

LEGAL AID SOCIETY CLEVELAND

2007-2010 STRATEGIC PLAN

April 2007

Approved by the Board of Directors

4/18/2007

Amended by the Board of Directors by adding some goals, 3/26/08

Our Mission

To secure justice and resolve fundamental problems
for those who are low income and vulnerable
by providing high quality legal services
and working for systemic solutions

Our Values

We believe in and practice—

- Using the Law on Behalf of Those We Serve
 - Empowering Those We Serve
 - Courage to Challenge
 - Commitment and Dedication
 - Pride in Doing Things Well
 - Respect for Others
 - Independence
 - Innovation
 - Resourcefulness

KEY RESULT AREAS

KEY RESULT AREA	OVERALL THREE YEAR RESULTS	RELEVANT BOARD COMMITTEE
KRA 1 Access to Justice	Increased mission alignment and capacity of intake; increased pro bono support; expanded reach to LEP and other underserved populations; and tracking of data on unmet needs	<ul style="list-style-type: none"> • Program Committee (to be formed)
KRA 2 Health/ Shelter/ Safety	Measurable client outcomes related to safety, housing, and health care access; preservation of affordable housing units; and preservation and advancement of rights related to all of the above.	
KRA 3 Economic/ Education	Measurable client outcomes related to impact on income and assets and to removal of barriers to employment, vocational programming and education; and preservation and advancement of rights related to all of the above.	
KRA 4 Marketing/ External Communications	Measurable increase in recognition and appreciation of LASC within the client, legal and donor audiences through a mission-based, targeted, consistently applied marketing plan and best practice website.	<ul style="list-style-type: none"> • No Committee
KRA 5: HR/Culture	Enhanced organizational unity, cultural competence; employee satisfaction; succession/back up and overall staff capacity; relevant performance evaluation and professional development plans; competitive compensation; and board goal setting and evaluation.	<ul style="list-style-type: none"> • Personnel Committee
KRA 6 Finances/ Fund Development	\$10M in total revenue, including \$1M contributed; non-OLAF/LSC funds representing 20% of total revenue; 3-6 months expenses in reserves; 10 known deferred gift commitments; and a system of strategic allocation of resources	<ul style="list-style-type: none"> • Finance Committee • Development Committee

KEY NEAR TERM STRATEGIC INITIATIVES WHICH CROSS KEY RESULT AREAS

1. Determine and implement the best method of integrating the four Legal Aid offices relative to their operational structures.
2. Determine and implement the best method of integrating the four Legal Aid offices relative to their substantive legal work.
3. Complete the development of the Intake Unit, which includes (i) completing and installing in PIKA the written questions/guidance for intake in each substantive area, (ii) completing the appropriate educational and pro se material in each substantive area, and (iii) providing the Intake Unit with the resources necessary to furnish short-service in appropriate cases.
4. Revise the intake criteria, as necessary, to insure that they are in alignment with Legal Aid's mission.
5. Implement the appropriate "separate entity" and/or other forms of legal service delivery in 2008 based on data gathered during 2007.
6. Determine the appropriate allocation of resources among all of Legal Aid's activities, including both substantive legal work and "support" activities (e.g., marketing and external communications, human resources, and fund development).
7. Determine and implement the appropriate system for staff evaluation and staff development.
8. Implement programs that expand the number of eligible clients that Legal Aid successfully refers to pro bono attorneys.
9. Implement policies that promote equitable access to justice for persons with limited English proficiency.
10. Establish methods and begin to track, based on those methods, the effectiveness of brief service, e.g., a) understanding of advice, b) use of the advice, and c) effectiveness of the advice
11. Create and implement a plan for education of policy makers.
12. Increase the use of paralegals and social workers

KRA 1 ACCESS TO JUSTICE

2009 Key Results

1. Intake will be in greater alignment with mission: Decisions about which clients to serve, in addition to the particular legal problem they present, will secondarily take into consideration the barriers to justice and impact on the person, and be made without being limited by LSC regulations.
2. There will be an annual increase in intake capacity (including information, advice and brief service).
3. There will be 50% more regularly scheduled pro bono clinics (for brief service and extended service) at accessible places in the entire service area and an expansion of one-on-one matches with pro bono attorneys for eligible clients expanded to the entire service area.
4. LASC will be reaching and serving specific Limited English Proficient "LEP" populations that we do not currently reach or serve due to communication barriers.
5. LASC will have a diverse mix of clients that is in greater alignment with the diversity in the client-eligible population in our entire service area.
6. There will be systematic tracking and analysis of data on individuals who request but do not receive LASC services so as to determine additional unmet needs.

2007-2009 Strategic Work

1. Develop effective and responsive intake systems that:
 - a. use our data and analysis to set up intake criteria and decision trees and
 - b. are flexible and responsive to emergencies and the most vulnerable and
 - c. train and supervise all staff (particularly reception and intake) and
 - d. have intake workers collaborate with case handlers and external agencies.
2. Provide access to justice for our most vulnerable clients, without being limited by LSC restrictions, through:
 - a. Comprehensive screening, intake, referral and representation of our entire target population;
 - b. Establishing vigorous and inclusive intake and referral;
 - c. Re-organizing priorities to include the most vulnerable in our entire service delivery model;
 - d. Enhancing legal and other social services and assistance outside Legal Aid (through courts, bar associations, other non-profits and governmental agencies, Civil Gideon).

3. Improve the system of referrals to social service, other agencies and other attorneys, for eligible and non-eligible clients through:
 - a. identification of referral resources;
 - b. development of additional partnerships with organizations who can and do assist clients when we can't;
 - c. collaboration with private attorneys to leverage attorney fees and do otherwise LSC restricted work;
 - d. use of technology to provide a clearinghouse of resources;
 - e. systematic documentation of unmet legal needs;
 - f. development of more mentor attorneys from Legal Aid and pro bono attorneys.
4. Set up a system of evaluation of effectiveness of Legal Aid's assisted self-help.
5. Develop interactive internet connections (including a Legal Aid interactive website) that provide improved access to justice, through separate access for case handlers, intake or other paralegals, and eligible clients.
6. Develop and expand our current alternative information resources and dissemination systems for people who cannot use technology.
7. Put website and other technology in place to develop database of referrals and to expand pro bono matches.
8. Finish development of LEP procedures and implement them.

2007 Priority Work

1. Develop effective and responsive intake systems
2. Provide access to justice for our most vulnerable clients, without being limited by LSC restrictions (for 2007, this means: a) completing and installing in PIKA the written questions/guidance for intake in each substantive area, b) completing the appropriate educational and pro se material in each substantive area, and c) providing the Intake Unit with the resources necessary to furnish short-service in appropriate cases.)
4. Set up a system of evaluation of effectiveness of Legal Aid's assisted self-help.
8. Finish development of LEP procedures and implement them.

KRA 2 HEALTH/SHELTER/SAFETY

2009 Key Results

1. 60% of our clients and their families who are victims of domestic violence and/or abuse or neglect will report an increase in their safety as a result of LASC assistance.
2. 70% of clients will secure or retain decent, affordable housing (e.g., subsidized rental housing) as a result of LASC assistance.
3. The current number of units of decent, affordable housing for low income persons, despite federal, state and local policies leading to a potential erosion of number of units, will be maintained.
4. 80% of clients and their families will achieve increased or maintain current access to health care as a result of LASC assistance.
5. There will be preservation and expansion of specific rights of: a) victims of domestic violence, b) tenants and homeowners and c) health care consumers.

2007-2009 Strategic Work

1. Expand capacity to provide legal services to domestic violence victims throughout LASC's geographical service area and develop a comprehensive and holistic model of organizational service delivery in line with our priorities for victims of domestic violence.
 - a. Create LASC protocol to screen for domestic violence.
 - b. Develop and use a legal and life needs screening tool designed to promote greater attorney competency related to domestic violence, enhance victim safety and identify legal and non legal issues which interfere with clients' ability to live violence free.
 - c. Pilot a holistic model of organizational service delivery that would enable victims of domestic violence to resolve legal matters beyond divorces and CPOs if the legal matter is related to the client's victimization and if left unresolved would result in the deterioration of the client's safety or economic stability. Victims of domestic violence and their children with immigration issues will be given preference in accordance with LASC's immigration policy.
 - d. Develop program for law students and pro bono attorneys who will assist victims of domestic violence with various legal matters.
2. Engage in projects (in collaboration with others) designed to secure or retain decent affordable housing for low-income persons.
3. Engage in projects (in collaboration with others), policy advocacy, and/or litigation designed to maintain the supply of decent affordable housing for low-income persons.
4. Develop more substantial, comprehensive approach to addressing health care beyond Medicare/Medicaid (look at OLAF's work) and engage in projects (in collaboration with others) and policy advocacy to increase or maintain current access to health care.

5. Engage in or continue projects (in collaboration with others) and policy advocacy designed to preserve or expand the rights of health care consumers, tenants, homeowners, victims of predatory lending, and victims of domestic violence.
6. Engage in or continue litigation designed to preserve or expand the rights of health care consumers, tenants, homeowners, victims of predatory lending and victims of domestic violence.

2007 Priority Work

1. Engage in re-entry project (seek to expand housing opportunities for formerly incarcerated persons via improvements to the ODRC pre-release planning, appropriate revisions in public housing admission rules, and training of public defenders and others on the collateral consequences of certain criminal offenses).
2. Engage in educational and pro se document project, including development of materials and educational programming.
3. Participate in reforms in the City of Cleveland with respect to further regulation of home improvement contractors (e.g., establish a performance bond requirement)
4. Compile a current inventory of all subsidized rental units in LASC's jurisdiction.
5. Enhance relationships with and to and from domestic violence programs throughout organization.
6. Participate in Cuyahoga County Foreclosure Prevention Program to address the problem of predatory mortgage lending and foreclosures.

KRA 3 ECONOMIC/EDUCATION

2009 Key Results

1. The average income of our clients with income-related issues will increase by 25% as a result of LASC representation.
2. 50% of clients with income-related issues will have their income increased as a result of Legal Aid Society of Cleveland representation.
3. 60% of clients with income-related issues will have their income preserved as a result of LASC representation.
4. The average value of assets of our clients with asset-related issues will increase by 25% as a result of LASC representation.
5. 70% of clients with asset-related issues will have their assets increased as a result of LASC representation.
6. 50% of clients with asset-related issues will have their assets preserved as a result of LASC representation.
7. 80% of clients will indicate that Legal Aid removed significant barriers to their employment, vocational programming and/or education.
8. There will be preservation and expansion of specific rights of people with issues related to: a) income/assets, b) employment and c) education.

2007-2009 Strategic Work

1. Engage in policy work to increase client community's access to income, including through consumer issues, public benefits, tax, employment, and child support.
2. Evaluate cases to spot systemic issues impacting income and education. Engage in advocacy on those systemic issues, including increasing affirmative claims in consumer cases and addressing other types of exploitation of client community.
3. Increase role in statewide and local policy work to increase client community's access to income.
4. Increase outreach to the LEP community to better serve that community and discern whether the community has different/additional needs regarding income and education.
5. Complete intake questionnaires and brief service protocols regarding income and education.
6. Review and refine immigration case acceptance to match priorities.
7. Engage in projects and policy advocacy to remove significant barriers to education for low income children including work with new state task force on education.
8. Increase use of pro bono attorneys.

9. Assist low wage and unemployed workers in obtaining and maintaining employment opportunities by removing barriers to employment and assisting with employment related problems.
10. Engage in community legal education on issues affecting income and education.

2007 Priority Work

5. Complete intake questionnaires and brief service protocols regarding income and education.
6. Review and refine immigration case acceptance to match priorities.
7. Work with new state task force on education.
9. Assist with employment related problems.

KRA 4 MARKETING & EXTERNAL COMMUNICATIONS

2009 Key Results

1. LASC will implement a marketing and external communications plan that is mission-based, targeted at specific groups (e.g., specific segments of client population, specific types of donors), and coordinated and consistent across all LASC offices.
2. There will be a measurable annual increase in the percentage of the client community and the legal community who understand that LASC provides high quality legal services and is a valuable contributor to our Northeast Ohio community.
3. LASC will utilize a website that meets "best practice" standards for community-based nonprofits.

2007-2009 Strategic Work

1. Develop an annual plan for mission-based communications and outreach. Plan should include print and non-print communication methods and website development, should identify specific audiences that LASC intends to target with communications and outreach, and identify current marketing and external communications activities at LASC.
2. Better integrate the communications and development functions, including improved database management and integration.
3. Improve technology resources and technology use through expansion of IT personnel, including database management and website development.
4. Further develop LASC's "brand identity" and create a motto/catch-phrase that communicates that LASC provides holistic services and contributes to creating a vibrant, prosperous, five-county community.
5. Hold cultural competency trainings for staff & Board and improve LASC's communications with linguistically and culturally isolated groups.
6. Develop non-print communication materials that complement LASC's print communication materials.
7. Increase capacity to recruit and manage all volunteers, including non-attorney volunteers.
8. Starting in 2008, regularly evaluate LASC's marketing and communications practices and the "best practices" of other organizations.

2007 Priority Work

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2. Better integrate the communications and development functions, including improved database management and integration.
3. Improve technology resources and technology use through expansion of IT personnel, including database management and website development.
4. Further develop LASC's "brand identity" and create a motto/catch-phrase that communicates that LASC provides holistic services and contributes to creating a vibrant, prosperous, five-county community.
5. Hold cultural competency trainings for staff & Board and improve LASC's communications with linguistically and culturally isolated groups.

KRA 5: HUMAN RESOURCES/CULTURE

2009 Key Results

1. Our structure, processes and communications related to our substantive legal work and operations will result in employee experience of organization-wide unity and client experience of consistent, culturally competent high quality services.
2. Employee satisfaction with major elements of the work place (including quality of supervision, workload, personnel policies, work/life balance, etc.) will be systematically measured and annually increased in order to ensure client experience of consistent, culturally competent high quality services.
3. All staff at all experience levels will have work plans that incorporate professional development goals and leadership and career track opportunities to be assessed and recognized through an annual performance evaluation process.
4. Staff salaries will be commensurate with people's responsibilities and both salaries and benefits will be competitive with governmental and public interest entities.
5. There will be improvement in organizational performance and capacity by (A) increasing the number of staff; (B) creating greater variety of staff positions (e.g. paralegals, social worker, information technology person); and (C) investing resources in current staff to improve and increase skills and facilitate mobility within the organization.
6. Board performance will be improving annually as measured by an annual board goal setting and assessment process, including improvement in board-staff relationship.
7. Written succession plans and back up plans will be in place for leadership roles within board, management and staff.

2007-2009 Strategic Work

1. Measure and increase employee satisfaction with major elements of the work place and increase client experience of consistent, culturally competent high quality services.
 - a. Manage workload to optimize efficiency and employee satisfaction
 - b. Develop and implement written policy regarding supervisor duties
 - c. Facilitate the process of having all staff create and utilize work plans
 - d. Implement ongoing diversity and cultural competency training for staff and board.
 - e. Improve and implement LEP policy
 - f. Conduct accessibility evaluation for building and make necessary improvements in all LASC offices.
 - g. Recruit and hire diverse staff
 - h. Create process for informing and resolving workplace diversity concerns
 - i. Establish and implement a plan to ensure staff safety and security in the workplace.

2. Ensure that work plans for all staff at all experience levels incorporate professional development goals and leadership opportunities to be assessed and recognized through an annual performance evaluation process.
 - a. Continue implementation of support staff training curriculum
 - b. Participate in Ohio Leadership Initiative and continue LASC implementation of LeadershipOHIO.
 - c. Provide ongoing opportunities to attend substantive training and professional conferences
 - d. Provide ongoing technology training
3. Ensure that staff salaries are commensurate with people's responsibilities and both salaries and benefits are competitive with governmental/public interest entities,
 - a. Gather information on governmental, public interest entities and other competitors for salary and benefits comparison
 - b. Identify best practices in the area of salaries and benefits
 - c. Consider implementing a cost of living raise for all staff
 - d. Establish equitable salary structure and system for raises.
 - e. Consider adopting paid maternity/paternity and family leave policies, formal flex time and job sharing policies, sabbatical leave policy, policy of increasing vacation time with years of employment, and a LRAP.
4. Add staff positions, increase staff members, improve and increase skills, facilitate mobility within the organization, and increase volunteers.
 - a. Assess current staffing in each LASC office and unit and add attorney staff as necessary to accomplish goals of Strategic Plan.
 - b. Add paralegals throughout organization
 - c. Add legal assistants throughout the organization
 - d. Create social work positions
 - e. Create Information Technology position
 - f. Create Human Resource position
 - g. Continue outreach to bar associations for volunteer attorneys in all counties.
 - h. Continue working with law firms through VLP.
 - i. Recognize and reward volunteer attorneys on annual basis.
 - j. Develop additional strategies for providing effective, efficient substantive mentoring and support to volunteer attorneys by LASC staff.
5. Conduct a board goal setting and assessment process annually, including cultural competency and optimizing board-staff relations
6. Put written succession plans and back up plans in place for leadership roles within board, management and staff.

2007 Priority Work

1. Improve and implement LEP policy.
2. Establish equitable salary structure and system for raises
3. Review and revise personnel policy in accordance with Strategic Plan Key Results and Strategic Work

KRA 6 FINANCES/ FUND DEVELOPMENT

2009 Key Results

1. Total annual revenue will increase from \$8.3M in 2006 to \$10M, including at least \$1M from the 2009 Annual Campaign for Legal Aid and other philanthropic solicitations and partnerships.
2. The percentage of revenue represented by non-OLAF or non-LSC funds will increase from 14.5% in 2006 to 20% in 2009.
3. Total reserves will equal 3 to 6 months of expenses.
4. An endowment will be in place and we will have secured 10 known deferred gift commitments.
5. There will be systematic allocation of resources among all of LASC activities based on the needs of our entire service area, including service area-wide needs and needs specific to localities, and this will be aligned with the strategic plan, resulting in effective distribution of LASC resources (human, financial, tools, data, systems) throughout our entire service area.
6. A gift acceptance policy will be in place, including a system of giving options.

2007-2009 Strategic Work

1. Ensure that Development Committee of the board (whose membership includes "Friends" of Legal Aid) continues to work on Annual Campaign and takes on responsibility for the creation of an endowment.
2. Explore, establish and communicate a variety of giving opportunities
3. Enhance annual campaign management staff and grants management
4. Reorganize the system of recording cash receipts so it so it can be analyzed from both accounting and development perspectives and connect the financial data system with the fundraising data system.
5. Develop a means for gathering and analyzing data based on the strategic work to ensure appropriate allocation of resources, prioritization of grant proposals, and fundraising support.
6. Align the annual development plan with the strategic plan and data from the internal case management and fund raising systems to ensure the Development Department is performing consistent with the strategic plan and goals.

2007 Priority Work

1. Explore, establish and communicate a variety of giving opportunities
2. Enhance annual campaign management staff and grants management
3. Develop a means for gathering and analyzing data based on the strategic work to ensure appropriate allocation of resources and fundraising support.
4. Align the annual development plan with the strategic plan and data from the internal case management and fund raising systems to ensure the Development Department is performing consistent with the strategic plan and goals.

KEY RESULT AREA PLANNING TEAMS & ISSUES

KEY RESULT AREA	CO-LEADERS (BOARD/STAFF)	PRIMARY ISSUES
KRA 1 Access to Justice	McKinney (B),Smith (S)	<ul style="list-style-type: none"> • What Should LASC Do To Improve Access To Justice? • How Can We Provide Access to Justice For More People, including Those With Special Vulnerabilities?
KRA 2 Health/ Shelter/Safety	Kutik(B), Ruden (S), Iskin (S)	<ul style="list-style-type: none"> • What Should Our Approach Be Related to Domestic Violence? • How Can We Support Health and Safety In A More Efficient & Effective Manner?
KRA 3 Economic/ Education	Anderson (B), Jackson/Myerson (S)	<ul style="list-style-type: none"> • What Should We Do To Support Financial Stability?
KRA 4 Marketing/ External Communications	Herman (B), Robie (S)	<ul style="list-style-type: none"> • How Do We Enhance/Improve LASC's Overall Image? • How Can We More Effectively And Efficiently Market LASC Services To Key Groups And Audiences?
KRA 5: HR/Culture	Icove (B), Fischione (S)	<ul style="list-style-type: none"> • How Do We Make Effective, Respectful, Sustainable Use Of Staff Resources? • How Do We Improve Communication Throughout The Organization?
KRA 6 Finances/ Fund Development	Holmes (B), Poole (B), Mlakar (S)	<ul style="list-style-type: none"> • How Can We Raise More Funds? • How Do We Effectively Allocate Funds (totals needed and process for allocation)?