tasked with the job of nominating a Deputy Vice-President for election at the AGM. Candidates are usually selected on a rotational basis from four geographic areas: Somerset; Exeter & East Devon; North Devon; Torbay & South Devon. It is also open to any full member to nominate a candidate for election.

The Committee is made up of the existing officers, current Sub-Committee chairs and elected members. Seats are also reserved for the Law Society Council member, the local government and CPS representatives and the SBA The Solicitors' Charity representatives. Sub-Committee chairs are encouraged to seek successors every three or four years. A job description will be prepared for Committee members.

The Committee is responsible for reviewing, monitoring, and pursuing the agreed strategy. The Executive Committee has delegated authority to act on behalf of the Committee where time constraints require.

The Executive team help through induction and guidance for officers and Sub-Committee chairs about their roles and responsibilities.

Lobbying & Representation

A core function of DASLS is to raise the profile of solicitors and represent their interests. Current activity includes:

- County Societies Group (CSG) – the CSG is a group of larger non-metropolitan local law societies comprising Devon & Somerset, Cheshire & North Wales, Kent, Leicestershire, Newcastle, and Surrey law societies. DASLS is a founding member of the group which represents over 5000 solicitors. It is likely that many lobbying and representative activities will be achieved by joint enterprise through that group.

It is difficult to measure the impact of the CSG. It has been recognised by The Law Society and the SRA who have both hosted and attended its meetings. It provides an opportunity to compare member services and trends across the country.

The CSG meet virtually every 4-6 weeks with an annual in-person meeting usually at The Law Society's Hall in Chancery Lane. Additional opportunities to meet are created around events such as the local law society conference and parliamentary liaison visits to Westminster. The Committee consider this to be an important group that can influence debate at a national level.

- Association of South Western Law Societies (ASWLS) – ASWLS has traditionally met three times a year bringing together Cornwall, Plymouth, Devon & Somerset, Bristol, Gloucestershire & Wiltshire, and Monmouthshire law societies. Recent changes in the management of ASWLS create an opportunity for reform of this organisation. The Committee believe there is merit in a forum that brings these societies together and is awaiting debate on how this might be achieved in the future.
- Parliamentary Liaison – DASLS network of Parliamentary Liaison Officers maintain regular contact with MPs. This is reinforced by regular visits to Westminster when Peers are also

invited to meet DASLS. The last event was organised in association with the County Societies Group securing attendance by the Secretary of State for Justice as well as the Chair of the Justice Select Committee and other senior MPs and Peers. Invitations were extended to any DASLS member who wished to attend. Another visit to Westminster is planned in association with CSG members. Other local law societies will also be invited to participate.

- The Committee and the Sub-Committees perform an important function by responding to the various consultations and discussion papers issued by The Law Society, Solicitors' Regulation Authority, and other professional and statutory bodies.

The introduction of virtual meetings has enabled a wider group of members access to the debates. The Committee are concerned that some of the Sub-Committees are not well supported. Sub-Committee chairs are encouraged to question and reappraise the purpose and focus of their sub-committee and how they may be developed. The Committee are conscious that many members may not wish to join a sub-committee but still wish to contribute to and learn about the work of DASLS. 'WhatsApp' groups will be trialled as a way of engaging with a wider demographic with a view to inviting new and existing members to join those of interest.

- Changes to the Law Society's relationship team have been successful and offer a good conduit for DASLS to raise issues on behalf of its members as well as via the elected Law Society Council member for the area.
- DASLS maintains a good relationship with the SRA executive both on its own account and through the CSG. We will seek to maintain this.

Promotion and Professional

DASLS will take opportunities to raise the profile of Solicitors and celebrate their professionalism. It will continue to support:

- Admissions Ceremony – this annual event welcomes newly qualified solicitors into the profession and the Devon & Somerset legal community. Two ceremonies have been hosted in 2022. The next will be in October 2023.
- Legal Awards & Annual Dinner – the Annual Awards event is a fixture on DASLS calendar and continues to be successful. The Committee will continue to support this activity working to promote the Society and its members. The 2020 awards have been celebrated with a dinner in Exeter Cathedral in May 2022. Planning has commenced for 2023. A new media partner has been secured and appropriate arrangements that secures DASLS position have been agreed.
- Joint Professions Networking / Other Professional Bodies – The formation of the JPNG was led by DASLS and has helped the Society forge better links with other local professional bodies. It meets two or three times a year and gives members the opportunity to network in a professional environment. We will continue to support this and seek further opportunities to meet colleagues across the professions.

Education & Training

The provision of practical training remains a key area of activity for DASLS. Prior to the pandemic DASLS arranged in the region of 50 to 60 face to face training events per year. This included several full day conferences. Attendance at webinars and seminars has not recovered. DASLS USP is presenting good quality competitively priced in-person training and it is hoped that this opportunity will return.

The Legal Services Board has asked the SRA to tighten the regime around mandatory training and it is anticipated that this will, in time, encourage members to return to training events.

We intend to grow our programme of full day conference events to supplement the combined programme of webinars and face to face seminar events in Exeter and where appropriate in other areas. Where possible we will collaborate with other local law societies to improve our offer and expand our potential audience.

Recruitment Assistance

The recruitment advertising service has proved attractive to members as a cost-effective way of attracting job applications without the high fees of agencies. There is a skills shortage across England and Wales and it is difficult to recruit experienced lawyers across the majority of practice areas. DASLS remains committed to helping its members recruit and will grow this service where opportunity allows.

Mediation Services

DASLS Mediation Panel operates as a self-administered service. DASLS office continues to provide the financial administration and promotion through the Newsletter and Website for which it takes a modest fee from each arranged mediation. Take up for this service remains modest despite the Court referral schemes to DASLS Panel and the growing expectation by the judiciary for parties to attempt resolution in this way.

The Society is accredited by the Civil Mediation Council (CMC) to provide mediation services with the costs being met by the Mediation Panel.

Social Activities

The Challenge Cup remains a keystone of social activity for DASLS. At the time of writing two events had taken place and two further are planned. The Committee remain committed to offering members the opportunity to get together. It will work with the JLD and CILEX to ensure well supported events.

Communications – Newsletter, Buzz, Website, Social Media

Improved communications is a key part of this strategic plan. The Committee is concerned about current levels of membership engagement and will invest in improved communications with an emphasis on building online communities using social media. Whilst traditional Committees will continue there will be greater emphasis on getting lawyers talking through digital channels.

Newsletter & Buzz - A new look, twice yearly Newsletter was launched in 2021 supplementing the 'Buzz' ebulletin that is circulated every two or three weeks that delivers news and updates on a more frequent basis. We intend these to continue in this format.

DASLS website continues to be DASLS's 'shop window' and carries news and other information relevant to members and the general public. The website was designed about five years ago and it is proposed to refresh the look and feel of its presentation.

Social Media – DASLS has Twitter, LinkedIn and Facebook accounts and regularly posts about forthcoming events and vacancies. It is thought that many members engage in social media and a greater investment into this form of communication is necessary to improve the demographic spread of member engagement. We will be seeking professional support to pilot social media projects, especially those such as WhatsApp that open up conversations.

Feedback – it is hoped that further use of social media will instigate better dialogue with members and feedback about DASLS activities. The use of QR codes will be investigated.

International Relations

There are two aspects to DASLS international relations:

- **Twinning** – there is a twinning Charter that links DASLS with various Bars predominantly in northern Europe; namely, Rennes (France), Erlangen (Germany), Leuven (Belgium), Verona (Italy), Gdansk (Poland), Bilbao (Spain).

There are other friendships that have developed because of DASLS activity notably with Barcelona, Cork, Rotterdam, and The Hague.

There is a good working relationship with visits to and from these Bars. DASLS values these connections and encourages members to take advantage of the opportunities offered.

- **Federation of European Bars (FBE)** - Devon & Exeter Law Society (as DASLS was then) joined the FBE in 1992 and hosted one of the twice yearly meetings in Torquay in 2008.

Whilst in recent times travel has been limited, membership of the FBE and twinning activities continue to be supported by DASLS.

Matters affecting international justice and the rule of law especially where the FBE has been actively engaged will be raised with DASLS members and highlighted using DASLS social media.

Practice Management

DASLS through the Practice Management Sub-Committee provide Conferences, Updates, Benchmarking and Networking for those engaged in the management of legal practices. It actively seeks to expand its services. These are popular with members and will be continued and where necessary adapted to reflect the current working environment.

Managing Partner/Practice Manager forums are hosted in five areas (Exeter & East Devon, Torbay & South Devon, North Devon, Somerset, Plymouth). The meetings have returned to in-person and it is hoped that they will be well supported. Following discussions within these groups additional forums have been formed, in particular the South Devon Residential Property Forum and the successful HR Managers Forum.

In-House Lawyers

DASLS is committed to supporting In-house lawyers working in its area and will continue to do so through its own In-House Lawyers' Group. It has proved difficult to identify activities that will appeal to all in-house lawyers but the annual conference dealing with common professional issues and skills will form a centre piece for the group.

Young Lawyers

Increasing participation of those in the early stages of their careers is a key objective for DASLS. The Committee would like to have more involvement from younger members in all its activities and it is hoped that better use of social media will assist. The Admissions Ceremony has proven a useful introduction to DASLS leading to engagement with the work of some of the Sub-Committees.

The social events, especially the Challenge Cup has proven popular with younger members as has the DASLS / JLD annual Rounders match.

The DASLS Legal Awards is a key event in the social calendar and the working group are charged with ensuring it will appeal to a younger audience than the traditional annual dinner.

JLD representatives are invited to attend DASLS meetings. JLD are encouraged to invite DASLS President and other officers to their events and meetings.

Large Firms

The Committee values the support it receives from the larger practices in the region and will work with them to offer new opportunities and greater engagement with DASLS by designing a package of appropriate activities especially around lobbying and representation. This might include activities such as opportunities to meet national Law Society officers and other relevant individuals.

Plymouth

DASLS has members who practise in the Plymouth Law Society area. The Committee respects Plymouth Law Society's wish to remain independent and will work closely with them to provide strong services for our respective and mutual members through the provision of training events, recruitment services and practice management support.

Partners

DASLS values its commercial partners and will work with them to deliver additional value to members and a return for sponsorship fees.

Membership and Officers

There are 1224 solicitor members of DASLS. Additionally, there are 461 Affiliate Members (Legal Executives/Practice managers etc.) and 53 Associate Members (Trainee Solicitors) (October 2022). Whilst there are no plans to change the structure of membership this will be kept under review. The Committee and staff will continue to promote the benefits of membership to the remaining Non-Members, particularly those working in-house and in Somerset.

Equally there are no plans to alter the nomination process for DASLS President, but the Committee will look at how the role can remain a prestigious election that is considered valuable to the individual and their organisation.

Finance & Premises

DASLS has a strong financial resource with a capital deposit of around £190,000 and its own premises at Aston Court, Pynes Hill, Exeter. It is owed £52,000 by Grow Marketing and arrangements have been made for repayment by instalments. The Executive are working to ensure this liability is met in full.

Adopted by DASLS Committee – 7 December 2022