

# Northeast Legal Aid/ Northeast Justice Center Strategic Plan

*-Approved by Board of Directors June 5, 2017-*

## Mission, Vision, and Values

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### **Mission (The core of what NLA/NJC does)**

Northeast Legal Aid and the Northeast Justice Center – together through their respective boards, management, and staff – (“NLA/NJC”) help low-income and elderly people of Northeast Massachusetts obtain justice and empowerment through skillful, creative, and persistent advocacy for systemic change and high-quality individual representation.

### **Vision (Our ideal for what the community and the justice system should look like)**

Our vision is a community and a nation in which a fair and accessible legal system helps assure that everyone’s basic human needs are met and their legal rights are protected, so that every member of our society can live with dignity, independence, safety, and security.

### **Values (The beliefs and principles that guide our daily actions at NLA/NJC)**

- Our clients deserve legal services of the highest professional quality, delivered with respect, empathy, and a commitment to fostering the client’s autonomy and control over the direction of their legal case;
- NLA/NJC has a profound responsibility to seek out and serve low-income populations who are especially marginalized, vulnerable, or isolated, including the homeless; mentally ill; survivors of domestic abuse; frail elders; children; non-English speakers; immigrants, whether documented or undocumented\*; refugees; those with criminal records; and other victims of discrimination;  
*\*NLA will represent immigrants only to the extent permitted by LSC rules*
- NLA/NJC is committed to fostering a collaborative and supportive organizational culture that blends teamwork, collegiality, training, supervision, and encouragement of professional growth with consistently high expectations for the quality of its service to clients;

- NLA/NJC is committed to staying informed about and responsive to current and emerging client and community legal needs;
- Everyone at NLA/NJC shares responsibility for the program's funding and looks for ways to preserve and increase it;
- Everyone at NLA/NJC understands that they are ambassadors for NLA/NJC and works actively to increase the program's visibility and its connections in the legal world and the broader community.

## Strengthening Advocacy for Clients

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**GOAL: NLA/NJC WILL USE ALL FORMS OF HIGH-QUALITY ADVOCACY TO MAXIMIZE ITS IMPACT ON THE LIVES OF ITS CLIENTS, FOCUSING ON THE CLIENTS' HIGHEST PRIORITY ISSUES, AS IDENTIFIED IN NLA/NJC'S LEGAL NEEDS ASSESSMENT**

Objective #1 In determining its substantive priorities for advocacy for clients, NLA/NJC will focus on the most urgent issues identified in the legal needs study conducted in 2015, while adapting these priorities as appropriate to emerging issues and other new events and developments in the community.

Objective #2 NLA/NJC will develop and maintain its capacity to employ a wide range of advocacy skills to assist eligible individual and group clients and achieve systemic change for the client community.

*Strategy #1 NLA/NJC will make use of the following advocacy tools, employing multiple tools as needed in one case or project to increase the likelihood of success and enhance the benefits to clients:*

- *Litigation (affirmative and defensive)*
  - *Individual cases*
  - *Impact cases*
  - *Class actions\**
- *Representation at administrative hearings and appeals*
- *Informal ("soft") advocacy: calls and letters;*
- *Legislative advocacy;\**
- *Rule-making;\**
- *Local government advocacy re poverty issues, municipal projects, ordinances, etc.;\**
- *Systemic advocacy in collaboration with other organizations which also serve NLA/NJC's clients;*
- *Court system reform through participation on Court committees;*

- *Traditional news media and social media;*
- *Entrepreneurial assistance to help clients rise out of poverty;*
- *Empowering people through community legal education of potential clients and providers;*
- *Educating the broader community about poverty and our clients' lives.*
- *Community lawyering*
- *Collaboration with the private bar*

*(\*primarily by NJC, and by NLA only to the extent permitted by LSC rules)*

Action Step #1 NLA/NJC's advocates and management will identify any need for training on these advocacy tools and will seek out such training.

Objective #3 NLA/NJC will strengthen its collaboration with the Private Bar in order to maximize the delivery of high-quality legal services to low-income people who would otherwise not be served by NLA/NJC.

Strategy #1 *NLA/NJC will appoint a staff or management person(s) to be the program's Pro Bono coordinator, who will responsible for overseeing NLA/NJC's efforts to recruit, train, monitor, and publicly recognize private attorneys who handle legal cases for low-income clients without charging fees.*

Action Step #1 The Pro Bono coordinator will work with members of the NLA/ NJC Boards, local Bar Associations, other lawyer organizations, and the judiciary to develop recruitment and recognition activities that will increase and maintain participation by private attorneys.

Action Step #2 The Pro Bono coordinator will work with NLA/NJC's substantive projects to identify cases categories that would be appropriate for referral to private attorneys and to develop plans for recruiting private attorneys to handle these cases.

Strategy #2 *NLA/NJC will develop training materials and standards of practice for private attorneys who handle cases under NLA/NJC's Pro Bono program and, as necessary, will mentor and co-counsel with private attorneys to help encourage participation and foster high-quality service.*

Action Step #1 Staff advocates, private attorney volunteers, and Board members with the appropriate knowledge and experience will develop training materials and standards of practice for private attorneys who handle cases through NLA/NJC's Pro Bono program.

Action Step #2 The Pro Bono coordinator, in consultation with staff advocates, will identify a limited number of cases in which ongoing mentoring or co-counseling with private attorney volunteers would benefit the client, improve the private attorney's skills, and encourage the private attorney's continuing participation in the Pro Bono program. The Pro Bono coordinator will match the volunteer attorney with an appropriate staff advocate, Board member, or experienced private attorney.

*Strategy #3 NLA/NJC will monitor the performance of private attorney volunteers, providing additional support or training as needed, and discontinuing referrals to volunteer attorneys whose performance does not meet NLA/NJC's standards of practice.*

Action Step #1 NLA/NJC will use input from staff attorney mentors, client satisfaction questionnaires, and other approaches to evaluate the performance of private attorney volunteers in representing the clients that NLA/NJC has referred to them, and, based on this information, will offer support, training, or other assistance to private volunteer attorneys, or, if necessary, remove attorneys whose performance is unsatisfactory from NLA/NJC's referral lists.

## Communications

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### **GOAL #1: CONTINUE TO STRENGTHEN THE SENSE OF UNITY AND COLLABORATION IN THE NLA/NJC STAFF AND BOARD**

### **GOAL #2: FURTHER ENHANCE NLA/NJC'S VISIBILITY AND REPUTATION IN THE COMMUNITIES IT SERVES**

Objective #1 NLA/NJC employs a simple consistent message about the merger that created NLA/NJC and the current organizational structure.

Objective #2 NLA/NJC employs a simple consistent and powerful message about NLA/NJC's mission and vision, and is encouraged to seek opportunities to express this message and otherwise serve as ambassadors for NLA/NJC.

Objective #3 NLA/NJC uses consistent and reliable means for regular internal communication among Board members and with the staff of all three offices.

Objective #4 NLA/NJC empowers its clients to speak on their own behalf and uses client stories and advocacy whenever possible to explain and promote NLA/NJC's work and to protect and improve its funding.

Objective #5 NLA/NJC makes effective use of social media and traditional news media to provide information to potential clients and to promote the organization.

Objective #6 NLA/NJC possesses the staffing, expertise and technology to meet its goals and objectives for internal and external communications.

*Strategy #1 NLA/NJC will consider hiring a part-time communication specialist, perhaps by having one person serve as a combined development and communication specialist.*

*Strategy #2 NLA/NJC will seek an outside provider and/or volunteers to re-develop NLA's website and create a coordinated web presence for NJC;*

*Strategy #3 NLA/NJC will consider employing a communications specialist or other resources to develop and maintain NLA/NJC's presence on social media, as well as relationships with traditional local and regional news media;*

*Strategy #4 NLA/NJC will further increase Board/staff communications and interactions through regular communication:*

*Action Step #1 The Board will continue to include staff presentations on the program's legal work and advocacy for clients on the agenda for as many Board meetings as possible;*

*Action Step #2 The Board will seek informal opportunities to interact with the staff at the NLA/NJC offices and in other social settings and at events that do not require extensive preparation;*

*Action Step #3 The Board will continue to encourage staff participation in fundraising events, Board recruitment, and other appropriate projects and committees undertaken by the Board;*

*Strategy #5 With the leadership of any communication specialist or through internal discussion, NLA/NJC will develop simple messages about the merger/current structure and about NLA/NJC's mission, and provide training in the use of these messages*

*Strategy #6 NLA/NJC staff will create a monthly internal program e-newsletter, with editorial responsibility rotated among staff members;*

*Strategy #7 NLA/NJC will build a group of present and former clients who are willing and prepared to speak publicly on NLA/NJC's behalf, by identifying and encouraging such potential speakers and providing training.*

# Funding and Fundraising

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## **GOAL: STABILIZE AND INCREASE NLA/NJC'S FUNDING OVER THE LONG-TERM**

Objective #1 NLA/NJC will diversify and enlarge its funding base.

Objective #2 NLA/NJC will maximize unrestricted funding whenever possible.

Objective #3 NLA will strengthen its resource-development.

Objective #4 NLA/NJC will create a culture of collaborative group responsibility for NLA/NJC's financial development and success.

Objective #5 NLA/NJC will further enhance its visibility and credibility with both potential donors and existing supporters [Note the relationship of this objective to the "Communications" goals, objectives, and strategies in this Strategic Plan].

*Strategy #1 NLA/NJC will consider hiring a part-time development director and consider investing in training, software and other organizational pre-requisites for resource development;*

Action Step # 1 NLA/NJC will seek advice and assistance from MIE, other legal services programs, and nonprofit fundraising experts about hiring a development director, choosing the right software, etc.

*Strategy #2 NLA/NJC will expand and enhance the annual individual donor campaign, with Board leadership and participation;*

Action Step # 1 Fundraising training for Board members

Action Step # 2 Recruitment of new Board members:

- i. Who are corporate counsel; or are
- ii. Local residents who practice law at large firms; or
- iii. Who have significant nonprofit fundraising experience;

Action Step # 3 Creation of a fundraising committee or council to help guide the fundraising effort, to include current and former Board members, current and former staff, and other supporters in the legal community and general public;

Action Step # 4 Consideration of one annual community fundraising event, and/or smaller regional events, receptions, etc.

Action Step # 5 Through community events or otherwise, regular public recognition and thanks to key supporters and allies;

*Strategy #3 NLA/NJC will increase its efforts to obtain attorneys' fees, consistent with program priorities and, for NLA, only as permitted by LSC rules;*

Action Step # 1 Continue to seek fees in Social Security disability benefit appeals;

Action Step # 2 After staff training, regularly seek fees in appropriate housing cases;

Action Step # 3 Develop retainer provisions regarding fees and protocols for discussion with clients about fees at the beginning of a case;

Action Step # 4 Provide staff training and support regarding the pursuit of attorneys' fees;

Action Step # 5 Continue to develop annual projections for the collection of attorneys' fees at NLA/NJC with assignments and support for staff who practice in these areas.

*Strategy #4 NLA/NJC will continue and expand its pursuit of grants from local, regional, and state foundations and other charities; focusing on funding that would enable NLA/NJC to implement its substantive priorities for advocacy for our clients.*

*Strategy #5 NLA/NJC will continue to develop cross-organizational and cross-disciplinary community projects and collaborations to improve and expand services to clients, and then engage in joint grant-seeking and other fundraising efforts with the partner organizations.*

## ENHANCING STAFF RECRUITMENT, RETENTION, DIVERSITY, AND PROFESSIONAL GROWTH

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### **GOAL: RECRUIT, RETAIN, AND DEVELOP A SKILLED, DIVERSE, AND DEDICATED STAFF**

Objective #1 To the extent feasible and consistent with the responsibilities of the organization, NLA/NJC's salary and benefit levels will be comparable to those in other legal services programs, government agencies, and other public-interest legal organizations in Massachusetts and New England and will reflect the cost of living in NLA's service area.

Objective #2 NLA/NJC's staff will reflect the diversity of the communities it serves.

*Strategy #1 NLA/NJC will undertake an active program to recruit people of color and other diverse candidates for its staff.*

Action Step #1 NLA/NJC will develop long-term relationships with the student leaders and faculty advisors of law school organizations for law students of color and from other diverse groups, particularly in Massachusetts.

Action Step #2 NLA/NJC will also develop long-term relationships with law school placement offices and seek their help in recruiting law students who live in or grew up in NLA/NJC's service area, and particularly people of color and other diverse candidates.

Action Step #3 NLA/NJC will use the relationships and contacts it develops at law schools to recruit summer law students of color and from other diverse groups, who can become potential candidates for permanent positions, and NLA/NJC will consider providing transportation stipends or other assistance to enable law students with fewer financial resources to take summer jobs in NLA/NJC's offices.

Objective #3 NLA/NJC will foster the skill development and overall professional growth of its staff.

*Strategy #1 NLA/NJC will create a culture that blends high standards for its legal services for clients with support and mentoring that encourages continuous development of advocacy and leadership skills.*

Action Step #1 NLA/NJC will provide in-house training and, as resources permit, will continue to encourage staff participation in statewide and national legal services conferences, training events, task forces, and other groups that include participants from multiple legal services programs and will communicate about such opportunities with staff.

Action Step #2 NLA/NJC will encourage staff participation in local and state bar activities and judicial projects and committees that are relevant to NLA/NJC's priorities and client needs and will also work with experienced non-NLA/NJC attorneys to develop the staff's skills and knowledge .

Action Step #3 NLA/NJC will continue to develop collaborative mentoring, co-supervision, and co-counseling systems to enhance skill development. NLA/NJC will make sure that those with unique projects or substantive practices have the opportunity to participate, and will encourage cross-fertilization across substantive lines through training and case assignments to promote an holistic understanding of our clients' lives and collaborative efforts to assist them.



# STRENGTHENING THE NLA/NJC BOARDS AND FURTHER CLARIFYING THEIR ROLE

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**GOAL: MAINTAIN STRONG DIVERSE BOARDS WHOSE MEMBERS PLAY A CENTRAL ROLE IN FUNDRAISING AND ARE ACTIVE AMBASSADORS FOR NLA/NJC**

Objective #1 The NLA/NJC Boards will continue to be demographically and geographically diverse and will continue to reflect the communities which NLA/NJC serves.

Objective #2 In addition to legal expertise and knowledge of the community, the NLA/NJC Boards will include members with a variety of skills and experience, including financial management, nonprofit leadership, fundraising, and communications.

Objective #3 The NLA/NJC Boards will play a leadership role in NLA/NJC's fundraising, and every Board member will make an annual donation, according to his or her individual financial capacity.

Objective #4 The NLA/NJC Boards will adopt a job description and a set of expectations for Board members.

*Strategy #1 The Boards will develop a list of criteria for recruiting new Board members and an assessment of their current strengths and gaps, which can help guide the recruitment and training of new Board members;*

Action Step #1 Creation of a Board Development Committee, including current and former Board members, current and former staff, and other supporters, which will:

- a. Draft a job description and set of expectations for NLA/NJC Board members, focusing on the roles of fiduciary, fundraiser, ambassador, and visionary;
- b. Develop a list of the diverse attributes and skills that the NLA/NJC Boards should possess and an inventory of how well the current Board membership satisfies these goals;
- c. Create a recruitment plan to enlist the network of NLA/NJC's supporters in assessing and recruiting new Board members to fill the gaps and build on the strengths of the current Boards;

*Strategy #2 The Boards, along with staff leaders, will increase their expertise and commitment to NLA/NJC's fundraising:*

Action Step #1 The Boards and staff will jointly participate in intensive fundraising training;

Action Step #2 The Boards will help recruit a fundraising committee or council to help guide the fundraising effort and broaden their reach in the legal community and the general public;

Action Step #3 The Boards will work toward the goal of participation by every member of each Board in NLA/NJC's fundraising effort:

- i. Through engagement in campaign activities; and
- ii. By making an annual donation at a financial level within his or her individual capacity.

*Strategy #3 The Boards will enhance the participation of their client Board members in each Board's key activities and decisions;*

Action Step #1 The Boards will designate experienced client members as mentors for new client members;

*Strategy #4 The Boards will hold their members accountable for fulfilling duties and commitments as Board members and will periodically evaluate their own performance.*