

LIFE PLANNING
IN LEGAL SERVICES RETRENCHMENT

by

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There was some discussion of whether or not this paper should be written, whether or not it was "too late." It is here despite those discussions for two reasons. First, whatever legal services program and personal decisions have been made and are being implemented, the conditions of uncertainty and change which forced those decisions are likely to continue, forcing new decisions about the future of programs and of the individuals which make them up. Second, life planning is a continuing process. The people who are leaving, the people who are staying, and new people who will join legal services will continue to be asking questions about their involvement with the program. To the extent that they are plugged in, awarely in charge of their lives, and consciously choosing a relation with legal services, the movement itself will be empowered.

What is Life Planning?

Life planning is, quite simply, a process by which the individual faces his or her present, chooses what kind of a future s/he wants to live, and acts so as to make that chosen future a reality. It involves the whole of the individual's life, and its traditional components therefore include financial planning, career planning, location choice, work on relationships, and time management. You've seen books, been offered workshops in, or read articles on all of those, and they are all components of life planning. Life planning simply means that the choices involved in all of those areas should be integrated, and should be grounded in a basic definition of who the individual chooses to be in relation to this life.

"There must be fifty ways to leave your lover."* And a hundred ways to plan your life. Some of them are suggested at the back of this paper. The thing which unites various life planning processes is that they are overt and conscious. Time is set aside. Questions are asked and answered. What do you want? How do you get there? People are making choices all the time, even if the choice is to leave everything as it is. Life planning is designed to bring the making of those choices to the conscious level, and to get the individual moving in the direction she or he wants to go. Engaging in life planning as a structured process is a useful tool for facing one's present life, and deciding what to do about it. That's all.

Why Life Planning in Legal Services Retrenchment?

For the individual, both those who go and those who stay.
For those who stay, life planning offers the sense of power which comes from the knowledge of choice. Life planning attempts to confront each individual with the truth, which is that in all but very rare circumstances, our lives are filled with options, whether we explore them or not. To stay with legal services in its next phase is a choice and a commitment, not a default. It is critical to the individual's sense of power and autonomy, as well as to the future of the program, that that choice be owned, not falsely labelled as the fate that was handed down.

For those who are seeking outside employment without being laid off, life planning offers organizational support for the process of exploration and choice. Because life planning

*Paul Simon, "50 Ways to Leave Your Lover"

supports the individual in confronting and expressing his or her own unique values, it can decrease the guilt of "deserting" a cherished institution and encourage the exploration of means of continuing the values wrapped up in legal services in other settings.

Perhaps the most critically in need of life planning support are those who are leaving involuntarily, for they are likely to feel the most threatened in the control of their destinies. Life planning is most enjoyable at a time when both the present and the future appear rich with promise. It is most necessary when both appear bleak, for it is then when the individual most needs support in becoming aware of options, exploring them, and moving towards the future s/he chooses.

For the individual legal services program. Larry Hirschhorn, in "Revealing and Disclosing in Managing the Retrenchment Process," has persuasively argued the case for engaging in joint planning - individual and program - where alternative futures for the individual are explored in conjunction with the organization's exploration and planning. A blunt statement of this argument to the manager to pay attention to and support the individual's process of choice would be - It's happening anyway, and it will continue to as long as conditions of uncertainty and change prevail. Either you manage and utilize that energy, integrating it with the process of building the organization's future, or you drive it underground, where its energies can run counter to the corporate planning process.

It is a sociological truism that corporate and institutional forms derive their characters and stance towards the world from the individuals who form them. The organizations which will carry forward the legal services movement into the 80's are likely to include formal legal services organizations, affiliated public interest law and advocacy centers, and private law firms linked by requirements from Washington and by the program's need for political survival.

The development of these forms, as well as the self-selection and group selection of the individuals who will make them up, presents a chicken-and-egg paradox. The organizational design challenge is to build the right mission for the future, and to find the right individuals to fulfill that mission. Which comes first? Ideally, they develop together.

Some project directors have co-opted this joint development by declaring, "This is what this legal services program will be. These are the linked organizations we are attempting to fund. And these are the people I want." This stance is in harmony with traditional management responsibility and has provided some degree of certainty in an otherwise vastly uncertain situation. The downside risk is that the manager's definition of organizational mission and form is limited by her or his own vision, and the team s/he selects for staffing may differ from those who would have chosen the positions for themselves.

For the Legal Services Movement. It is a premise of this paper that the future of the legal services movement will in large measure be determined by the individually felt terms under which staff members leave or remain employed in the program. Those

terms will define both the organizational forms under which the movement will move forward and the breadth of involvement and depth of commitment which is felt by those within and outside of legal services programs as we have known them.

There has been much discussion of the need for the legal services "movement" to define its stance towards the present, its goals for the future and its strategy for getting there. But the "movement" is the people who make it up, and what they are together. The numbers and names of those people are changing. The movement will continue to be the sum, and something larger than the sum, of individual actions and commitments made in relation to it. If the legal services movement is to continue to survive and to grow, its members, both those within and without formal legal services programs, must have a clear sense of what they are doing, why they are doing it, and by what actions they can continue to commit to the provision of legal services and advocacy for the poor.

Program Directors and the Organizational Environment During

Retrenchment

The Program Director has been critical in the definition of what has gone on in the retrenchment process to this point, however s/he has played the leadership role. That role will continue to be central during the decisions which will be faced in the future. Positions taken by the Director on both the nature and the rules of the "game" we are in may not be final for programs, but they will be critically important in determining the direction the programs will take.

Defining the Nature and the Rules of the Game. Program Directors, by virtue of their positions and of the fact that they have been confronted with a (constantly changing) set of facts on which they must act, have determined for themselves what the nature of the game is for legal services in the next few years. These definitions have ranged from a view that legal services as we have known it is over, and that the "shell" should be used for the future to a quite literal "retrenchment" in individual service to a focus on state politics and decisionmaking. Making a judgment about what is going on is part of the manager's job. The only caution life planning would offer would be to be aware that the manager's analysis of, judgments on, and decisions about the current situation are based on the manager's own values, information, and ways of perceiving the world. Other, perhaps equally valid, conclusions are being drawn by individual members of the program. A support for life planning implies that each person can come to a valid individual judgment, based on the information, needs and values from which s/he is working.

Defining the rules of the game may be even more important to the organizational environment during retrenchment and redirection. There are two poles, and many positions in between. At the one extreme, and in fact a prevalent position in the early days of retrenchment, has been the rule that "only rats desert a sinking ship." At the other is the rule of mutual support in defining the future, both corporate and individual. The one could be called macho, though it is a natural instinct for group survival when a valued institution is threatened. The other assumes that the individuals who made up legal services were there for a good

reason, and that they will stay or leave for a good reason, and that that is their appropriate decision.

Practical Steps - Accessing Support Resources

If a manager decides that support for the organization's employees in exploring their individual futures is a sound idea, there are numerous options available. In many cases, volunteer resources are available from the community. Where that is not the case, many of the following supports can be located at small cost compared to the potential benefit to the program.

Life planning: workshops and consultation are offered by private training and consulting firms, as well as university departments of human development. Programs can hire the service, or subsidize individual employees' participation. If the employee is in a marriage or other partnership, the partner's participation can be important. The strongest programs, in my view, combine an emphasis on soul-searching with some ways to do something about it, such as financial and career planning.

Career Counselling: This seems to me to be one clear area where peer counselling and internally run programs are unlikely to do the trick. People who have been secretaries, paralegals, lawyers and managers within legal services have developed a wide range of skills of use to the world beyond legal services. But I am not sure that people within the program are the best ones to articulate how those skills fit outside. For career counselling, resume writing, and job search training, you are looking for someone who knows the rest of the world, knows legal services, and can make some kind of reasonable connection between the two.

Therapy: Forced change is almost always disruptive, and sometimes traumatic. One small program reported one divorce and two separations during the process of retrenchment. Making easily accessible and reasonably priced counselling assistance available can be an important help. Some health plans cover it, other programs have located therapists willing to work at a reduced fee with legal services employees.

Financial Planning: Banks frequently offer investment counselling, as do brokerage firms. The kind of person who could assist legal services employees in their life planning decisions would more likely be a smart, thoughtful, and probably leftist accountant who could counsel on such areas as "How long can I survive without a job? How much money do I really need to live in a way I would be comfortable with? and "What do I need to do now if I'm concerned about ten years from now?" Dollars and cents. Budgets and projections. Assets and liabilities. Boring, but somehow comforting once you know where you are.

Community Contacts in Job Search: Even the most politically inadequate program has some friends in the broader community. And its staff members probably have quite a few. Most professional job search organizations counsel "networking" above any other strategy. That is, you call everyone you know, tell them what you can do, and tell them you need a job. The potential of networking as a strategy is obviously expanded if the manager of an organization calls the organization's friends, and members of the organization feel free to call their friends, in seeking out employment opportunities for members of the organization who are leaving.

The Importance of Having Your Own Act Together: Forget, for a moment, the importance of other members of the organization figuring out what they are doing and will do. Isn't it obvious that at least the leader should have some idea what s/he is doing? Some Program Directors have taken a week at the beach or in the mountains. Others have started therapy, exercise or meditation. Others have tried to give themselves a little more space, or be a little gentler on themselves. The times demand a high degree of maturity, of self-awareness and of tolerance for self and others while we are moving towards greater clarity about the future.

The rest of this paper is an eclectic introduction to life planning, and as such is not directly related to legal services. I believe the presense of life planning within the context of the building of legal services' future can be a strategy for building organizational strength, and a strategy for individual and organizational empowerment.

A Highly Personal, Highly Abbreviated Tour of Life Planning

The process of life planning is illusion-shattering and dream-building. My own favorite statement of the mental stance which makes it work at its most powerful levels comes not from any modern self-help or planning book, but from the ancient Chinese book of wisdom, the I Ching. In the hexagram called "Waiting" in the Wilhelm/Baynes translation,

" Only a strong man can stand up to his fate, for his inner security enables him to endure to the end. This strength shows itself in uncompromising truthfulness with himself. It is only when we have the courage to face things exactly as they are, without any sort of self-deception or illusion, that a light will develop out of events, by which the path to success may be recognized. This recognition must be followed by resolute and persevering action. For only the man who goes to meet his fate resolutely is equipped to deal with it adequately."

Different leaders of life planning workshops emphasize different aspects of the individual's life - personal relationships, career paths, financial security. Almost all seek an increased self-awareness on the participant's part, and encourage the individual to identify actions which will get him or her moving towards a life which is closer to what s/he would like it to be. Some emphasize group sharing and dialogue, others individual reflection.

There are advantages to participation in a group life planning workshop. It provides professional direction and structuring of the process, which can keep you moving over some of the rougher or more painful periods. A number of people setting aside the time to confront their presents and take charge of their

futures is a naturally supportive and exhilarating environment. If group sharing of the individual work is part of the design, one has the opportunity to spot others' self-created traps first, the "I would but I can't because..." half-truths, then to realize one's own self-laid blocks.

Most important, I believe, is the imposed discipline of the weekend or whatever blocks of time are set aside for the group. Assessing and planning one's life is difficult and often painful work, easily avoided when doing it alone. People engage in formal, guided life planning processes for the same reason people engage in exercise programs and weight loss groups. You could do it alone, but more likely you won't.

I strongly recommend setting aside totally committed blocks of time to the process of life planning, whether you do it in a group, alone, or with a partner - blocks of time where that is all you're going to be doing, with objective products, statements and plans to produce. My experience has been that without a degree of strictness in regard to schedule and product, the process is just too potentially painful, too easy to get bogged down in, and too easy to stop.

That said, what follows are some thoughts on processes in which you can engage alone, with a partner, or in a group.

Books

I have found very few books in general circulation which deal with the whole of life planning. Ironically, retirement planning books, dealing with planning for the last phase of one's life, come closest to integrating a consideration of the various

components of one's life. There are many good guides available on those components - financial planning, career planning, understanding yourself, preventive health care. I recommend browsing in a well-stocked bookstore in sections corresponding to those areas, checking out how the material is presented and which authors speak to you. Career counselling sections of universities, companies and public libraries often have guides, manuals and workbooks which are not in general circulation, but have been developed for a particular program.

Richard N. Bolles' What Color is Your Parachute? is a classic, and focusses primarily on career planning, though it deals with integrating other areas of your life into career decisions. His later and longer The Three Boxes of Life and How to Get Out of Them is wider ranging, though not as clearly designed to be a compact, how-to guide. Peter L. Brill and John P. Hayes' Taming Your Turmoil - Managing the Transitions of Adult Life contains discussion of many of the issues of life planning and the organization, as well as instructions for several useful processes, such as constructing a Life Chart, a Social Systems map, a Historical Skills Inventory, and a Career Action Plan.

The Intensive Journal Method

The Intensive Journal process has been developed over many years by Ira Progoff and his colleagues as a method for assisting individuals in getting and staying in touch with the path and meaning of their lives. Though overtly based in no formal religion, the process is imbued with a belief that there is a meaning and a destiny to each life, and that we are capable of knowing and

following that path.

The Journal process, which primarily involves silent reflection and writing, is designed to help the individual access information and wisdom from what Progoff calls "depth levels" and to understand the interplay of the various parts of his or her life. Despite its reliance on words and writing, Progoff has had considerable success using the process with prison inmates, welfare clients, and others whose lives have not involved them in a great deal of silent thought and written reflection. The Journal process is highly structured (thoughts about different things are recorded in labelled sections of a notebook) and it is hard work. Progoff has written a book, At a Journal Workshop, which describes and gives instructions in the Journal method. The book is useful and in places moving, but several of my highly verbal, book-oriented colleagues have found it rather slow going. Still, even those who waded part way in and stopped have been impressed with the power of the process. Progoff himself strongly recommends embarking on the Journal process in a Journal Workshop. Listings of dates and locations can be obtained from Dialogue House/National Intensive Journal Program, 80 East Eleventh Street, New York, N.Y. 10003.

"Corporate" Planning

I call this "corporate" planning, because that was the title of the course in which I was introduced to the process by Dr. Hasan Ozbekhan of the Wharton School's Social Systems Science department. It is a process involved with the conscious creation of futures, and can be used as a planning tool for an individual life, a work unit, a company or a country. This brief description will obviously

not do it justice, but I suggest it anyway because I have personally found it immensely powerful, and because - if you are disciplined in setting aside the time and doing it - it works very well done alone.

1. "Is" Description.

Simply describe in writing your present situation, as clearly and factually as you can. What does your life look like? feel like? How do you spend your time? What is this person, you, doing?

2. Reference Projection

Then describe, in writing, where that present situation is logically leading, say, three to five years from now. If you do nothing in particular to change the direction you're now headed in, where will you be?

Lay those two pieces aside and forget them for now.

3. Idealization

Describing to yourself your "ideal" life needs quiet, space, and a willingness to listen to your inner self. You may wish to take some random notes before you start the actual description, sorting through images, wishes, dreams. The only constraints which apply in describing this ideal are that you actually have to want it as a life (i.e., only sitting on the beach might be a bit much) and that it has to be at least theoretically viable - containing some visible means of support. The deeper you allow yourself to go in listening to your dreams, the more powerful this idealizing phase of life planning will be.

4. Values Analysis

Though the phrase "values analysis" sounds pretty theoretical

and off-putting, I have found the process itself crucial in centering on what you are about as distinct from what you would like to be about. Read over your "Is" description, with its logical reference projection into the future, and then read over your ideal. What values is each living out? Survival? Creativity? Justice? Family nurturing? Political empowerment? Hedonism? Spiritual Growth? How far apart are the values of your present life and those of your ideal life?

5. Alternative Scenarios

The purpose of articulating the values inherent in your ideal is to open up the possibility of alternative expressions of that ideal. Take some time to let your mind float, play, explore five, ten, however many ways you could express in a life what you most value. Which ones emphasize one value at the expense of others? Which ones make you happiest to think about? Which would be the most fun to move towards? Can parts of one be combined with parts of another, building a third and stronger plan?

This is the design phase. Describe the life you want to begin moving towards. What is the future you want to create?

6. Action Planning

This is the phase of the planning process most similar to traditional "planning". How do you get from here to there? What are the steps - financial, information-gathering, decision-making? What needs to happen? Lay them out for yourself, concretely, action by action.

Two things become clear from putting an action plan down in black and white. First, a great deal of what needs to be done if your life is to come closer to your ideal needs to be done by you. You either are moving or are not moving towards the future you want, but whether or not you are is largely your responsibility. Second, there is always a first step. However many steps there are, and however long it would take, there is always something that has to be done before other things can happen. Once you know what that step is, you either do it, schedule when you will do it, or decide to delay moving towards the future you want.

7. Acting on the Action Plan

I think of moving on a life plan as a lot like sailing. "Staying on course" from where you are to where you want to go does not mean sailing a straight line from point A to point B. You tack, you use the wind, you get blown off course, you keep your sights on the goal and get there as soon as you can.

This planning process is a circular one, because as you begin to act to move towards your ideal, your "Is" situation will change. As you get closer and get more information about the life you are building, your sense of what you want it to be will change. Even the values inherent in your ideal may change. A new "Is", a new reference projection, and a new scenario of where you are going will require a new action plan. Fine. This is no Five Year Plan carved in stone. It is your life. The important thing is that you are moving in the direction you want to be.