



# STATE BAR OF TEXAS STRATEGIC PLAN FY2020 & FY2021

## 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 drafts a plan covering a five-year period beginning with the next odd-numbered year. As further required by the Act, the State Bar adopts performance measures based on the purposes and goals expressed in the strategic plan, and reports performance outcomes.

### Plan Operation and Updates

The Strategic Plan will be the guidepost for all decisions and activities of the Board of Directors and of the Bar as a whole and will be reviewed and revised by the Board at least every other year to ensure its relevance and suitability.

All decisions and activities of the Board and the staff of the State Bar must comport with the goals of this Strategic Plan. The annual budget of the State Bar will be developed specifically to advance the State Bar's goals and objectives as expressed herein.

### Implementation

The State Bar will be accountable for using its resources to accomplish the goals set forth by the Plan. Performance measures based upon the following goals will be developed and reported. To implement the Strategic Plan, the State Bar will work with and through:

- the State Bar Board of Directors;
- the Texas Young Lawyers Association;
- its extensive network of volunteers, including its 45 sections, three 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;
- its annual meeting and other conferences;
- press releases and articles disseminated to and through news media;
- emails, listservs, and facsimiles to its members;
- social media; and
- 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 those 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 ([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 (“The Act”). The Act lists the purposes of the State Bar and a number of specific requirements with which the State Bar must comply. The State Bar has implemented policies and procedures to ensure compliance with the Act. Because these requirements are statutory and ongoing, 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**

### ***Education and Assistance to the Public***

A. Through the distribution (in different languages and formats) of electronic and print publications, in-person presentations, and the use of information technology and social media, increase the public's knowledge and understanding of the following:

- the Rule of Law;
- significant areas of the law;
- the judicial system and its funding needs;
- selection and compensation of members of the judiciary;
- lawyers' professional ethics;
- lawyers' standards of practice;
- attorney discipline procedures;
- the Client-Attorney Assistance Program (CAAP);
- the Lawyer Referral and Information Service (LRIS);
- the importance of jury service and the jury process;
- availability of the client security fund; and
- fee dispute resolution.

B. Actively promote the development of and participation in programs at all levels of education that encourage a more diverse population to pursue legal careers.

C. Assist in efforts to identify needs of under-served populations and low-income Texans, including non-English-speaking persons, and develop services and programs to assist them.

D. Increase access to consumer legal information for the public.

E. Actively promote disaster and crisis response services.

F. Actively promote the Lawyer Referral and Information Service.

### ***Volunteer Opportunities***

G. Expand opportunities for lawyers, judges, and law students to be involved in community service and education.

H. Enhance awareness of pro bono and volunteer work provided by lawyers and lawyers' contributions both to the legal community and the public . Encourage pro bono reporting by all lawyers.

I. Identify and employ new methods and technologies by which pro bono training can be made accessible and available to more Texas lawyers.

## **SERVICE TO MEMBERS**

### **Statement Of Purpose**

The State Bar of Texas provides 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; in establishing and maintaining efficient, effective, satisfying, and productive law practices; in serving their communities; and in winding down their practices.

### **Goals**

#### ***Professional Education***

A. Monitor evolving trends in the legal profession and implement appropriate services to help Texas lawyers adapt to and succeed in their ever-changing legal, technological, and business environment. Adapt the role, function, and services of the State Bar as the legal profession changes.

B. Monitor the evolving continuing legal education needs of Texas lawyers, and develop new educational programs and resources to address those needs. Increase awareness and use of CLE options available from the State Bar, including low-cost and free opportunities and CLE scholarships. Collaborate with other education providers, including local bar associations with an emphasis on non-metropolitan bar associations. Continue to explore new and innovative methods and media for delivering CLE and other resources to State Bar members. Encourage State Bar Board members to speak at high-profile CLE events about State Bar programs and services, and videotape these presentations.

C. Continue to educate members on law practice management topics and best practices. Foster and share innovative practice tools and business models through the Texas Opportunity and Justice Incubator.

D. Educate members on financial skills, including law firm and personal finance.

E. Develop and provide resources for succession planning.

F. Provide resources on disaster preparation and recovery.

#### ***Access and Participation***

G. Facilitate increased use of State Bar services by Texas lawyers. Develop strategies to increase participation in State Bar elections.

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

I. Increase diversity and inclusion among members of the State Bar, including sections, committees, divisions, and other entities. Continue to publicize and support State Bar diversity programs and initiatives.

J. Add surveys to State Bar Director update emails and presentations to allow members to indicate how they would like to get involved in the State Bar (for example, through service on a grievance committee).

### ***Resources for Members and the Profession***

K. Continue to monitor and enhance State Bar member benefits and promote their use by members.

L. Enhance services to and collaboration and communication with State Bar Sections, local bar associations, minority bar associations, specialty bar associations, and national bar associations to more effectively provide services to all Texas lawyers.

M. Enhance services to and collaboration with Texas law schools in an effort to improve State Bar outreach to law students. Encourage and support the development of mentoring programs for lawyers and law students by licensed attorneys. Support the development of law school preparation institutes at the undergraduate level. Continue to offer State Bar presentations at law schools. Encourage and support State Bar participation in law school programs that encourage diversity, equity, and inclusion in the legal profession.

N. Survey members periodically on the types of member benefits they would like to receive, and adjust communications and benefits accordingly. Allow members to designate which communications they would like to receive and not receive.

O. Develop additional member services regarding alternative careers, career counseling, and career development. Where possible, collaborate with law schools on these services.

P. Continue to educate members about the Texas Lawyers Assistance Program and health insurance options available through the Texas Bar Private Insurance Exchange.

Q. Develop and provide services and support to senior lawyers, including information on mentoring and practice opportunities as well as end-of-career issues.

## **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 high ethical standards and professionalism, which are applied fairly and uniformly throughout the state.

### **Goals**

- A. Increase knowledge of and compliance with professional ethical standards and disciplinary rules through education and the dissemination of information for all attorneys who are licensed to practice in Texas.
- B. Educate the public and attorneys about the Client-Attorney Assistance Program, a pre-grievance dispute resolution program.
- C. Educate the public and lawyers who are licensed to practice in Texas about the State Bar grievance system and the Client Security Fund, and continue to ensure sufficient funds are available for disbursement.
- D. Review and recommend improvements, as necessary, to ensure a fair, uniform, and effective disciplinary system and dispute resolution procedure, and continue monitoring the Grievance Referral Program for impaired attorneys.
- E. Educate the public and attorneys regarding the unauthorized practice of law (UPL), advertising rules, and barratry issues. Where appropriate, support the work of the Unauthorized Practice of Law Committee, local law enforcement, and district attorneys in pursuing these matters.

## **ACCESS TO JUSTICE**

### **Statement of Purpose**

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

### **Goals**

- A. Augment pro bono services:
  - Provide incentives for attorneys who perform pro bono legal services.
  - Provide public recognition 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, local bar and specialty bar associations, and law students about 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.

- Educate attorneys about the Volunteer Attorney Program.
- Educate attorneys about the mentorship program for pro bono volunteers.
- 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.
- Promote the use of information technology to increase access to justice and support legal services programs.
- Identify and pursue methods to assist State Bar Sections, local bar associations, and specialty bar associations in creating and expanding 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.
- Educate attorneys about and promote assistance to legal services programs around the state.
- Continue to monitor developments in and approaches to access to justice in other states.

B. Build and support partnerships to enhance delivery of legal services:

- Educate and engage non-legal professionals who can provide relevant resources, such as mediators and accountants.
- Help Texas law schools and universities create and expand clinics, mentorship programs, and other efforts to increase legal services to the poor.
- Increase collaboration with other agencies that provide legal services.
- Provide local and specialty bar associations and State Bar Sections with jump-start programs, basic toolkits, and mentoring opportunities.
- Continue to help connect legal aid lawyers with local volunteer attorney programs.
- Enhance efforts to assist traditionally underserved or specialty populations.
- 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 and encourage state and local courts to extend case deadlines for affected persons. Share disaster response training resources with local bars and attorneys in affected areas.
- Continue to support partners who provide high quality pro se information, education, and support materials for indigent persons.
- Support the work of and help identify pro bono opportunities for participants in the Texas Opportunity and Justice Incubator.

C. Increase the visibility of pro bono efforts and access-to-justice issues:

- Educate attorneys regarding the structure and funding of access to justice programs, including explanations of how funds are used, who imposes fees that fund access to justice, and the definition of “pro bono.”
- Spotlight the contributions of law firms and individual attorneys who provide pro bono legal services and improve measurement of and publicity for lawyer volunteer efforts.
- Increase efforts to engage the media about what bar associations and lawyers are doing to support access to justice.
- Act as a clearinghouse for local bar associations to help them communicate about legal aid efforts.
- Explore and implement new methods and training opportunities to increase awareness and understanding among Texas lawyers and the public about access to justice issues. (for example, promote pro bono needs and opportunities at Section and CLE events, and share stories of people being helped).
- Create a fundraising program to allow donors to “adopt” pro bono attorneys, legal clinics, or law students who provide pro bono services.

D. Increase support for pro se litigants

- Encourage and support better access to court records and other resources for pro se litigants.
- Publicize successful pro se pro bono programs.

## **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. On at least a biennial basis, assess, enhance, develop, and implement a plan for the training, mentoring, and retention of State Bar staff.

B. On at least a five-year basis, review and, if advisable, develop and recommend a plan and system to reapportion State Bar districts to better reflect and represent the geographical distribution of State Bar members, taking into account factors such as practice area, firm size, and population.

C. Review and improve processes for handling and responding to customer service requests and communications, 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. Review and adapt methods of member communication as warranted (for example, electronic, paper, personal), and when possible target communications according to lawyer interests and demographics.

F. Provide for the continued maintenance and improvement of the Texas Law Center and other facilities occupied by the State Bar in conjunction with preventive maintenance and asset replacement plans.

G. Continue the emphasis on diversity, inclusion, quality, efficiency, and professionalism 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 the best management and transparency practices observed by Texas state agencies and by bar associations of similar size and scope.

### **Goals**

A. Safeguard and improve the efficiency and effectiveness of managing the State Bar's financial resources.

B. Conserve and grow State Bar assets by efficiently and effectively delivering the services of the State Bar both to the public and to its members.

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 financial and internal audits are unqualified, through competent financial administration and thorough Board oversight.

E. Annually review the State Bar's financial and reporting requirements to ensure efficient and effective compliance with the State Bar Act.

F. Improve communication between the State Bar staff and Sections with regard to financial management and reporting.

G. Enhance communication to members and the public about the status of State Bar financial management, using graphical illustrations to simplify the presentation of data and dashboards on the State Bar website.

H. Explore the use of zero-based budgeting and multi-year budgeting.

I. Explore creating a disaster relief fund to improve services to the public.