Title:
Oh the Places That You'll Go! Strategic Pro Bono Planning Roadmap

Presenters:
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Julia Wilson, OneJustice, San Francisco, CA

How can you get to Great Places without a road map? Participants, with the help of Dr. Seuss’ library & facilitators, will start outlining the road map, including pitfalls, to creating a strategic pro bono plan that’s intentional, collaborative & transformative for the local pro bono ecosystem.
Step 1: “Oh, the Places You’ll Go!”
Map the local pro bono ecosystem: note the entities in the local system, what roles they are likely to play, is there a logical lead entity to facilitate the planning process? How will the group make decisions?

Step 2: “You’ll look up and down streets. Look ‘em over with care.”
Environment Scan: note the opportunities and threats in the broader environment and their likely impact on the local pro bono ecosystem.

Step 3: “You have brains in your head. You have feet in your shoes. You can steer yourself any direction you choose.”
(A) Assess the Current System:
1. Create a map of the current legal services delivery system: what entities are providing services in what subject matter areas and at what levels of service? Use the continuum of legal services if helpful.
2. Using that map of legal services, identify where pro bono services are part of the delivery system.
3. What quantitative data do you have about the system? Qualitative data?
Step 3 continued:
(B) Stakeholder Feedback (Data Collection): *note the stakeholders you can contact for data collection to help assess the current pro bono ecosystem, and whether you would ask to participate in a survey, focus group, or one-on-one interview (or all three)?*

Step 4: “It’s open there in the wide open air.”
Set the Vision: *based on your mapping of the current system and analysis of the stakeholder feedback, what is the shared vision for the pro bono system moving forward? [Note: this can be a shared priority for the region, or collaborative strategies that further the individual goals of the separate entities in the system.]*

Articulate the strategies: *what does the system need to do to get to that vision? What structures, systems, actions, and tactics are needed?*

Test prototypes for additional feedback: *design prototypes (descriptions or other tests) and pilot projects to gather feedback from stakeholders*

Step 5: “Be sure where you step. Step with care and great tact and remember that Life’s a Great Balancing Act.”
Create the Plan and Timeline: *articulate an operational plan with goals, objectives, and timelines/deadlines. Assign clear roles.*
Step 6: “On and on you will hike. And I know you’ll hike far and face up to your problems wherever they are.”

Implement, Evaluate and Check-In: this is the on-going process of implementing the plan created in Step 5. Be sure to include After Action Report (AAR) moments for collective debriefing and learning after major implementation points. Use shared process evaluation tactics to record decisions, modifications, and learning along the way.

Your Notes: Tips and Pitfalls

What is ONE THING you can implement from this session? What is one thing you will do on MONDAY as a result of this session?

As Dr. Seuss said, “KID, YOU’LL MOVE MOUNTAINS!”
OH THE PLACES THAT YOU'LL GO!

STRATEGIC PRO BONO PLANNING ROADMAP
FACILITATORS

ERICKA GARCIA

JULIA WILSON

[Logos for Collaborative Justice Partners and One Justice]
GOALS FOR SESSION

• Present a road map for regional, multi-agency pro bono strategic planning

• Test practical application to your pro bono ecosystem
COMMON STRATEGIC PLANNING PROCESS FOR INDIVIDUAL ORGANIZATIONS
STRATEGIC PLANNING STEPS

• Plan to Plan
• Environmental Scan
• Assess Where You Are – Get the Meta-View
• Vision the Future – Set Your Strategies
• Create Operational Plan: goals, objectives, and timeline
• Implement, Evaluate and Check-In
THE ROAD MAP

HOW TO APPLY THOSE STRATEGIC PLANNING CONCEPTS TO A REGIONAL PRO BONO ECOSYSTEM
PLAN TO PLAN:
MAP YOUR ECOSYSTEM
“OH, THE PLACES YOU’LL GO!”

• Who will be involved?
• What roles will they play in the process?
• Who is your lead entity to facilitate the planning process?
• The importance of trust
ENVIRONMENTAL SCAN

"YOU’LL LOOK UP AND DOWN STREETS.
LOOK ‘EM OVER WITH CARE”

• Get a meta view on the broader context
• Opportunities & Threats: in the broader environment
• Most Common areas to consider:
  • Client needs (unmet, new, changes in law)
  • Funding (increase or decrease)
  • Business context (changes to private sector context)
  • Other Externalities (pressures or positives)
ASSESS WHERE YOU ARE:
GET THE META-VIEW
(DATA COLLECTION & STAKEHOLDER FEEDBACK)

“YOU HAVE BRAINS IN YOUR HEAD.
YOU HAVE FEET IN YOUR SHOES.
YOU CAN STEER YOURSELF ANY DIRECTION YOU
CHOOSE.”
THE META-VIEW

PART 1: DATA COLLECTION
MAP CURRENT PRO BONO SERVICES IN THE REGION

• Map overall legal services delivery
  • What subject matter areas?
  • What types of levels and services?
• Map pro bono involvement in delivering services
  • Pro Bono used in what areas?
  • How effectively?
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<th>Full Scope Rep.</th>
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- **Legal Aid of Westeros**
- **Narnia Pro Bono Project**
- **Hogsmead Legal Services Center**
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- ● Green: Legal Aid of Westeros
- ●● Red: Hogsmead Legal Services Center
- ●●● Blue: Narnia Pro Bono Project
- ●●●● Purple: Pro Bono Project
THE META-VIEW

PART 2: STAKEHOLDER FEEDBACK

• How well is the system working?
• Where are the bright spots?
• Where are the weaker spots or gaps? What impact do they have?
• Get feedback (surveys, focus groups, and interviews)
• Types of stakeholders: Law firms, In-house counsel, Law Schools, Individual volunteers
VISION THE FUTURE
AND
ARTICULATE THE STRATEGIES

“IT’S OPEN THERE IN THE WIDE OPEN AIR.”
VISION THE FUTURE

SET THE VISION

• What is the shared vision for pro bono delivery for the future? Pro Bono used in what areas?

• The VISION can be composed of the aggregated goals of the individual entities, OR can be a shared regional priority setting.
VISION THE FUTURE

ARTICULATE THE STRATEGIES
TO GET TO THAT VISION FOR THE FUTURE

• What does the system need to do to get there?

• What structures need to be in place?

• What does each organization need to do?
VISION THE FUTURE

PROTOTYPING

Importance of creating prototypes and getting additional stakeholder feedback
PLAN TO IMPLEMENT: GOALS, OBJECTIVES, AND OPERATIONALIZATION

“BE SURE WHERE YOU STEP. STEP WITH CARE AND GREAT TACT AND REMEMBER THAT LIFE’S A GREAT BALANCING ACT.”
PLAN TO IMPLEMENT

CREATE IMPLEMENTATION TIMELINE

• What goals, objectives, structures and deadlines
• Plot along a timeline
• Assign clear roles to organizations
• How will you evaluate success along the way?
• Use of process evaluation
IMPLEMENT, EVALUATE, AND CHECK-IN

“ON AND ON YOU WILL HIKE. AND I KNOW YOU’LL HIKE FAR AND FACE UP TO YOUR PROBLEMS WHEREVER THEY ARE.”
• Implement the plan created

• Build in concrete “check in” moments in the timeline

• Importance of AAR (after action reports) to distil and record the learning along the way.
EXAMPLES, TIPS, AND PITFALLS
THANK YOU!

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