**LAS Strategic Plan**

**Mission Statement**: Equal Justice for people in poverty.

**Objective 1 (Clients):** Prioritize Society resources to provide high quality, client-directed advocacy that creates maximum impact for the safety, stability, and health of eligible clients.

1. Staff resources specifically are dedicated to informal and formal outreach and engagement that targets eligible clients.
2. The Society’s priorities are responsive to legal needs identified by our client community.
3. The Society leverages technology to enhance strategic goals and operational effectiveness.

**Objective 2 (People):** Recruit, retain, and develop staff, directors, volunteers, and vendors who reflect the diversity of the Society’s Service Area.

1. The Society employs respected and professional staff who are appropriately trained, supervised, developed, compensated, and supported.
2. The Society has a robust volunteer and contract attorney network who provide priority services to eligible clients and the Society.
3. The Society has engaged board members who are passionate about the work, serve as strategic thought partners, and serve as ambassadors in the community.

**Objective 3 (Resources):** Develop a diverse and growing sources of revenue that support client identified priorities and strategic goals.

1. The Society has a broad base of private donors who are passionate and supportive of the work we do.
2. The Society will only accept restricted funds that support our mission and identified priorities.
3. The Society’s budget reflects the values identified in its priorities.

**Implementation**

* Performance of the Strategic Plan shall take place through the collaborative efforts of the Legal Aid Society Board of Directors and the Leadership Team of the Legal Aid Society.
* The Leadership Team will review the Strategic Plan at regular management meetings no less than one time per quarter and utilize it to guide the Society’s work.
* The Board Strategic Planning & Implementation Committee will provide a report to the full Board of Directors not less than twice per year, documenting progress of this Strategic Plan and to solicit assistance, feedback, modifications, and suggestions.
* The Society will achieve its strategic client, people, and resource objectives as described in the following 3 sections.

**Clients**

(Strategic Objective 1)

Objective 1 (Clients): Prioritize Society resources to provide high quality, client-directed advocacy that creates maximum impact for the safety, stability, and health of eligible clients.

1. **Staff resources specifically are dedicated to informal and formal outreach and engagement that targets eligible clients.**
   * Staff members are intentionally and specifically assigned and tasked with outreach and client engagement tasks.

* Dedicate budgetary resources to support formal outreach and engagement work.
* Identify barriers to access to the Society’s services as well as systemic barriers to the economic well-being and health of our clients.
* Increase awareness of Legal Aid in the potential client community and the community at large.
  + Assure that when people need us, they know they need us, and they know how to access our services.
* Target communications to eligible clients about what we do and what their rights are. (legal Information, social media engagement.)
* Ensure presence in the same spaces, places, and communities as our clients (office locations, office hours).
* Be in the room and at the table with our clients listening to their issues and discussing their needs with those with power.   
  (client engagement, community development).

1. **The Society’s priorities are responsive to legal needs identified by our client community.**

The Society updates its priorities each year to meet the evolving needs of our ever-changing client community. This priority review is driven by client feedback and expressed needs, census information, and the experiences of our staff, board, stakeholders, and partners working alongside people forced to live in poverty.

* + We refine our priorities annually based on what eligible clients tell us they need (Listen to clients). These Priorities are publicly available at <https://yourlegalaid.org/what-we-do>.
* Create a priority review cycle that incorporates data from community engagement, intake (telephone, in-person, and online), and partner and government data.
  + We design and implement our advocacy programs with the goal of meeting client identified needs expressed in our priorities.
* Revise case acceptance policies driven by our priorities that ensure acceptance of the most important client needs.
  + We dedicate meaningful advocacy towards addressing high-need, systemic issues.
* Ensure an appropriate balance of impact and service cases.

1. **The Society leverages technology to enhance strategic goals and operational effectiveness.**
   * The Society is in the process of implementing a modern case management system (CMS) that will—

* Improve case/hour tracking to align workplans with funding.
* Measure impact of advocacy on client community.
* Improve technology to track all volunteer recruitment, cases, volunteer, and training.
  + The Society will utilize technology with clients that is accessible, user-friendly, and increases effective advocacy.
* Complete Technology Innovation Grant “Kick the tires.”
* Adopt workplan to implement recommendations.

**people**

(Strategic Objective 2)

Objective 2 (People): Recruit, retain, and develop staff, directors, volunteers, and vendors who further the mission of the Society and reflect the diversity of the Society’s Service Area.

1. **The Society employs a respected and professional staff who are appropriately supervised, developed, compensated, and supported.**
   * Supervision

* Implement Performance Review System (PRS) that assures timely, ongoing feedback or past performance and sets goals and expectations of future performance.
  + Training
* Implement Professional Development Guidelines (PDG) that provide staff with skills benchmarks throughout their careers at the Society.
* Develop an inventory of essential training to meet the PDG.
* Implement a training and mentoring program to assure competency with essential skills and training identified in the PDG.
* Support
* Regularly assess staff morale and concerns on an ongoing basis.
* Assess diversity of staff on an ongoing basis.
* Identify communities that are underrepresented within the Society.
* Conduct regular compensation study to ensure staff compensation is competitive with similarly situated public interest roles.
* Implement regular management-labor committee meetings to improve management-labor communications.

1. **The Society has a robust volunteer and contract attorney network which provides priority services to eligible clients and the Society.**
   * The Society’s Volunteer Lawyer Program is key to increasing the delivery of legal aid to eligible clients by using volunteer and contract attorney resources to expand the Society’s capacity.

* Develop a system to determine the appropriate number of volunteer and contract attorneys.
* Develop and regularly hold trainings on key poverty law areas identified to address systemic legal problems that affect the low-income community.
* Partner with local bar associations to identify joint areas for training and collaboration.
* Revive Pro-Bono Consortium in partnership with the Louisville Bar Association.
* Develop a system to identify primary contact/volunteer coordinator at each law firm and in-house legal department and maintain relationships with those roles.
  + Utilize contract attorneys to deliver priority services in underserved areas where the Society lacks sufficient staff or volunteer resources.
  + Train all staff with the concepts of *Pro Bono Proficiency* to increase appropriate referrals to the Volunteer Lawyer Program and support of volunteer attorneys by staff with poverty law expertise.

1. **The Society has engaged board members who are passionate about the work, serve as strategic thought partners to the Society’s leadership team, and serve as ambassadors in the community.**
   * The Society’s board of directors is engaged in the mission and the work.

* Ensure that each board member actively serves on one committee.
* Include non-directors on its committees when appropriate to ensure a broad perspective of diverse opinions and ideas and to develop future board members.
* Assess thediversity of the board on an ongoing basis.
  + Each board member understands the Society’s funding and funding goals.
* Train the board in fundraising techniques, including overall training on all the agency’s funding streams – grants, private donors, government funding, and foundations.
* Board members contribute meaningfully to the Society’s fundraising efforts and include the Society as one of their three biggest gifts each year.
  + Each board and committee member serves as an ambassador to the potential client community and the community at large.
* Regularly create opportunities for all board members to learn about staff and the work of the Society.
* Develop annual board trainings to ensure board members remain updated on the Society’s work.
* Conduct a new board member training between a new board members appointment and their first official board meeting.

**Resources**

(Strategic Objective 3)

Objective 3: (Resources): The Society has diverse and growing sources of revenue that support its client identified priorities and strategic goals.

1. **Develop a broad base of private donors who are passionate and supportive of the work we do.**
   * Engage the Board of Directors in fundraising and communications.
   * Develop a system to assess and measure outcomes of the Society’s fundraising projects.
   * Develop a system to assess the diversity of revenue sources and monitor threats to funding.
   * Identify funding sources to support short-term projects that implement portions of the Strategic Plan or other short-term needs.
   * Identify long-term funding sources that support priorities of the Society.
2. **The Society will only accept funding that support our mission and identified priorities.**
   * The Society prioritizes its resources to focus on the highest needs of our clients and aims to create the most impactful advocacy on behalf of low-income people

* Prioritize the development of unrestricted funding.
* For each potential grant or source of funding, we will implement a decision logic that weighs—
  + whether it supports a defined priority,
  + the potential impact for our client community, and
  + the sustainability of the program supported by the funding.
* When a staff vacancy occurs, prior to re-hiring, the Society will re‑assess the vacant role to determine whether a different or modified role would better serve the Society’s priorities.

1. **The Society’s budget reflects the values identified in its priorities.**
   * The Society’s priorities are defined by our mission to pursue equal justice for people experiencing poverty, by removing barriers to accessing the legal system and by delivering impactful advocacy improving the lives of all clients.

* Each item in the budget is designed to fund a specific priority designed to have a measurable impact in the lives of our clients.
* We are transparent with our budget, strategic planning, and our impact by making key documents and reports available on our website at [budget], [strategic plan], and [[impact](https://yourlegalaid.org/news/2021-year-in-review)].
  + We budget appropriate resources to—
* Ensure the appropriate training and supervision of staff, contractors, and volunteers.
* Support the work of management staff to manage, safeguard, and develop the resources of the Society.
* Support the work of the board of directors and its committees in providing oversight of the work of the Society.

**Where We are Today.**

[[2021 Year in Review](https://yourlegalaid.org/news/2021-year-in-review)]

[[priorities](https://yourlegalaid.org/what-we-do)]

[[impact](https://yourlegalaid.org/our-impact)]

[budget] \*New page

[[990](https://yourlegalaid.org/s/Legal-Aid-Society-2020-990-Form.pdf)]

[strategic plan] \*New page

**How we will know if this plan has been successful.**

* Our client community knows when they need us and they know how to access our services.
* Our client community values our work and believes we are responsive to their needs.
* We report both the number of people we are able to help as well as the impact of our work through client success stories and case studies.
* We demonstrate equitable client services by county.
* We have created greater access and awareness about our services throughout our 15-county service area.
  + Bardstown Office fully staffed. (In planning)
  + Elizabethtown Office fully staffed. (In planning)
  + Shelbyville Office fully staffed. (In development)
  + West Louisville Office fully staffed. (In development)
* We are using an effective, modern case management system.
* The Society’s staff, directors, and partners are reflective of the diversity of our client community.
* We have broad, successful, productive partnerships with local bar associations, social service entities, other legal aid providers, and other stakeholders in the success of our clients.
* Staff report high engagement through measures of job satisfaction, low turnover, and perceptions of fairness and transparency.