

NEIGHBORHOOD LEGAL SERVICES

2023 - 2026 STRATEGIC PLAN

BROCADE STUDIO

INTRODUCTION

When I started as Executive Director in 2022, I inherited a healthy and flourishing legal aid program. Neighborhood Legal Services had weathered the worst of the pandemic with aplomb. We pivoted to mobile workspaces and virtual solutions that allowed us to continue providing outstanding representation to our clients while keeping staff and clients safe and healthy. We used made critical upgrades to our technology and service delivery. We hired a cadre of bright young lawyers who will be integral to our future leadership.

For the last five years, the story of Neighborhood has been one of rapid change to meet changing demands. As we all know, change brings challenges. With senior leadership and long-time attorneys starting to retire, how will Neighborhood transfer institutional knowledge from those leaders and develop our next generation of managers? After our rapid growth before and during the pandemic, do our management groups still represent the best way to structure our organization? How do we grow our development and fundraising efforts to insulate Neighborhood from the fluctuations of state and federal funding? Are we fully using our new technology to streamline our operations and better serve our clients?

These were the key questions we needed to incorporate into our strategic planning. We sent out surveys to our staff and board members, and then conducted follow-up interviews. We sought out suggestions for goals and priorities and asked for recommendations for operational improvements. We used that feedback to form the basis for our priorities.

Our first priority is revising our organizational structure.

While we have a core group of staff attorneys who have worked for Neighborhood for decades, 66% of our staff attorneys have worked here less than four years, including almost half of our managing attorneys. As senior management ages out, we must reassess the way we organize our advocacy units, given the increase in our staffing and the experience levels of our attorneys and management.

Our second priority is to develop these new attorneys and staff members.

We must ensure that we equip our new attorneys with the skills to succeed as litigators and managers so that they have the same lengthy career at Neighborhood as their predecessors.

Our third priority is to examine our intake and case handling processes to find ways to increase the efficiency of our legal services.

Neighborhood opened a record 8,000 new cases last year. During the pandemic, as domestic violence increased, so did our Protection from Abuse (PFA) caseload. Even as the pandemic has slowed, the PFA cases have not. Evictions are back at pre-pandemic levels and will most likely increase as the local housing authorities lift self-imposed moratorium on evictions. This elevated caseload looks to be the new normal for the immediate future. We need be smart and strategic about our deployment of our practice management and intake systems to meet this increase in demand for our services.

Our fourth priority is developing our fundraising capacity.

While our cases may be steadily increasing, our state and federal funding is not. Building out our ability to cultivate other sources of funding will help us meet the growing need for our services and insulate us from potential changes to our existing funding sources.

Our fifth priority is building the infrastructure to expand our pro bono services.

Working in partnership with law firms and private attorneys in our region to connect them with pro bono cases is an essential role for legal aid organizations. We'll work over the next few years to lay the foundation for expanded, sustainable pro bono services.

Finally, our sixth priority is creating a secure and coordinated technology infrastructure.

After investing in our technology infrastructure, we've been able to use technology to assist people in ways that I never would have thought possible in a legal aid setting. However, now that Neighborhood and our clients are used to our new virtual reality, Neighborhood needs to take stock of our technology infrastructure. We must ensure that the technology we are using is protected from bad actors, that we are spending our tech dollars wisely, and that we are putting our new technology to full use.

These goals are the foundation of our strategic plan. They reflect a truth that became evident as we embarked upon our strategic planning. In order for Neighborhood to build, we have to first reinforce our existing systems. We must prepare for the loss of senior staff by designing an organizational chart that will compensate for the loss of seasoned leaders. We have to equip our bright young stars to become our next generation of leaders. We need to streamline and assess our intake and technology systems so that we can take on new projects. We must develop our fundraising capacity so that we can fund our next big idea.

NLS has experienced unprecedented a change and growth over the last few years. The strategic direction we set here will allow us to fortify our existing systems so that we can meet the next big challenge.



Kris Bergstrom
Executive Director

HOW THIS PLAN WAS DEVELOPED

Beginning in fall 2022, Brocade Studio, Neighborhood Legal Services' (NLS') strategic planning consultant:

- Reviewed key internal documents, including LSC reports and prior and current planning documents
- Invited all staff and board members to participate in a survey meant to identify the issues and questions staff and board felt should be addressed through this process
- Consulted its in-house expert on restricted legal service programs - a nationally renowned legal services state director for 22 years - on best practices and emerging considerations
- Interviewed a subset of staff and board members - representing a cross-section of perspectives, roles, and offices - to gather additional information on the key issues and questions raised in the survey
- Identified a set of key issues the strategic plan might need to address and formed, against each issue, staff work groups (in the case of the development-focused work group, staff and board), which each met at 3+ times in winter 2023
- Worked with senior leadership to refine the work groups' output and iteratively develop this plan

In summer 2023, with guidance from Brocade, NLS will work to develop a companion implementation plan and subsequently encourage teams throughout the organization to ensure their work is aligned with the strategic plan.



MISSION, VISION, AND GUIDING PRINCIPLES

Mission

To meet the civil legal needs of low-income and vulnerable individuals in our community through effective legal representation and education.

Vision

A just community where all people are treated fairly and have access to civil legal representation to meet their basic needs of safety, economic security, and stability.

Guiding Principles

Defend and empower vulnerable people giving them a voice in the system

Treat everyone with compassion, dignity and respect

Proactively collaborate with community partners to provide holistic services

Champion pro bono services

Incorporate the values of Diversity, Equity and Inclusion in actions

Foster innovation

STRATEGIC PRIORITIES

Priority 1

Create an organizational structure that supports NLS' mission and case priorities

Priority 2

Support professional growth and offer meaningful career opportunities for staff

Priority 3

Increase efficiency and effectiveness in our delivery of legal services

Priority 4

Expand donor and volunteer support to increase financial sustainability

Priority 5

Build a centralized and sustainable infrastructure for expanded pro bono services

Priority 6

Develop a secure and well-coordinated technology infrastructure and IT support program that is aligned with organizational needs

PRIORITY 1

CREATE AN ORGANIZATIONAL STRUCTURE THAT SUPPORTS NLS' MISSION AND CASE PRIORITIES

GOAL 1 Design and implement a modernized organizational structure

- Reorganize advocates and intake workers into a Legal Advocacy Unit with five main divisions: Intake, Housing, Family, Financial Stability, and Special Projects
- Unify Pro Bono projects under a single Pro Bono Manager in charge of pro bono across all subject matter areas
- Merge accounting, technical, and HR departments into a single Business Administration Unit
- Align new organizational structure with job descriptions that clearly define job roles, responsibilities, and supervision chains
- Gather and transfer institutional knowledge from senior staff
- Update or create pleadings and resource banks for all substantive areas
- Have long-term staff create a “knowledge binder”

PRIORITY 2

SUPPORT PROFESSIONAL GROWTH AND OFFER MEANINGFUL CAREER OPPORTUNITIES FOR STAFF

GOAL 1 Encourage initial success by reimagining on-boarding and training for all new hires

- Prepare employee training manuals for each position and assign responsibilities to keep them up to date
- Prepare an employee handbook
- Establish a mentor/mentee program pairing new hires with more experienced staff
- Develop and implement NLS Academy for first-year employees

GOAL 2 Better support staff in their roles

- Provide professional development opportunities for all staff
- Develop and individual Staff Development Plans, including an annual review and informal mid-year check-in
- Establish law groups for every substantive legal area (with consistent meetings) to provide support to attorneys
- Establish a rotating system of weekly “office hours” for managers to answer general questions
- Create an employee-driven Wellness Committee that is empowered to implement recommendations

GOAL 3 Foster a new generation of leaders

- Promote opportunities for staff to serve as ambassadors for NLS
- Use annual staff development plans to identify staff interested in learning management skills and grant administration
- Provide trainings for managers and designated staff on effective supervision techniques

PRIORITY 3

INCREASE EFFICIENCY AND EFFECTIVENESS IN OUR DELIVERY OF LEGAL SERVICES

GOAL 1

Improve internal communications

- Create materials to educate staff on current grants and service levels
- Increase discussions about our priorities and levels of service in substantive law groups
- Improve communications on grants with organizations that directly refer clients
- Empower staff to develop improvements in service delivery

GOAL 2

Update practice management systems

- Analyze average time/case to better assess volume and determine where overloads occur
- Examine and evaluate current case management processes as they manifest in day-to-day case handling
- Within substantive law areas define how current resources should be allocated amongst representation, pro se assistance, pro bono referrals, advice and counseling

GOAL 3

Increase staff efficiencies

- Map out current support available for attorneys and identify needs or gaps in the support systems
- Develop an effective non-lawyer support team in balance with the number of lawyers
- Identify needed staff resources, training and changes in service delivery to allow NLS to help more people
- Identify opportunities to use technology more effectively to streamline legal work

GOAL 4

Strengthen the intake process to improve the pace, flow, and quality of services to clients

- Form a committee to examine and map the current processes including staffing, training, communications, and uses of technology:
 - Review input from strategic planning workgroup
 - Identify bottlenecks and other problem areas of intake systems
 - Gather and share information about successful intake processes and best practices in peer organizations
 - Utilize data to make informed decisions
 - Recommend intake process improvements
 - Refine the intake process and implement changes
 - Monitor and evaluate intake process improvements

PRIORITY 4

EXPAND DONOR AND VOLUNTEER SUPPORT TO INCREASE FINANCIAL SUSTAINABILITY

GOAL 1

Increase awareness and visibility of NLS

- Concentrated marketing and communications (messaging, media, public relations)
- Utilize special events
- Create friendraising opportunities

GOAL 2

Diversify the donor and volunteer base, and deepen engagement

- Broaden individual donor base
- Increase participation from attorneys and social-justice-minded individuals
- Establish stronger relationships with local government officials and foundation representatives

GOAL 3

Build board and staff initiatives to increase engagement in fund development

- Develop better understanding of fundraising and grant development through training
- Identify specific opportunities board and staff can participate in in development efforts
- Clearly define and articulate responsibilities for board and management-led fundraising efforts
- Strengthen relationships amongst board/staff/community to increase sphere of influence in the larger community
- Position staff and board members as ambassadors to spread the good word of NLS' work in the community

GOAL 4

Ensure internal capacity to support increased and more varied fund development efforts

- Assess internal development capacity and reflect any needed capacity in the organizational staffing plan

PRIORITY 5

BUILD A CENTRALIZED AND SUSTAINABLE INFRASTRUCTURE FOR EXPANDED PRO BONO SERVICES

GOAL 1

Build a centralized and sustainable pro bono infrastructure across all substantive areas

- Identify pro bono opportunities that align with priority community needs
- Inventory and assess available pro bono resources
- Develop an online resource library of case handling resources and related materials for pro bono attorneys
- Design internal systems specifically tailored to maximize the success of pro bono programs
- Create volunteer training resources to support pro bono programs
- Develop volunteer recruitment and recognition strategy
- Implement and promote reinvented pro bono program and initiatives

PRIORITY 6

DEVELOP A SECURE AND WELL-COORDINATED TECHNOLOGY INFRASTRUCTURE AND IT SUPPORT PROGRAM THAT IS ALIGNED WITH ORGANIZATIONAL NEEDS

- GOAL 1** Update IT policies and procedures to reflect the guidelines put forth by the LSC Technology Baseline
- GOAL 2** Strengthen network security and align with security and compliance best practices
- Adopt tightened cyber security protocols for IT systems (SSO, multi-factor authentication)
 - Launch a training program focused on security awareness
- GOAL 3** Utilize technology to improve program operations and office efficiency
- Migrate to a fully cloud-based system
 - Implement cost-savings strategies identified in the IT assessment
 - Adopt a training program focused on enhanced use of existing digital tools
- GOAL 4** Utilize the Tech Steering Committee to develop future IT projects
- Reconfigure the Tech Steering Committee to include a cross-section of employees with different job categories and subject matter expertise

