Strategic Plan

Dallas Volunteer Attorney Program
Long Range Planning Goals

VISION

To create a pro bono program through which all Dallas attorneys support legal services to the poor and ensure equal access to justice.

MISSION STATEMENT

The Dallas Volunteer Attorney Program is dedicated to increasing and enhancing pro bono legal services to the poor in Dallas through the **recruitment, training and support of volunteer attorneys.**

2009 Strategic Planning Committee:
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Revision: July 2009

LONG RANGE PLANNING GOALS OF THE DALLAS VOLUNTEER ATTORNEY PROGRAM[1]

I.
RECRUITMENT & RETENTION

Increase the number of new volunteers by 5 % per year.
Increase the number of active volunteers by 5 % per year.

II.
MEASURING ACTIVITIES & OUTCOMES

Measure activities and outcomes on a regular basis.

III.
SERVICES TO CLIENTS

Provide effective, efficient, and high quality legal services to our clients.

IV.
PARTNERSHIPS

Develop appropriate partnerships with other agencies to effectively target and serve eligible clients.

V.
COMMUNICATION

Effectively communicate about our program with providers, volunteers, board members, clients and the media.

VI.
PROGRAMMING FOR CLIENTS AND VOLUNTEERS

Develop and implement short and long term plans for effective program operations and service delivery.

VII.
OPERATIONS

Manage internal operations of the program to maximize and efficiently allocate human resources.

VIII.
FUNDRAISING

Review and participate in fundraising activity on an annual basis.

IX.
FISCAL MANAGEMENT

Maintain and preserve a healthy revenue base and manage expenses prudently.

X.
BOARD INVOLVEMENT

Enhance the leadership's knowledge and understanding of DVAP and its active participation in oversight and supportive activities.

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[1] The Dallas Volunteer Attorney Program is a joint program of the Dallas Bar Association and Legal Aid of NorthWest Texas. The term "leadership" of the Dallas Volunteer Attorney Program is defined as the boards of the Dallas Bar Association (DBA), DBA Community Service Fund (CSF), and Legal Aid of Northwest Texas (LANWT) and includes all three organizations whenever used in this document unless otherwise stated.

Strategies for Implementation

GOAL I
RECRUITMENT & RETENTION

Increase the Number of New Volunteers by 5% per year.
Increase the Number of Active Volunteers by 5% per year.

A. **DVAP should constantly strive to increase the number of New Volunteers.** Strategies to accomplish this goal include:

1. Place special focus on recruiting newly-licensed lawyers.
   (a) Expand law firm recruiting during associate training programs.
   (b) Target new DBA members through publicity, networking events, and training opportunities.
   (c) Promote the availability of mentoring and opportunities to gain legal experience.
2. Identify new sources of volunteers
   (a) DBA Pro Bono Activities Committee
   (b) Senior or retired lawyers
   (c) DBA Sections and Committees
   (d) Corporate Lawyers and corporate legal departments
   (e) Minority Bar Associations
   (f) Dallas Association of Young Lawyers
   (g) Other local bar associations and membership groups(e.g. Federal Bar Association, Dallas Association of Women Lawyers, Inns of Court, etc.)
   (h) Members of the Judiciary
   (i) Government Lawyers
   (j) Legal Professionals and their associations
   (k) Funding sources with volunteer components
   (l) Law, college, and high school students and public service students

3. Reevaluate for expansion, elimination and/or modification all current recruiting plans and initiatives.
   (a) Recruiting Materials (video, brochures, etc)
   (b) Law Firm Clinics
   (c) CLE Programs
      (i) Family Law
      (ii) Other Civil Law
      (iii)Pro Bono Opportunities
      (iv)Free CLE Programs in exchange for taking cases

   (d) New Lawyers Luncheons
   (e) Expand or develop cooperative relationships with DBA sections and committees, DAYL, minority bar associations, and other local bar associations.
   (f) Expand Lend a Lawyer Program

4. Continue to identify, update, and catalog all volunteer opportunities
   (a) Lawyer and Judge Volunteers
   (b) Non-Lawyer Volunteers

(i) Legal Assistants
(ii) Trainers
(iii) Data Entry Volunteers
(iv) Desktop Publishing Volunteers
(v) Computer Support
(vi) Public Relations Volunteers
(vii) Legal Librarians
(viii) Court Reporters
(ix) Videographers and other audio/visual support
(x) Translators
(xi) Other experts (handwriting/medical/technical)

5. Create new initiatives to maintain a positive culture of volunteerism.

6. Continue volunteer recognition events and publicity.

7. Continue to utilize technology to increase pro bono involvement. Promote mentoring, training, and legal experience opportunities to encourage participation.
8. Continue to develop new programs and modify existing programs to appeal to volunteer interests and client needs.

B. DVAP Should Enhance Retention of Volunteers.
Strategies to accomplish this goal may include:

1. Evaluate all current strategies aimed at retaining volunteers
   (a) Monthly CLE Programs
   (b) Pro Bono Awards Reception
   (c) Volunteer Week Letters
   (d) Nomination for local, state and national volunteer and pro bono legal services awards.
   (e) Thank you Letters from DBA President and clients.
   (f) Scholarships for volunteers at state-wide training sessions.
   (g) MCLE credit for volunteer mentor attorneys.
   (h) Publicity in Headnotes, DBA Online (e.g. DVAP's Finest)

2. Provide and improve programs that combine delivery of services with a networking and/or social component for the volunteers.
3. LANWT Mentoring Services in Substantive -Legal Areas.
4. Periodically survey the active volunteer base to obtain feedback on current programs and ideas for initiating more volunteer-friendly communications, support and/or programs.
5. Consider feasibility of implementing other strategic retention/reward programs for current volunteers.

C. DVAP should develop strategies to activate enrolled but inactive attorneys.
Strategies to accomplish this goal may include:

1. Continue analyzing data on inactive attorneys to create feasible ways to actively target inactive volunteers.
2. Evaluate benefit versus expense of calling or initiating other direct contact with inactive attorneys

(a) Availability of funding
(b) Availability of staff to contact volunteers

3. Publicizing "new" programs that may appeal to inactive volunteers.
4. Enlist active pro bono attorneys to reach out/partner with inactive attorneys.
5. Present in-house programs/opportunities to major firms, DBA sections, and minority bar associations.

GOAL II
MEASURING ACTIVITIES AND OUTCOMES

Maintain a reliable method of measuring activities and outcomes.

A. DVAP should maintain systems and methods for measuring programs by:

1. Continually assessing software needs and acquiring or upgrading software to facilitate statistical reporting, volunteer and case management, volunteer recruiting and retention, and client services.
2. Continually assessing all activities which must be measured.
3. Continue to work with LANWT to take advantage of its systems and programs for measuring outcomes.

GOAL III
QUALITY OF SERVICES

Provide effective, efficient, and high quality services to our clients.

A. **DVAP should continue to provide effective, efficient, and highquality service to its clients.**
Strategies to accomplish this goal may include:

1. Expanding training opportunities for volunteers.
2. Expanding and improving mentoring services for volunteers through the use of volunteer attorneys, DVAP staff attorneys and LANWT staff attorneys.
3. Assessing and improving the monitoring process of open files to ensure timely, appropriate delivery of service.
Assessing and improving communications between DVAP and its clients and DVAP volunteers and their clients.
4. Providing technical assistance to volunteers, including regular distribution of forms and materials electronically.
5. Improving communication with volunteers.
6. Developing innovative programs and volunteer opportunities to match attorneys' specialized skills with client needs.
7. Targeting vulnerable client populations and other eligible individuals.
8. Utilizing technology such as e-mail, fax and telephone systems to expand efficient services to attorneys and clients.
9. Continuing to update and train LANWT staff on the programs and cases DVAP handles to facilitate referrals of appropriate cases from LANWT to DVAP and vice versa.
10. Acquiring and training DVAP staff on volunteer management software in addition to further specialized training for staff on the current case management software to provide seamless support and services to clients and volunteers alike.

Participate in LANWT's clients' needs assessment and formulate ways to address underserved client needs and populations of clients.

GOAL IV
PARTNERSHIPS

DVAP should develop appropriate partnerships with other agencies to effectively target and serve clients.
Strategies to accomplish this goal may include:

1. Contacting local churches and service providers to the poor to develop relationships and partners in serving the poor.
2. Strengthening relationships with the judiciary and other court personnel.
3. Collaborating with other service providers when combined efforts can increase volunteer opportunities and service delivery. (i.e. Housing Crisis Center, Lawyer Referral Service, etc.)
4. Educate community leaders, including civic, corporate and law firm leaders, and enlist their assistance in publicizing the volunteer needs of DVAP as well as the needs of the low-income families Dallas County.

GOAL V
COMMUNICATION

Effectively communicate about our program with providers, volunteers, DVAP leadership, clients and the media.

A. **DVAP should communicate effectively about its program to the media, the public and members of the Dallas Bar Association.**
Strategies to accomplish this goal may include:

1. Increasing DVAP's visibility among members of the DBA to encourage participation in its volunteer opportunities and/or financial support for its programs.
2. Developing ways to educate the public about DVAP through presentations at churches, civic and community centers.
3. Working with LANWT's community education department to enhance pro bono involvement in educating the poor about their legal rights.
4. Increasing media awareness of the program through press releases and articles in DBA, State Bar of Texas, other local bar association, and LANWT publications.
5. Publicizing and continually updating the DVAP web site.

GOAL VI
PROGRAMMING FOR CLIENTS AND VOLUNTEERS

Develop and implement short and long term plans for effective program operations and service delivery.

A. **DVAP should seek innovative programs and refine existing programs by:**

1. Evaluating and, as needed, modifying the structure, locations, and schedules of the clinics.

2. Refining the Pro Se Clinic to increase volunteers and participation by the judiciary.
3. Identifying emerging issues and the future of the provision of legal services to the poor.
4. Maintaining and expanding availability of juvenile law and truancy classes in community agencies and schools.
5. Continuing to offer services through Conflict, Prohibited Cases and Mediation Panels.
6. Expanding mentoring services available to volunteers through, e.g. senior lawyers and others with experience and time for mentoring.
7. Conducting volunteer-conducted clinics in such subjects as wills, housing, bankruptcy, and child support enforcement/collection.
8. Enhancing lawyer and non-lawyer volunteer assistance to program staff in preparation of pleadings, handling of return cases, and data entry and processing.
9. Enhancing linkages to complementary legal services programs, e.g., Lawyer Referral Service.
10. Build and strengthen the availability of multi-language services to clients.
11. Continually analyze needs and increase representation in areas of greatest need (e.g. benefits, family law, etc.)

GOAL VII
OPERATIONS

Manage internal operations of program to maximize and efficiently allocate human resources.

A. Internal operations should be managed to maximize resources and efficiently allocate financial and human resources by:

1. Implementing appropriate technology to maximize efficiency.
2. Enhancing staff knowledge and skills in use of technology through training and support.
3. Exploring the benefits of additional staff to increase volunteer participation and support and maintain existing volunteers.
4. Continuing programs in support of Goal VII., A:
    a. Administering grants, clinics, programs, volunteers and staff.
    b. Managing human resources to keep morale high and turnover low.
    c. Utilizing temporary and contract services when needed to maintain program operations.
    d. Planning to accommodate staffing changes. Continue to recruit law firm staff to provide non-legal support.

GOAL VIII
FUNDRAISING

Review fundraising levels and activity on an annual basis.

A. DVAP should continue to review and examine all potential sources of revenue and funding that are available in the community and beyond.

B. The Community Service Fund should be advised on all potential revenue sources on a regular basis and be ready to examine and implement new efforts to gain financial resources for DVAP.
C. DVAP and the DBA Board of Directors shall work together to raise the level of participation by the membership of the DBA in the funding of DVAP.
D. DVAP should look at all sources available to it in order to increase the effectiveness of its fund-raising efforts.

GOAL IX
FISCAL MANAGEMENT

Maintain and preserve a healthy revenue base and manage expenses prudently.

A. Regular review of the financial reserves of DVAP should be undertaken in order to protect the long-term integrity of the DVAP program, including the maintenance of adequate reserves;
B. The Community Service Fund Board of Directors should be given regular, comprehensive financial reporting and shall recommend periodic changes in the reporting methodology when warranted;
C. Continue to examine ways to expand legal services to the needy in the Dallas community by using existing resources and utilizing further resources in ways that maximize the benefits to derive from increased funding;
D. DVAP should continue to examine every aspect of its operation on a regular basis to insure that all expenditures are justified and incurred wisely.

GOAL X
BOARD INVOLVEMENT

Enhance the leadership's knowledge and understanding of DVAP and active participation in oversight and supportive activities.

A. The leadership should become knowledgeable and actively involved in oversight and assistance to DVAP by:

    1. Continue to update the written summary of DVAP structure and programs.
    2. Assessing the purpose and function of the CSF Board in relation to DVAP.
    3. Establishing subcommittees of the leadership to provide assistance and recommendations regarding specific areas of DVAP operations, e.g., technology, training, and recruitment and use of volunteers.
    4. Participating as volunteers in one or more DVAP programs to acquire or enhance understanding of DVAP program operation.
    5. Enhancing understanding and active support of DVAP programs and objectives by leadership of other bar organizations, e.g., the boards of the Dallas Bar Association, Dallas Asian American Bar Association, Dallas Association of Young Lawyers, Dallas Hispanic Bar Association, and J.L. Turner Legal Association.
    6. Conducting a review of DVAP long-range plans and goals at least every three years.

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OPP Document Request, Number 7

LANWT has not developed a formal Strategic Plan. The events of 2008 and the ensuing change in leadership have derailed that process. However LANWT has since developed a process for developing a strategic plan. That process accompanies this statement.

As part of the plan, during August and September of this year, each office conducted multiple "town hall meetings" with community leaders, providers and other stakeholders present. The purpose of the meetings was to educate the community on current operations and priorities and to seek their input on priority community needs. The reports from the meetings are being compiled to assist in the development of a Strategic three to five year plan.

Necessary components of the Strategic Plan are staff retention and a capital campaign to retire the debt on the new Fort Worth office. The new Collective Bargaining Agreement, ratified on October 16, 2009, adopted new staff hiring scales, with commensurate increases for current staff, as well as annual step increases that will foster staff retention and avoid the historical 30% attrition that has occurred in years past. The capital campaign committee will finalize a Case Statement to retire the debt on the Fort Worth building and this document should be available when the OPP visit occurs.

We are also providing a copy of the Strategic Plan developed by the Dallas Volunteer Attorney Program, a collaborative private attorney involvement project between LANWT and the Dallas Bar Association. This plan will necessarily be incorporated into LANWT's Strategic Plan.

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