



NEIGHBORHOOD
LEGAL SERVICES, INC.

Strategic Plan 2018-2019

Executive Summary

Mission: Neighborhood Legal Services seeks equitable justice by providing access to legal advice, representation, and education to those in our communities who, due to financial vulnerability, disability, discrimination, or abuse, require assistance and protection of their civil legal rights.

Vision: The future will include better lives for our neighbors who are most impoverished, vulnerable and challenges because they will have opportunities and choices, and will be protected by full access to the justice system through access to the civil legal resources necessary to pursue self-sufficiency and address their most basic needs.

Values: Neighborhood Legal Services is a client-centered legal services organization that endeavors to: (1) treat each individual with respect and dignity; (2) find strength in diversity and respect for cultural differences; (3) provide zealous representation to fully advocate for our clients; (4) be fair in all decisions; (5) pursue equal justice for everyone we represent; (6) break barriers that prevent effective legal representation for all; and (7) work hard on behalf of client and community yields life-changing results.

Strategic Imperatives: NLS has identified six strategic imperatives that NLS will drive our progress through Q4 2019. Each strategic imperative will describe and detail needed improvements related to that imperative, and each section describes that different benchmarks and targets for progress to achieve the targeted objectives.

Status of NLS Organization: During latter half of 2017, NLS was searching for a new executive director. NLS is excited to announce that Lauren Breen, Esq. has been recently named Executive Director of NLS. NLS remains committed to its mission and continues to seek equitable justice in the work that it does.

Systems Enhancement

Objectives:

- Review and all IT issues concerning NLS
- Create Ad Hoc Committee to review intake and case management systems; IT grant opportunities; outsourcing capabilities to Synchronet
- Review development of Litigation Department

Start date: Q3 2018

Resources Needed

- At this time, no monetary resources are required for Ad Hoc Committee or the review of the Litigation Department.
- The three primary objectives will be accomplished by the Executive Director and the Ad Hoc Committee reviewing the case management systems.
- IT Consultant fees will cost approximately \$3,000.

Benchmarks & Targets

- By Q4 2018, the Ad Hoc Committee will provide the Board with the results of the review process.
- By Q1 2019, the Executive Director will provide an update on: (1) any and all remaining IT concerns; and (2) the Litigation Department.

Revenue Development

Objectives:

- Increase number and value of grants from non-governmental sources. (Increase to 8% of the budget. Currently at ~2.7%)
- Maintain number and value of grants from public sources.
- Increase the percentage of the budget represented by non-grant income sources. (Increase to 4% of the budget. Currently at ~.5%)
- Create an Ad Hoc Exploration Committee to review prospects of creating wholly-controlled foundation and/or other related entity.

Start date: Q4 2018

Resources Needed:

- At this time, no monetary resources are required for the review process.
- Board members to participate in Ad Hoc Exploration Committee.
- Hire Development Consultant. Cost: \$3,000

Benchmarks & Targets

- By Q4 2018, the Ad Hoc Exploration Committee must be formed.
- By Q4 2018, Executive Director must identify staff person(s) who will lead the charge for expanding our grant opportunities.
- By Q1 2019, Executive Director will provide report to the Board on progress of expanding grant opportunities.
- Executive Director will remain responsible for providing updates on new income.
- By Q1 2019, Executive Director will present a 2019 development plan to the Board.

Community Impact

Objectives:

- Increase the number of people benefitting from community legal education in each year of this plan as reported in the annual IOLA grant provider report.
- Develop partnerships to better serve clients.
- Create/build a sustainable medical-legal partnership.
- Continue to expand the NLS outreach to homeless shelters and other not-for-profit organizations serving our target populations, including, but not limited to, our rural, refugee, and immigrant communities.

Start Date: Q4 2018

Resources Needed:

- At this time, minimal monetary resources are required. (Estimated: \$ unknown at this time.)
- The administration and supervising attorneys will continue efforts to secure partnerships in the community.
- Staff will continue efforts of outreach to homeless shelters and other not-for-profits.

Benchmarks & Targets:

- By Q1 2019, the Executive Director will provide a report to the Board concerning partnerships in the community.
- By Q1 2019, the Board will seek members of the NLS staff to report on the outreach efforts.
- During Q2 2019, the Board will consider the progress in this category and make all necessary adjustments to ensure the objectives are being met.

Branding

Objectives:

- Craft consistent brand look and message across all NLS branches and revise, as necessary, internal communications, web, telecommunications, signage, social media, emerging technologies, and print materials.

Start Date: Already in Progress

Resources Needed:

- At this time, minimal monetary resources are required. (Estimated: \$20,000.)
- Staff will create a team to review branding efforts and inform Board of ways to increase branding.
- Board and Executive Director will endeavor to manage the consistent brand message across all branches and in the community.

Benchmarks & Targets:

- By Q3 2018, staff will report its assessment of the NLS brand.
- Q3 2018, the Board will make the following decisions:
 - whether to seek further consultation with respect to NLS brand.
 - whether to create/adopt a different motto or tag line.
 - whether to assign a staff person as a branding and marketing coordinator

Governance

Objectives:

- Ensure that all strategic plan objectives are being reviewed and accomplished
- Make Board membership a coveted and attractive leadership opportunity.
- Review relationship between Board and NLS staff.

Start Date: Q4 2018

Resources Needed:

- At this time, minimal monetary resources are required.
- Board participation will be required.

Benchmarks and Targets

- By Q4 2018, the Board will assign a Board Member who is a member of the Strategic Planning Committee to oversee the execution of this plan.
- By Q1 2019, the Board will have engaged in a discussion regarding Board self-evaluation.
- By Q1 2019, the Board will assign a Board member to review the leadership succession ladder and identify method by which this process takes place.
- By Q2 2019, the Board will review the status of the relationship between NLS staff and Board members.

Compliance & Development

Objectives:

- Manage relationship with LSC/IOLA/OCA and maintain positive rapport with LSC representatives
- Create an Ad Hoc Committee to review systems design and compliance strategy

Start Date: Q1 2019

Resources Needed:

- At this time, minimal monetary resources are required.
- Staff involvement is necessary to fulfill this objective.

Benchmarks & Targets:

- During Q1 2019, the Executive Director will provide the Board with her plan to maintain and promote a good relationship with LSC/IOLA/OCA.
- By Q2 2018, the Board will determine the need for a Ad Hoc Committee and assign Board members to the committee. If necessary, this committee will be tasked with reviewing our compliance strategy and ensuring processes, including intake, at NLS are coordinated.



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Appendices

- A. Strategic Intent & Driving Strategies**
- B. Board's Charge in the Review Process**
- C. Strategic Plan Governance Protocol**
- D. Future Goals**
- E. Deviations from Former Strategic Plans**



Appendix A: Strategic Intent and Driving Strategies

Neighborhood Legal Services, Inc., strives to remain the most respected, supported and impactful of Western New York’s not-for-profit legal services providers and to serve as a statewide leader in the delivery of civil legal services. We operate on values that drive our client-centered legal services organization. We firmly believe that there should be no barriers to effective legal representation. In an effort to progress as an organization, we are driven by the following strategies:

- 1. Build operational strength and productivity through investments in management, supports, and technology.**
- 2. Develop new modes of communication – internal and external – that address the realities of the communities we serve and changing generational expectations.**
- 3. Identify diversified revenue sources that complement the NLS mission.**
- 4. Increase collaboration by finding opportunities to share resources with similar organizations in order to reduce redundancies and lower the cost of operations.**
- 5. Become a more visible community change agent through law reform efforts and advanced community legal education, among other strategies.**
- 6. Use technology to enhance service capabilities for populations we are currently serving.**



Appendix B: Board's Charge in the Review Process

The Neighborhood Legal Services Board of Directors shall, at all times, remain responsible for the implementation of the objectives contained within the NLS Strategic Plan. The President of the Board, along with the Executive Director, shall remain cognizant of the progress in reaching the objectives and shall, to the extent necessary, assign additional board members to reach the objectives contained within the NLS Strategic Plan.

In addition to the review process by the Executive Director and President of the Board, a member of the Strategic Planning Committee shall be assigned to review the Board's progress each quarter. This member shall be responsible for providing an update on the Board's progress with the Strategic Plan once per quarter or as necessary for the benefit of the Board.

All inquiries regarding progress and implementation of the objectives shall be directed to the President of the Board or the Executive Director.

The Board, at any given time, can review its charge in the review process and make changes necessary for the benefit of the Strategic Plan and NLS as a whole.



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Appendix C: Strategic Plan Governance Protocol

The Neighborhood Legal Services Board is charged with reviewing the progress and implementation of the objective contained within the Strategic Plan. When providing updates to the Board, the committee, committee chair, individual board member, or staff person who is tasked with providing an update shall provide a brief written update as well as an oral update at the next board meeting. All written updates shall indicate the intended recipient, the author, the date, and the subject matter of the update.

Written updates shall be provided to the Executive Director, Board President, and Secretary for recordkeeping.



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Appendix D: Future Goals

Neighborhood Legal Services has drafted this Strategic Plan that will operate through Q4 2019. NLS has several goals, however, which are larger in nature and span across several years. As a result, NLS has dedicated a section of its Strategic Plan on NLS's future goals that extend beyond the time frame outlined in its current plan. After speaking various NLS stakeholders, including but not limited to its clients, employees, board members and community members, the organization has identified the following future goals:

1. **Reviewing the present real estate that NLS leases and determining a long-term plan concerning location(s) of NLS office(s).**
2. **Continually reviewing and analyzing funding sources and opportunities for long-term sustainable growth.**
3. **Maintaining excellent relationships with other community-based service organizations, including legal service organizations surrounding WNY.**
4. **Instituting newer comprehensive software for case, time and document management systems.**
5. **Regularly reviewing our functions at NLS to ensure that we are continuing to modernize.**
6. **Developing clearly defined roles for HR administration and oversight.**
7. **Continually reviewing diversity/quality/outputs of staff at NLS to ensure staff is able to deliver high-quality services to community/clients.**



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Appendix E: Deviations from Former Plans

This plan looks different from former plans. This is with good reason. NLS has experienced a dramatic shift in its financial health and its leadership. As a result, the current strategic plan has departed in style and substance from the former plan. NLS has designed this plan as a two-year targeted look at the items most important to NLS at present.

Moving forward, each strategic plan shall provide a brief update on deviations from former plans to allow NLS to maintain targeted growth and progress.