



*2-Year Strategic Plan
(November 2015 – October 2017)*

VIRGIN ISLANDS BAR ASSOCIATION MISSION STATEMENT

The mission of the Virgin Islands Bar Association is to promote and foster legal ethics, education, professionalism and discipline for its members, with a goal of advancing access to justice and improving the quality of legal services. Additionally, the Bar Association has an altruistic goal of legal-related public service to the community.

VIRGIN ISLANDS BAR ASSOCIATION STRATEGIC PLAN DEVELOPMENT

• INTRODUCTION

This two-year strategic plan was developed by the leadership of the Virgin Islands Bar Association (VIBA) to address the future of the territory's largest voluntary law-related organization. VIBA leadership believed it to be an appropriate time to convene a facilitated long-range planning retreat to assess the current state of the organization, discuss emerging issues affecting the legal community, establish strategic direction, develop an action plan and assign who will do what by when to ensure a unified plan is in place to define future success. However, with board elections slated for December, the current board acknowledged the importance of permitting a review of this plan with new leadership following elections, with the possibility of alteration and adjustment.

The 2015 VIBA retreat was facilitated by ALPS Executive Vice President Chris Newbold. Newbold was selected based on his experience working with lawyers and law-related organizations intent on realizing their organizational potential. The 2015 MSBA retreat was preceded by eight pre-retreat interviews of current VIBA board member and staff.

On November 16, 2015 at the Buccaneer in St. Croix, a group of board directors and staff met for a full day retreat, which began at 9am and concluded at 3pm. Board participants included President Natalie Nelson Tang How, President-Elect Russell Pate, Ernest Morris, Anthony Ciolli, Andrew Capdeville, Shari D'Andrade, Yvette-Ross Edwards, Chivonne Thomas Jones and Executive Director Hinda Carbon. From those discussions, a plan was developed to be shared and ultimately approved by the full VIBA board subsequent to the sitting of the new board.

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

▪ **2015-2017 STRATEGIC GOALS**

- Goal 1: Through initiatives targeted at improving the administration of justice, work to advocate for lawyers, the judiciary and the public's confidence in the legal system.
- Goal 2: In pursuit of a more engaged and representative governance structure, evaluate and streamline commitment alignment, the potential of area of practice sections, reporting functions of committee chairs and the board election process generally.
- Goal 3: Increase partnerships with State Bars, specialty Bars and other organized legal groups as a means of developing non-dues revenue, showcasing the Virgin Islands as a CLE destination and providing greater educational opportunities to VI Bar members
- Goal 4: Improve the Bar's commitment to improving access to justice to low and middle income communities.

▪ **GOALS AND TWO-YEAR OBJECTIVES**

Goal 1: Through initiatives targeted at improving the administration of justice, work to advocate for lawyers, the judiciary and the public's confidence in the legal system.

• Objective 1.1:

Research and educate key decision makers on the state of judicial funding for VI courts, with a particularly emphasis on the Senate.

Responsible Party: Judicial Committee

When? Early 2016

• Objective 1.2:

Given the impact the jury duty experience has the public's perceptions of lawyers and the court system, work to strengthen the experience, with an eye toward timeliness of participation, compensation, logistics, orientation and other aspects of the jury duty experience

Responsible Party: Judicial Committee

When? Late 2016

• Objective 1.3:

To enhance the administration of justice, advocate for Virgin Islands representation on the Third Circuit, as well as the additional of another St. Croix judicial seat.

Responsible Party: Board President through Board Resolution

By When? Resolution passage: January 2016;
Advocacy: Immediately thereafter

Goal 2: In pursuit of a more engaged and representative governance structure, evaluate and streamline commitment alignment, the potential of area of practice sections, reporting functions of committee chairs and the board election process generally.

• Objective 2.1:

Evaluate and streamline Bar Association committees, focused on meaningful output, activity, engagement and reporting integration with the Board of Governors

Responsible Party: Board President

By When? Process completed by March 2016

- Objective 2.2:

Recommend by-law changes and Supreme Court review that permit Bar Association governance to be staggered, representative amongst islands, and best geared for productivity and efficiency. Initial recommendation include moving to either 9 or 11 directors (odd number), transitioning to electronic voting amongst members, staggered 2 year terms on the board, with two at-large positions from each island (4 total) and the ABA delegate not be a full seated director.

Responsible Party: Board President

By When? Recommendation forwarded to the Supreme Court by June 2016 for implementation in 2016.

- Objective 2.3:

Explore the viability and value of a Bar Association-sponsored area of practice sections, intended to build communities amongst practitioners in specific fields.

Responsible Party: Executive Committee

By When? Full Board recommendation to be delivered by September 2016, with a goal of 2 sections created by June 2017, if adopted.

Goal 3: Increase the value of CLE to VI Bar members through partnerships with other State Bars, specialty Bars and other organized legal groups as a means of developing non-dues revenue, diversified content and diversified content delivery through simulcast.

- Objective 3.1

Engage in one State Bar CLE partnership during the term of this plan, with a goal of raising \$100,000 in revenue from that partnership.

Responsible Party? CLE Committee

By When? Initial list of targeted states to be development by Q2 2016, with a deal solidified for implementation in 2017

- Objective 3.2

Evaluate current CLE topics and expand focus into substantive CLEs, with one pilot project during the term of this plan.

Responsible Party? CLE Committee

By When? By Q4 2016.

- Objective 3.3

Utilizing court technology, develop a simulcast CLE event.

Responsible Party? CLE Committee

By When? By Q2 2017.

Goal 4: Improve the Bar's commitment to improving access to justice to low and middle income communities.

- Objective 4.1:

Evaluate the current architecture of committees working on this challenge, and infuse new energy into substantive strategies the Bar Association can take a leadership role.

Responsible Party? Access to Justice Committee

By When?

- Objective 4.2:

Recognize on an annual basis through an award or other appropriate means those who serve to champion the access to justice cause.

Responsible Party? Access to Justice Committee

By When? Annual meeting

- Objective 4.3:

Survey bar members on an annual basis as to *pro bono* commitment, or other means of individual action which advance the access to justice cause.

Responsible Party? Executive Director

By When? Via annual dues statements

APPENDIX A: STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

STRENGTHS

- Communication with members, what's coming up, weekly emails, bar journal
- Brown Bag lunches
- Excellent relationships with all three Courts: Supreme, Superior, Federal District Court
- Members are engaged at CLEs – content is always materializing / new laws, etc.
- Not afraid to pivot on CLE programming
- “Free” online legal research for active members
- Extension to the community – kiosk concept, moot court competition, other public service
- Option is sought on key matters

WEAKNESSES

- Not nimble enough to be a strong voice on key issues
- Don't create enough excitement to spur engagement
- Timid in taking stands / shy / reactive
- Everything is personal, which at times can effect leadership stands and Bar advocacy
- Need resources of simple questions
- Marketing ourselves – don't tell people what we do
- Committees and committee involvement
- Board micromanagement of Committee outputs / discourages volunteerism
- Lack of institutional knowledge
- Defects in governance model – high turnover

OPPORTUNITIES

- Do less and be more focused; do a few things very well
- Courts maturing, Bar maturing . . . CLE and how it's been embraced; opportunity for review
- Progressive bench – high caliber of practice
- We can be more active
- Have members with other bar memberships opine on membership value
- Advocate for our lawyers – seat on Third Circuit, court budgets, can touch a lot of people through education which can impact access to justice and other bar goals
- Review of VI Bar committee appointment powers
- Government paying for lawyers' professional liability insurance

THREATS

- Self-sabotage of information to the press
- Folks speaking on behalf of the Bar without authorization
- Inability to advance positions because of small populations and relationships
- Follow will of Bar or members interests: balance?
- Tiers of membership and representation
- New District Court rules and procedures – now compete on CLE, other priorities / picture now blurred

APPENDIX B: PRIORITIZATION OF IDEAS

As a means of ensuring that the focus of the two-year plan was properly aligned with what matters, attendees were asked to brainstorm ideas that, if achieved, would significantly move the Bar forward. Then, each participant was asked to prioritize these ideas through the distribution of three “dots”, which could be distributed to available ideas by attendees in any manner deemed appropriate (including one dot on every area, or three dots on one area).

Here were the results:

- New Bar building – better financial play / meeting space (0 votes)
- Increase non-dues revenue through partnerships with State Bars to revenue share on CLEs, provide better education for members, take advantage of the Islands as a tourist destination (8 votes)
- Creation of a bar foundation to fund more public bar programs (0 votes)
- Stronger commitment to access to justice – being an originator (6 votes)
- Advance an “agenda” – control the narrative, ideas, public relationship, take more stands – code revisions, marketing, advocacy (3 votes)
- Invest in data integrity on lawyers; demographics / needs (1 vote)
- CLE improvements – area of practice sections, budgeting, online reporting, etc. (6 votes)
- Commitment alignment, effectiveness, section opportunities, integration with board of governors (5 votes)
- Bridge the gap program with young lawyers – resources, mentorship, introduction to the legal profession (1 vote)
- Improving ethics and civility amongst lawyers (1 vote)
- Governance – terms, rotation, representation, total #, inclusion of ABA delegate (2 votes)
- Advocate for our lawyers – judicial funding, Third Circuit judge, administration of justice (4 votes)
- Utilize bar dollars judiciously; good expense stewardship / transparency (0 votes)

APPENDIX C: TEN BASIC RESPONSIBILITIES OF AN EFFECTIVE STATE BAR BOARD

- I. Determine the Organization's Mission and Purpose
- II. Select the Executive Director
- III. Support the Executive and Review Her Performance
- IV. Ensure Effective Organizational Planning
- V. Ensure Adequate Resources
- VI. Manage Resources Effectively
- VII. Determine and Monitor the VIBA Programs & Services
- VIII. Enhance the Public Image of VIBA
- IX. Serve as a Court of Appeal (for HR Matters)
- X. Assess its Own Performance