CLSEPlanning 2019-2021

Strategic Plan
Adopted by the Board of Directors on November 15, 2018
1. Regional Context
2. CLSEPA’s History
3. Strategic Plan Highlights
4. Strategic Frame
5. Strategic Priorities
6. Organizational Staffing
7. Board Development Plan
8. Next Steps
Regional Context

1. Problem Statement
2. Systemic Forces
3. Regional Displacement
Low-income communities and communities of color in East Palo Alto and surrounding areas are subject to the systemic forces of exclusion, inequity, and exploitation.
Systemic Forces Impacting Communities

• Increases in cost of living
• Shortage of affordable housing in the region
• Anti-immigrant laws and policies at federal level
• Pervasive barriers to employment and economic advancement
• These forces disproportionately impact low-income communities and communities of color
Regional Displacement Trend

“Inequality is redrawing the geography of the Bay Area. Low-income communities and communities of color are increasingly living at the expanding edges of our region. There they often struggle to find quality jobs and schools, decent affordable housing and public transportation, adequate social services, and environmentally safe and healthy neighborhoods. Those who do live closer to the regional core find themselves unable to afford skyrocketing rents and other necessities; many families are doubling or tripling up in homes, or facing housing instability and homelessness.”

- Race, Inequality, and Resegregation in the Bay Area, Urban Habitat, 2016
Organization History

• Community Legal Services in East Palo Alto (CLSEPA) and its predecessor agency, the East Palo Alto Community Law Project, have provided legal services to low-income individuals and families in East Palo Alto and neighboring communities for over three decades.

• In October 2014, CLSEPA initiated a 3-year strategic plan, marking a shift toward providing "transformative legal services" to diverse communities in East Palo Alto and beyond.

• During that time, the organization tripled its budget, doubled its staff, and significantly expanded its programs in the areas of housing, immigration, and economic advancement.

• CLSEPA now operates in six locations throughout the region, and partners with nearly 800 volunteers to provide over 36,000 hours of legal services each year.
Strategic Plan Highlights

In the coming three year period, CLSEPA looks to:

• Invest in organizational and administrative capacity and systems to optimize the impact of CLSEPA’s programming;
• Reaffirm its commitment to the East Palo Alto community, helping individuals and families exercise their strength and power to determine their futures; and
• Partner with low-income communities and communities of color to break down systemic barriers to inclusion and equity.
Strategic Frame

1. Who We Serve
2. Intended Impact Statement
3. Client Impact
4. Systemic Impact
5. Organizational Impact
6. Theory of Change
Who We Serve

CLSEPA prioritizes services to the following clients residing in San Mateo and Santa Clara Counties:

- Very low- and extremely low-income individuals and families
- People and communities impacted by systemic forces of exclusion, inequity, and exploitation (e.g., immigrants, people of color, formerly incarcerated, etc.)
- The East Palo Alto community, broadly-defined to include current residents and families, workers, and former residents with lasting ties to the City

In situations where we recognize an opportunity to impact system change or collective impact through legal action (whereby broadly benefiting our priority population), we may work strategically with clients and communities outside of these guidelines.
Intended Impact Statement

CLSEPA partners with low-income communities and communities of color to **break down systemic barriers to inclusion and equity**. CLSEPA achieves this impact by providing direct legal services to individuals and families and by working to improve systemic conditions in the East Palo Alto community and beyond. CLSEPA **helps individuals and families to exercise their strength and power and determine their own futures**.
Client Impact

- Clients know their rights and actively self-advocate
- Clients enjoy reduced poverty, reduced displacement, and improved mental and physical health outcomes

Immigration
Clients naturalize and/or secure legal status

Economic Advancement
Clients overcome barriers to economic advancement

Housing
Clients have stable, safe, and affordable housing

Clients enjoy reduced poverty, reduced displacement, and improved mental and physical health outcomes
Client Impact Goals

1. Positive resolution of legal challenges for our clients
2. Our clients have the opportunity to remain in the community
   a. Secured legal immigration status
   b. Increased household income
   c. Stable, safe, and affordable housing
3. Our clients increase capacity to self advocate within the legal system
4. Our clients increase civic engagement and participation in organizing efforts
Systemic Impact

- Private actors and government agencies adhere to the law
- Fewer exploitative, discriminatory, fraudulent, predatory, retaliatory actions
- Supportive policy framework in place (equitable laws; safety net systems, inclusive policies, incentives for investment)
- Former clients, community members, and partners are self-advocating and organizing

Immigration
Protect the fundamental rights of immigrants

Economic Advancement
Expand opportunities for individuals and families to thrive economically

Housing
Expand tenant protections and availability of affordable housing
Systemic Impact Goals

1. Strengthen the capacity and efficacy of community partners and coalitions in the regions we serve
2. Shift local and regional policies toward better protections for low-income communities and communities of color:
   a. Protect the rights of immigrants
   b. Overcome barriers to employment and fair wages
   c. Increase tenant protections and access to affordable housing
3. Win affirmative cases that serve to deter unlawful actions
4. Increase community awareness of the issues impacting our clients
Organizational Capacity Goals

1. Revisit strategic plan implementation status quarterly with leadership; plan should evolve to meet dynamic environment
2. Achieve 18-21% annual investment in administrative and development capacity and strengthen administrative and development infrastructure
3. Implement Board Development plan
## Theory of Change

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<thead>
<tr>
<th>Activities</th>
<th>Results</th>
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<tr>
<td>a. Social work services; emergency relief fund</td>
<td>a. Full spectrum of client goals and desires are identified and addressed</td>
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<td>b1. Holistic, direct legal services</td>
<td>a/b. Clients experience support, reduced stress, better health</td>
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<td>b2. Affirmative civil suits</td>
<td>b/c. Cases are won, positive resolution of legal challenges achieved for CLSEPA clients and other similarly-situated individuals or communities</td>
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<td>b3. Impact litigation</td>
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<td>b4. Pro bono placement</td>
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<td>c. Pro se assistance</td>
<td>c. Individuals gain tools and skills to navigate legal cases without counsel</td>
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<td>d. Community outreach/Know Your Rights (KYR)</td>
<td>d. Individuals, community organizers, and CBO leaders understand the legal process and are better able to advocate for their own rights and for the rights of community members</td>
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<td>e. Media campaigns (in partnership with CBOs)</td>
<td>e. Increased local coverage sheds more light on systemic injustices</td>
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<td>f. Policy Advocacy</td>
<td>f/g/h. Pressure is placed on local lawmakers and officials to strengthen laws/policy protecting the rights of low income people and people of color</td>
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<td>g. Training and technical assistance for partner CBOs, community organizers, and lawmakers</td>
<td>g/h. Clients and former clients participate in and/or lead outreach, KYR events, policy advocacy</td>
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<td>h. Building leadership capacity of select current and former clients</td>
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## Theory of Change (cont.)

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<tr>
<th>Outcomes →</th>
<th>Impact →</th>
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<tr>
<td>a/b. Clients’ housing situation, immigration status, economic security, mental health and/or physical health are stabilized</td>
<td>a/b/c. Lower-income clients and clients of color experience decreased displacement, increased stability and family unity, reduced poverty and stress, improved health and educational outcomes. These benefits extend to our clients’ communities.</td>
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<td>b/c. Clients receive monetary compensation for damages (including lost wages) and relief from poor or unfair treatment and conditions</td>
<td>b/c/d/e. Private actors and government agencies adhere to the law; fewer exploitative, discriminatory, fraudulent, predatory, retaliatory actions</td>
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<td>a/b/c. Clients find work, can support themselves and their families, access social welfare systems, access fair wages and stable housing</td>
<td>e/f/g/h. Policy framework at the local/regional level is actively engaged and enforced such that low-income communities and communities of color are protected from exploitation, barriers to equity are dismantled, and pathways to inclusion are created and utilized</td>
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<td>b/d/g. Strong partnerships exist with local and regional law firms, community based organizations, and community leaders</td>
<td>g/h. Former clients, community members and partners/collaborators are self-advocating and organizing, and engage more deeply in social justice issues</td>
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<td>e. The general public is increasingly aware of systemic injustices and how to take action</td>
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<td>e/f/g/h. Policy framework at the local/regional level exists to protect low-income communities and communities of color from exploitation, break down barriers to equity, and create pathways to inclusion</td>
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<td>g/h. Capacity of former clients and community members to self-organize increases, resulting in a greater number of associations and community organizing efforts.</td>
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Strategic Priorities

To deliver on our Intended Impact and Theory of Change, we will focus on these strategic priorities over the next three years

1. **Build administrative and operational capacity**
   a. Identify staffing and infrastructure needs; fill key needs and build quality processes in a timely manner
   b. Ensure future program growth is aligned with administrative capacity

2. **Build fundraising and communications capacity**
   a. Align available funding with organizational needs and impact objectives
   b. Strengthen CLSEPA’s development function to secure additional funding through grants, contracts, and donations
   c. Develop an organizational communications plan and related materials
   d. Raise adequate funds to support investments in administrative and program operations capacity
3. **Refine programmatic activities**
   a. Adjust intake and other processes to ensure target population is reached with services
   b. Enhance systemic impact, advocacy, and other services targeted to combat systemic forces
   c. Build structures to support cross-program collaboration and coordination

4. **Evolve Board membership and engagement**
   a. Implement CLSEPA’s Board recruitment priorities
   b. Adjust Board committee structure, roles and meeting requirements to meet objectives

5. **Build evaluation and measurement capacity**
   a. Draft and implement Impact Evaluation Plan
Organizational Staffing

1. **Administrative staffing (reach 18 - 21% investment target)**
   a. Invest in additional staffing/contracting/consulting support for key functions (fundraising & communications, finance, IT, HR, and operations)
   b. Grow administrative staffing at a pace commensurate with program growth

2. **Program staffing**
   a. Conduct staffing analysis for each program (attorney, paralegal, social worker, intake, pro bono, direct services staffing, systemic impact staffing) to determine the optimal staffing requirements
   b. Align each program staffing model to achieve target impacts
The CLSEPA Board Development Plan lays out opportunities for the Board to maximize its impact as a “Governing Board” over the coming three years 2019-2021. The Plan envisions the Board as a driving force in governing and leading the organization, engaging in organizational planning and helping the Executive Director manage a dynamic organization.
Board Development Plan

Executive Summary

Specific priorities over the course of the plan include:
1. Consolidating the Executive and Board Development Committees into one, robust committee meeting regularly, driving this plan and the important recruiting work
2. Actively engaging in Board recruitment to bring on 4-6 new members in 2019
3. Managing Board composition regularly to ensure optimal membership
4. Engaging in Board education and self-assessment activities with regularity
5. Ensuring Board committee work actively supports the organization in key areas, particularly fundraising
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<tr>
<th>Category</th>
<th>Action</th>
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| Administrative Capacity              | • Conduct evaluation of operations, reception, space, IT, HR, and finance needs & increase investments in under-resourced areas  
• Refine financial projections for FY 2020 and FY 2021 to ensure we are on track to meet our 18-21% investment target |
| Fundraising and Communications Capacity | • Strengthen investment in fundraising & communications (staffing, consultant support)  
• Develop fundraising and communications strategy to increase unrestricted funding and funding necessary to achieve optimal program staffing models |
| Program Design                       | • Develop optimal program staffing models (e.g., attorney, paralegal, social worker, intake, pro bono, direct services staffing, systemic impact staffing)  
• Invest in training to ensure staff are well-equipped to meet holistic needs of clients  
• Refine cross-program intake process  
• Strengthen cross-program collaboration and develop cross-program initiatives, utilizing CLSEPA’s committee structure (e.g., policy committee, litigation committee, media/outreach committee) |
| Board Development                    | • Reconfigure Board Committees and roles  
• Launch Board recruitment effort and recruit 4-6 new members  
• Expand Board’s role in fundraising |
| Evaluation Capacity                  | • Build a cross-program team to develop and implement an Impact Evaluation Plan  
• Develop a dashboard related to the strategic goals |