

STRATEGIC PLAN
2015-2020

ATLANTA VOLUNTEER LAWYERS FOUNDATION



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BACKGROUND

The Atlanta Volunteer Lawyers Foundation (AVLF) is the largest provider of pro bono legal services in Greater Atlanta.

For more than 35 years, AVLF has leveraged the full power and resources of this metropolitan area's legal community to provide education, advocacy and representation at no charge to families with basic civil legal needs and to offer lawyers a way to give back that is as meaningful and easy as possible. AVLF annually leverages \$2.5M in donated attorney hours, directly serves nearly 5,000 people and reaches hundreds more through community outreach and workshops. Today, AVLF's focus is on ensuring that when low-income Atlantans stand up to demand safe and stable housing, to insist on pay for an honest day's work, or to break free from domestic violence, a lawyer always stands with them

WHY WAS AVLF CREATED?

The Atlanta Volunteer Lawyers Foundation was founded in 1979 by a diverse group of leaders in Atlanta's legal community who understood that private attorneys have a central role to play in promoting access to our civil legal system for people who cannot afford legal representation. The founders believed then what more than 35 years of history has proven: this access not only advances notions of justice and fair play, but also provides direct social and economic benefit to low-income families and their communities. Since its founding, the work of AVLF has demonstrated that a poor person walking into a court and being able to access the judicial process like any other can prevent homelessness and the disruption of employment and education, secure wages desperately needed to survive, provide legal protection to victims of violence and protect children from abuse and neglect.

HOW DOES AVLF WORK?

AVLF currently has eight programs that provide free legal representation in civil matters for Fulton – and, in limited circumstances, Clayton – County residents. AVLF staff and volunteer lawyers work primarily in Fulton Magistrate, State, Probate and Superior Courts. A complete listing of these programs can be found on page 14 of this report, but the process is as follows:

After potential clients make initial contact with AVLF, we determine their eligibility to receive our services through a quick intake interview. For those who qualify for our services, every step of the process is designed to get them the highest quality services as quickly as possible. Eligible callers with landlord-tenant or unpaid wage disputes are scheduled to meet with an attorney on the very next available weekend through our Saturday Lawyer Program clinic, while those facing imminent eviction are immediately referred to AVLF's Eviction Defense Program. Callers with questions relating to the death of a family member are referred to our Probate Information Center; as well, AVLF has assistance available to those with bankruptcy-related concerns and a variety of other related legal problems.

Members of our community who have been abused by intimate partners, or who fear they will be injured, are sent directly to the Fulton County courthouse, where the Safe Families Office, Georgia's only courthouse-based walk-in clinic, is located. There is no income test for domestic violence clients. All visitors to the Safe Families Office are offered legal support and safety planning (through SFO partner Partnership Against Domestic Violence), and if desired, help filing a Petition for a Temporary Protective Order. In hundreds of cases a year, those who have received an initial Order and who want an extension of that Order are offered direct representation by an AVLF volunteer attorney.

Once representation is established, AVLF is a leader in supporting volunteer attorneys by leveraging every resource possible to make volunteering easier and the impact for our clients more meaningful. Pro-bono forensic accountants, process servers, private investigators, mediators and court reporters all join the cause when needed. AVLF's expert staff attorneys and program support staff assist clients and volunteers at every step. Whether we offer direct representation by one of our hundreds of volunteer attorneys, thoughtful and thorough advice by one of our staff attorneys, or a tailored referral to the best available resource, we strive to be the last call someone has to make to get help. It is through this process that AVLF strives to create safe and stable homes and families.

HOW IS AVL F FUNDED?

AVLF has three sources of revenue. We receive an add-on to civil filing fees from the State and Magistrate Courts of Fulton County, so that \$2 of every State Court filing fee and \$3 of every Magistrate Court filing fee is distributed to the Foundation in monthly installments. These funds account for approximately 25% of AVL F's annual proceeds. We also receive grants, some from the Fulton County's Human Services program or other government or quasi-government groups, but largely through private family foundations. In any given year, grants can account for 15-30% of the Foundation's income. AVL F must raise the balance from gifts, and is fortunate to be able to count on a generous legal community. Donations from individual lawyers, law firms, corporate legal departments, Bar sections and vendors to lawyers are largely secured through AVL F's four annual fundraisers, the largest of which is The Winetasting, held in a different exciting location each November, and attended by 1,000 Atlanta lawyers and related guests. This event has become an institution in the Atlanta legal community and is AVL F's single largest funding source.

AVLF BOARD OF DIRECTORS

AVLF has a vibrant Board of Directors which is engaged in the direction of the Foundation's legal work and especially involved in the raising of the funds necessary to sustain and expand our pro bono programs. The AVL F board is an intentional mix of lawyers from private practice and corporate legal departments, and non-lawyers including those who lead banking operations and forensic accounting teams. The Bylaws allow for 35 members, and as of September 2015 there are 34 Board members. As AVL F board members attest in the formal Board Member Commitments:

We, as Directors of the AVL F's Board, recognize the vital role that the Foundation plays in the administration of justice and in the safety and well-being of its clientele. As Board Members, we are stewards of AVL F, entrusted with the Foundation's Mission. We are devoted to AVL F's continued growth, long term relevance and sustainability. We are ambitious about AVL F's future. We will draw upon our individual talents and collective enthusiasm to support the efforts of the Foundation and will marshal our resources, wisdom, and talent to ensure its success. We are dedicated to maintaining AVL F's continued viability by setting and supporting the strategic vision of the Foundation.

AVLF is also fortunate to have a Junior Board, now 23 members, comprised of younger lawyers and businesspeople who help fundraise, recruit volunteers and otherwise further the work of the Foundation.

AVLF STAFF

AVLF employs 10 people. Five are lawyers, two are paralegals, one is a part-time Marketing Director, one is the Office Manager and one serves as a Program Assistant.

Marty Ellin is the Executive Director; Michael Lucas is the Deputy Director; Cole Thaler is the Safe and Stable Homes Project Director; and Jamie Perez is the Safe and Stable Families Director.

AVLF's pro bono programs are personnel driven: AVL F staff design programs to address the unmet civil legal needs of the metropolitan area's poor, recruit lawyers who will represent those individuals, train the lawyers in the necessary substantive areas and after linking trained lawyer and client-in-need, mentor and supervise the lawyer through the representation. One AVL F staff lawyer can leverage direct representation for hundreds of clients. It is in this context that salary and benefits make up more than 70% of AVL F's annual expenses.

APPROACH

WHY A 5-YEAR STRATEGIC PLAN?

In 2008, the AVL F board concluded that a strategic plan was an important step to prepare the organization to meet current and anticipated challenges. After a six-month process that included input from dozens of community partners, a strategic plan was developed. The plan was crucial to decision making through an economic downturn and guided decisions around closing programs, directing funding and incremental fundraising. Now, in 2015, AVL F has recovered financially and strengthened as an organization. AVL F is uniquely positioned to leverage an established base of volunteer attorneys and maintains a strong brand and reputation, leadership and financial situation, but still must be discerning about whether and how to best serve. We have an obligation to promote the highest level of service, but we must balance that responsibility with the understanding that taking on too much may dilute the efficacy and impact of AVL F's contribution. AVL F undertook this latest round of strategic planning to be as intentional and effective as possible in deploying its current strengths and resources in pursuit of its Mission.

AVL F 2020: STRATEGIC PLANNING BIG PICTURE

Purpose: Formulate a long-term plan to help:

- Answer the question: Where and how to grow?
- Make informed business decisions, including around the opening or closing programs and pursuit of funding sources.
- Clarify and simplify the AVL F story and positioning in the community and to raise awareness for all audiences.

Deliverable: Create a report and visual roadmap to clarify AVL F's unique position, destination and strategies to get there.

AVL F 2020: STRATEGIC PLANNING PROCESS

The AVL F strategic planning process included a thorough and thoughtful review of the overall organization. A Strategic Planning Committee (SPC) was assigned to set scope and shepherd the process through to completion. Strategic Planning Committee Members were: Chair: Elizabeth Finn Johnson; Current Board Chair: Steve Allen; Board Members: Paul Murphy, Chel Tanger, Margaret Scott, Dena Hong, Jim McGinnis, Walt Davis; Staff: Michael Lucas and Marty Ellin. At the direction of the SPC, AVL F and its consultant undertook the five-step process outlined below. Steps 1-4 culminated in a one-day facilitated offsite meeting with the board and staff to distill feedback, finalize the mission, vision and strategies, and to brainstorm strategic initiatives for several strategies. Identified "subcommittees" then worked to produce a report and roadmap.



SCOPING AND FRAMING

KEY STRATEGIC QUESTION: WHERE AND HOW WILL AVL F GROW?

AVLF was interested in charting a path to growth by taking into account (1) community needs (2) funding to support these needs and (3) capacity of the organization. At the core, AVL F needed to decide whether to:

- Broaden services with new programs, geographies or demographics or
- Deepen services by strengthening current programs, reaching deeper into current geographies, addressing unmet needs and offering more holistic services.

ADDITIONAL AREAS OF INQUIRY FROM THE BOARD

In addition, the AVL F Board wanted to explore and better understand some key areas:

- Identity and Awareness: (1) Clarify and simplify the positioning and story of AVL F; (2) consider a name change; and (3) raise awareness and relevance beyond the legal community.
- Funding: Pursuit of funding that is more sustainable, larger, and more diverse.
- Board Composition & Engagement: The recruitment and engagement of board members and the connection to fundraising.

ADDITIONAL AREAS OF INQUIRY FROM THE STAFF

The AVL F Staff wanted to explore additional topics around programming:

- Serving clients holistically and improving client awareness, accessibility and education.
- Improving community awareness and branding of each specific program or groupings of programs.
- Developing a strategic plan of attack for key relationships across both the Safe and Stable Homes and Safe and Stable Families Projects.
- Determining the optimal organizational structure to pursue these goals.

INTERNAL AND EXTERNAL REVIEW

CURRENT STATE OF AVL F

To kick off the strategic planning process, the management of AVL F produced a “State of AVL F” report to present to its Board of Directors an overall picture of the operations of AVL F. The document gave a snapshot of the then-current budget (2014) and program activities including strengths and challenges. This document served as an important foundation for the Board’s engagement in the strategic planning process.

GATHERING FEEDBACK

It was important that AVL F have a broad-based perspective to shape the future direction of the organization. Feedback was captured from four key audiences: staff, Board, Junior Board and stakeholders via questionnaires, face-to-face interviews and facilitated discussions. The stakeholders selected included individuals from similar non-profits, court representatives, government representatives, grantors, community leaders and lawyers. A questionnaire was developed so that interviewees were asked for the same information, thus allowing for a more consistent survey. (Appendices A and B: “AVL F Stakeholder Interview Survey” and “List of Stakeholders”) Board members conducted the stakeholder interviews and the consultant conducted staff interviews. The consultant conducted one facilitated discussion with the Board and two with the staff. In total, feedback was collected from 107 people: 44 stakeholders, 31 Board members, 22 Junior Board members and 10 staff members.

The interviews and survey explored the following issues in depth:

- Awareness of AVL F and its programs
- Current image and branding perceptions
- Strengths, weaknesses, challenges and opportunities
- Growth opportunities
- Financing to support growth opportunities
- Collaborations and partnerships
- Name: Effectiveness of the name “Atlanta Volunteer Lawyers Foundation”

EXECUTIVE SUMMARY OF FINDINGS

The interview results were synthesized by the consultant to isolate themes. These themes and key findings, which are summarized here, were incorporated into the “Summary of Stakeholders Interviews and Key Findings” (Appendix C).

- AVL F is highly regarded *in the legal community* and has strong brand equity and reputation, all stemming from the quality of volunteers, its support within and from the legal community, its strong, focused, impactful programs, the high level of service provided and a very well respected, inspiring staff.
- At the same time, funding remains challenging and limits the growth conversation for AVL F. Specifically, stakeholders want to see the organization grow more diverse and sustainable funding in creative ways. Stakeholders stated that this might be accomplished in part through closer partnership with similar organizations and by better linking programs and their impact with new funding sources (e.g., by telling a more compelling story).
- We asked stakeholders directly: “How is AVL F best positioned to grow: broader with new programs, geographies and demographics, or deeper by strengthening current programs and meeting unmet need within the context of that programming?” Over half of stakeholders support deepening current programs in current geographies as the approach to growth.
- Lack of resources and lean staffing was another noted limitation to growth. Respondents recognize that a growth conversation is challenged without deepening and strengthening staffing levels to serve the current market for AVL F.

- Within the legal community, AVL F’s brand strength is high and the name is effective to most of those interviewed. AVL F is, however, a well-kept secret outside of the legal community and would benefit by raising awareness and exposure and clarifying its unique position in the landscape. AVL F should refine their positioning and more clearly distinguish themselves from others.

INTERNAL PROGRAM REVIEW

To supplement the feedback process, AVL F undertook a staff-level review of its flagship programs. The description of services was clarified, and successes, challenges and growth opportunities were captured. The review results are highlighted below:

The Safe and Stable Families Project (domestic violence programming)

Identified Goals

- Raise the profile and awareness of the Safe Families Office, AVL F’s domestic violence clinic, and, with it, funding.
- Support stable families by going beyond the securing of a protective order to provide more holistic services, including divorce representation and support from social workers to access and benefit from other services in the community.

Identified Needs

- A “freed -up” Project Director to focus on raising program profile, building new partnerships, attracting new funding and exploring growth.
- New staff needed: 1) One staff attorney to provide fuller coverage, increase critical assistance into new areas (divorces), and “free up” the Project Director; 2) One social worker to assist more clients in completing the process and getting to court, and to offer broader, more holistic assistance (e.g., access to shelters, housing, unemployment/employment assistance, counseling, linkages to other resources).

The Safe and Stable Homes Project (The Saturday Lawyer and Eviction Defense Programs)

This review focused on pockets of ongoing unmet need within its current service area. To illustrate unmet demand, AVL F developed a “heat map” showing poverty concentration in Fulton County and pinpointing where AVL F has – and has not – served clients (see following page). AVL F found that it does a good job of serving the poorest of Fulton, but many populations and neighborhoods are not currently served (purple dots represent clients of AVL F in 2014).

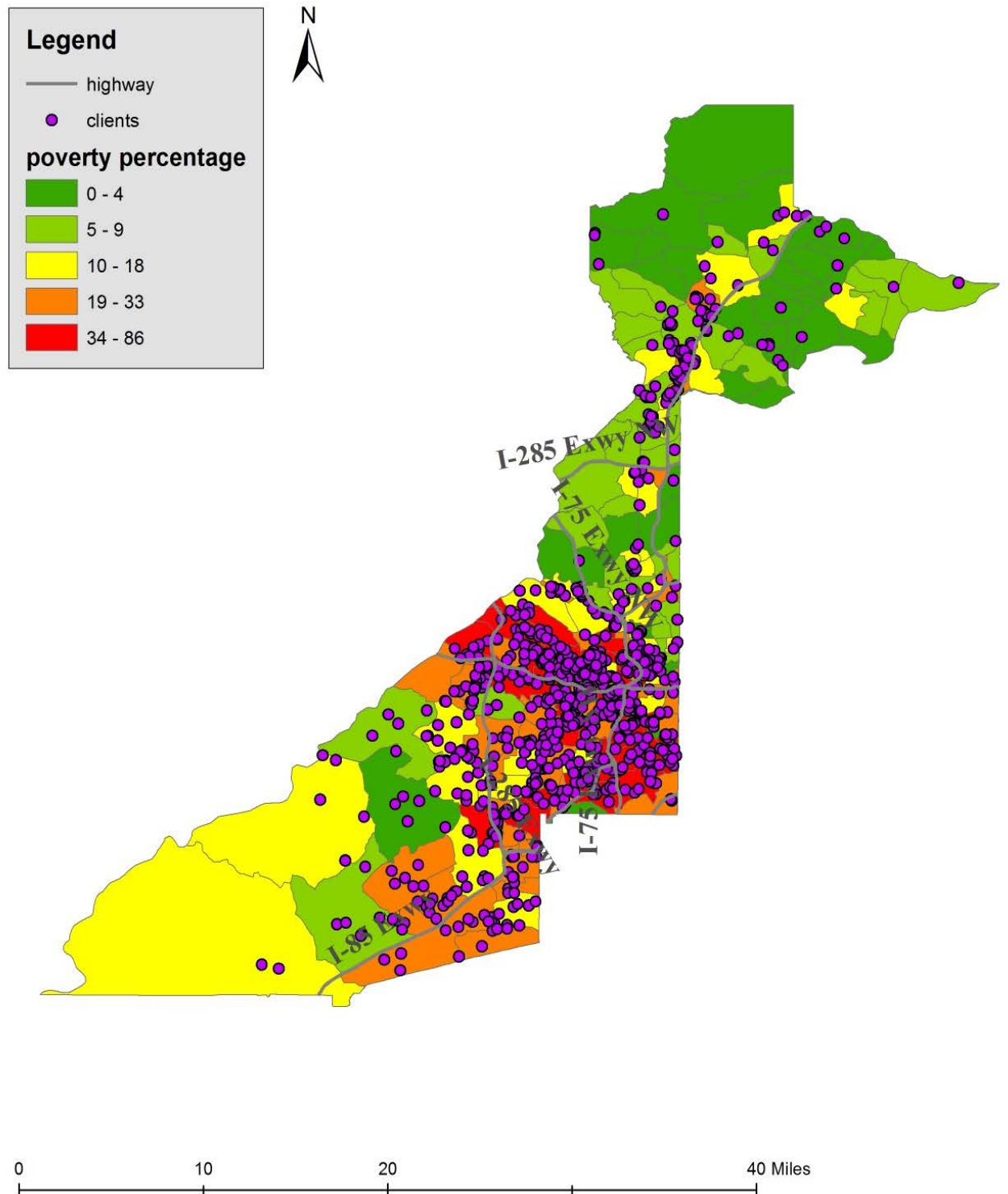
Identified Goals

- Formalize outreach effort and make programmatic changes to make services more accessible.
- Strengthen ties between AVL F and client community to reach new clients and improve access and services.
- Increase volunteer commitment and numbers to meet increased client demand: (1) Strengthen & expand current ties with firms and attorneys (for Eviction Defense & Saturday Lawyer Program) (2) Raise placement rate for Eviction Defense cases (3) Build pool of new eviction defense volunteers, both independent and new anchor firms, and (4) Grow volunteer commitment (case acceptance rate) for Saturday Lawyer Program.

Identified Needs

- New priority staff needed: One Outreach Coordinator/ Community Educator to: (1) Establish “mobile office;” (2) Better understand low-income neighborhoods of need (e.g., find gathering places and places of need, build relationships); and (3) Generally help improve access to the Saturday Lawyer Program (e.g., mobile intake, assist with document and evidence gathering, improve access and “show-rates.”)
- Possible additional staff needed: 1) One program paralegal to assist with screening of and communication with increased number of clients; and 2) One staff attorney to manage additional client load, to recruit, train and supervise additional attorneys, to manage potential increased “access points” and clinics (e.g., court-based clinic, mobile clinics, evening clinics), and to “free up” Project Director for further pursuit of identified goals.

Client Location vs. Poverty Level in Fulton census tract



RESULTS

STRATEGIC INTENT: HOW WILL AVLF GROW?

Drawing from the consultant’s work with AVLF staff, stakeholder feedback received, input from the Board and staff at the facilitated offsite session, and AVLF’s own program review, AVLF decided on the following focused approach to growth:

AVLF will grow by *deepening and strengthening* our current programs for greater *impact and relevance* in the community.

Through the planning process, AVLF determined that this approach:

- Will focus on strengthening anchor programs.
- Will pursue and respond to new opportunities within the context of those current anchor programs.
- Will require additional staff, the timing and order of the hiring of which will matter.
- Will mean different things for different programs.
- Will be best realized by doubling revenue to become a \$2M organization.

This approach will allow AVLF to:

- Have a greater – and measureable - impact in the community.
- Achieve goals around diversifying funding and growing brand relevance.
- Reach people they have not yet reached and reach them in a more meaningful way.

MISSION & VISION

The staff and Strategic Planning Committee met to review and revise the AVLF mission and vision statements. The goal was to amplify and simplify the AVLF mission and vision to attract donors, clients and volunteers. AVLF wanted the new mission to be centered on “why” the organization exists with language that is accessible, emotional and communicates impact and outcomes. For the new Vision, AVLF sought an aspirational articulation of the community it hoped to create and how it would go about pursuing that vision. Input was solicited from the entire board and the following statements were adopted.

<p>PREVIOUS MISSION</p> <p>The Atlanta Volunteer Lawyers Foundation develops and coordinates programs that provide legal representation, education and advocacy for at-risk, low-income individuals by tapping the enthusiasm and commitment of volunteer legal professionals to address the unmet civil legal needs in the Atlanta community.</p>	<p>NEW MISSION</p> <p>Creating safe and stable homes and families by inspiring attorneys to fight for equal justice.</p>
<p>PREVIOUS VISION</p> <p>The Atlanta Volunteer Lawyers Foundation is the leader in leveraging the full power, resources and passion of the legal community so that people in greater Atlanta are not deprived of basic civil legal needs without benefit of a lawyer.</p>	<p>NEW VISION</p> <p>AVLF leverages the full power and resources of the legal community so when low-income Atlantans stand up to demand safe and stable housing, to insist on pay for an honest day’s work, or to break free from domestic violence, a lawyer always stands with them.</p>

STRATEGIES

The Staff and Strategic Planning Committee, drawing on the feedback received, identified five key strategies that served to guide the development of this strategic plan.

1. Scale and strengthen our organization to attack growing needs proactively.
2. Recast and grow funding to be balanced, sustainable and diverse.
3. Serve more people more holistically by aggressively deepening and strengthening our programs.
4. Clarify and communicate the AVL F brand to amplify our mission to all audiences.
5. Build a coordinated approach to strategic relationships & partnerships to support all strategies.

STRATEGIC INITIATIVE

During the May 15th and 16th facilitated offsite session, teams brainstormed and discussed the following four key challenge questions in an effort to develop strategic initiatives to support each of the five strategies:

- How can we identify and pursue funding that is broader, sustainable, non-traditional, and amplified? (Strategy 2)
- How can we better link the Safe and Stable Homes and Safe and Stable Families Projects to targeted funding sources? (Strategies 2, 3)
- How can we build criteria to know when to say “no” or “yes” to new and current programs? (Strategy 1)
- How can we be known and relevant in the city of Atlanta? (Strategy 4)

Coming out of – and drawing on work from both before and during – the offsite session, AVL F identified several strategic initiatives related to each of the five strategies, with some supporting more than one strategy and the strategy of “building a coordinated approach to strategic relationships & partnerships” serving as a gloss across all identified initiatives. The full breadth of those initiatives, along with the rest of the deliverables from the strategic planning process, is reflected in the “Strategic Roadmap” included in Appendix E.

EARLY PROGRESS & IMPACT

AVLF is already realizing the impact of the strategic planning process. As a result of the strategic planning process, AVLF has made progress on select strategic initiatives, has begun the process of focusing the scope of its programming, and its branding, messaging and related collateral have been updated accordingly.

STRATEGY SCREEN

As a result of the strategic planning process, AVLF developed new criteria to guide informed programming decisions. Detailed criteria can be found in the AVLF 2020 Strategy Screen (Appendix D). The screening criteria include: Mission and Strategic Plan Alignment, Need, Impact, Staffing, Funding and Volunteer Fit as well as Marketability and whether the program has the support – and is supportive – of the courts.

SCOPE OF PROGRAMMING

Consistent with the identified strategic intent of focusing on its core programmatic strengths, AVLF declined to adopt a new immigration-related program that was proposed during the planning process because it did not meet the criteria ultimately incorporated into the new strategy screen. Additionally, AVLF decided to suspend its handling of a small number of consumer debt cases within its Saturday Lawyer Program, based on both an assessment of the return on investment of staffing what was a low volume/low-need issue and a determination that the particular cases common to the program were not a good fit for volunteers and did not have strong alignment with the new AVLF mission and vision.

CLARIFYING PROGRAMS AND INCORPORATING BRANDING

As a result of the work during the evaluative process, AVLF streamlined program branding and grouping as follows, creating two complimentary core “Projects” that house all of AVLF’s programs:

Safe and Stable Homes Project (Lead by the Safe and Stable Homes Project Director)

- The Saturday Lawyer Program
- The Eviction Defense Program
- The Bankruptcy Program
- The Dollars for Judgments Program
- The Low-Income Creditor Assistance Program

Safe and Stable Families Project (Lead by the Safe and Stable Families Project Director)

- The Safe Families Office
- The Guardian ad Litem Program
- The Probate Information Center

MARKETING COLLATERAL

As a result of the strategic planning process, much of AVLF marketing collateral – e.g., brochures, banners, the website – have already been updated to reflect new mission and vision statements and the rebranded program groupings. Additionally, the new branding and related messaging that grew out of the planning process is now regularly incorporated into AVLF’s public speaking, recruitment and training opportunities.

CONCLUSION

AVLF has an opportunity to build on its success. It has a strong reputation, respected board and staff, brand equity, financial health and support-base, as well as solid programming and a history of success in the legal community on which to build. **AVLF has an opportunity to get stronger.** Through this strategic planning process, it prioritized specific initiatives and personnel decisions to increase the size and diversity of its funding base, and made decisions in other strategic areas that will support its ability to pursue new sources of funding. **AVLF has an opportunity to grow.** It made the core directional choice that growth means deepening and strengthening its current programs for greater impact and relevance in the community, as opposed to expanding geographic focus or adding divergent programs. **AVLF has an opportunity to have even greater impact.** Motivating the decision to grow by deepening and strengthening was a desire to serve more people more holistically in the critical areas in which the organization could most greatly impact lives and communities. Significantly, the decision AVLF made to focus will better position it to have more meaningful impact, better track that impact, and learn from that data to have yet more impact. **AVLF has an opportunity to become better known.** A decision was made to have more meaningful impact in the community and improved tracking of that impact will allow AVLF to better tell its story – and that of its clients and volunteers – to a wider range of people.

AVLF has positioned itself to seize all of these opportunities not only because of the strategic decisions reflected in this document, but also because of the process by which it made those decisions. Through this process, a Board of Directors more engaged in AVLF's future emerged and became central to many of the resulting strategic initiatives. A greater understanding between AVLF's staff and board – as well as among staff – developed around the shared vision for AVLF, fostering a connection and renewed commitment that will serve AVLF well as it executes the resulting strategy. Finally, AVLF learned more about its programmatic strengths and weaknesses, leading to a streamlining which better positions AVLF to implement this strategy.

AVLF is committed to executing this strategic plan, has identified detailed strategic initiatives that will guide that execution, and has designated board leadership and staff to push and track its progress. By 2020 – when AVLF will again consider whether and how it will grow – the organization will be stronger, better funded and staffed, better known and better positioned to make a meaningful and measurable impact in the lives of its clients and the community it serves.

APPENDICES

APPENDIX A: AVL F STAKEHOLDER INTERVIEW SURVEY

Atlanta Volunteer Lawyers Foundation Stakeholder Interview 2015

Purpose

The Atlanta Volunteer Lawyers Foundation (AVLF) is developing a five-year strategic plan. As part of this process it is important that we have a broad-based perspective on the opportunities, challenges and future direction of our organization. We'd like your input to help AVLF plan for the future and best serve the interests of our community.

Stakeholder Background Information

*1. Stakeholder and Organization

Name

Organization

2. Stakeholder Category (please check appropriate category and subcategory)

- ☐ Similar Non profit Organization
- ☐ Individual donor
- ☐ Grantor: State, County or City Government
- ☐ Grantor: Private profit or non-profit entity
- ☐ Grantor: Foundation
- ☐ Lawyer: Attorney AVLF Volunteer
- ☐ Lawyer: Attorney Non-AVLF Volunteer
- ☐ Lawyer: Law Firm Pro Bono Coordinator
- ☐ Community Leader
- ☐ Government Representative
- ☐ Court Representative
- ☐ Media Representative
- ☐ Other (please specify)

3. Have you ever heard of Atlanta Volunteer Lawyers Foundation (AVLF)?

- ☐ Yes If "Yes," Complete Section A
- ☐ No If "No," Complete Section B

Section A

Atlanta Volunteer Lawyers Foundation Stakeholder Interview 2015

4. What is your affiliation with AVL F?

5. What is your understanding of AVL F's work and programs?

6. Which AVL F programs are you familiar with?

7. How do you understand AVL F to be funded?

8. What other organizations do you think offer similar work and programs to AVL F?

9. What makes AVL F different from these organizations?

10. What words would you use to describe AVL F?

11. How did you learn about AVL F?

12. How do you keep updated with AVL F?

Atlanta Volunteer Lawyers Foundation Stakeholder Interview 2015

13. How effective is AVLF at the following:

	Poor	Fair	Good	Excellent
Recruiting volunteers?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supporting volunteers?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appreciating volunteers?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Representing clients?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Why?

Strengths, Weaknesses, Opportunities, Challenges

14. What are AVLF's three greatest strengths? Why?

15. What are AVLF's three greatest weaknesses? Why?

16. What are AVLF's three greatest opportunities? Why?

17. What are AVLF's three greatest challenges? Why?

Customers and Clients

18. What client community does AVLF serve?

19. What is your understanding of the geographic areas that AVLF serves?

- ☐ Fulton
- ☐ Dekalb
- ☐ Cobb
- ☐ Gwinett
- ☐ Clayton

Other (please specify)

20. AVLF is interested in understanding growth opportunities: both emerging community needs and funding to support those needs. In your opinion, AVLF is best positioned to:

- ☐ Broaden their service with new programs, geographies or demographics
- ☐ Deepen their service by strengthening current programs, geographies and addressing unmet need
- ☐ Other (please specify)

21. If AVLF were to deepen or broaden, on which client communities do you think we are best positioned to do so?

Which geographic areas?

Certain client demographics?

22. If AVLF were to deepen or broaden, with which programs do you think we are best positioned to do so? How?

Saturday Lawyer

Eviction Defense

Domestic Violence

Guardian Ad Litem

Other / New

23. Based on the communities and programs you identified above, what sources of funding do you recommend? How might AVLF pursue further?

Atlanta Volunteer Lawyers Foundation Stakeholder Interview 2015

24. What other trends or changing needs do you see emerging in the next 2-3 years?

Name

25. How effective is the name Atlanta Volunteer Lawyers Foundation?

- ☐ Poor
- ☐ Fair
- ☐ Good
- ☐ Excellent
- ☐ Other Comments

26. What are the limitations of the name Atlanta Volunteer Lawyers Foundation?

27. What name suggestions do you have?

Volunteers

28. Have you volunteered to do pro bono legal work? If so, for what organization?

29. What are the benefits of volunteering with AVL F and their programs?

30. What are the barriers of volunteering with AVL F and their programs?

Closing

Atlanta Volunteer Lawyers Foundation Stakeholder Interview 2015

31. What can people in your position do to help AVLF?

32. What can AVLF do to help people in your position?

33. Any additional comments?

SECTION B

FOR THOSE UNFAMILIAR WITH ATLANTA VOLUNTEER LAWYERS FOUNDATION OR ITS WORK

Thirty-five years ago the Atlanta Volunteer Lawyers Foundation was created to connect low-income people in Fulton County with volunteer lawyers. AVLF and these volunteers provide representation for thousands of indigent residents in Fulton County each year.

34. What are the greatest legal needs of low-income people in Fulton County?

35. How do you see those needs changing in 3-5 years?

36. What more can people in your position do to help AVLF?

37. What more can AVLF do to help people in your position?

Atlanta Volunteer Lawyers Foundation Stakeholder Interview 2015

38. Any additional comments?

Thank you for participating in this interview!

APPENDIX B: LIST OF STAKEHOLDERS

AVLF 2020 Stakeholder Interviews: Pairings and Assignments

Steve Allen and Maggie Hanrahan

- 1) Dave Whisnant, Exec. Dir, Georgia Law Center for the Homeless
- 2) Terri Beck, Executive Director, Atlanta Bar Association
- 3) John Chandler, Partner, King and Spalding

Dena Hong and Walt Davis

- 1) Kathy Palumbo, Director of Community Partnerships, Community Foundation for Greater Atlanta
- 2) Cheryl Naja, Alston + Bird
- 3) Art Brannan, Partner, DLA Piper
- 4) The Honorable Myra Dixon, Chief Judge, Fulton County State Court

Jim McGinnis and Denelle Waynick

- 1) The Honorable Gail Tusan, Chief Judge, Fulton County Superior Court
- 2) Melanie Velez, Managing Attorney, Southern Center for Human Rights
- 3) Greg Riggs, Executive Coach, Novateur Partners

Elizabeth Finn Johnson and Nancy Baughan

- 1) Tracey Johnson, Director, Fulton County Family Law Division
- 2) Daphne Walker, Executive Director, Partnership Against Domestic Violence
- 3) Commissioner Joan Garner, Fulton County Board of Commissioners
- 4) Michael Terry, Partner, Bondurant, Mixson & Elmore

Chel Tanger and Jennifer Jackson

- 1) Monica Khant, Executive Director, Georgia Asylum and Immigration Network
- 2) Robbie Dokson, Partner, Ellis Funk
- 3) Meredith Hobbs, Reporter, Daily Report

Paul Murphy and Richard Mitchell

- 1) Phyllis Holmen, Executive Director, Georgia Legal Services Program
- 2) Mary Judd, Poston Communications (formerly with the Daily Report)
- 3) Len Horton, Executive Director, Georgia Bar Foundation
- 4) Linda Klein, Managing Shareholder, Baker Donelson (and incoming American Bar President)

Tom Best and Jeff Nix

- 1) Louis Levenson, former Fulton County Magistrate Court Judge
- 2) Marc Taylor, Partner, Taylor English Duma
- 3) Bill Barwick, Partner, Duane Morris

Will Shearer and Adria Perez

- 1) Yolanda Lewis, Court Administrator, Fulton County Superior Court
- 2) Shiriki Cavitt, Corporate Counsel, Equifax (leadership in GABWA and YLD)
- 3) Wade Malone, Partner, Nelson Mullins
- 4) Jonathan Eloff, Dir. of Immigration Services, Latin American Association

Avi Stadler and Kinshasa Williams

- 1) Cicely Barber, State Court Administrator, Fulton County
- 2) Carla Brown, Director, Lawyer Referral Information Service
- 3) Tamara Caldas, Pro Bono Partner, Kilpatrick Townsend
- 4) Thomas Wheatley, News Editor, Creative Loafing

Bryan Ward and Rebecca Shanlever

- 1) Steve Gottlieb, Executive Director, Atlanta Legal Aid Society
- 2) Rita Sheffey, Assistant Dean for Public Service, Emory Law School
- 3) Shukura Ingram, Senior Associate, Thomas Kennedy Sampson & Tompkins

Brian Smith and Paul Donsky

- 1) Terri Hendley, Pro Bono Coordinator, Troutman Sanders
- 2) Willoughby Mariano, Investigative Reporter, Atlanta Journal Constitution
- 3) Josh Toll, Pro Bono Partner, King & Spalding

Margaret Scott and Meka Ward

- 1) Cheri Tipton, Deputy Director, Atlanta Legal Aid Society
- 2) Sharon Hill, Executive Director, Georgia Appleseed
- 3) Phyllis Silverstein, Vice President, Wells Fargo Philanthropic Services
- 4) Roger Kirschenbaum, former Chair of the Estate Planning Section

APPENDIX C: SUMMARY OF STAKEHOLDERS INTERVIEWS AND KEY FINDINGS

AVLF 2020 Strategic Plan
Summary of Stakeholder Interviews and Key Findings
May 8, 2015

Overview:

- As part of the 2015-2020 Strategy process, the board and staff conducted stakeholder interviews and surveys. We gathered 59 responses (from a max of 97: 44 stakeholders, 31 board members and 22 Junior board members).
- Enclosed is a summary of findings across all interviews including verbatim from some respondents. This represents a directional (not a statistical) capture of the volume of answers around each question.

Key Themes Emerging:

- Starting from a position of strength: AVLF is highly regarded in the legal community, has strong brand equity and a strong reputation. Stakeholders called out the quality of volunteers, support from the legal community, strong, focused, impactful programs, a high level of service and a very well respected, inspiring staff.
- Several factors may limit growth:
 - Funding remains challenging. Specifically, stakeholders encouraged the organization to grow non-traditional, sustainable funding in creative ways. Suggestions included: partner more closely with similar organizations and better link our program impact with funding sources (tell a more compelling story).
 - Need to raise awareness, exposure and clarity of positioning to reach within and beyond the legal community. AVLF was described as a “well kept secret” and a “hidden gem”.
 - Lack of resources and lean staffing: Respondents recognize that a growth conversation is challenging without deepening and strengthening staffing levels both to serve more within our current scope and to explore growth or expansion.
- We asked stakeholders directly “How is AVLF best positioned to grow? Broader with new programs, geographies and demos? Or deeper by strengthening current programs, geographies and unmet need?”
 - Over half of stakeholders support deepening current programs in current geographies as the approach to growth.
 - For geographic expansion, stakeholders ranked Dekalb, Clayton and Gwinett as highest (in order).
 - For demographic expansion, stakeholders mentioned Immigrant/Non-English speaking (especially Hispanic).
 - For program expansion: Domestic Violence and Saturday Lawyer programs were highest priorities for growth.
- The AVLF name scored high for awareness and effectiveness. Stakeholders were mixed about the strengths/weaknesses of the name. Some believe “foundation” limits fundraising while others believe the name equity is very strong.

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STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Volunteer pool, quality/caliber • Support & appreciation of volunteers, • Support from Atlanta bar and legal community • Meeting needs of clients • Reputation in the community, Marty • Programs: strong, focused, streamlined impactful • Quality of services it provides • Quality and commitment of staff PRICELESS 	<ul style="list-style-type: none"> • Funding – creative solutions for sustainable, non-traditional funding • Limited practice areas & coverage • Recruiting more lawyers as volunteers and donors. Educating lawyers about issues. • Confusion around what AVLF does & what makes it unique • Lack of awareness and exposure outside the legal community • Lack of resources. Thin staff.
OPPORTUNITIES	THREATS/CHALLENGES
<ul style="list-style-type: none"> • Expand services and programs (SFO, new practice areas, immigrant population) • Strengthen programs – link funding, outreach • Engage more lawyers • Innovation in matching clients/lawyers, • Creative thinking for sustainable funding solutions • Collaboration & true partnerships with similar organizations – link to broader community • Strengthen the staff levels 	<ul style="list-style-type: none"> • Attracting funding given the overlap with other organizations (money and time) • New funding sources: sustainable, beyond legal, beyond events, corporate • Matching legal expertise to needs • Distinguishing the brand from other pro bono groups (in house, etc) • Meeting needs of immigrant community • Staff turnover, retention, bench strength

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“Strengths” Detailed Themes (rank order)

- ☐ **Volunteer** pool (big firms), caliber & quality, on-boarding, support, good volunteer experience, easy, time-limited volunteer opportunities, connecting volunteers to programs & cases, volunteer appreciation.
- ☐ **Support received:** from Atlanta bar, private bar, judges), the Atlanta Legal Community,
- ☐ **Support given** to volunteers (training & ongoing), clients, the legal community by serving this need
- ☐ **Reputation within the legal community**, “darling” of the legal community, Marty as an excellent ambassador.
- ☐ Strong, focused, streamlined **programs** with great impact, successful, good focus. Quality of program staff: leadership of Liz and Cole.

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- ☐ **Quality of services** it provides. The benefit of providing these services to the community in need.
- ☐ **Quality of staff:** every single one a great advocate, inspirational leaders, priceless!

“Strengths” Detailed Verbatim

- ☐ “Easy volunteer opportunities.....AVLF is incredibly well organized.....you know exactly what you will be doing (because of guides sent prior to volunteering) and as soon as you show up (Michael, Liz, Cole do a great job of greeting volunteers and explaining expectations prior to starting). So keep up the good work on that”
- ☐ “Garners wide support in the legal community (both financial and volunteer support)”
- ☐ “AVLF is the darling of the legal community. Every lawyer I know loves AVLF”
- ☐ “Their staff is their greatest strength because they are dedicated to the cause, dedicated to their clients, and supportive of the lawyers at my firm in their efforts”
- ☐ “Every single staff member right now is a great advocate – Marty is always inspirational (great leader), I was brought to tears by Cole's thoughtful talk before we started a Saturday Lawyers day last year, Liz does an excellent job explaining the importance of the domestic violence program (you really feel like you know her and you know her clients), Michael is always so welcoming and appreciative (remembering names of people he's met once, speaking eloquently at that movie night, etc.) – the whole staff is priceless. AVLF is this staff. They are likeable people”

“Weaknesses” Detailed Themes (rank order)

- ☐ **Funding** need creative thinking for more, sustainable, continued, non-traditional funding. Need to raise awareness in order to grow funding, attract funding from places other than legal profession, better match the programs with sources of funding. Collaborate with other organizations for funding,
- ☐ Limited practice areas, limited coverage
- ☐ Recruiting **more lawyers** to contribute and volunteer, educate lawyers about the problems they can help solve, convert those think highly of AVLF into volunteers, attract younger lawyers, other practice areas, more small firm lawyers, law students. Advertise volunteer opportunities and communicating the need for more volunteers.
- ☐ **Confusion:** People not understanding what AVLF does, how it differs from legal aid, what AVLF needs and why (why do we need money if we are a group of volunteers , why do we need volunteers if we have staff?), lack of understanding of **differentiation** with Legal Aid, expanding brand strength
- ☐ Lack of **awareness and exposure** outside the legal community, is not as well known as others in the space, need for marketing and getting our message out there, social media.
- ☐ Lack of **resources**, thin staff

AVLF 2020 Strategic Plan
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“Weaknesses” Detailed Verbatim

- ☐ “Funding limitations. Relying too heavily on events to generate money. AVLF’s biggest issue is, and has been, generating revenue to fund the ever-growing needs of Atlanta and beyond. AVLF has the staff, the volunteer base and the cache to expand. The only limitation is funding”.
- ☐ “Lack of money. A huge one -- my impression of why some of the programs were cut.”
- ☐ “A lot of AVLF’s effectiveness comes down to volunteer involvement. And a lot of that is driven by whether law firms encourage associates to participate in pro bono activities.”
- ☐ “Recruiting volunteers from smaller firms and other practice areas like family law, where there appears to be a substantial need.”
- ☐ “Inability to serve core client needs if it doesn't fit with volunteer experience.”
- ☐ “The overlap between AVLF and other organizations is confusing”
- ☐ “Market differentiation. How do we distinguish ourselves from other organizations? How do we distinguish our cause from that of others? Competing for the same dollars and pro bono organizations all very supportive of one another, so dollar for one is dollar for all (because supporting same client base)”.
- ☐ “Focus on some of the main issues before they become problems through community education initiatives. I do not see too much preventive education from AVLF. As great as AVLF’s projects are, there is something to be said for educating the community about how to avoid problems and pitfalls rather than just dealing with them after the fact.”
- ☐ “It strikes me there are many more attorneys in Atlanta who think highly of AVLF than who volunteer . I recommend an increased and continued effort to advertise volunteer opportunities to, in particular, younger attorneys in Atlanta. Is there a way to convert the goodwill among people who think highly of AVLF, but whose involvement is limited to attending the Winetasting and/or Beertasting, into greater involvement throughout the year?”

“Opportunities” Detailed Themes (rank order)

- ☐ **Expand** its services and programs: Program expansion, expand SFO, new programs, expand geographically, expand in other areas of legal representation which might attract new volunteers, expand into new areas of need (immigrant population and unaccompanied children immigrants)
- ☐ **Strengthening programs**, better linking funding with programs, better outreach in community about programs.
- ☐ **Engaging more lawyers**: smaller firms, future lawyers, law schools, educate the lawyers more about the problems in our community that they can help solve.
- ☐ **Innovation** in matching lawyers to cases/clients. The demands of practicing law have changed but has AVLF changed with it? Creative solutions to funding. How to serve more people-innovative ways to get more services to people beyond “one lawyer per client”
- ☐ **Collaboration** & true partnerships with similar organizations (and other non-profits, agencies, counties) to get more services to more people. Meet more clinical needs,

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expand into significant gaps in the community, ties to just one bar/court. Identify new partners with whom we can work for grants. Linking to the broader community.

- ☐ **Creative thinking** for sustainable funding sources. Connect our work to community health, partner with non-traditional sources of funding and help break down silos
- ☐ **Strengthen staff** levels

“Opportunities” Detailed Verbatim

- ☐ “Ability to expand , and the question is how? Do more with what you're doing now, or new programs?” “Expand SFO model geographically. This model could also be used for other services”
- ☐ “Educate the lawyers more about the problems in our community that they can help solve. I worked in law firms for 30 years until I got involved in pro bono and had no idea of slumlords or the extent of domestic violence issues. Lawyers are uniquely positioned to help solve those problems. How can we educate them? I sense that senior lawyers are more into pro bono than the new generation. Maybe it's the increase in billable hour requirements. As the demands of practicing law have changed, has AVLF changed with it? Has the concept of volunteering adjusted?”
- ☐ “Becoming more of an innovator when it comes to matching volunteers and lawyers Because AVLF has such a great reputation, it can be innovative and try new things”.
- ☐ “Collaboration with other non-profits, expanding programs for outreach ... (heir property) closing the loop on legal needs through additional programs and collaboration.”
- ☐ “Creative thinking regarding sustainable funding sources, especially aggressive foundation matchingrepackaging our existing programs to highlight certain underserved populations (e..g. eviction defense - we should be seeking out funds to support children)”

“Threats” Detailed Themes (rank order)

- ☐ Attracting **funding** given the overlap with other organizations (pro bono), money and time (competing with the billable hour), funding outside legal community, sustainable funding, funding beyond special events, greater exposure to corporate funding individual gifts from beyond legal community.
- ☐ Competition with other non profits and volunteer opportunities for **money and time**. Getting volunteers, especially younger lawyers
- ☐ **Matching legal expertise to needs**
- ☐ **Distinguishing the brand** from other pro-bono groups, distinguishing between the many ways for volunteer lawyers to get matched up with clients. E.g. law firm in-house pro bono programs; etc
- ☐ Meeting the **needs** of immigrant communities; need for translators
- ☐ **Staff turnover**, retaining staff, bench strength at the staff level

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“Threats” Detailed Verbatim

- ☐ “Apathy and the bystander effect.....really suffer from people thinking that “someone else” is going to take care of it.... beneficial if AVLF emphasized the need for volunteers (in addition to donations) at events]”
- ☐ “Giving the perception that all we do is fundraise and having donors forget what we are about – I think a fair amount of people only come to fundraising events and don't volunteer.... Thanks to the current staff , these people are reminded of AVLF's mission”
- ☐ “Money and time. Does AVLF have the resources needed to address all of the needs of the community and can it market it to attorneys in such a way to convince attorneys to give up their time..?”
- ☐ “Stretched thin. Is there enough of them?like to see Michael and Liz out in the community speaking about what they do. The Board needs to be looking for where we can nominate Michael and Liz for community awards, i.e., the YMCA, Womenetics, etc. Provides an opportunity to promote our best assets”.
- ☐ “Most law firm/company discretionary budgets have shrunk due to the economy, and many organizations are reluctant to spend money without clear evidence of an expected return. AVLF has to find a way to demonstrate a tangible upside of a partnership with it. Also, many of the people with decision making authority in law related entities are older and have long standing relationships with specific organizations. It is therefore sometimes difficult for a “new” organization to break in.”

Other Notable Comments

- ☐ “Keep on keepin' on! AVLF's service to the community is invaluable, as demonstrated by its long history in the community through good times and bad, and the allegiance that so many people have toward its cause.”
- ☐ “The AVLF is the premier legal service provider in the city”
- ☐ “AVLF is the best part of my professional life”
- ☐ “I believe AVLF's highest priority needs to be strengthening its finances and finding sources of recurring funding. Only after doing that would I consider expanding programming or geography. I also think we have to make sure that AVLF's amazing staff are happy and that there is a succession plan.”
- ☐ “AVLF needs to focus on being creative and collaborative with other non-profits. Should also develop tool to measure results, which you can show to potential funders to show effectiveness. This could be survey to clients on effectiveness of assistance and gathering results in other ways”.
- ☐ “She again emphasized the need to deal with root causes of problems; government has to go deeper and become more efficient in using resources to help build stronger communities so we can play a role there by partnering with government – we have to be able to show our impact, have evidence of our impact so funders can see their investment is paying off”

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KEY STRATEGIC QUESTION: HOW AND WHERE TO GROW?

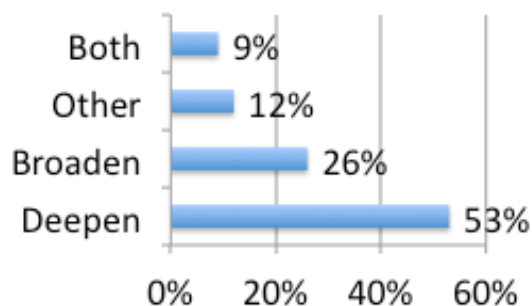
Executive Summary:

- ☐ Over half of stakeholders support deepening current programs in current geographies as the approach to growth
- ☐ If AVLF were to expand geographically: Dekalb, Clayton and Gwinnett were highest
- ☐ If AVLF were to expand its demographics: Immigrant/Non-English speaking (especially Hispanic) were highest
- ☐ If AVLF were to expand its programs: Domestic Violence and Saturday Lawyer programs were highest priorities for growth. Stakeholders have specific ideas as to how to grow
- ☐ For funding sources to support growth, Stakeholder feedback captured three big themes (specific ideas were also captured):
 - Outside of the legal community
 - Outside of government sources
 - Repackage or positioning our services to appeal to broader funding sources

Growth Question Detail

AVLF is interested in understanding growth opportunities; both emerging community needs and funding to support those needs. In your opinion, AVLF is best positioned to:

- Broaden their services with new programs, geographies or demographics
- Deepen their service by strengthening current programs, geographies and addressing unmet need
- Other (please specify)



“Other” responders clarified that we should:

- Do an assessment of programs to see if current programs meeting need before making the decision
- Desire that growth be slow, organic and strategic
- Needs a PR “boost” to attract lawyers

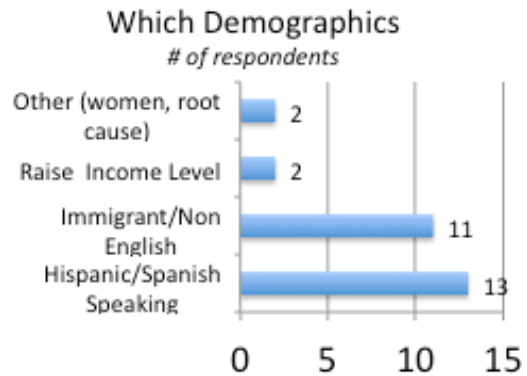
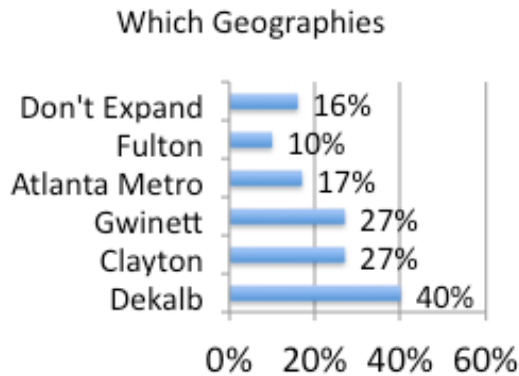
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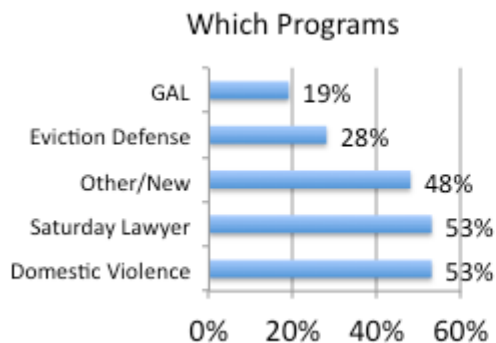
If AVLF were to deepen or broaden, on which client communities do you think we are best positioned to do so?

- Which geographies?
- Certain client demographics?



If AVLF were to deepen or broaden, with which programs do you think we are best positioned to do so?

- Saturday Lawyer
- Eviction Defense
- Domestic Violence
- GAL
- Other/New



"Other" responders clarified:

- Social Security and Veterans benefits
- Family court beyond intimate partners
- Raise the income threshold. Low Bono gap/middle class
- Creditor/College Loans
- Immigration
- Auto Repossession
- Address the root causes of inequity
- Juvenile court
- Regular training at firms for new lawyers

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Based on the communities and programs you identified above, what sources of funding do you recommend? How might AVLF pursue further?

Ranked roughly in order

1. Grants (alone and with partners)
2. Foundations (including corporate and national)
3. Corporations
4. Partnerships (in non-profit and elsewhere)
5. Individual donations (including lawyers)
6. Law firms
7. In-Kind Donations
8. Social Events

Summary of Ideas for Funding

Grants, Partnership & Other Sources

- Violence Against Women Act
- Open Society Foundation
- United WayFord Foundation
- Kaiser Foundation
- Valerie Porter at the Foundation Center
- Governors office
- Dept of Community Affairs
- DHS
- Have a large firm “adopt” a program
- Small donors like faith communities, small local businesses (hair salon, hardware)
- Wal-Mart, Publix, Home Depot, Tech Companies

Communication:

- Make public how much firms give to encourage individual donations
- Raise visibility and awareness by meeting with key target organizations 1 x year for volunteers and donations
- Repackage our programs and services to tailor to specific grant opportunities and/or appeal to a broader spectrum of funders (impact on children, example: cancer & AIDS for Legal Aid)
- Understand the link between our current mission and corporate foundation criteria
- Shift pitch focus on specific programs
- Marketing surveys of individual donors to understand themes/motivation
- Target themes around justice and equality to resonate with individual donors

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BRAND, IMAGE AND POSITIONING

What other organizations do you think offer similar work and programs to AVLF? (rank order):

- ☐ Atlanta Legal Aid (ALAS) – 58%
- ☐ Georgia Legal Services – 28%
- ☐ Dekalb Volunteer Lawyers Foundation – 14%
- ☐ Pro Bono Partnership – 14%
- ☐ Innocence Project

What makes AVLF different from these organizations?

- ☐ Doing work through Volunteer lawyers (vs staff attorneys)
- ☐ Income levels (for Consumer and no income limits for DV)
- ☐ Programs: more specific programs (versus broader offerings of others). Saturday Lawyer program
- ☐ Focus areas (subject matter expertise), scope of services and types of cases are a differentiator
- ☐ Presence, brand, better name recognition and leadership reputation in the pro bono community
- ☐ Support of the legal community

Which AVLF programs are you familiar with? (rank order):

- ☐ Saturday lawyer
- ☐ Domestic violence
- ☐ Landlord tenant
- ☐ Guardian ad litem

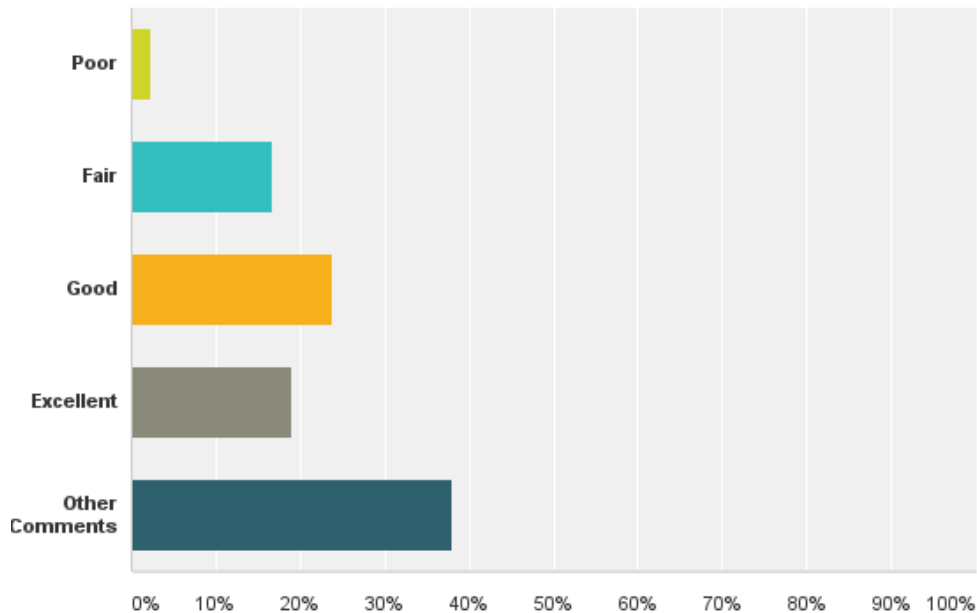
What words would you use to describe AVLF? (rank order):

- ☐ Effective, Committed, Compassionate, Needed, Amazing, Marty Ellin, Pro Bono, Good People, Equal Access to Justice, Necessary, Respected, Smart

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How effective is the name “Atlanta Volunteer Lawyers Foundation”?

- ☐ 100% awareness of name among stakeholders
- ☐ Strong effectiveness – over 50% think it’s “good” or “excellent”



- ☐ What are the limitations of the name?
 - No limitations: the name is good and has equity, recognition
 - “Foundation” makes it sound like you give money, not get money
 - Doesn’t communicate what we do, just who volunteers
 - Sets Geographical limitation
- ☐ What name suggestions do you have?
 - Many stakeholders like and wouldn’t change the name
 - Some said “proceed with caution and do more research”
 - Most popular suggestion was “Atlanta Volunteer Lawyers”
 - Some suggested using the acronym AVLF but not the full name

How do you keep updated with AVLF? (rank order):

- ☐ Marty
- ☐ Emails
- ☐ Board meetings
- ☐ Staff
- ☐ News
- ☐ Daily Report

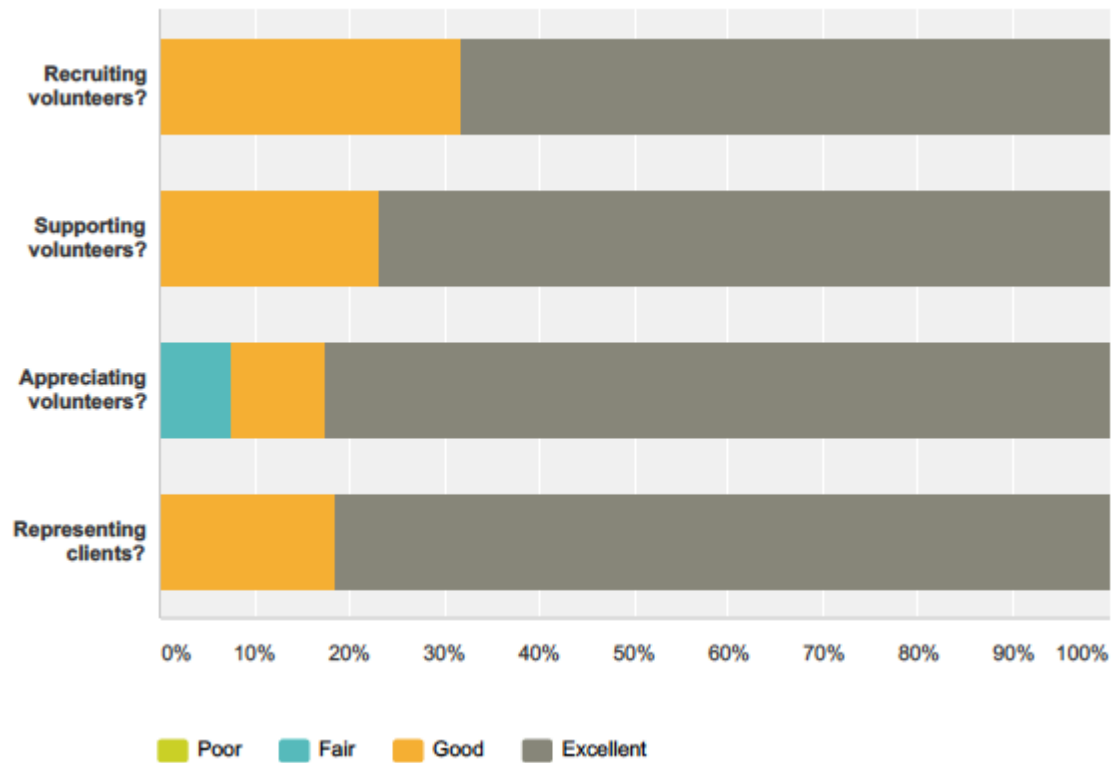
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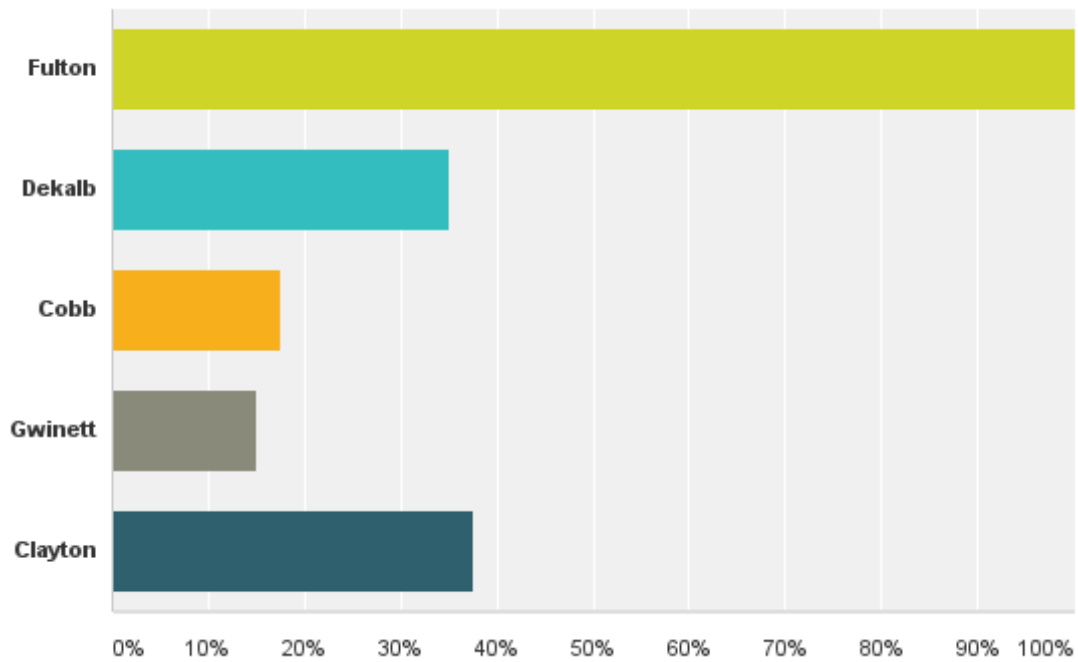
How effective is AVLF at the following?

- ☐ AVLF is seen as “excellent” or “good” at recruiting, supporting, and appreciating volunteers and representing clients.



What is your understanding of the geographic areas AVLF serves?

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APPENDIX D: AVL F 2020 STRATEGY SCREEN

AVLF 2020 Strategy Screen:

Criteria for Initiation and Retention of Programming

This “Screen” is intended to guide a disciplined evaluation of all potential and existing programs. While the discussion does not have to be scripted or mechanical, the Screen contemplates a specifically-ordered conversation and evaluation that should generally progress as outlined.

Mission and Strategic Plan Alignment: Absent the most extraordinary circumstances, only programs aligned with our mission and strategic plan should receive further consideration. To assist in evaluating the connection between the program and AVLF’s Mission and Strategic Plan, consider the following questions: *Is there a connection to our mission and strategic plan? Would the program make families safer or more economically stable? Does it complement our current work?*

The Need: Given AVLF’s limited resources, it should give further consideration only to programs with a high “ranking” in terms of need. If the ranking is high, the inquiry should continue. If not, the program should not be adopted. To assist in evaluating the need, consider the following questions: *What is the degree of need? How fundamental is the need (safety, housing, etc.)? How severe are the consequences if the issue is left unaddressed? What is the longevity of the need? Is another service provider adequately addressing this need? Is there a market for the cases involved, such that private lawyers could adequately address the issue?*

Impact: Where there is a strong need for a program, AVLF should give further consideration only if the program would have a meaningful impact. High rankings in “Need” and “Impact” are not sufficient; the inquiry must continue. To assist in evaluating the impact of the program, consider the following questions: *Does the program have the potential to make a real difference to the stated need? Does it have the potential to change lives? How many people will it affect? What would happen in the absence of the program? Is there potential for a deeper impact for our current client base? Would the program result in outcomes we can measure?*

Funding: For a program that can be supported with current staff, consider whether it would open up new funding opportunities (which weighs in favor of adopting the program). For programs requiring new staff, the inquiry should be concrete: research potential government and foundation support; get funding partners committed in principal; and confirm AVLF’s time and ability to pursue them. A high “score” on this criteria warrants approval of the pursuit of new funding, not implementation of the program. Finally, even where there is funding for implementation, AVLF should rarely approve a program unless there is a concrete, achievable plan for sustained funding. Questions: *Can we support the program with current funding? If not, is there other funding available? Either way, does the program open doors for new funding? Will funding be sustainable? Are there other sources for continued, sustained funding? What are the restrictions on any new funding? Is there competition for funding in this area?*

Staffing: If the program cannot be implemented under current staffing levels without detracting from current services, or if responsibly managing the program requires expertise we do not currently have, AVLF should not consider it further unless it can secure funding to support additional staff or training or both. Either way, proceed to the “Funding” inquiry to explore possible new funding opportunities and sustainability. Questions: *Do we have enough staff, skills and expertise (including language access issues) and time, including impact on management’s time? Will using current staff detract from current programming? Are staff receptive to the program?*

Volunteer Fit: Ultimately, high “scores” on all criteria to this point will not support adding a program that is a poor fit for volunteers. AVLF should not adopt a program if it cannot expect to consistently recruit, train and supervise an adequate pool of volunteers to support the program. Where a specific volunteer pool has already committed to take the program on as a “signature project” or otherwise, we must have confidence that new volunteer pools can be recruited as the program grows or initial support fades. To assist in evaluating the “volunteer fit” of the program, consider the following questions: *What is the interest level of volunteer lawyers to do the work generally? Are there particular firms or groups that have expressed interest or that would otherwise be a compelling fit? How difficult are the related types of cases? Is the position we would be taking controversial? Does the client base present a high degree of challenges? How easy/difficult will it be to recruit, train and support volunteers? Is the need and the potential impact compelling to volunteers?*

Marketability: This factor would provide additional weight but is not determinative. Questions: *Are particularly compelling stories likely? Is the program and its impact “accessible” to the general public and would the press be interested? How “attractive” is the program from a branding and marketing perspective? Could it be leveraged to build and expand our brand – specifically for fundraising and marketing? Does the program represent a particular opportunity to expand our brand beyond the legal community? Conversely, would it present risks to our brand?*

Supportive of the Courts: Another factor that would provide additional weight; not determinative. Questions: *Would the program ease the burden on the courts or judges or otherwise inure to the benefit of either? Do the courts support the program?*

Regarding Retention of Current Programs: AVLF should use this Screen to evaluate current programs – which could include specific aspects of current programs (e.g. areas of substantive coverage) – on a periodic basis (the presumption is annually). For “legacy” programs (e.g., Saturday Lawyer), AVLF will carefully consider the program’s history and impact and give due weight to the community’s specific reliance on the program.

DECISION

APPENDIX E: STRATEGIC ROADMAP

AVLF 2020: Strategic Plan 2015-2020



Mission

Creating safe and stable homes and families
by inspiring attorneys to fight for equal justice

Vision

AVLF leverages the full power and resources of the legal community
so when low-income Atlantans stand up
to demand safe and stable housing,
to insist on pay for an honest day's work, or
to break free from domestic violence,
a lawyer always stands with them.

Strategic Intent

Grow by **deepening** and **strengthening** our current programs
for greater **impact** and **relevance** in the community

Strategies

Scale and strengthen
our **organization** to
attack growing needs
proactively

Recast and grow
funding to be
balanced, sustainable
and diverse

Serve more people
more holistically by
aggressively
deepening and
strengthening our
programs

Clarify and
communicate the
AVLF **brand** to
amplify our mission
to all audiences

Build a coordinated approach to strategic **relationships & partnerships** to support all strategies

Key	Current Priority	Initiated & Ongoing	Achieved/Completed
Strategies	Recast and grow funding to be balanced, sustainable and diverse	Scale and strengthen our organization to attack growing needs proactively	Serve more people more holistically by aggressively deepening and strengthening our programs
	Clarify and communicate the AVLF brand to amplify our mission to all audiences		
	Build a coordinated approach to strategic relationships & partnerships to support all strategies		
Initiatives (as of 8.20.2015)	Strengthen AVLF development office with new Development Director and support staff		Create Marketing Director position
	Continue to diversify board composition to support efforts to recast and grow funding	Focus on deepening reach and impact of current housing and domestic violence work	Develop professional social media strategy
	Increase board-member assisted fundraising	Make targeted hires of attorneys, social workers and program staff to solidify and strengthen current programs	Better utilize client stories, storytelling and videos
	Aggressively pursue program-specific foundation funding	Help strengthen court self-help center and create director-level position to manage court-based pro bono services	Increase media coverage in non-legal outlets
	Increase support from local corporations and related foundations		Position board members, volunteers and staff as thought-leaders
	Jointly pursue funding opportunities with community partners	Better track, report and act on data that measures outcomes and impact	Increase awareness through board-led ambassador effort.
	Establish planned-giving initiative to fund new AVLF endowment	Develop strategy screen to guide creation and retention of programs	Leverage marketing efforts of firm and corporate partners
		Use targeted, data-driven outreach and improve programming to increase access and expand reach of housing work.	Expand holistic services to domestic violence survivors, including representation for divorces and access to social services

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