

# Memorandum

To: Legal Aid Executive Director Search Committee

From: Executive Director

Re: Initial Work Plan

Date: September 2, 2011

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## **INTRODUCTION**

You have asked me to prepare an outline of a work plan that would guide my efforts and focus over the course of the first six months, were I selected as this organization's Executive Director. Those first six months are a critical time during which I would be putting into place the basic building blocks for achieving my vision of a truly outstanding legal aid program. I envision this organization as one of the premier programs in the country; a program that is:

- ✦ Deeply connected to and engaged with the communities it serves
- ✦ Achieving advocacy goals that reflect the highest priority needs of the community, ascertained through ongoing communication, structured community listening/needs assessment, and strategic planning
- ✦ Alleviating both immediate, critical client problems and barriers that keep low-income people in poverty
- ✦ Made up of a motivated, diverse, highly skilled and fulfilled staff
- ✦ Respected, effective and highly visible in many forums
- ✦ Governed by a diverse, committed and knowledgeable Board
- ✦ Fiscally robust, with strong financial management
- ✦ Built on strong, effective internal systems that ensure high quality work, support the development of all staff and promote organizational cohesiveness and efficiency

In my mind, the first six months set the stage for achieving goals that have a somewhat longer timeframe. I am therefore providing the goals I would expect to achieve over the course of a year, so that the six-month plan is set in a clear context.

## ONE YEAR GOALS FOR THIS ORGANIZATION

- ✚ **Financial stability:** This organization will have a clear plan for achieving financial stability, including sustainable resource development strategies, and will have made tangible process toward increasing revenues.
- ✚ **High impact, high quality strategic advocacy:** This organization will have an aggressive, ambitious and realistic advocacy agenda, designed to achieve broad-based results consistently across its delivery system, even as it addresses the most pressing legal needs of low-income residents of this state.
- ✚ **Visibility and stature:** The program as a whole, and the Executive Director, will be known to, consistently visible and respected among stakeholders, policy-makers and leaders in client communities.
- ✚ **Program cohesiveness:** This organization will function with strong, efficient central support for a coordinated system of offices that maintain deep connections with, and are responsive to, the communities they serve. Staff in all offices will view themselves and their work as part of a unified organization that encourages flexibility and innovation to respond to varying local needs and conditions.
- ✚ **Collective bargaining:** Management and union will have reached agreement on a Collective Bargaining Agreement (in the first six months).

## MOVING TOWARD THE GOALS – THE FIRST SIX MONTHS<sup>1</sup>

In each of the above areas, I would expect to make significant progress over the course of the first six months. While I expect to lead these efforts, I would also draw on staff and Board resources to benefit from their experience and knowledge, and to develop leadership within the organization. My six-month goals for my core areas are the following:

- ✚ **Financial stability**
  - Based on a firm grasp of the organization’s current condition, advocacy goals and organizational infrastructure needs, I would have an aggressive resource development plan in place and implementation of that plan under way, including pursuit of immediate sources of revenue.

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<sup>1</sup> I have not included many of the daily responsibilities of the Chief Executive Officer in this plan, which can be time-consuming and challenging. Those can include grant compliance, personnel and meeting a variety of administrative needs. I believe the plan is realistic and would permit attentiveness to those responsibilities as well as permitting achievement of the larger objectives.

- I would have taken immediate steps to address any urgent financial solvency issues.
- In consultation with finance staff and others, I would have ascertained whether this organization is maximizing the value of existing resources and would make appropriate adjustments if that were not the case.

#### **High impact, high quality strategic advocacy**

- I would have assessed the program’s delivery system(s), priorities, case acceptance and legal work management procedures, staff skills and on-going advocacy commitments. That assessment would enable me to identify advocacy-related strengths and opportunities for growth or additional support.
- Have a clear, realistic and impactful advocacy agenda based on current knowledge of client needs and existing commitments and resources.
- Advocacy staff and I would have determined priorities for maintaining and building a high impact practice. Some of these might become parts of (or expanded upon) in a more comprehensive strategic planning process. Those priorities might include:
  - Undertaking a comprehensive “community listening”/needs assessment process to ensure that program work is aligned with emerging client needs
  - Developing strategies to reach isolated communities
  - Meeting training, supervision, legal work management needs
  - Creating any needed policies, procedures or standards of practice
- We would have developed a plan that translates identified priorities into action steps

#### **Visibility and Stature:**

- I would develop relationships with key stakeholders in this state's advocacy, judicial, policy-making, legal communities and foundations. Developing relationships includes exploring common and divergent goals, forming formal and informal partnerships and learning how and where we can have most impact on clients and issues that affect poor people. I would seek guidance from and engage staff and Board members in these efforts. I would seek opportunities to become involved with appropriate coalitions or associations to further the goals of this organization and its clients.

#### **Program Cohesiveness:**

- I believe that program cohesiveness is furthered by providing strong support for staff in all offices, which support is perceived as readily available and equitably distributed. Support includes access to technology, substantive guidance, access to training and attentiveness to professional development needs, facilitating coordinated work and making expertise broadly available. It is enhanced when staff from different offices consistently have opportunities to work together on issues of mutual interest. In the first six months, I would therefore:
  - Identify areas where central support for all offices could be strengthened
  - Lead staff in developing ways to achieve that support (this may dovetail with similar efforts focused on maintaining a high impact practice)
  - Support existing or implement new opportunities for staff to share information and develop strategies to address challenges for clients or for service delivery
  - Develop, with Board and staff, a framework for a comprehensive strategic planning process

 **Collective Bargaining:**

- Develop a relationship with union leaders and an understanding of membership issues
- Engage in collective bargaining with the expectation that a new agreement would be ratified within my first six months

Month	Internal Activities	External Activities
1-2	Develop relationships with staff, understand issues in their areas: <ul style="list-style-type: none"> <li>● Finance</li> <li>● Admin/HR/managers</li> <li>● Senior advocacy staff</li> <li>● Union representatives</li> <li>● Tech staff, consultants</li> </ul> Establish or continue regular meetings with managers, other appropriate groups of staff, the Board  Visit all offices; conduct one-on-ones with staff  Assess quality and scope of the legal work	Develop relationships with significant external stakeholders, including: <ul style="list-style-type: none"> <li>● Current funding sources</li> <li>● The judiciary</li> <li>● Bar and Access to Justice leaders</li> <li>● Key policy-makers</li> <li>● Key community leaders</li> <li>● Other advocacy, anti-poverty organizations</li> <li>● Others (e.g., law school, corporate leaders, existing collaborators)</li> </ul> Identify potential sources of new revenue <ul style="list-style-type: none"> <li>○ Donors</li> </ul>

	<p>Meet with Board Chair, Members of Board Executive Committee</p> <p>Identify significant staffing or other gaps that need to be addressed immediately and do so</p> <p>Post Litigation/Advocacy Director position</p>	<ul style="list-style-type: none"> <li>○ Foundations</li> <li>○ Businesses</li> <li>○ Governmental</li> <li>○ Other</li> </ul>
3	<p>Identify priority issues for strengthening program capacity and impact</p> <p>Develop process to engage staff in developing ways to address those priority issues</p> <p>Convene staff and Board representatives to develop framework for comprehensive strategic planning process</p>	<p>Pursue resource development opportunities</p> <p>Join coalitions or other associations that will help enhance program stature, client interests or foster connections to potential funders</p>
4	<p>Have Advocacy Director hired</p> <p>Begin implementation of priority measures to strengthen program capacity with appropriate staff</p>	<p>Continue relationship development</p> <p>Pursue resource development opportunities</p>
5	<p>Continue on-going program development efforts</p> <p>Have framework developed for a comprehensive strategic planning process</p>	<p>Continue resource development efforts</p>
6	<p>Have a new CBA ratified</p> <p>Have a clear, strategically focused advocacy agenda</p> <p>Have resource development plan in place and implementation underway</p> <p>Begin planning for a statewide staff/Board conference, perhaps to coincide with comprehensive strategic planning process</p>	<p>Continue above efforts</p>

I recognize that the foregoing plan is ambitious and based on incomplete knowledge of program circumstances. I also suspect that the program may be well on its way to having achieved some of these goals. I would therefore expect that this plan would undergo refinement as I gather more information about its capacity, environment and staff. I am looking forward to that opportunity.