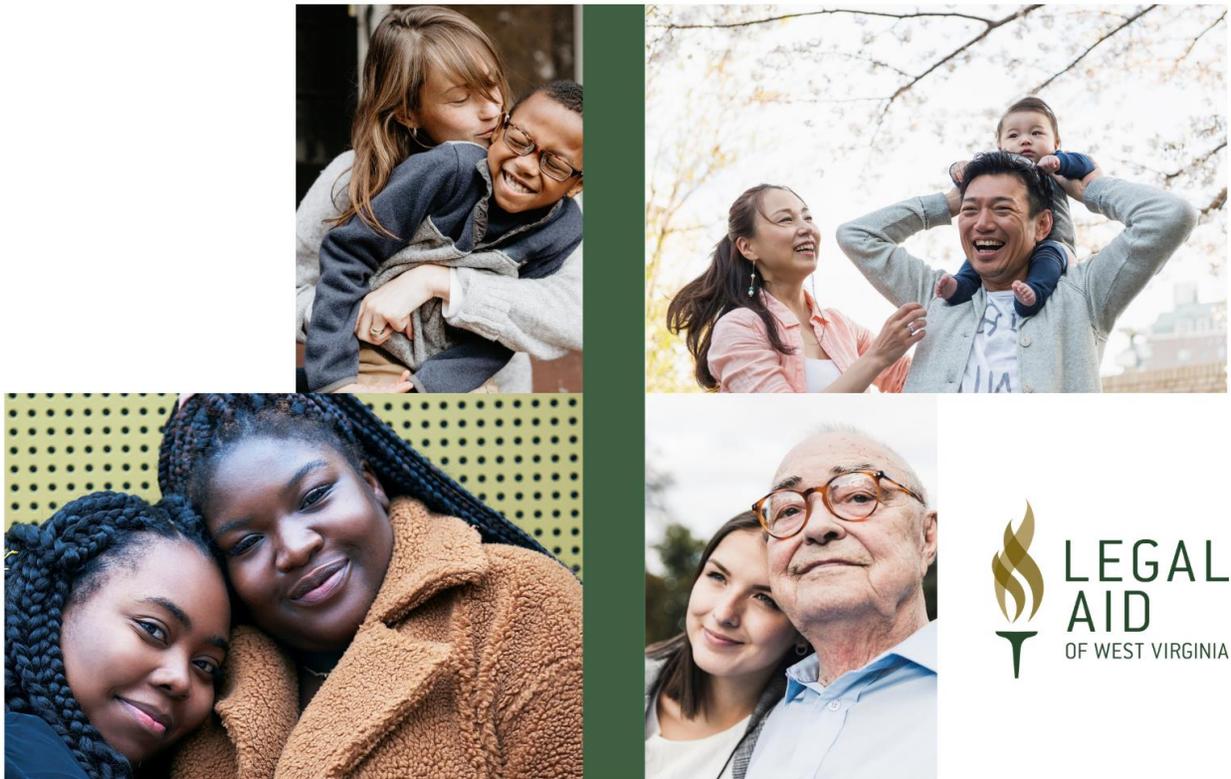


# Legal Aid of West Virginia

# STRATEGIC PLAN

# 2021-2023



# *Legal Aid of West Virginia - Strategic Plan*

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## Legal Aid of West Virginia - Strategic Plan 2021-2023

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### Introduction

Navigating a challenging environment requires a roadmap. With that in mind, Legal Aid of West Virginia (LAWV) has now completed development of our sixth strategic plan. With this Strategic Plan, LAWV has taken a fresh look at the issues facing West Virginia and selected those which pose significant threats to social and legal justice and those where a creative, innovative LAWV can make a difference to individuals and communities caught in a cycle of poverty and inequity.

Previous plans over the last 15 years have prioritized strategic thinking and planning to create the road map for LAWV's resource allocation, governance, staff support, management, strategic advocacy and the decision making that accompanies each area. Plans have also been important in meeting the challenges present in our cultural, legal and political landscapes.

Our last plan (2017-2020) noted the following:

***Over the last five years, West Virginia's dismal jobs outlook, along with a devastating drug epidemic, have changed our state's economic and community-level landscapes. These current difficulties, combined with an already high situational and generational poverty rate and a lack of investment in our social, technology and business infrastructure, are challenging West Virginia's efforts to build a bright future, particularly for rural residents.***

Unfortunately, little has changed for our State residents in 2021. And new levels of uncertainty and unrest, particularly over the past year, have added a challenging backdrop

to West Virginia's struggles. This new Plan was developed as our country experienced a racial justice reckoning, extreme economic distress and chaos from COVID-19-related closures, a political attack on our democratic institutions and significantly heightened health concerns from the pandemic. All weighed heavily on our view of the present and the future.

Much of LAWV's work over the last three years has focused on helping our clients overcome legal barriers to self-sufficiency – living free from family violence, being in a stable housing situation, accessing drug treatment or obtaining a driver's license and employment – all big steps on a potentially long journey. The pandemic-year has presented new hurdles, but also new resources and sources of support for low-income West Virginians. Part of LAWV's mission will be to help our clients successfully navigate systemic or individual obstacles to stimulus payments, educational opportunities and housing resources, supporting them on a path out of poverty.

In this uncertain environment, when federal and state decisions will dramatically impact our clients and LAWV, strategic planning has never been more vital to address a future full of challenges, changes ... and opportunities.

Ultimately, we have built a resilient, strong, effective statewide poverty law firm providing a range of high quality legal and advocacy services to West Virginians who are vulnerable or living in poverty. We are a key partner to other non-profit organizations and government agencies, multiplying our impact. We are well-supported by donors, funders, friends and partner institutions. And success is marked through a range of outcomes, from a service array that is growing and diversifying to recognition as West Virginia's large "Non-Profit of Excellence" in 2018. And service statistics, combined with stories of positive outcomes for many clients, paint a picture of an organization successfully grounded in "seeking justice and changing lives."

As LAWV accomplishes more, each new plan contains goals that push us further and harder. We know our successes directly impact our ability to respond to those who need our help, now and in the future. This Plan presents strategic priorities, goals and objectives that are both realistic and aspirational. It navigates choices and challenges through the thoughtful and intentional allocation of limited resources and with a special focus on sharpening and broadening the impact of LAWV's work for clients and communities.

For the next three years LAWV will be guided by this Plan. It is built on a solid foundation of core values, a clear statement of mission, and specific goals for action, which will guide LAWV through 2023.

Seven broad strategic priority areas with thirty-four supporting goals are the heart of the Plan. The Plan recognizes that LAWV will continue to provide the highest quality advocacy,

while ensuring a diverse funding base to sustain services, staffing, and a strong infrastructure. A deepened commitment to work on critical issues is emphasized in the priority areas of delivering high-quality, high impact client services and in engaging the client and stakeholder communities through outreach, education and service collaboration. And finally, our statewide Board will continue to be an engaged, committed and knowledgeable governing group.

The following pages detail the process used to formulate the Plan including the people involved. They also affirm LAWV's Vision, Mission and Core Values and provide summary charts and graphics outlining the seven Strategic Goal Areas and the focus of each.

The Strategic Planning Committee believes that, as Legal Aid of West Virginia implements this Plan, the lives of our clients and the legal institutions of this State will be improved. LAWV firmly believes that systems can function better to the benefit of our clients and the State as a whole. It believes that lawyers in general and Legal Aid specifically can, through the professional and conscientious representation of our clients, bring greater justice and a sounder social fabric which will benefit all the citizens of the State. We also believe that this Plan will help bring that about.

This Strategic Plan was approved by the LAWV Board of Directors on April 9, 2021.

***Professor Marjorie McDiarmid, Esq.***  
**LAWV Board Treasurer and Committee Chair**  
**Strategic Planning Committee**

***Adrienne Worthy***  
**LAWV Executive Director**



## **Vision, Mission and Core Values**

*This Strategic Plan will be guided by an inspiring vision for the future, a clearly defined mission, and core values reflective of the Board and Staff.*

### **Our Vision:**

The vision of Legal Aid of West Virginia is to seek justice and transform the lives of West Virginians in vulnerable or disadvantaged situations.

### **Our Mission:**

Legal Aid of West Virginia seeks fairness and equal access to justice through legal services, advocacy and system change.

### **Our Core Values:**

The Board of Directors and Staff of Legal Aid of West Virginia believe in and are dedicated to:

- ❖ Identifying and addressing the needs of our client communities;
- ❖ Empowering clients through self-education and client-centered advocacy;
- ❖ Providing high quality and effective services;
- ❖ Focusing on advocacy that responds to adverse conditions in disadvantaged communities or practices that impact people who are marginalized by race, disability, sexual identification and other factors;
- ❖ Working collaboratively with community partners to address the most pressing needs of our client community;
- ❖ Bringing justice to client communities through systemic change;
- ❖ Effectively and strategically using our resources;
- ❖ Being a voice of strength and integrity;
- ❖ Providing a healthy and fulfilling workplace for volunteers and staff;
- ❖ Respecting, supporting and caring for our clients, volunteers, staff and board members; and
- ❖ Ensuring involved and committed leadership and excellent governance by LAWV's Board of Directors

## *The Planning Process*

### **Strategic Planning Committee Members:**

**Meeting Facilitator:** Marjorie McDiarmid

#### ***Board Members:***

- Marjorie McDiarmid, Chair of the Strategic Planning Committee
- Andy Nason, President of LAWV Board
- Alyssa Sloan, Shanequa Smith and Tina Faber

#### **Managers and Staff Members:**

- Adrienne Worthy, Executive Director
- Kate White, Clint Adams, Kerry LeMasters, Chris Martin, Bill Albert, Erica Pulling, Tim Litten, Elizabeth Wehner, Tammy Mullins, Kathy Carpenter, Susana Duarte, Roy Herzbach, Jessica Carter and Kenley Hanna

#### **Social Work Extern:**

- Michelle Richmond

#### **Subcommittee Volunteers:**

- Deborah Worley, Nancy Fry, Maria Borrer, Jenny Layne, Cindy Withrow, Vanessa Beam, Carmen Howell, Dominique Razzook, Angie White, Aimee Goddard, Michele Good, Amy Crawford, Marie Bechtel, Rachael Thompson, Sherry O'Malley, Pat Kelley, Nancy Brown, Kelly Beck, and Phyllis Conrad

### **Needs Assessment Process in 2020:**

- Needs Assessment Plan developed by Legal Director – August 2020
- Needs Assessment Plan reviewed with Supervising Attorneys, Advocacy Support Group and Management Team - August 2020
- Needs Assessment Implementation – Significant work by Morgantown Office Intern Carrie White and Data Specialist Nancy Brown – August 2020
- Needs Assessment Survey shared with LAWV Staff, Clients, Client Community and Community Partners – September 2020
- Needs Assessment Survey published in WV Bar Blast to State Bar members – October 2020
- Needs Assessment Survey sent to LAWV Board of Directors - October 2020
- Survey Results compiled and sent to Strategic Planning Committee for review and analysis – November 2020
  - Board Member responses – 9
  - Staff Member responses – 54

- Community Partner responses – 103
- Client and Client Community responses – 33
- Bench and Bar responses - 45

**TOTAL – 244**

- US Census Data (poverty and population) and LAWV comparative case statistics (2016-2019) sent to Strategic Planning Committee for review and analysis – November 2020
- Legal Services Corporation Performance Criteria sent to Strategic Planning Committee for review – November 2020

**Strategic Planning Process in 2020-2021**

Historically LAWV has used a large and representative Strategic Planning Committee (SPC) to develop its five previous Strategic Plans. Because of the COVID-19 pandemic, LAWV adapted its planning process. The meetings of the SPC and all subcommittees were held virtually, and the SPC planning structure incorporated fewer people than in the past.

Much of the planning work happened within the seven subcommittees, under the leadership of key managers or board members. The various subcommittees included Board members, managers and staff, recruited to offer diverse viewpoints and willing to work between SPC meetings. Internal groups, including the Advocacy Support Group, Management Team and Supervising Attorneys/Project Supervisors group, and staff were used to provide information and feedback. The 2020 Needs Assessment Surveys, along with other data from sources on the reference list at the end of this report, provided foundational information.

**Strategic Planning Timeline:**

- ◆ Wednesday, October 7 - Organizational meeting
- ◆ Wednesday, October 28 - Progress Report, Subcommittee Check-ins
- ◆ Wednesday, November 18 - Progress Report, Review of SMART Goals, Data, \* Subcommittee Work and Check-ins
- ◆ Wednesday, January 6, 2021 - Progress Report, Subcommittee Draft Goals and Final Review Process Determined (This meeting was interrupted and then terminated as the news relayed information about the attack on the United States Capitol.)
- ◆ Monday, March 8, 2021 – Check in with Subcommittee Chairs for review of Draft Plan.
- ◆ Wednesday, March 10, 2021 – Draft Plan shared with all LAWV staff via SharePoint. Survey created to capture comments, additions, suggestions.
- ◆ Monday, March 29, 2021 – Draft Plan, with staff comments incorporated, shared with Strategic Planning Committee for final review and comment prior to being sent to the LAWV Board of Directors.

- ◆ Monday, April 5, 2021 – Final 2021-23 Strategic Plan Draft sent to LAWV Board of Directors.
- ◆ Friday, April 9, 2021 - LAWV Board Meeting - Presentation, Review and Approval of Plan
- ◆ April 9 – May 8, 2021 – Responsible Management Team Strategic Priority Area leaders will develop timelines, objectives and success measures and begin Plan implementation.

\* Note: Data includes 2020 LAWV Needs Assessment Survey results, county and state level population and poverty US Census data, LAWV 2016 and 2019 comparative case data.

\*\*Note: Individual subcommittees met a total of 23 times during this process and two Legal Server Demos were also held.

## About Legal Aid of West Virginia:

Legal Aid of West Virginia (LAWV) has served West Virginia as a statewide organization since 2002, “seeking justice and changing lives” through legal services and advocacy. As a non-profit law firm, LAWV is a key player in West Virginia’s justice community and delivers vital services addressing access to safe and affordable housing, reducing barriers to employment, protecting families from domestic violence, improving access to public benefits, health care and education and protecting the rights and quality of life for those in institutions, all for our state’s poorest and most vulnerable populations. LAWV operates from 12 regional offices and three additional advocacy locations from which more than 65 attorneys and 150 total staff and volunteers work. Partnerships with a range of community-based organizations and government agencies that serve LAWV’s client populations help multiply the impact of LAWV’s legal services and advocacy work. More than 10,600 cases were handled agency-wide in 2019, a “normal” year before the impact of COVID-19 closures.

### Legal Aid of West Virginia Board of Directors (2020-2021) and Executive Director

<b><i>Officers</i></b> 2020-2021			
Andrew G. Nason, Esq. <i>President</i> Charleston, WV	Robert J. Gaudio, Esq. <i>Vice President</i> Wheeling, WV	Amanda Holliday <i>Secretary</i> White Sulphur Springs, WV	Professor Marjorie McDiarmid, Esq. <i>Treasurer</i> Morgantown, WV
<b><i>Members</i></b> 2020-2021			
Jeffrey Bailey West Union, WV	Bob Baker, Esq. Beckley, WV	Ted Boettner Charleston, WV	Anita Casey, Esq. Charleston, WV
Harry Deitzler, Esq. Vienna, WV	Tina Faber Kenna, WV	Bader Giggenschach, Esq. Morgantown, WV	Hoyt Glazer, Esq. Huntington, WV
Matt London, Esq. Clarksburg, WV	Teresa McCune, Esq. Williamson, WV	Kameron Miller, Esq. Charleston, WV	Rita Rectenwald Charleston, WV
Sabrina Shrader Princeton, WV	Alyssa Sloan, Esq. Martinsburg, WV	Dr. Shanequa Smith Charleston, WV	Christine Stump, Esq. Lewisburg, WV
Rachel Weaver Weirton, WV	Heather Wolford Williamson, WV	David Yaussy, Esq. Charleston, WV	
Adrienne Worthy <i>Executive Director</i>			

**Strategic Plan 2021-2023**  
**Legal Aid of West Virginia**



<i>Strategic Priority Area</i>	<i>Summary</i>
<p><b>#1.</b></p> <p><b>Improve Access to LAWV Services, Resources and Information.</b></p>	<p>This area includes four goals for increasing the effectiveness, quality and quantity of LAWV’s service access points and self-help resources to best address the needs of low-income and vulnerable West Virginians, including using simplified and effective technology, outreach, community partnerships and evaluation.</p>
<p><b>#2.</b></p> <p><b>Provide Holistic, Effective, High Quality Legal and Advocacy Services.</b></p>	<p>This area includes five goals for continuous planning, implementation and assessment of holistic, high quality legal and advocacy services that produce meaningful results for our clients.</p>
<p><b>#3.</b></p> <p><b>Engage in Effective Internal and External Partnerships and Collaborations with Staff, Community Stakeholders and the Client Community.</b></p>	<p>This area includes three goals to engage LAWV staff, community stakeholders and the client community through outreach, education and service collaborations, strengthening cross-unit knowledge, communication and cooperation within LAWV and building strong, effective partnerships in the community to better serve low income and vulnerable West Virginians.</p>

<p><b>#4.</b></p> <p><b>Ensure a Committed, Highly Qualified, Well-Supported, and Unified LAWV Team.</b></p>	<p>This area includes five goals relating to staff salaries and benefits, workforce diversity, cultural competence, employee satisfaction, staff development, training and health, all focused on attracting, retaining, developing and unifying members of LAWV’s team.</p>
<p><b>#5.</b></p> <p><b>Ensure that LAWV’s Financial Foundation is Secure, Diverse, Well-Managed and Mission Aligned.</b></p>	<p>Dollars are the fuel that makes LAWV run. This area includes seven goals to improve and streamline processes around seeking, obtaining, and managing those dollars while increasing new sources of unrestricted support that align with LAWV’s strategic priorities and celebrate its successes. The areas of focus under this SP category include 1) financial processes and administration; 2) grants management, compliance, and strategic expansion; and 3) fundraising/and external communication and outreach.</p>
<p><b>#6.</b></p> <p><b>Ensure that LAWV’s Operations and Communications Infrastructure Best Supports Current Services and Future Growth.</b></p>	<p>This area includes four goals to improve the effectiveness of LAWV’s data, communication and information infrastructure.</p>

**#7.**

**Ensure that LAWV has Excellent Governance with an Engaged, Knowledgeable and Supportive Board of Directors.**

**This area includes six goals to ensure LAWV's Board members are well-trained and engaged to provide effective leadership, governance, planning, financial and programmatic oversight and support of LAWV's mission and services.**

# Strategic Priority Area 1

## Improve Access to LAWV Services, Resources and Information

*Summary: This area includes goals for increasing the effectiveness, quality and quantity of LAWV's service access points and self-help resources to best address the needs of low-income and vulnerable West Virginians, including using simplified and effective technology, outreach, community partnerships and evaluation.*

*Committee Chair: Kate White*

*Members: Kathy Carpenter, Michelle Richmond (WVU Social Work Extern with LAWV), Deborah Worley, Kenley Hanna, Nancy Fry, Maria Borrer, Jenny Layne, Cindy Withrow, Tina Faber*

**Goal 1.1: Increase usage of LAWV's mobile-friendly technology-based legal information resources and tools by twenty percent to improve client communication as well as client and community understanding of legal issues.**

- **Objective 1.1.1:** Create/restart Client Access Team to address specific access/communication goal tasks, methods of implementation, time frames, and data collection and measurements, working with appropriate managers.
- **Objective 1.1.2:** Simplify and improve how public resources are found on LAWV's public website.
- **Objective 1.1.3:** Develop more automated forms to be used by the public and for internal use.
- **Objective 1.1.4:** Develop more video-based self-help resources.
- **Objective 1.1.5:** Expand the use of social media and/or text messaging to provide information, increase awareness of resources, and provide a way for the public to ask questions.
- **Objective 1.1.6:** Implement text messaging for simple one-way client communication, such as reminders and notifications.
- **Objective 1.1.7:** Increase messaging and communication options for clients to interact with and provide information to their advocates/attorneys.

**Goal 1.2: Expand community lawyering processes and resources, increasing community-based access for clients by five percent, with each office targeting an underserved community in its region.**

- **Objective 1.2.1:** Based on data about use of LAWV services, assess and define underserved community(ies) in each office region.
- **Objective 1.2.2:** Plan targeted and appropriate outreach initiatives, working with community and client-based organizations, to create or expand clinics and outreach models to places like community centers, veteran’s centers, libraries and senior centers.
- **Objective 1.2.3:** Work with appropriate managers to identify and resolve barriers to implementation including local office staffing and pro bono support.
- **Objective 1.2.4:** Maintain existing Lawyer in the School programs and assess expanding school-based clinic model to other counties.
- **Objective 1.2.5:** Develop a plan for LAWV to utilize social work interns through local colleges and universities to assist LAWV clients more holistically.
- **Objective 1.2.6:** Resume LAWV divorce and custody clinics and assess clinic expansion including topics, times offered and virtual models.

**Goal 1.3: Examine ATLAS client intake and case assignment processes to ensure that internally they are efficient and collaborative, and externally that they are effective, welcoming and client centered.**

- **Objective 1.3.1:** Use a Business Process Improvement consultant and/or LSC client review team to help with initial assessment.
- **Objective 1.3.2:** Determine data to assess and review with a specific focus on access for and intake of those who may be marginalized by race, disability, sexual identification or other factors.
- **Objective 1.3.3:** Coordinate data collection and assessment in ATLAS with broader data collection and assessment goals is Strategic Priority Area 2, Goal 2.5.
- **Objective 1.3.4:** Set specific goals based on data, assessment and best practices.
- **Objective 1.3.5:** Develop continuous evaluation component of new model and processes as appropriate.

**Goal 1.4: Assess the efficacy of LAWV’s Pro Bono Program with the goal of making structural and process improvements that will enable LAWV to shift the organizational culture toward utilizing more pro bono volunteers in a larger number of cases, for greater client impact each year.**

- **Objective 1.4.1:** Apply for PBI Transformation Grant through the Legal Services Corporation (LSC).

- **Objective 1.4.2:** Design an assessment process, whether grant funded or not, to evaluate integrated, successful pro bono staffing models of other LSC programs of a comparable size.
- **Objective 1.4.3:** Seek assessment information via surveys of and meetings with West Virginia private attorneys, existing volunteers, the judiciary, LAWV Board and staff and others.
- **Objective 1.4.4:** Use assessment information to develop concrete goals for creating a high-impact Pro Bono Program, integrated through all areas of program advocacy.

## Strategic Priority Area 2

### Provide Holistic, Effective, High Quality Legal and Advocacy Services

*Summary: This area includes goals for continuous planning, implementation and assessment of holistic, high quality legal and advocacy services that produce meaningful results for our clients.*

*Committee Chair: Clint Adams*

*Members: Clint Adams, Tim Litton, Andy Nason, Nancy Fry, Vanessa Beam, Carmen Howell, Dominique Razzook, Jessica Carter, Kenley Hanna*

**Goal 2.1: Further develop, refine and enforce standards for case handling, supervision and workload management to ensure excellent advocacy and meaningful results for clients.**

- **Objective 2.1.1:** Use case reviews, centralized internal resources and LAWV best practices to ensure services are of high quality and staff are adept in all areas in which they provide services.
- **Objective 2.1.2:** Establish, review and maintain caseload guidelines and case assignment processes to ensure they reflect appropriate service levels, especially for priority cases.

**Goal 2.2: Strategically plan for impactful and substantial litigation in federal courts and West Virginia Supreme Court of Appeals.**

- **Objective 2.2.1:** Identify issues that adversely impact our clients that can be addressed through litigation, using the Advocacy Manger to work with the Advocacy Support Group, supervisors, attorneys and advocates.
- **Objective 2.2.2:** Develop structured appeals process including co-counsel, mentoring and training to ensure high-quality, well-supported appeals.

**Goal 2.3. Develop Rapid Response Team protocols and procedures to ensure LAWV is well-prepared to respond to a regional or statewide natural disaster or significant change in the law impacting our clients.**

- **Objective 2.3.1:** Led by the Advocacy Manager, identify members of a rapid response team and their roles, who will, in a situation needing immediate response, ensure the team identifies the impact of the crisis on LAWV's client community and effectively and efficiently deploys program resources in response.
- **Objective 2.3.2:** Maintain on SharePoint disaster or client-impact related materials, including updated disaster templates, to ensure they are available for future use.
- **Objective 2.3.3:** Involve externs and summer fellows to support initial and on-going work in this area to be as proactive as possible with crisis resources.

**Goal 2.4: Focus LAWV resources on areas that most impact persons in poverty and specifically address issues that create barriers to self-sufficiency.**

- **Objective 2.4.1:** Ensure all LAWV resources are mission-aligned and focused in areas that affect those in poverty including:
  - ◇ Housing/Housing Security
  - ◇ Public Benefits
  - ◇ Unemployment
  - ◇ Social Security Cessation and Overpayments
  - ◇ Medicaid/ Medicaid Waivers
  - ◇ Priority Family Law
  - ◇ Domestic Violence
  - ◇ Children Impacted by the Drug Epidemic
  - ◇ Child Snatching
  - ◇ Child Abuse
  - ◇ Sexual Assault
  - ◇ Personal Safety
  - ◇ Safety of Children
  - ◇ Education Law
  - ◇ Financial Exploitation
  - ◇ Legal issues of Persons in Recovery from SUD (Substance Use Disorder)
  - ◇ Expungements
  - ◇ Reinstatement of Driver's License
  - ◇ Addressing issues that affect vulnerable West Virginians including: elderly, children, persons who have been victims of domestic violence or sexual assault, persons with mental illness, victims of human trafficking, etc.
- **Objective 2.4.2:** Coordinate with LAWV Task Forces to target services for those marginalized by race, disability, sexual identification or other factors.
- **Objective 2.4.3:** Plan services to avoid duplication with other community partners, government agencies and other legal services organizations.
- **Objective 2.4.4:** Make services as fully accessible and uniformly available throughout West Virginia as possible.

- **Objective 2.4.5:** Ensure cases that are served with extended services are identified as priority matters.
- **Objective 2.4.6:** Develop materials and partnerships to address lower priority areas.
- **Objective 2.4.7:** Manage annual office protocols in ATLAS to ensure they are aligned with LAWV’s mission.
- **Objective 2.4.8:** Use the Advocacy Support Group to continually ensure areas of priority are being considered, addressed, and staff are supported.

**Goal 2.5: Institutionalize a data management process to regularly collect, report and analyze data to inform LAWV decisionmakers about emerging legal problems, trends, effectiveness of access and service delivery systems, and outcomes for clients, with specific focus on services for those who may be marginalized by race, disability, sexual identification or other factors.**

- **Objective 2.5.1:** Decide whether to consult with a professional data analyst to assist in identifying appropriate data for collection as LAWV transitions to Legal Server.
- **Objective 2.5.2:** Identify areas or processes for which we require data and determine the system(s) to collect it considering funder requirements, equalizing services statewide, addressing the needs of underserved communities and information related to trends, outcomes and access.
- **Objective 2.5.3:** Determine who will oversee regularly collecting, analyzing and reporting data to program leaders and the Board of Directors to inform internal decision making and for use with funders and policy makers.
- **Objective 2.5.4:** Institutionalize a practice of data analysis within the Advocacy Support Group to inform developing or expanding client services while ensuring decisions are client centered.
- **Objective 2.5.5:** Provide general training to staff, management and board on the “why” and “how” of high-quality data collection and reporting to support advocacy decision making, compliance and resource allocation.

## Strategic Priority Area 3

### Engage in Effective Internal and External Partnerships and Collaborations with Staff, Community Stakeholders and the Client Community.

*Summary: This area includes goals to engage LAWV staff, community stakeholders and the client community through outreach, education and service collaborations, strengthening cross-unit knowledge, communication and cooperation within LAWV and building strong, effective partnerships in the community to better serve low income and vulnerable West Virginians.*

*Committee Chair: Bill Albert*

*Members: Elizabeth Wehner, Roy Herzbach, Angie White, Aimee Goddard, Michele Good, and Amy Crawford.*

**Goal 3.1: Increase STAFF awareness of internal LAWV services and resources that will improve collaboration to holistically meet the needs of clients and help them become more self-sufficient.**

- **Objective 3.1.1:** Conduct an annual staff survey to measure awareness of LAWV resources, services and cross-unit collaboration.
- **Objective 3.1.2:** Develop tools to support attorneys, advocates and support staff in increasing their understanding of the work of LAWV's units and special projects.
- **Objective 3.1.3:** Simplify and improve how internal resources are found by staff and provide staff training on the information resources that are available.
- **Objective 3.1.4:** Provide structured opportunities (lunchtime learning sessions, job shadowing, local staff meetings, intra-unit meetings, community presentations, case collaboration) where staff can formally or informally meet, learn, share, collaborate.
- **Objective 3.1.5:** Build cross unit job shadowing/sharing expectations into the professional development portion of the annual review process.
- **Objective 3.1.6:** Ensure LAWV staff are aware of formal referral processes associated with LAWV programs through education and centralization of referral forms.

**Goal 3.2: Work with COMMUNITY STAKEHOLDERS to improve outreach to potential clients who would benefit from LAWV services.**

- **Objective 3.2.1:** Identify community stakeholders (community providers, partners) in target service areas (foster care, children, individuals with disabilities, seniors, veterans, domestic violence victims, people in recovery, etc.), and create a sortable, electronic list to strategically share information about LAWV services.
- **Objective 3.2.2:** Advocate with leadership in prioritized government agencies at the local, regional, and state level to publicize LAWV services to their staff and to those members of the public they serve.
- **Objective 3.3.3:** Identify stakeholders within diverse communities underserved by LAWV and include as key contacts on a sortable, electronic list to specifically target for services and materials. (e.g., Partnership for African American Churches, Fairness WV, etc.)
- **Objective 3.4.4:** Develop a referral List of professional groups and partner organizations whose members provide services to clients who may overlap with LAWV target clients to ensure needs are met.
- **Objective 3.4.5:** Provide annual trainings to community partners about the breadth of LAWV services and resources, specifically prioritizing who provide computer access to our client community (i.e., senior centers, libraries, veteran’s centers, and schools).

**Goal 3.3: Affirm, establish and enhance meaningful partnerships and collaborations to address service gaps and assist with service provision.**

- **Objective 3.3.1:** Review existing partnerships to determine alignment with LAWV’s advocacy priorities and establish the scope of ongoing partnerships/collaborations.
- **Objective 3.3.2:** Enhance or establish service partnerships, addressing gaps around LAWV advocacy priorities to assist with referrals, substantive expertise or collaborative service delivery.
- **Objective 3.3.3:** Partner with a broad community coalition to tackle 1-2 statewide significant community concern(s) like homelessness and/ or substance use disorder and bring our knowledge and skills to the partnership, addressing issues from a client-centered standpoint.
- **Objective 3.3.4:** Increase collaboration with “sister agencies” to help maintain existing hotlines, helplines and clinics (connect to coordinate advocacy and services related to education law and work for behavioral health clients).

## Strategic Priority Area 4

### Ensure a Committed, Highly Qualified, Well-Supported and Unified LAWV Team

*Summary: This area includes goals relating to staff salaries and benefits, workforce diversity, cultural competence, employee satisfaction, staff development, training and health, all focused on attracting, retaining, developing and unifying members of LAWV's team.*

*Committee Chair: Alyssa Sloan*

*Members: Shanequa Smith, Kerry LeMasters, Marie Bechtel, Kathy Carpenter, Rachael Thompson*

**Goal 4.1: Continue to maintain, improve and provide a salary and benefit package that supports retention of highly qualified staff.**

- **Objective 4.1.1:** Commit to annual salary increases contingent on financial circumstances and Board approval.
- **Objective 4.1.2:** Support a strong LAWV benefit package and evaluate annually for changes.
- **Objective 4.1.3:** Implement the 2020 Market Study, using a process that assesses feasibility during the annual budget process, presents phased options to the Board of Directors for review and completion based on Board approval.
- **Objective 4.1.4:** Continue to assess and support the Employer TDA contribution, as budget feasible, and educate about and incentivize around the Employee TDA contribution.
- **Objective 4.1.5:** Institutionalize support for compassion fatigue including through a well-promoted Employee Assistance Program.

**Goal 4.2: Improve recruitment and onboarding of highly qualified candidates for LAWV staff positions.**

- **Objective 4.2.1:** Improve and refresh LAWV on-boarding training using the LMS system and including multiple learning strategies including video and in-person presentations.
- **Objective 4.2.2:** Improve and expand LAWV recruitment through deeper relationships with regional and state law schools, colleges, junior college and professional programs, recruitment videos, and other creative outreach strategies.

**Goal 4.3: Integrate values of diversity, equity and inclusion into LAWV policies and practices to ensure a welcoming, respectful approach to high-quality services for clients, applicants and community partners who may have been marginalized by race, disability, sexual identification or other factors.**

- **Objective 4.3.1:** Support and expand the work of the new LAWV Diversity Equity and Inclusion (DEI) Task Force including commitments for funding a LAWV Diversity Summer Fellow, staff and board training, data collection and community outreach.
- **Objective 4.3.2:** Ensure regular employee diversity and cultural competency training for staff that best addresses where they are in their legal aid career development.
- **Objective 4.3.3:** Review LAWV's policies and processes around recruiting, hiring, training, evaluation, promotion and internal communication to ensure they are without bias.

**Goal 4.4: Provide a safe and healthy workplace for LAWV staff.**

- **Objective 4.4.1:** Create a Program Safety Group with a focus on physical safety, disease prevention, wellness initiatives and emergency procedures.
- **Objective 4.4.2:** Develop policies and procedures for Post-Pandemic workplaces include updated Remote Work Policy and an evaluation of work-space requirements impacting leases.

**Goal 4.5: Support training and development for all LAWV staff, relevant to their role in LAWV and individual career goals, through internal and external training opportunities.**

- **Objective 4.5.1:** Develop Level II develop learning tracks for applicants in all job classes for LSM.
- **Objective 4.5.2:** Provide funding for national, state, regional or local training opportunities for all LAWV staff.
- **Objective 4.5.3:** Coordinate with Task Force leaders to provide internal training opportunities for all LAWV staff (First Fridays, statewide, compliance and substantive) annually.

- **Objective 4.5.4:** Ensure all training plans developed by supervisors for staff, are updated annually to reflect evolving professional goals of staff members and include required training on diversity and inclusiveness and on providing trauma informed services.
- **Objective 4.5.5:** Survey staff annually on training needs and focus program capacity and resources on identified program priorities.

## Strategic Priority Area 5

### Ensure that LAWV's Financial Foundation is Secure, Diverse, Well-Managed and Mission-Aligned.

*Summary: Dollars are the fuel that makes LAWV run. This area includes goals to improve and streamline processes around seeking, obtaining, and managing those dollars while increasing new sources of unrestricted support that align with LAWV's strategic priorities and celebrate its successes. The areas of focus under this SP category include 1) financial processes and administration; 2) grants management, compliance, and strategic expansion; and 3) fundraising/and external communication and outreach.*

*Committee Chair: Erica Pulling*

*Members: Tammy Mullins, Elizabeth Wehner, Jessica Carter, Andy Nason, Shanequa Smith, Sherry O'Malley*

**Goal 5.1: Evaluate accounting systems for better data collection, reporting capabilities, remote access, and potential integration with other LAWV systems.**

- **Objective 5.1.1:** Make financial status reports about grants available to managers, directly, without requiring accounting or grants management involvement.
- **Objective 5.1.2:** Move to a new platform or modify current system to ensure easy, consistent, and secure remote access to all necessary staff.

**Goal 5.2: Evaluate grants management systems for better data collection, reporting capabilities, remote access, and potential integration with other LAWV systems.**

- **Objective 5.2.1:** Move to a new platform or modify current system to ensure easy, consistent, and secure remote access to necessary staff.
- **Objective 5.2.2:** Develop calendaring/ tracking tools to assure grants application and compliance deadlines.
- **Objective 5.2.3:** Provide staff with tools and supports to effectively utilize grant dollars in quality advocacy services delivery including training materials and a Grants Compliance hub on SharePoint.

- **Objective 5.2.4:** Ensure continuity of financial and administrative functions through comprehensive cross training and system access between departments, as appropriate.

**Goal 5.3: Align LAWV resources expended on grant applications, compliance and management with LAWV strategic priorities.**

- **Objective 5.3.1:** Develop a process for selecting prospective grants based on LAWV strategic priorities, ease of administration, sustainability and other key metrics.
- **Objective 5.3.2:** Assess annually if additional grant resources are needed to address priority advocacy areas or emergent issues.

**Goal 5.4: Establish a planned giving program for LAWV supporters to make meaningful legacy gifts.**

- **Objective 5.4.1:** Enhance key staff knowledge via other legal and non-profit programs about legacy programs.
- **Objective 5.4.2:** Research legal and financial options to receive gifts.
- **Objective 5.4.3:** Develop a clearly articulated purpose and parameters for LAWV planned giving program.
- **Objective 5.4.4:** Implement program with annual goals.
- **Objective 5.4.5:** Incorporate into all aspects of LAWV communications.

**Goal 5.5: Create a client portfolio of compelling stories, videos, photos and speakers to support outreach and resource development efforts.**

- **Objective 5.5.1:** Create LAWV forms that ensure client confidentiality, adherence to the rules of professional conduct and ethical storytelling.
- **Objective 5.5.2:** Create SharePoint site to house forms, releases and stories.
- **Objective 5.5.3:** Create an ad Hoc internal team to develop a storytelling philosophy and framework that works directly with clients to develop stories that are told by them, emphasizing client dignity and ownership of their stories.
- **Objective 5.5.4:** Reach out to other legal aid organizations who are already doing this well and incorporate successful best practices.
- **Objective 5.5.5:** Educate supervisors and staff on client storytelling, LAWV protocols and creative media options, particularly for social media channels.

**Goal 5.6: Create “Rising Professionals” group to engage newer attorneys in pro bono and fundraising for Legal Aid to ensure long-term professional support of LAWV’s work.**

- **Objective 5.6.1:** Meet with Just One Campaign donors/leaders, pro bono volunteers, and LAWV leadership and staff to identify potential leadership and member prospects.

- **Objective 5.6.2:** Reach out to other legal aid organizations who are doing this well.
- **Objective 5.6.3:** Develop structure and benefits that will encourage participation.
- **Objective 5.6.4:** Launch with several events and activities designed to promote and grow the group.

**Goal 5.7: Celebrate LAWV's 20<sup>th</sup> anniversary in 2022 through a variety of activities with board, staff, donors, volunteers, community partners and others with a focus on highlighting services and enhancing support.**

- **Objective 5.7.1:** Create a time-limited Board/staff committee to determine options and capacity for planning and implementing various anniversary activities.
- **Objective 5.7.2:** Implement activities that align with LAWV's service, community outreach, communication and resource development priorities and strategies.

## Strategic Priority Area #6

### Ensure that LAWV's Operations and Communications Infrastructure Best Supports Current Services and Future Growth.

*Summary: This area includes goals to improve the effectiveness of LAWV's data, communication and information infrastructure.*

*Committee Chair: Chris Martin*

*Members: Chris Martin, Adrienne Worthy, Pat Kelley, Amy Crawford, Nancy Brown, Kelly Beck, and Phyllis Conrad*

**Goal 6.1: Replace LAWV Clients Prime (case management system) with a system that ensures effective remote access; enhanced data collection and reporting; improved file organization; user-responsive updates; and long-term system support.**

- **Objective 6.1.1:** Replace Clients Prime with Legal Server.
- **Objective 6.1.2:** Systematize capture of case follow-up data (after case closure) and use it to inform our work and decision-making within Management Team and Advocacy Support Group.
- **Objective 6.1.3:** Train staff (as appropriate) initially and annually on Legal Server system, including storing case data, documents, grant information, in a single location.
- **Objective 6.1.4:** Train targeted groups of staff (legal assistants, paralegals, supervisors, etc.) initially and annually on specialty reporting, usage and other job-specific tasks.

**Goal 6.2: Improve communication with the public, including community partners, donors and volunteers.**

- **Objective 6.2.1:** Ensure appropriate staffing to support the development of communication materials and implementation of donor, volunteer, partner and public communication goals.
- **Objective 6.2.2:** Revamp the LAWV website to make it more user-friendly for the clients, supporters, volunteers, donors and the public.
- **Objective 6.2.3:** Implement new social media techniques to build community and involve more people in LAWV.

- **Objective 6.2.4:** Create print and other materials as appropriate for specific outreach efforts and audiences and improve distribution efforts.
- **Objective 6.2.5:** Evaluate strategic and targeted alternatives for email blasts to reduce the likelihood of emails being filtered.
- **Objective 6.2.6:** Evaluate and improve donor platform.
- **Objective 6.2.7:** Create a “Live” feed of donations/donors that is publicly viewable.
- **Objective 6.2.8:** Build on-going relationships with traditional and new media sources to share expertise, client stories and news.

**Goal 6.3: Improve systems and opportunities for effective communication among staff including in-office, remotely and a mix of both.**

- **Objective 6.3.1:** Promote effective use of TEAMS as LAWV’s internal staff communication technology.
- **Objective 6.3.2:** Ensure all staff are using SharePoint with the law library fully transitioned and all sites active.
- **Objective 6.3.3:** Create and use discussion forums for inter-office communication as well as for communication with board members, donors, volunteers and former staff members.
- **Objective 6.3.4:** Start a program of periodic inter-office in person or virtual informal gatherings to support and sustain personal and professional connections.

**Goal 6.4: Ensure strong remote work capabilities across all job functions and systems by assessing and updating key staff and client access systems so we can effectively do what we do from anywhere.**

- **Objective 6.4.1:** Evaluate and, if determined necessary, invest in, scanning capabilities and capacity for converting hardcopy files to electronic files.
- **Objective 6.4.2:** Transition to cloud-based file storage for access to all files.
- **Objective 6.4.3:** Assess/update/transition staff E-forms.
- **Objective 6.4.4:** Update the LAWV phone system to support remote access and ability to collaborate.
- **Objective 6.4.5:** As computers are being replaced, replace all with laptops with docking stations for maximum remote work flexibility.

## Strategic Priority Area 7

### Ensure that LAWV has Excellent Governance with an Engaged, Knowledgeable and Supportive Board of Directors.

*Summary: This area includes goals to ensure LAWV's board members are well-trained and engaged to provide effective leadership, governance, planning, financial and programmatic oversight and support of LAWV's mission and services.*

*Committee Chair: Adrienne Worthy*

*Members: Marjorie McDiarmid, Andy Nason, Shanequa Smith, Tina Faber, Alyssa Sloan*

**Goal 7.1: Provide Board training and development opportunities hosted by LAWV, and with state and national partners.**

- **Objective 7.1.1:** Develop comprehensive orientation and on-going training for LAWV Board members, using a mix of presentation approaches and including topics ranging from fiduciary and fiscal oversight and LSC regulations to community engagement, diversity and resource development.
- **Objective 7.1.2:** Offer orientation and board development to all board members annually.
- **Objective 7.1.3:** Send at least two Board members to Equal Justice, NLADA, LSC, WVNPA, Philanthropy WV, TGKVF or other training annually.

**Goal 7.2: Further develop LAWV Board Client Community Committee (CCC) to support leadership development, client community outreach and engagement and on-going assessment of LAWV services in meeting client needs.**

- **Objective 7.2.1:** Make the CCC a permanent standing committee of the LAWV Board of Directors.
- **Objective 7.2.2:** Support annual planning and goalsetting for the CCC and at least three meetings annually.

- **Objective 7.2.3:** Assess the LAWV Strategic Plan to identify ways the CCC can help with outreach to and engagement of client communities in the state.
- **Objective 7.2.4:** Assess the LAWV Strategic Plan to find ways the CCC can help ensure regular feedback about and assessment of LAWV's access, intake, outreach and services.
- **Objective 7.2.5:** Use CCC to recruit client-eligible Board members when vacancies occur.

**Goal 7.3: Increase Board involvement with LAWV's Diversity, Equity and Inclusion (DEI) efforts, with a special focus on racial justice.**

- **Objective 7.3.1:** Review LAWV DEI Statement and annually assess staff activities to inform the Board of LAWV action in this area.
- **Objective 7.3.2:** Determine Board goals for leadership, education and action in this area.
- **Objective 7.3.3:** Assess how well the LAWV Board is cultivating an understanding of the communities we serve, hearing their perspectives, needs and priorities to inform our strategic decision-making.
- **Objective 7.3.4:** Schedule at least one presentation to the LAWV Board, focusing on DEI.

**Goal 7.4: Increase Board Involvement in fundraising and outreach.**

- **Objective 7.4.1:** Reestablish Board Development Liaison and establish goals.
- **Objective 7.4.2:** Incorporate fundraising and outreach into board member training.
- **Objective 7.4.3:** Create annual board outreach and fundraising goals from a menu of opportunities aligned with the Strategic Plan.
- **Objective 7.4.4:** Promote the goal of 100% Board giving at a personally significant level to LAWV's annual Campaign.

**Goal 7.5: Ensure up-to-date and effective oversight, planning and governance roles of the LAWV Board.**

- **Objective 7.5.1:** Use Strategic Plan Implementation Committee to oversee strategic plan progress through quarterly goal review, assessment and reporting.
- **Objective 7.5.2:** Ensure Board members are engaged, active and well-trained by performing a Board self-assessment annually.
- **Objective 7.5.3:** Use By-Laws Committee to review by-laws, with particular attention to post-pandemic updates to committee documentation, email voting, virtual meetings and meeting notice.

**Goal 7.6: Develop and organize LAWV Board SharePoint site for simplified access to Board documents – historical and current.**

- **Objective 7.6.1:** House all Board resolutions, approved policies and committee and member documentation on the Board SharePoint site.
- **Objective 7.6.2:** House all Board training materials including orientation and on-going training information on the Board SharePoint site.
- **Objective 7.6.3:** Store Board archives, as appropriate, from 2002 – present on the Board SharePoint site.

## References:

### *External:*

- *American Bar Association Standards for the Provision of Civil Legal Aid*
- *Legal Services Corporation Performance Criteria (2018 – Update)*
- *Legal Services Corporation DRAFT Strategic Plan (2021)*
- *Management Information Exchange (MIE) Principles of Leadership*
- *West Virginia Non-Profit Association’s Principles and Practices for Non-Profit Excellence*
- *United States Census Information – West Virginia Population and Poverty Statistics*

### *Internal:*

- *Economic Impact Study for Legal Aid of West Virginia (2020)*
- *Needs Assessment Surveys of LAWV Staff and Board, West Virginia Bench and Bar, Community Partners, Clients and Client Community (2020)*
- *Comparative LAWV Case Data (2016-2019)*