



*Serving the Public. Serving the Profession.*

## **MISSION**

The mission of the Louisiana State Bar Association is to assist and serve its members in the practice of law, assure access to and aid in the administration of justice, assist the Supreme Court in the regulation of the practice of law, uphold the honor of the courts and the profession, promote the professional competence of attorneys, increase public understanding of and respect for the law, and encourage collegiality among its members.

## **VISION**

The LSBA is an exemplar of service to the public and the professional interests of its members through effective leadership, the administration of its regulatory authority, the facilitation of access to justice and ensuring the competence and integrity of the bar.

## **GOALS**

**Goal 1: The LSBA preserves self-regulation and self-governance through our mandatory bar in service to the public and the profession.**

- The State Bar assists the Louisiana Supreme Court in the regulation of the practice of law by expanding and excelling at fulfilling its administrative regulatory responsibilities.
  - Continue to administer the Mandatory Continuing Legal Education program while fully integrating its systems into those of the LSBA and ensuring sufficient staffing to serve the needs of Louisiana lawyers;
  - Continue the collection of mandatory licensing fees (dues and disciplinary assessment) and the maintenance of the roll of attorneys in accordance with Supreme Court Rule XIX;

- Continue to administer the Plan of Legal Specialization which serves the public by certifying as specialists attorneys who meet certain criteria;
- Continue to administer the Transition Into Practice Mentoring Program as adopted by the Louisiana Supreme Court;
- Continue to operate the Fee Arbitration Program to settle fee disputes either between attorneys or between clients and their attorneys;
- Continue to operate the Practice Assistance and Improvement Program, including the Attorney-Client Assistance Program and Diversion Program (which includes Ethics School and Trust Accounting School);
- Continue to administer and staff the Rules of Professional Conduct Committee to provide input and assistance to the Louisiana Supreme Court on ethical rules governing lawyers;
- Continue to provide oversight and financial support to the Judges and Lawyers Assistance Program;
- Continue to assist in the regulation of lawyer advertising by issuing Lawyer Advertising Advisory Opinions as directed by the Louisiana Supreme Court in the Rules of Professional Conduct;
- Continue to secure funding for and administer the Client Assistance Fund to compensate clients who lose money due to lawyers' dishonest conduct;
- Continue to maintain and provide training for the statewide uniform case management system for Louisiana Legal Services Corporations and pro bono providers;
- Assume administration of the Court Interpreters Program;
- Implement and administer the Receivership Program wherein receivership teams would assist in instances of death or disability inactive status where there is no associate, partner or estate administrator;
- Explore and strengthen efforts as related to addressing the unauthorized practice of law;
- Assume administration of Bar Admissions in Louisiana; and
- Continue to coordinate with the Louisiana Supreme Court to identify and assume additional regulatory functions.

**BENCHMARK(S):** Continuation of or assumption of program responsibility.

- The State Bar ensures that its public policy positions are in compliance with existing law and serve in the maintenance of the unified bar.
  - Continue to closely monitor legal developments and litigation concerning unified bars;

- Review and assess House of Delegates policy positions in light of current constitutional issues and consider asking the House to rescind potentially problematic policies;
- Amend the governing documents to increase the size of the majority needed to adopt future policy positions;
- Consider whether governing documents should be amended to increase the size of the majority needed for the Board of Governors to adopt positions on pending legislation;
- Keep the House of Delegates informed regarding mandatory bar litigation and developments; and
- Consider revisions to the Bylaws dealing with legislation to ensure compliance and consistency with changing legal landscape.

**BENCHMARK(S):** Current case law and constitutional compliance, and defensible policy positions that impact only the regulation of attorneys, the regulation of the practice of law and the administration of justice.

**Goal 2: The LSBA cultivates professionalism, collegiality and quality of life among its members to improve the quality of practice and respect for the profession.**

- The State Bar continues its professionalism and wellness outreach and educational programs.
  - Continue to offer Continuing Legal Education programs in these areas;
    - Create and offer a one-hour CLE program (including PowerPoint) to discuss the Revised Code of Professionalism
  - Continue publishing articles on these topics in the *Louisiana Bar Journal*;
    - Consider a dedicated issue of the Journal with articles on professionalism, collegiality, wellness and fitness
  - Continue to administer the Transition Into Practice voluntary mentoring program;
    - Require a comprehensive meeting between mentors and mentees to discuss in detail the Revised Code of Professionalism
  - Continue to offer Support of Lawyers/Legal Personnel – All Concern Encouraged (SOLACE);
  - Continue to offer Ethics Advisory Service; and
  - Continue to support Judges and Lawyers Assistance Program (JLAP).

- The State Bar partners with other stakeholders including inns of court, local and specialty bar associations, law school, the judiciary and law firms.
  - Continue outreach to the law schools in these areas;
  - Contact the leaders of all local and specialty bar associations and offer to provide free to their members (including speakers and materials) the one-hour CLE program (including PowerPoint) to discuss the Revised Code of Professionalism (this could be a stand-alone presentation or could be included as part of a multi-topic program);
  - Coordinate with the Senior Lawyers Division to provide panelists from that group to discuss the Revised Code of Professionalism and their experiences through the years with respect to professionalism, ethics and the practice of law. This program could be offered to other organizations and/or law schools to make presentations to their respective groups;
  - Continue joint programming between the Senior Lawyers Division and the Young Lawyers Division to advance professionalism in the practice of law and to provide a forum for those groups to learn from and benefit from one another's perspectives;
  - Contact either judges' associations or judges and offer to present the one-hour CLE program on the Revised Code of Professionalism, including providing speakers and materials; and
  - Provide a copy of the Revised Code of Professionalism of appropriate size and quality for display in every courthouse throughout the state (the actual goal would be to provide a *framed* copy of the code but budget implications would need to be explored).

**BENCHMARK(S):** Greater understanding of the Code of Professionalism and related services offered by the LSBA, as well as greater satisfaction among practitioners and fewer disciplinary complaints.

**Goal 3: The LSBA helps foster inclusion and participation by the diversity of its members and works to satisfy the unique needs of all members.**

- The State Bar fosters a welcoming environment throughout the association (leadership, sections, committees and personal outreach) by nurturing a spirit of inclusivity that embraces the variety of experiences, perspectives and interests across the membership.
  - Continue to encourage participation through committee and section service;

- Encourage the LSBA president to consider diversity when appointing committee leaders
- Utilize co-chairs to ensure committee leadership pipeline
- Consider surveying committee members at end of terms to secure feedback on reasons for involvement or lack of same
- Continue to sponsor the annual Conclave on Diversity in the Legal Profession;
- Continue to offer the Leadership LSBA program;
  - Work to include in other areas of the LSBA those not selected for leadership class
- Continue to promote sections' commitment to diverse programming by ensuring seminar speakers are representative of the diversity of LSBA membership
  - Revise section reporting to include specific questions about inclusion of young attorneys, women, attorneys of color and geographic diversity
- Encourage sections' promotion of benefits of section membership
  - Suggest using section funds to recruit members
- Ensure that Board and House members are representative of LSBA members and that diversity is a consideration in appointed leadership positions; and
- Recruit diverse members to run for office.
  - Provide potential candidates with more information about duties and responsibilities of Board and House members

**BENCHMARK(S):** Diverse opportunities and pathways to service and membership satisfaction that the LSBA has something for them.

- The State Bar ensures accessibility in the areas of leadership, programming and electronic outreach by ensuring multiple points of entry for members to engage.
  - Continue programming such as Disabilities Series, Women's Professional Development Workshop Series, Specialty Bars Conference, Diversity and Inclusion Managers Summit, Professionalism Facilitator Teams and Black History CLE Seminar
  - Continue presentation of awards including Chief Justice Bernette Joshua Johnson Trailblazer Award, Guardian of Diversity Award and Citizen Lawyer Awards;
  - Encourage engagement of Board of Governors and House of Delegates members with constituents in their respective districts
  - Encourage leaders to engage with local and specialty bars in their

- respective areas;
- Encourage young and/or senior lawyer groups at local bar associations and consider programming which targets these groups;
- Work to increase participation of judges in LSBA programs, especially in areas where programs are held;
- Provide programming that focuses on disability issues
- Recognize those that executive the Statement of Diversity Principles;
- Continue pipeline programs such as Suit Up for the Future High School Summer Legal Institute and Intern Program; and
- Create programming to increase diversity pipeline to legal profession.
  - Invite law students to events
  - Explain partnership between those in the profession and those studying to enter the profession
  - Create programming about profession for law students
  - Provide information on importance the LSBA places on diversity and inclusion in the legal profession

**BENCHMARK(S):** Members feel the LSBA is accessible.

- The State Bar strengthens ties with members by engaging them through outreach and meeting them where they are.
  - Continue to offer receptions for new admittees in locations throughout the state;
  - Continue to offer and expand database of information on local and specialty bar associations;
  - Collaborate with local and specialty bar associations;
    - Identify programs which would welcome partnerships with LSBA
    - Assist local and specialty bar associations with strategic planning and leadership development
    - Promote diversity and inclusion and preserve historical content
  - Maintain presence at events across state including red masses and bench-bar conferences;
    - Offer LSBA ID cards at these events
  - Continue regional outreach;
    - Implement annual meeting with minority bar leadership to support their organizations
    - Identify existing LSBA conferences which can be duplicated in less served areas of state
    - Encourage use of member outreach CLE PowerPoint to expand member knowledge of LSBA services

- Continue utilizing publications and social media to facilitate member outreach;
  - Consistently highlight legal advancements in diversity and inclusion
  - Assess effectiveness of current publications and social media
- Increase programming which utilizes videoconferencing technology the LSBA has provided to local bars across the state;
- Consider how the LSBA app can assist with member engagement in an impactful way;
  - Consider improving app design to simplify member sign-in and interface, and to enable member contact to express interest in getting involved in LSBA
  - Utilize app to notify members of important deadlines such as dues, MCLE compliance, voting, etc.
  - Promote the app at all LSBA events and ask members to download it right there
  - Promote app at local and specialty bar events, including where LSBA is exhibitor
- Increase visibility of leaders from Board of Governors and/or House of Delegates through communication with their constituents;
- Facilitate Board member attendance at events in their regions to network and promote LSBA participation to interested attorneys;
  - Four Corners CLE seminars
  - Louisiana Attorney Disciplinary Board CLE seminars
  - Local and specialty bar meetings
  - Local and specialty bar committee or section meetings
- Increase presence north of I-10 in a meaningful and long-term way; and
  - Through outreach at established local and specialty bar events
  - Through utilization of Young Lawyers Division and Senior Lawyers Division members to reach out to their counterparts
- The LSBA should utilize every opportunity to exhibit at its own events (CLE seminars, meetings, etc.) to promote member engagement through participation and utilization of services.
  - Explain and promote committees and encourage involvement
  - Explain and promote sections and encourage membership

**BENCHMARK(S):** Increased member awareness, satisfaction and engagement.

## **Goal 4: The LSBA expands access to justice.**

- The State Bar develops sustainable, coordinated and centralized funding for civil legal services.
  - Facilitate the work on the ATJ Commission Funding Committee;
    - Develop and coordinate yearly state funding plan
    - Work with lobbyists to develop and facilitate passage of state funding request
    - Coordinate breakfast to educate legislators on civil legal aid
    - Assess possible alternative sources of state and local funding
    - Hold a Louisiana Access to Justice Commission Meeting in Baton Rouge, LA to encourage participation by legislators
  - Coordinate Annual ABA Visit to Congress in support of federal funding for LSC;
  - Develop Communications Plan; and
    - Create educational material for public and legislators
    - Promote the LBF Economic Impact Study
    - Coordinate Civil Legal Aid Day at Louisiana State Capitol
    - Create stakeholder “communication team” to raise awareness of the benefits of civil legal aid
    - Create and execute a communication campaign to increase awareness of civil legal aid and the efforts of the Louisiana Access to Justice Commission
  - Facilitate coordinated resource development.
    - Coordinate criminal justice reinvestment grant application
    - Create stakeholder group to identify alternative funding options
  
- The State Bar develops resources to ensure optimum funding of civil legal aid providers.
  - Facilitate the work of the Technology Committee and Disaster and IFP Committees;
  - Assess technical capacities of civil legal aid providers;
  - Assess statewide technology needs of the Civil Justice Community and develop priority list of possible initiatives and projects;
  - Assess training needs and develop appropriate resources;
    - Host annual Louisiana Justice Community Conference
    - Provide targeted training throughout the year on public interest legal issues
  - Coordinate the statewide legal services disaster response plan;
  - Identify and assess current substantive legal issues faced by civil legal aid providers; and
    - Coordinate substantive law task forces (CINC, Elder Law, Family



- Law, Housing and Consumer Law, Public Benefits)
        - Investigate IFP issues
    - Partner with Louisiana Bar Foundation to launch Legal Navigator Program.
- The State Bar fosters development in civil legal aid.
  - Continue to facilitate ATJ Pro Bono Subcommittee;
  - Continue to develop Volunteer Attorney Outreach;
    - Coordinate annual Lawyers in Libraries
    - Administer Free Legal Answers Program
    - Certified as Provider for “CLE for Pro Bono”
    - Create Pro Bono CLE template to foster a culture of PB representation
    - Facilitate education on volunteer portal of statewide case mgt system
    - Coordinate ATJ Distinguished Pro Bono Fellowship Program
    - Participate in National Celebrate Pro Bono Week
  - Foster law student engagement in civil legal aid;
    - Coordinate ATJ Developing Leadership Intern Program
    - Participate in LSU Apprenticeship Week
    - Coordinate outreach on children’s and disability law job opportunities
  - Research methods to increase attorney/legal volunteerism and develop initiatives and best practices;
  - Relaunch the Louisiana Civil Justice Center (LCJC) to work with other stakeholders to provide civil legal services;
  - Educate and increase awareness among judges and judicial staff;
    - Outreach to judiciary
    - Host biannual Pro Bono Summit
    - Create materials and trainings to educate judges and judicial staff
  - Share ATJ components of strategic plan with the Supreme Court of Louisiana and the Louisiana Bar Foundation to garner support; and
  - Continue to coordinate annual LSBA Pro Bono Awards recognition.
- The State Bar develops alternative or additional legal resources to support unaddressed issue or provide extra-judicial services.
  - Continue to facilitate the work of the Building Bridges, Modest Means and SRL Committees, as well as the Gap Assessment Subcommittee;
  - Continue to partner with libraries to support the Legal Education and Assistance Program (LEAP);
  - Create and support legal resources for the public;

- Develop and expand use of “Find Legal Help” site
- Create new and maintain existing SRL resource centers (websites and help desks) and statewide uniform domestic forms
- Develop and expand membership of online modest means directory
- Update “Becoming an Adult” website
- Authored unmet statewide legal needs report;
- Continue to administer the Legal Innovators for Tomorrow (LIFT) Program which targets new attorneys interested in focusing a practice on unmet legal needs;
  - Address domestic violence, disaster and expungement legal needs
  - Match interested attorneys with providers to address unmet legal needs
- Develop and implement a pilot conflict resolution program located where other resources are not readily available;
- Collaborate with the Supreme Court of Louisiana and Clerks of Court as to what data needs to be collected; and
- Convene Clerks of Court, and other stakeholders from judicial bodies to discuss the unified court systems.

**Goal 5: The LSBA improves public trust and confidence in the legal system and its participating judges and lawyers.**

- The State Bar effectively communicates the value of a self-regulated profession to facilitate the public’s understanding of the importance of lawyers and their role in the delivery of legal services.
  - Continue to work with the Lawyers in Libraries program;
  - Promote and grow the Suit Up for the Future High School Summer Institute and Intern Program;
  - Continue to support and partner with the Louisiana Center for Law and Civic Education and its initiatives;
    - Develop a “Speaker’s Bureau” for LCLCE programs that could speak on the rule of law but also other important relevant topics.
  - Develop a “Speaker’s Bureau” to speak at local Rotary Clubs, Lions Clubs, etc. to emphasize the Rule of Law and the role of lawyers and judges in maintaining the rule of law. Speakers would use the approved PowerPoint presentation that was created by Bar leaders and staff;
  - Facilitate attendance of Board of Governors and Young Lawyers

- Division District Representatives at local Board meetings and social events;
  - Create a list of bullet points of what services lawyers offer and what they do for the public that they can reference when being criticized by the public;
  - Solicit articles for the *Louisiana Bar Journal* once or twice a year about the Rule of Law; and
  - Share relevant articles with the local press and authorize reprints of same.
- The State Bar promotes public understanding of the law, the legal system, and the contribution of lawyers to society to garner public recognition for lawyers' good works and the importance of the Rule of Law.
  - Utilize social media to promote the good works of Louisiana Lawyers;
  - Defend judicial decisions which are attacked in the press by defending the process and the rule of law (rather than defending the actual outcome);
  - Promote the Secret Santa program to lawyers and the public; and
  - Share the articles that are published in the *Louisiana Bar Journal* about the Rule of Law and the good works of Louisiana Lawyers.

**Goal 6: The LSBA has the financial, governance and organizational capacity to serve its vision.**

- The State Bar ensures that its financial, volunteer and staff resources are aligned with its priorities.
  - Pay close attention to the aging lawyer population and its impact on both the profession and the LSBA; and
    - Monitor and plan for the exit of aging lawyer both from the profession and from leadership positions within the organization
  - Strive to encourage involvement of senior lawyers in the profession to the extent they are interested.
    - Continue studying the creation of "Emeritus" status for those lawyers who are no longer actively practicing but which to maintain their licenses and/or provide pro bono legal services
- The State Bar engages in best practices in Board governance and ensures that the Board is focused on its established priorities and moving them forward.
  - Work diligently to prevent the LSBA from becoming involved in social, political or other debates that do not relate directly to the practice of

- law and the essential and fundamental mission and purpose of the LSBA; and
    - Consider increasing the power of the Bar Governance Committee in an effort to discourage House of Delegates resolutions that could harm the LSBA.
  - The State Bar aligns its governance structure with its vision to ensure governance of the Association is flexible, responsive and attentive to best practices.
    - Continue to partner with the Louisiana Supreme Court in the regulation of the practice of law;
      - Carefully guard and protect the strong relationship with the Supreme Court which is rooted in mutual trust and respect
      - Work to poise the LSBA to be the Supreme Court’s preferred partner in the regulation of the practice of law, especially in the event the Bar’s mandatory status is challenged
    - While working to ensure its continued mandatory status, explore how the LSBA might look as a voluntary organization, including its retention of some regulatory functions and mandatory fees for same; and
    - Consider changing the name of the LSBA to simply “Louisiana State Bar” to reflect the reality that the LSBA is and always has been a regulatory entity and not simply a professional association.
- The State Bar Board of Governors continues its prudent management of financial resources to ensure the Bar has the financial infrastructure to support its vision.
  - Continue to monitor revenue and expenses and to engage in budget forecasting;
    - Make budgeting decisions with focus on both short and long-term needs
    - Critically examine return on investment of programs
  - Continue to produce and work to increase sources of non-dues revenue;
  - Continue prudent investment of reserves while maximizing return; and
  - To the extent possible, be cautious about using reserves to fund routine operations.

**BENCHMARK(S):** A financially solvent organization which aligns its resources with its mission.