

WEST TENNESSEE LEGAL SERVICES

Strategic Plan for 2021-2024

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OUR APPROACH TO STRATEGIC PLANNING

Per guidance provided by the Legal Services Corporation (LSC), WTLS approached this strategic plan in steps, as outlined below.

Strategic Planning Steps

1. Creating the plan
 - a. Gather data
 - b. Develop the plan
 - i. Mission, vision, priorities
 - ii. Develop strategic goals
2. Implementation
3. Evaluation

WTLS' data gathering activities included an analysis of the types of problems our clients reported, feedback from staff members, feedback from the Board of Directors, and analysis of responses to our legal needs assessment questionnaire. We received responses to our legal needs assessment from clients, Board members, staff members, community partners, and members of our community.

Our plan's development took place over six months. During this time, the Development and Communications Coordinator (formerly Executive Assistant) used feedback gained from data gathering to develop areas of focus for the 2021-2024 strategic plan; the initial areas of focus for the strategic plan are below.

2021-2024 Strategic Plan: Initial Areas of Focus

1. Enhanced resource development
 - a. Organized, central location of grant information
 - i. Better understanding of spending throughout grant cycle
 - b. Fundraising
2. Communications and Technology
 - a. Website
 - b. Social media
 - c. Audience-building
 - d. Strengthening relationships with community partner organizations
 - e. Remote outreach development
 - f. New case management system
 - g. Technology maintenance and planning
3. More robust legal needs assessment
4. Institutional move towards racial equality
5. Future of pro bono
6. Succession planning
 - a. Board and staff

The Development and Communications Coordinator (DCC) held meetings with members of the Management team, members of the Board, the Pro Bono Coordinator, an outside strategist, the IT Manager, Executive Director (ED), and General Counsel to get input on the areas of focus and to develop SMART goals (goals that are specific, measurable, achievable, realistic, and time-bound) for making an impact on those focus areas.

The motivation behind these strategic plan development meetings was this question: **What do we want our organization to look like in 5 years?**

Keeping this question in mind, between July and December 2020, WTLS' strategic plan developed from the outline of focus areas above to the detailed goals, objectives, and strategies presented in this document.

WTLS' MISSION, VISION, AND PRIORITIES

Strategic planning is about enhancing our ability to achieve our mission. All parts of the strategic plan must stem from WTLS' mission and vision. Therefore, WTLS must have a mission statement that is able to communicate:

- What we do
- How we do it
- For whom we do it

Implementation of this strategic plan will begin with a clarification of WTLS' mission statement, development of WTLS' vision statement, and consideration of WTLS' priorities. WTLS' mission, vision, and priorities will be published on the WTLS website and will be communicated to all staff via email and will be easily accessible on WTLS' SharePoint Online site.

STRATEGIC PLAN

GOAL 1: Enhance resource development to ensure organizational sustainability and the ability to serve a diverse population

Objective 1.1: WTLS will create a better understanding of the progress of grants on an ongoing basis for all involved in grant management.

Strategies

1.1.1: Utilize LegalServer's Advanced Grant Management module to create an organized, central location of grant information

1.1.2: ED and CFO will have quarterly meetings with grant managers to discuss progress, deliverables, and necessary changes/updates

1.1.3: All WTLS administrative staff will enter their time into LegalServer so that administrative burden can be accurately assessed at the end of each grant's fiscal year

Persons Responsible: DCC, management team, all non-Ryan White staff, Board

Measurable Outcomes: grants entered into LegalServer; staff time allocated accurately per grant, limits and alerts will be set up; schedule of quarterly meetings; report of legal and administrative staff time per grant

Objective 1.2: WTLS will help ensure sustainability by including fundraising efforts in their annual resource development plan.

Strategies

1.2.1: Create a resource development plan¹, review the plan with the ED, General Counsel, CFO, and Board

1.2.2: Create a case for support and review annually

1.2.3: Utilize the donor and volunteer management software that comes with new website host to create a meaningfully segmented donor list

Persons Responsible: DCC, ED, General Counsel, CFO, Board

Measurable Outcomes: increased fundraising income, annual resource development plans, case for support, increase in donors

GOAL 2: Enhance WTLS' use of communications and technology

¹ Note: this plan will include plans for grant management and acquisitions as well as fundraising plans)

Objective 2.1: WTLS will strengthen engagement and collaboration with community stakeholders, partner organizations, and client communities.

Strategies

2.1.1: Redesign the website to enhance WTLS' ability to communicate effectively with clients, community members, and potential donors

2.1.2: Development and Communications Coordinator will create a communications plan, review the plan with the ED, General Counsel, and Board

2.1.3: Collaborate with nonprofit and legal community to the benefit of our client population, the nonprofit community, the legal community, and the greater community

2.1.4: Increase WTLS' capacity for remote outreach

Persons Responsible: DCC, ED, General Counsel, CFO, Board, outreach staff, Pro Bono Coordinator, management team

Measurable Outcomes: updated website, annual communications plans, events/collaborations with nonprofits/legal orgs, analysis of audience

Objective 2.2: WTLS will increase its efficiency with and capacity for utilizing technology.

Strategies

2.2.1: Fully utilize the new case management system (LegalServer)

2.2.2: Create an annual tech maintenance plan and tech updates calendar and present to ED, CFO, and Board; assess annually

2.2.3: Create an annual plan for staff training

Persons Responsible: IT Manager, ED, CFO, Board, all staff

Measurable Outcomes: technology plan, technology calendar, staff training plan

GOAL 3: Enhance WTLS' legal needs assessment

Objective 3.1: We will analyze questions and responses to legal needs assessment questionnaires regularly to track trends in client needs.

Strategies

3.1.1: Analyze responses quarterly and present findings to Management and Board

3.1.2: Review the questions in the legal needs assessment annually

Persons Responsible: DCC, General Counsel, ED, Board

Measurable Outcomes: analyses, updated legal needs assessments

Objective 3.2: WTLS will engage in an organized effort to disperse legal needs assessment.

Strategies

3.2.1: Bi-annual push to the public, nonprofit partners, client-eligible population, and the legal community through communications

3.2.2: Disperse to clients on an ongoing basis – at intake and at conclusion of cases

Persons Responsible: DCC, Intake staff, ED

Measurable Outcomes: twice yearly public push of legal needs assessment, responses from clients

GOAL 4: Enhanced Private Attorney Involvement

Objective 4.1: WTLS will recruit and retain new and returning pro bono volunteers.

Strategies

4.1.1: Use of low bono/compensation program

4.1.2: Free or reduced fee CLEs in exchange for pro bono participation

4.1.3: Create communications plan for outreach to pro bono and potential pro bono attorneys

4.1.4: regular publishing of *the Brief*

Persons Responsible: Pro Bono Coordinator

Measurable Outcomes: increased private attorney involvement, increased pro bono case numbers, communications plan

Objective 4.2: WTLS' PAI Coordinator will increase use of legal clinics.

Strategies

4.2.1: Increased number of virtual clinics

4.2.2: Create a clinic handbook

Persons Responsible: Pro Bono Coordinator

Measurable Outcomes: number of legal clinics annually, clinic handbook

GOAL 5: Enhanced succession planning

Objective 5.1: Increase organizational sustainability by developing robust succession plans.

Strategies

5.1.1: Update job descriptions for all staff; include as part of annual evaluation/pre-evaluation

5.1.2: Update WTLS Policy Manual

5.1.3: Plan for sharing institutional knowledge

Persons Responsible: management team, all staff, ED

Measurable Outcomes: updated and accurate job descriptions, accurate and updated Policy Manual, area on SharePoint for institutional knowledge, cross training staff

IMPLEMENTATION PLAN

This strategic plan will be implemented by using more detailed plans for each of the goals. Each plan includes detailed action plans and time-bound objectives, including quarterly milestones. These plans were created with the input from the individuals responsible for each goal, as detailed below.

Goals and Person(s) Responsible

1. Enhance resource development to ensure organizational sustainability and the ability to serve a diverse population – DCC
2. Enhance WTLS' use of communications and technology – DCC and IT Manager
3. Enhanced legal needs assessment – DCC and General Counsel
4. Enhanced Private Attorney Involvement – Pro Bono Coordinator
5. Enhanced succession planning – DCC, ED, and General Counsel

The detailed plans include a breakdown of measurable outcomes by year and by quarter, as well as individuals responsible. This level of preciseness will allow for a clear path for implementation and meaningful ongoing evaluation; there is an understanding that these are living documents. This means that progress on each of the goals will be assessed regularly, and changes will be made to these detailed plans as needed.

As suggested by LSC, one individual has been identified as responsible for overseeing the implementation of WTLS' strategic plan; that individual is the DCC. As mentioned, the DCC

will assess progress on the detailed plans at least quarterly and will prepare reports of progress quarterly to present to the Board and to WTLS' management team.

EVALUATION PLAN

Plan progress will be evaluated quarterly by the DCC, and that information will be shared with Management and WTLS' Board of Directors. There will be a more in-depth report of strategic plan progress annually, and changes to the plan will be made when necessary based on changes in organizational need, organizational capacity, and other mitigating factors. A final, complete evaluation will take place starting mid-2024. This evaluation will be utilized when making the new strategic plan.