



***2-Year Strategic Plan
(June 2015 – May 2017)***



WYOMING STATE BAR MISSION STATEMENT

The mission of Wyoming State Bar is to regulate the practice of law, facilitate the provision of quality legal services to the public and assist attorneys in the professional practice of law.

WYOMING STATE BAR STRATEGIC PLAN DEVELOPMENT

• INTRODUCTION

This two-year strategic plan for the Wyoming State Bar (WSB) addresses the future of the organized bar in Wyoming. Beginning in 2001, WSB leaders have gathered once every two years to assess progress made, discuss emerging issues confronting the legal profession, establish strategic direction, develop an action plan and assign who will do what by when to ensure a plan is appropriately enacted.

In 2013, the WSB adopted a strategic plan with four overall goals, stated as follows:

- Goal 1: To ensure the integrity of the legal profession and as an administrative agency of the Wyoming Supreme Court, the Wyoming State Bar will solidify and excel in the core administrative functions of the Bar, to include admissions, the professional development of attorneys and a structurally sound, consistently-fair and well-regarded disciplinary system.
- Goal 2: The Wyoming State Bar will strengthen its commitment to provide value to Wyoming attorneys through meaningful practice aids and well-conceived member benefits, championing justice through leadership on important issues facing the legal profession (to include improvements to the integrity, efficiency and access of the judicial system) and to promote respect for the law and the legal system in the eyes of the public.
- Goal 3: To promote and increase participation of members in Bar programs and activities, the Wyoming State Bar will better define its value to members, more effectively market bar services, properly welcome

new bar admittees and strengthen member awareness of bar activities through Commissioner communication.

Goal 4: The Wyoming State Bar will implement and operate a state bar built upon best practices by maintaining sound fiscal management and accountability, strengthened policies and procedures, assessment of annual board and staff performance and an evolution in the architecture of the Bar's internal structure to meet existing and emerging bar needs.

The "2013 Plan" was executed with great success. The organization made excellent strides in "getting back to the basics" in the core administrative / regulatory functions of the Bar, making substantive achievements in what constitutes the unauthorized practice of law, updating the Rules of Professional Conduct, updating the Disciplinary Code and related practices and procedures, updating CLE rules, updating Admissions rules and updating the Bylaws of the Wyoming State Bar. What attendees would have rated as a 6 (on a scale of 1-10) in 2013, 2015 attendees now assessed regulatory program effectiveness at an 8.7. Plans now shift to programs intended to protect the public like Fee Disputes and Clients' Security Fund protocol.

Similarly, the "2013 Plan" was highly successful on the member benefits / member value side with the implementation of low-cost and no-cost CLE programming, the launch of an ethics hotline and the development of a Wyoming Lawyer Assistance Program (WYLAP) solution, in addition to the strengthening of disciplinary opinion transparency. Add those to an already impressive list of member benefits (which continually need marketing emphasis) and effectiveness ratings amongst Commissioners, Officers and Staff elevated from 5.8 in 2013 to 8.0 today.

The 2013 Wyoming State Bar retreat was facilitated by Chris Newbold, Executive Vice President of ALPS. Based on the success of previous retreats and knowledge of bar association best practices nationally, Mr. Newbold was invited to facilitate the 2015 retreat, his fifth consecutive WSB retreat facilitation.

On June 19-20, 2015, at the Saratoga Resort & Spa in Saratoga, Wyoming, bar leadership and staff embarked on a two-day retreat. Bar leadership

participants included officers President Brad Bonner, President-Elect Devon O'Connell, Treasurer Weston Graham and Immediate Past President Patrick Korell. Commissioners in attendance included Melinda McCorkle, Dawnessa Snyder, Monica Vozakis, Nicholas Haderlie, Bobbi Overfield, Jim Edwards, Kenneth Barbe, Nate Hibben and Erika Nash. Young Lawyers Section President Blake Klinkner also was in attendance.

Staff participants included Sharon Wilkinson, Mark Gifford, Marie Ellis, Cathy Duncil, Brandi Robinson and Shannon Howshar. The retreat began at 10:00 a.m. on June 19 and concluded at noon on June 20.

After extensive discussion, the following strategic goals were adopted for the two-year period ranging from June 2015 through May 2017:

▪ **2015 STRATEGIC GOALS**

- Goal 1: To maximize organizational efficiency and enhance the customer experience of bar members, the Wyoming State Bar will strengthen the infrastructure backbone of bar operations through investment in necessary information technology.
- Goal 2: The Wyoming State Bar will strengthen its commitment to provide quality legal services to the public (and value to members) through periodic review and improvement of the Wyoming Lawyer Assistance Program, the development of a Modest Means Program and the promotion of benefits associated with a small town practice through a Rural Practice Initiative.
- Goal 3: To enhance member interaction, the Wyoming State Bar will accelerate its commitment to technology-driven outreach, including but not limited to social media platforms, an interactive and professional website, and the exploration of a mobile app option of value to members.
- Goal 4: To reduce duplication and centralize grant-making, the Wyoming State Bar will advocate, if feasible, for the shifting of IOLTA administration from the Wyoming State Bar Foundation to Equal Justice Wyoming.

Retreat attendees agreed the Wyoming State Bar is operating at a high level at present, thus providing an opportunity to continue to strengthen the foundation in pursuit of elevating from good to great. Several strategic goals contained herein are intended to be further investigated by staff with future recommendations, keeping in mind the thoughts and considerations of board input at strategic planning.

▪ **GOALS AND TWO-YEAR OBJECTIVES**

Goal 1: To maximize organizational efficiency and enhance the customer experience of bar members, the Wyoming State Bar will strengthen the infrastructure backbone of bar operations through investment in necessary information technology.

• Objective 1.1:

Explore the merits of whether the Wyoming State Bar's current and future IT investments are best served through investment in an internal IT director, stronger accountability to the current vendor, exploration of other outsourced partners better able to meet time-sensitive deadlines, or some combination of the above. (By when? August 2015)

Responsible Party: Executive Director

• Objective 1.2:

Make IT investment recommendations to the Board of Commissioners. (By when? September 2015, to coincide with annual budgeting).

Responsible Party: Executive Director / Treasurer (for financial impacts)

Goal 2: The Wyoming State Bar will strengthen its commitment to provide quality legal services to the public (and value to members) through periodic review and improvement of the Wyoming Lawyer Assistance Program, the development of a Modest Means Program and the promotion of benefits associated with a small town practice through a Rural Practice Initiative.

• Objective 2.1:

Biannually review the effectiveness of the Wyoming Lawyer Assistance Program for utilization, impact and return on financial investment. (By when? Ongoing)

Responsible Party: Executive Director

- Objective 2.2:

Recommend adjustments to the Wyoming Lawyer Assistance Program on both the WPAP partnership and the Lawyers Helping Lawyers components, with the primary criteria being 1) how bar solutions ultimately avail themselves to lawyers at their greatest time of need and 2) whether the program is financially sustainable on a basis commensurate with impact. (By when? June 2016)

Responsible Party: Executive Director

- Objective 2.3:

To increase access to justice for those otherwise not eligible for civil legal aid assistance, develop a Bar-sponsored Modest Means Program with a goal of recruiting 50 lawyers into the program and aiding 150 clients. (By when? May 2017)

Responsible Party? Lawyer Referral Coordinator

- Objective 2.4:

To ensure the integrity of the Wyoming legal system, explore the challenges and rewards of rural practice, with an eye towards 1) understanding how rural areas are being served by Wyoming lawyers; 2) spotlighting the rewards of rural practice through a content spotlight in the *Wyoming Lawyer*; 3) providing practice aids for those in rural areas, including how to launch a rural practice; and 4) work to match those soon to be retiring from rural practice with those interested in taking over their practice. (By when? January 2017)

Responsible Party? Executive Director

Goal 3: To enhance member interaction, the Wyoming State Bar will accelerate its commitment to technology-driven outreach, including but not limited to social media platforms, an

interactive and professional website, and the exploration of a mobile app option of value to members.

- Objective 3.1

Define a technology advancement plan that prioritizes how this push will occur, on what timeline and at what projected expense. (By when? November 2015)

Responsible Party? Executive Director

Goal 4: To reduce duplication and centralize access to justice grant-making, the Wyoming State Bar will advocate, if feasible, for the shifting of IOLTA administration from the Wyoming State Bar Foundation to Equal Justice Wyoming.

- Objective 4.1:

Discuss with the Wyoming State Bar Foundation board why shifting IOLTA administration to Equal Justice Wyoming serves the best long-term needs of access to justice organizations, grantees and the cause generally. (By when? July 2015)

Responsible Parties? Wyoming State Bar liaisons to the WSBF board, and Erica Nash.

- Objective 4.2:

With the support of the WSBF board, discuss with Equal Justice Wyoming leadership their interest in IOLTA administration, and how that shift could be effectuated through the Wyoming Rules of Professional Conduct. (By when? August 2015)

Responsible Party? Executive Director

- Objective 4.3:

Understand how this move could be effectuated and build support from necessary stakeholders who would need to support such a plan, including the Wyoming Supreme Court. (By when? Fall 2015)

Responsible Party? Bar President / Executive Director