REVISED STRATEGIC PLAN – 2010 UPDATE PROCESS

Mission

At the Legal Assistance Foundation of Metropolitan Chicago we work together to provide high quality civil legal services to low income and disadvantaged people and communities.

Through advocacy, education, collaboration and litigation we empower individuals, protect fundamental rights, strengthen communities, create opportunities and achieve justice.

In carrying out our mission we treat all people with compassion and respect.

Primary Excellence Goals (PEGs)

Strategies

Superior Client Service – Superior service to clients and their communities

- Organize our legal capabilities into specialty practice groups and related sub-specialty groups
- Align the role of the Client Screening Unit to respond to specialization and opportunities to provide brief services and/or effective referrals to clients who need them
- Ensure greater mobility for staff to provide access to LAF services in a growing array of venues
- Develop and enforce standards of best practices, business processes, supervision and workload management for all staff
- Reinvent LAF's approach to pro bono, volunteer and in-kind assistance to maximize benefits to clients and LAF

Community Engagement – Foster and sustain collaborative relationships with other organizations, communities and other entities

- Create a dedicated unit to engage with communities and community organizations – creating and sustaining points of access to LAF in clients' communities
- Establish and maintain relationships with other organizations and at courthouses to provide comprehensive services (including education, help desk and other non-traditional services)

Committed and Unified Team – Highly qualified, well trained, productive, and diverse people across the agency

- Engage all employees in the mission of the agency
- Centralize physical resources in a single downtown office that improves the physical work environment and the efficiency of LAF
- Redefine job categories and the overall organization structure, capitalizing on skills and knowledge at all levels
- Implement comprehensive professional development program
- Revolutionize hiring and promote retention to increase diversity (race, ethnicity, etc.) and the quality of staff
- Restructure administrative functions at LAF, especially human resources to serve centralized LAF better
- Connect staff across all departments and practice groups

Financial Health and Stability – Diverse, secure funding and non-monetary resources

- Mobilize LAF staff and Board to commit to and participate in fundraising
- Use centralization to begin a major gifts campaign
- Revise and adjust the agency-wide budget process in light of centralization
- Invest in branding and marketing the new LAF

May 6, 2010

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **SUPERIOR CLIENT SERVICE – SUPERIOR SERVICE TO CLIENTS AND THEIR COMMUNITIES**

Strategy: **Organize Our Legal Capabilities into Specialty Practice Groups and Related Sub-Specialty Groups**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Research/fact gathering on client need (by legal specialty/subspecialty and by demographic/community of need) – in parallel with defining the structure	Practice Group Committee Jim Brady and Rachel Heaston	Begin ASAP Facts by Labor Day 2010
• Research what client needs are best met by other legal service agencies in Cook County	Practice Group Committee Jim Brady and Rachel Heaston	Begin ASAP Facts by Labor Day 2010
• Benchmark best practices at other legal services agencies relative to organizing and managing in practice groups	Practice Group Committee Jim Brady and Rachel Heaston	Begin ASAP Facts by Labor Day 2010
• Determine the number and focus of the practice groups – coordinated with CSU and Community Engagement Committees	Practice Group Committee Jim Brady and Rachel Heaston Steering Committee	Initial Recommendations by 10/31/2010
• Define the structure of the practice groups (including discussion/input, position descriptions, and straw man analysis – e.g., caseload capacity vs projected demand) • Includes organization of supervisory roles/capacity	Practice Group Committee Jim Brady and Rachel Heaston Steering Committee	Initial Recommendations by 12/31/2010
• People decisions (likely including a high level of matching interests to positions) – Must include union input and engagement	Practice Group Committee Jim Brady and Rachel Heaston Steering Committee	Decisions on People by 3/31/2011
• Transition to new practices (including training/orientation)	Practice Group Committee and Training Committee	Begin discussion and training in Spring 2011 Transition post-centralization
• Leverage technology to maximize productivity, enhance quality, and support the adoption of best practices	Practice Group Leaders and Training for All Employees	In preparation for move to practices and central office

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **SUPERIOR CLIENT SERVICE – SUPERIOR SERVICE TO CLIENTS AND THEIR COMMUNITIES**

Strategy: **Align the role of the Client Screening Unit to respond to specialization and opportunities to provide brief services and/or effective referrals to clients who need them**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Determine the scope of CSU's role in a centralized LAF (universal screening and practice group roles?)	Cynthia Sadkin/CSU Committee (coordinating with Practice Group and Community Engagement Committee)	Scope by 10/31/2010
• Determine staffing needs and model for CSU – coordinated with practice group organizational design	Cynthia Sadkin/CSU Committee (coordinating with Practice Group and Community Engagement Committee)	12/31/2010
• Determine intake process needs vis-à-vis outreach relationships (parallels establishment of deeper/broader outreach relationships) – Screening coordinated with outreach partners (e.g., completed pre-screening forms by outreach partners) – Interviews at outreach locations and/or LAF – with coordination of practice groups	Cynthia Sadkin/CSU Committee (coordinating with Practice Group and Community Engagement Committee)	12/31/2010 Immediate needs related to South Side office closure on fast track
• Develop a plan for brief services at the CSU level (likely follows other organizational changes)	Cynthia Sadkin/CSU Committee	12/31/2010
• Effectively coordinate with other legal services providers to provide meaningful referrals (next layer of follow-up and effectiveness)	Cynthia Sadkin/CSU Committee	Referral Guidelines by 5/31/2011 Ongoing thereafter
• Coordinating decisions across these implementation initiatives and recommendations	Steering Committee	Coincidental with above

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **SUPERIOR CLIENT SERVICE – SUPERIOR SERVICE TO CLIENTS AND THEIR COMMUNITIES**

Strategy: **Ensure greater mobility for staff to provide access to LAF services in a growing array of venues**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Develop a comprehensive plan to ensure court coverage – consistent with client needs and practice group capacity	Logistics Committee Bill Kolen	In place by Memorial Day 2011
• Determine technology needs and develop a plan to provide needed technology	Logistics Committee Bill Kolen	In place by Memorial Day 2011 – immediate decisions for South Side
• Develop plans and resources to provide transportation for staff and for clients (e.g., Go-Cars, CTA passes, Metra passes, parking discounts)	Logistics Committee Bill Kolen	In place by Memorial Day 2011 – immediate decisions for South Side
• Establish a fundamental checklist for work space needs for staff working outside the central office	Logistics Committee Bill Kolen	In place by Memorial Day 2011 – immediate decisions for South Side

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **SUPERIOR CLIENT SERVICE – SUPERIOR SERVICE TO CLIENTS AND THEIR COMMUNITIES**

Strategy: **Develop and Enforce Standards of Best Practices, Business Processes, Supervision and Workload Management for All Staff**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Benchmark other agencies to help inform best practices	Practice Group Leaders	Beginning 2012/Post-Centralization
• Practice supervisor/practice group development, documentation, and propagation of best practices	Practice Group Leaders	Beginning 2012/Post-Centralization
• Parallel activities vis-à-vis outreach best practices, tips and tools	Community Engagement Unit Leadership	Beginning 2012/Post-Centralization
• Develop tools and training modules to preserve and improve issue spotting capabilities across all practice groups	Training Committee Alicia Aiken	Beginning Fall 2011/Post-Centralization
• Develop and maintain community education materials (up-to-date and language appropriate)	Practice Group Leaders and Community Engagement Unit	Beginning Fall 2011/Post-Centralization

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **SUPERIOR CLIENT SERVICE – SUPERIOR SERVICE TO CLIENTS AND THEIR COMMUNITIES**

Strategy: **Reinvent LAF's Approach to Pro Bono, Volunteer and In-Kind Assistance to Maximize Benefits to Clients and LAF**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Benchmark what other legal service organizations do to capture pro bono assistance without undue burden on the agency	Dick Hess and Pro Bono Committee	Beginning after establishment of practices in 2011
• Tailor our use of and relationships with pro bono attorneys – from private law firms, in-house legal departments and other sources – to client, practice group and community needs	Dick Hess and Practice Group Leaders	Beginning after establishment of practices in 2011
• Create and recognize the pool of other professional service advisors and companies that provide pro bono and in kind assistance to LAF	Gloria Friedman and Young Professionals Board	Annual and ongoing
• Address the impact that the transition to centralized space will have on pro bono activity (especially in North Suburban Cook)	Dick Hess and Pro Bono Committee (with Bill Kolen's insights)	In advance of physical relocation to a centralized office space

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **COMMUNITY ENGAGEMENT – FOSTER AND SUSTAIN COLLABORATIVE RELATIONSHIPS WITH OTHER ORGANIZATIONS, COMMUNITIES AND OTHER ENTITIES**

Strategy: **Create a Dedicated Unit to Engage with Communities and Community Organizations – Creating and Sustaining Points of Access to LAF in Clients' Communities**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Research and benchmarking on past LAF experiences	James Solomon (Current) Community Engagement Committee (Historic)	Current experiences completed by 5/31/2010 History by 7/31/2010
• Establish a working committee	Diana White and Adela Carlin	By May 31, 2010
• Begin immediate, ad hoc work on community engagement focused on outreach to south side zip codes	Adela Carlin (w/Community Engagement Committee)	Begin May 1, 2010 – six month learning opportunity
• Research and benchmarking on the experiences and best practices of other agencies (legal aid and otherwise) - for instance ILAO	Community Engagement Committee Adela Carlin	Completed by 12/31/2010
• Gather direct input from and engagement with targeted set of potential outreach partners (assumes a long list is developed, researched and shortened based on reasonable criteria and judgment)	Community Engagement Committee Adela Carlin	Completed by 12/31/2010
• Create a dedicated, staffed community engagement unit (including permanently staffed LAF positions and potential roles for VISTAs) – posted position(s) and/or outside hiring • Includes development of job descriptions for the key positions in the community engagement unit	Community Engagement Committee Adela Carlin	Completed by 3/31/2011
• Coordination with other major initiatives	Steering Committee	In parallel with above

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **COMMUNITY ENGAGEMENT – FOSTER AND SUSTAIN COLLABORATIVE RELATIONSHIPS WITH OTHER ORGANIZATIONS, COMMUNITIES AND OTHER ENTITIES**

Strategy: **Establish and Maintain Relationships with Other Organizations and at Courthouses to Provide Comprehensive Services (Including Education, Help Desk and Other Non-Traditional Services)**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Establish standing relationships with selected community organizations (note that existing outposts would likely continue for at least the near term)	**Near term** – Community Engagement Committee **Thereafter** – Community Engagement Unit	Beginning immediately and ongoing thereafter
• Tailor LAF engagement with each outreach partner based on population needs (e.g., DV, consumer, housing, first language, etc.)	Community Engagement Unit w/Practice Group Leaders (Committee initially)	South side pilot by 12/31/10 Others beginning spring 2011 (w/launch of unit)
• Tailor LAF's engagement with each courthouse that fills client and community needs (avoiding duplication of effort other organizations have taken on)	Community Engagement Unit w/Practice Group Leaders (Committee initially)	Beginning with establishment of CEU in Spring 2011, then Ongoing
• Expand relationships (and the number of relationships) as new practice groups and other organizational change is implemented	Community Engagement Unit w/Practice Group Leaders (Committee initially)	Beginning with establishment of CEU in Spring 2011, then Ongoing
• Identify the breadth of services provided by other legal aid organizations, avoid duplication of effort, and fill critical gaps (in partnership with community organizations)	Community Engagement Unit	Ongoing beginning 2011

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **COMMITTED AND UNIFIED TEAM – HIGHLY QUALIFIED, WELL TRAINED, PRODUCTIVE, AND DIVERSE PEOPLE ACROSS THE AGENCY**

Strategy: **Engage All Employees in the Mission of the Agency**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Use language, ceremonies, awards and other communications to underscore our collective importance to LAF achieving its mission	Starting with Leadership	Ongoing
• Hold periodic all LAF meetings (semi-annual meetings) – town hall/state of LAF meetings	Diana White and All Employees	Semi-Annual
• Update the LAF staff directory (ideally with photos) and post on the intranet – maintain on a continuing basis	Jaclyn Stacy and Maria Salgado	First Revision by end of 2010, then ongoing
• Use our social media and other technology to facilitate intra-agency communication and engagement with the mission	Kristy Boyer and all staff	Plan by 6/30/2010, then ongoing

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **COMMITTED AND UNIFIED TEAM – HIGHLY QUALIFIED, WELL TRAINED, PRODUCTIVE, AND DIVERSE PEOPLE ACROSS THE AGENCY**

Strategy: **Centralize Physical Resources in a Single Downtown Office That Improves the Physical Work Environment and the Efficiency of LAF**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Determine central space related needs and plans (e.g., needs assessment, space design, equipment needs and capacities, communications plans)	Diana White, Transwestern, Real Estate Committee and Board of Directors	By 12/31/2010 Coordinated with Practice Group Committee work
• Find, acquire and prepare centralized office space (including multiple moves)	Diana White, Transwestern, Real Estate Committee and Board of Directors	GO Lease Expires November 2012
• Outlying space initiatives and checklists (outreach considerations, court house locations, other ideas)	Logistics Committee Community Engagement Committee Practice Group Committee	By Memorial Day 2011 – immediate decisions for south side
• Closely coordinate physical office closures and moves with the ramp-up of Community Engagement Unit (note: the current service office staffs are in many instances the face of LAF)	Steering Committee	Parallel with above
• Develop and implement communication plans for each move – keep the staff well informed before actual moves	Gloria Friedman and Dick Hess	In coordination with and anticipation of moves

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **COMMITTED AND UNIFIED TEAM – HIGHLY QUALIFIED, WELL TRAINED, PRODUCTIVE, AND DIVERSE PEOPLE ACROSS THE AGENCY**

Strategy: **Redefine Job Categories and the Overall Organization Structure, Capitalizing on Skills and Knowledge at All Levels**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Define a clear and rational organizational structure – In parallel with organizational design work referenced above for legal and non-legal positions	Steering Committee	In parallel with practice group design (12/31/2010)
• Include new Community Engagement Unit positions in job categories and job descriptions	Community Engagement Committee	See Above initiatives in Community Engagement PEG
• Incorporate non-attorney roles in new organization design (within the newly created practice groups, within newly created Community Engagement Unit, and in the newly centralized LAF office)	Practice Group Committee, Community Engagement Committee – coordinated by Steering Committee	In parallel with practice group design (12/31/2010)
• Redesign the roles and responsibilities of LAF's social work – better integrating it into our approach to meeting clients' legal needs	Practice Group Committee and Andrya Soprych	In parallel with practice group design (12/31/2010)
• Redesign the roles and responsibilities of LAF's interpreters – better integrating them into our approach to meeting clients' legal needs	Practice Group Committee, Cynthia Sadkin and Margie Dominguez	In parallel with practice group design (12/31/2010)

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **COMMITTED AND UNIFIED TEAM – HIGHLY QUALIFIED, WELL TRAINED, PRODUCTIVE, AND DIVERSE PEOPLE ACROSS THE AGENCY**

Strategy: **Implement Comprehensive Professional Development Program**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Involve all attorneys in the CSU – a regular rotation to support CSU and intake from all the practice groups	Practice Group Leaders and CSU Committee	Beginning post-centralization and ongoing
• Create and deliver a *"poverty law 101"* course for all new staff	Training Committee (link with Staff Development, Retention and Evaluation Committee)	2012 and ongoing
• Design and deliver effective cross-practice group training sessions for all staff – developed and delivered by the practice groups (including Community Engagement Unit)	Practice Group Leaders Alicia Aiken	Ongoing sessions - monthly
• Determine what professional development opportunities will be available for individual attorneys seeking to work across practice group lines – with special attention to the natural overlaps across practice lines	Practice Group Committee Alicia Aiken	First draft with initial organizational design at 12/31/2010
• Create and deliver in-depth professional development within the practice groups	Practice Group Leaders and Training Committee	Beginning post-centralization and ongoing
• Provide management and supervisory training opportunities	Training Committee (link with Staff Development, Retention and Evaluation Committee)	Ongoing
• Ensure all employees have individualized professional development plans – managed jointly with their supervisors	All Employees with their Supervisors (link with Staff Development, Retention and Evaluation Committee)	Ongoing
• Manage effective generalized/agency-wide training programs for all employees	Training Committee (link with Staff Development, Retention and Evaluation Committee)	Ongoing

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **COMMITTED AND UNIFIED TEAM – HIGHLY QUALIFIED, WELL TRAINED, PRODUCTIVE, AND DIVERSE PEOPLE ACROSS THE AGENCY**

Strategy: **Revolutionize Hiring and Promote Retention To Increase Diversity (Race, Ethnicity, etc.) and the Quality of Staff**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Develop and implement a comprehensive diversity and inclusion strategy	Jane Pigott and Diversity Committee	Underway Jane Begins May 2010 Information by June 2010 Comprehensive Strategy by 12/31/10
• Coordinate the work of the Diversity Committee and the Hiring Committee	Diversity Committee and Hiring Committee Jack Block	Beginning immediately Ongoing
• Integrate the diversity and inclusion strategy into the rest of the strategic plan (and related priorities)	Steering Committee	Beginning 1/1/2011 and Ongoing

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **COMMITTED AND UNIFIED TEAM – HIGHLY QUALIFIED, WELL TRAINED, PRODUCTIVE, AND DIVERSE PEOPLE ACROSS THE AGENCY**

Strategy: **Restructure administrative functions at LAF, especially human resources, to serve centralized LAF better**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Provide additional leadership support to administrative functions through the transition to a centralized agency	Diana White and Dick Hess	Through Spring 2011
• Realign all administrative functions in parallel with other organizational changes	Steering Committee and Dick Hess	In parallel with other organizational work (spring 2011)

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **COMMITTED AND UNIFIED TEAM – HIGHLY QUALIFIED, WELL TRAINED, PRODUCTIVE, AND DIVERSE PEOPLE ACROSS THE AGENCY**

Strategy: **Connect Staff Across All Departments and Practice Groups**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• TBD post-centralization	TBD post-centralization	Post-centralization
• Linkage to diversity and inclusion	TBD	After diversity plan (1/1/11)

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **FINANCIAL HEALTH AND STABILITY – DIVERSE, SECURE FUNDING AND NON-MONETARY RESOURCES**

Strategy: **Mobilize LAF Staff and Board to Commit to and Participate in Fundraising**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Provide fundraising training for staff and board (e.g., finding good case stories; participation in events; identifying potential donors; other fundraising roles)	Gloria Friedman and Jaclyn Stacy	Beginning January 2011 and ongoing thereafter
• Develop and implement a Board evaluation process	Board Executive Committee and Diana White	By June 2011
• Engage the Executive Director in development activities	Gloria Friedman and Diana White	Immediately and ongoing

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **FINANCIAL HEALTH AND STABILITY – DIVERSE, SECURE FUNDING AND NON-MONETARY RESOURCES**

Strategy: **Use centralization to begin a major gifts campaign**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Work with pro bono major gifts consultant to create goals and implementation strategies	Gloria Friedman	Ground work in 2010 Program underway in 2011
• Identify funding opportunities including naming opportunities	Gloria Friedman	Beginning 1/1/11
• Engage the Board, the Young Professionals Board, and staff in donor identification and solicitation	Gloria Friedman	Ongoing

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **FINANCIAL HEALTH AND STABILITY – DIVERSE, SECURE FUNDING AND NON-MONETARY RESOURCES**

Strategy: **Revise and Adjust the Agency-Wide Budget Process in Light of Centralization**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Adjust budget processes, categories and thinking in light of centralization, practice group formation, and other organizational changes	Diana White and Kevin Morrissey	Fall 2010 (in parallel with other organizational work) Ongoing thereafter
• Model the financial implications of centralization (including baseline assumptions on headcount, etc.) – 2011 and out year(s)	Kevin Morrissey, Diana White and Transwestern	Summer 2010

IMPLEMENTATION INITIATIVES BY STRATEGY

PEG: **FINANCIAL HEALTH AND STABILITY – DIVERSE, SECURE FUNDING AND NON-MONETARY RESOURCES**

Strategy: **Invest in Branding and Marketing the New LAF**

IMPLEMENTATION INITIATIVES	RESPONSIBILITY	TIMING
• Apply to Taproot Foundation to get pro bono marketing assistance	Gloria Friedman	Apply in Summer 2010 Implementation dependent upon outcome of Taproot project
• Explore new names, logos, and other identity markers	Marketing Committee With Taproot Assistance	TBD based on Taproot
• Ensure new marketing programs meet fundraising, client outreach, community engagement, recruiting and other external communication needs	Marketing Committee (Rich Wheelock and Gloria Friedman) Development, Community Engagement Unit, and Practice Groups	Post-Taproot engagement (2011 initiative)
• Develop and implement a communication plan to reach client communities and other stakeholders in anticipation of our move to centralization	Marketing Committee Community Engagement Unit (Committee initially)	Planning in Fall 2010, implementation throughout 2011 and beyond
• Invest in marketing the new LAF to client communities, community organizations, philanthropic organizations, and other stakeholder groups	Marketing Committee Development, Community Engagement Unit, and Practice Groups	Beginning in second half 2011 and continuing
• Incorporate communication considerations in managing closure of south side office – including reaching out and using volunteer assistance (e.g., fliers, posters, meetings, etc.)	Marketing Committee Community Engagement Committee	Through transition period in 2010