

## **1. Executive Summary**

In July 2025, Shore Legal Access held a one-day strategic planning retreat to review its expiring 2023–2025 strategic plan and begin shaping the next one. The Board of Directors, Executive Director, and staff assessed progress, organizational needs, and priorities for the upcoming planning cycle. Under Meredith Girard’s leadership, the 2023–2025 plan guided the organization through major transitions increasing organizational capacity through improved service delivery, systemic legislative advocacy, and improved Board of Directors engagement and governance. The 2026–2029 Shore Legal Access Strategic Plan outlines a comprehensive roadmap to continue expansion of organizational capacity, advance governance, enhance financial sustainability, and promote innovation and inclusion across Shore Legal Access. The plan organizes key priorities across several committees— Governance, Program, Finance, and Inclusion, Diversity, Equity and Access (IDEA) - and establishes clear timelines, success metrics, and structures for accountability.

## **2. Mission Statement**

Shore Legal Access supports and assists individuals and families who are unable to afford representation in civil matters and to provide connections to community services.

## **3. Vision Statement**

All people are empowered to resolve civil legal issues.

#### 4. Core Values

- Dignity
- Service
- Respect
- Integrity
- Collaboration
- Professionalism

#### 5. Environmental Scan (SWOT Analysis)

##### **Strengths**

SLA is built on a foundation of excellence in service delivery and strong organizational integrity. At its core, the organization consistently delivers high-quality legal services that make a meaningful difference for clients. This is made possible by dedicated, skilled, and professional staff who bring both expertise and commitment to their work. Complementing the staff is a diverse, community-connected, and service-oriented Board of Directors that reflects the communities SLA serves.

The organization also enjoys a strong reputation and credibility with partners and funders — an asset that has been cultivated over time and is difficult to replicate. This credibility has translated into excellent success with foundation and institutional fundraising, providing a reliable and sustained base of funding for core services. Rounding out these strengths is a committed group of volunteer attorneys who, though small in number, are effective and deeply invested in SLA's mission.

##### **Weaknesses**

Despite its strengths, SLA faces several internal constraints that limit its reach and operational flexibility. The volunteer attorney network, while valuable, is thin in rural communities, leaving gaps in geographic coverage where legal needs may be acute. More broadly, the

organization's capacity to deliver certain services is directly constrained by funding and staffing levels, creating a ceiling on how many clients can be served.

A structural challenge compounds this: SLA's funding model is heavily tied to direct service delivery, leaving very little room for investment in general operations, communications, and administration. This makes it difficult to sustain strategic communications efforts or build the internal infrastructure needed for long-term growth. Finally, board member time limitations may reduce the board's capacity to fully support SLA's expanding work, a risk that grows as the organization's needs increase.

### **Opportunities**

There are meaningful opportunities available for SLA to diversify and strengthen its long-term position. On the financial side, diversifying revenue through planned giving and cultivating an individual donor base could reduce reliance on any single funding stream and build a more resilient financial model. Similarly, securing new funding sources to address changing community needs would allow SLA to continue to respond nimbly to emerging challenges.

Programmatically, SLA has an opportunity to expand capacity and improve accessibility by developing community justice workers — an approach that can extend the organization's reach without requiring proportional increases in attorney staffing. Internally, investing in staff and board development focused on leadership succession would position SLA for continuity and stability. Taken together, these opportunities point toward a larger strategic goal: long-term financial planning that builds the organizational reserves and flexibility needed to weather economic uncertainty.

### **Threats**

SLA operates in an external environment shaped by significant and overlapping pressures. The broader financial landscape — encompassing the national economy, state budget decisions, and their downstream effects on communities, businesses, and nonprofits — poses ongoing uncertainty for both the clients SLA serves and the organization's funding environment. This is compounded by the particular funding challenges in rural areas, where resources are especially limited.

Workforce dynamics present another serious challenge. The pool of candidates for staff positions is constrained, and SLA's funding structure further limits the types of roles it can offer, making recruitment and retention for certain positions more difficult. At the federal level, policy shifts have a far-reaching impact on SLA's client communities — from threats to public benefits and immigrant populations to reduced

federal support flowing to nonprofit and civil legal services partners. Finally, the fundraising landscape is increasingly competitive, with high donor competition across the nonprofit sector and community-based funding sources that are both scarce and shrinking.

Mission creep is also a potential threat. As unmet legal needs in the community continue to grow, SLA faces the risk of expanding services beyond its capacity, core mission, and strategic focus. Careful governance and program oversight are needed to ensure services remain mission-aligned and that we do not re-enter service areas intentionally phased out. Ongoing alignment with the strategic plan is critical to maintaining focus and sustainability.

## **6. Strategic Priorities / Goals**

### **1. Strengthen Financial Sustainability & Fundraising Capacity**

Shore Legal Access will build long-term financial stability by expanding and formalizing its fundraising infrastructure and activities. Key initiatives include forming a dedicated Fundraising Committee, establishing a strategic fund with a local Community Foundation, and launching a legacy giving program to cultivate future donor commitments.

### **2. Enhance Governance & Leadership Development**

The organization will invest in strong Board governance through improved leadership development, streamlined committee structures, and updated policies. Priorities include ongoing Board recruitment, implementing a Board mentorship program, conducting a comprehensive review of committee structure, and providing annual professional development to strengthen leadership capacity among staff and Board members.

### **3. Expand Innovation & Community Impact**

To increase service reach and deepen engagement, Shore Legal Access will continue developing community partnerships, especially targeting organizations that serve populations we have been challenged to reach. Priorities will include developing innovative approaches to service delivery, developing responsive solutions to real-time client and community needs, tracking and developing additional metrics to measure Impacts and outcomes.

#### 4. Advance Inclusion, Diversity, Equity & Accessibility (IDEA)

The organization will advance an equitable and inclusive culture by honoring individual differences and fostering dignity, respect, and belonging grounded in social justice. Priorities include implementing services, systems, and tools that support all service recipients, staff, volunteers, and leaders.

### 7. Strategic Goals & Metrics

#### Goal 1 - Lead Committee: Governance

Cultivating leadership within the organization is essential to fulfill the ongoing mission of Shore Legal Access and maintain the organization’s stability. The effectiveness of Shore Legal Access as a nonprofit organization depends upon the strength of its people and leadership.

#### Goal 1.1 — Cultivate Leadership Within Shore Legal Access

SMART Component	Description	Responsible Parties
<b>Specific</b>	Implement mentorship pairing for new board members; provide governance, advocacy, and engagement training; establish clear leadership advancement pathways.	Governance Committee; Board Chair; Executive Director
<b>Measurable</b>	<b>100% of new board members paired with mentors annually; at least 2 board training sessions per year; minimum of 2 board members step into chair/co-chair roles annually.</b>	Governance Committee; Training Lead
<b>Achievable</b>	Leverages existing board structures and training resources.	Governance Committee
<b>Relevant</b>	Strengthens organizational leadership and board effectiveness.	Board Leadership
<b>Time-Bound</b>	FY26–FY28	Governance Committee

**Goal 1.2 — Review & Adjust Committee Structure**

<b>SMART Component</b>	<b>Description</b>	<b>Responsible Parties</b>
<b>Specific</b>	Assess committee composition/responsibilities; identify overlap and opportunities to merge, sunset, or restructure; provide chair orientation; develop annual work plans; update bylaws as needed.	Governance Committee; Board Chair; Executive Director
<b>Measurable</b>	<b>Completion of committee assessment report;</b> Board approval of recommended changes; <b>annual work plans</b> developed for all committees; updated bylaws adopted by Board vote.	Governance Committee; Board Secretary
<b>Achievable</b>	Feasible through committee review processes and Board action.	Governance Committee
<b>Relevant</b>	Ensures committees are structured for effectiveness and alignment with organizational goals.	Executive Director; Board Leadership
<b>Time-Bound</b>	FY26 (Assessment & Recommendations); FY27 (Implementation)	Governance Committee

### Goal 1.3 — Strengthen Policy Development

SMART Component	Description	Responsible Parties
<b>Specific</b>	Assign staff/board members to review existing policies; develop recommendations for updates or new policies aligned with community needs.	Governance Committee; Assigned Staff; Executive Director
<b>Measurable</b>	Comprehensive policy review completed; <b>at least 2 policy updates or new policy recommendations submitted annually; ≥70% Board approval rate.</b>	Governance Committee; Policy Review Team
<b>Achievable</b>	Utilizes internal review team and established Board approval processes.	Assigned Policy Review Team
<b>Relevant</b>	Ensures policies support strong governance and community-aligned operations.	Board of Directors
<b>Time-Bound</b>	FY26–FY27, then ongoing	Governance Committee

### Goal 1.4 — Advance Innovation & Community Outreach

SMART Component	Description	Responsible Parties
<b>Specific</b>	Explore pilot programs (tech-assisted intake, remote representation, multilingual access); deepen community collaboration to assess needs and expand outreach.	Executive Director; Program Director; Outreach Coordinator
<b>Measurable</b>	At least <b>2 pilot programs evaluated annually; 5 new community partnerships established per year.</b>	Program Director; Outreach Coordinator
<b>Achievable</b>	Builds on existing partnerships and internal capacity for pilot testing.	Program & Outreach Teams

SMART Component	Description	Responsible Parties
<b>Relevant</b>	Increases reach, innovation, and community impact.	Executive Leadership; Program Committee
<b>Time-Bound</b>	FY26–FY28	Program Director

## Goal 2 - Lead Committee: Program

Provide no cost or reduced fee legal assistance to all residents of the Eastern Shore who qualify and seek assistance from Shore Legal Access.

### Goal 2.1: Implement Access to Legal Assistance Across the Eastern Shore

SMART Component	Description	Responsible Parties
<b>Specific</b>	Provide free or low-cost legal assistance to income qualified residents in key areas (housing, family law, life planning, consumer debt). Strengthen eligibility criteria and outreach to underserved/diverse communities and those vulnerable to evolving policy actions.	Executive Director; Program Director; Outreach Coordinator
<b>Measurable</b>	Meet <b>25% of legal aid need by 2036</b> . Track quarterly metrics: inquiries, cases accepted, types/levels of service. Collect and analyze client satisfaction surveys quarterly.	Data & Evaluation Lead; Program Manager; Intake Team
<b>Achievable</b>	Partner with community groups, use technology for remote consultations, and conduct <b>10 clinics/workshops per year</b> .	Community Partnerships Manager; Legal Staff; Volunteer Coordinator

SMART Component	Description	Responsible Parties
<b>Relevant</b>	Advances mission to ensure equitable access to essential legal services and support community stability.	Executive Leadership; Board Program Committee
<b>Time-Bound</b>	Achieve <b>25% need benchmark by 2036</b> ; implement <b>10 clinics per year</b> .	Program Director; Clinic Coordinators

**Goal 2.2: Respond to the Legal Needs of Communities**

SMART Component	Description	Responsible Parties
<b>Specific</b>	Address priority needs such as heirs property, consumer debt, and emergency planning. Work with stakeholders to identify and respond to emerging needs with innovative service delivery models.	Program Director; Community Engagement Lead; Pro Bono Committee Liaisons
<b>Measurable</b>	Conduct an <b>annual needs assessment</b> and address at least <b>one emerging community need per year</b> in collaboration with pro bono committees and community partners.	Evaluation Lead; Program Managers; Community Partners
<b>Achievable</b>	Utilize remote tech, virtual consultations, and mobile/popup clinics. Expand volunteer recruitment and staff training to support new service models.	Volunteer Coordinator; Evaluation Lead; Office Manager
<b>Relevant</b>	Supports mission to meet evolving legal needs and expand equitable access to justice.	Executive Director; Program Committee
<b>Time-Bound</b>	Annual needs assessment; respond to at least <b>one new need each year</b> .	Program Director; Pro Bono Committee Chairs

**Goal 2.3: Build Capacity Through Attorney & Non-Attorney Resources**

<b>SMART Component</b>	<b>Description</b>	<b>Responsible Parties</b>
<b>Specific</b>	Increase organizational capacity by recruiting more volunteers, expanding geographic reach, participating in tiered legal service initiatives, and supporting attorney pipeline development. Advocate for policy and funding reforms.	Executive Director; Volunteer Coordinator
<b>Measurable</b>	Conduct <b>4 remote clinics per year</b> in underserved areas. Lead and participate in statewide task forces and committees. Advocate for <b>2 policy reforms annually</b> .	Legal Director; Community Justice Worker (CJW); Executive Director
<b>Achievable</b>	Leverage technology, partnerships, and existing leadership roles within statewide coalitions.	Evaluation Lead; Program Director; Coalition Partners
<b>Relevant</b>	Ensures long-term sustainability of legal aid capacity and strengthens access to justice.	Executive Leadership; Board of Directors
<b>Time-Bound</b>	Annual objectives and review cycle.	Executive Director

**Goal 3 - Lead Committee: Finance**

Ensure that human and financial resources are available to make legal representation accessible to all residents of the Eastern Shore who are qualified and seek assistance.

**Goal 3.1: Develop a 3-Year Budget Plan**

<b>SMART Component</b>	<b>Description</b>	<b>Responsible Parties</b>
<b>Specific</b>	Create a comprehensive 3-year budget plan that replaces single-year budgeting and aligns resources with organizational priorities.	Finance Committee; Executive Director
<b>Measurable</b>	<b>3-year draft budget plan</b> completed and presented to the Board for review.	Finance Committee
<b>Achievable</b>	Builds on existing financial reports, historical data, and staff/Board input.	Finance Committee; Executive Director
<b>Relevant</b>	Supports long-term sustainability and strategic resource allocation.	Board; Finance Committee
<b>Time-Bound</b>	Completed by FY27.	Finance Committee; Executive Director

**Goal 3.2: Implement Financial Literacy & Transparency Initiatives**

<b>Specific</b>	Deliver a financial literacy workshop and implement quarterly financial updates for staff and Board members.	Finance Committee; Executive Director
<b>Measurable</b>	<b>Financial literacy workshop delivered; at least one training delivered annually; quarterly updates</b> instituted.	Finance Committee; Executive Director
<b>Achievable</b>	Uses existing financial reports and internal expertise.	Finance Committee
<b>Relevant</b>	Increases transparency, builds internal capacity, and supports informed decision-making.	Executive Director; Board
<b>Time-Bound</b>	Workshop developed within 6 months; quarterly updates begin immediately thereafter.	Finance Committee; Executive Director

**Goal 3.3: Establish a Fundraising Committee & Expand Fundraising Capacity**

<b>Specific</b>	Create a dedicated fundraising committee and establish relationships with community foundations to support fundraising growth.	Board; Executive Director
<b>Measurable</b>	<b>Board decision on committee structure within 3 months; meetings held with community foundations;</b> progress documented.	Board Leadership; Executive Director
<b>Achievable</b>	Supported by existing Board capacity and foundation partnerships already in development.	Board; Finance Committee
<b>Relevant</b>	Enhances long-term financial stability and diversifies revenue streams.	Board; Finance Committee; Executive Director
<b>Time-Bound</b>	Committee established within 6 months; foundation meetings within 1 month.	Board; Executive Director

**Goal 3.4: Advance Legacy Giving & Community Foundation Partnerships**

<b>Specific</b>	Develop a legacy giving framework and explore establishing funds with Mid-Shore Community Foundation and the Community Foundation of the Eastern Shore.	Executive Director; Finance Committee
<b>Measurable</b>	<b>Draft legacy giving plan; documented partnership proposals;</b> meetings scheduled and completed.	Executive Director; Finance Committee;
<b>Achievable</b>	Builds on existing conversations and external expertise from community foundations.	Finance Committee; Executive Director
<b>Relevant</b>	Supports long-term sustainability through planned giving and investment partnerships.	Board; Executive Director
<b>Time-Bound</b>	Legacy giving framework drafted within 12 months; foundation meetings held within 1 month.	Executive Director; Finance Committee

**Goal 4 - Lead Committee: Inclusion, Diversity, Equity and Access**

Guide and support the Organization in fulfilling its responsibilities to acknowledge and honor individual differences by fostering a culture of dignity, respect, and belonging for all service recipients, staff, volunteers, and leaders.

**Goal 4.1: Review and Determine IDEA Committee Structure (Standing vs. Ad Hoc)**

SMART Component	Description	Responsible Parties
<b>Specific</b>	Conduct a full review of the IDEA Committee’s structure, responsibilities, and alignment with SLA Bylaws, including implications of transitioning from a Standing Committee to an Ad Hoc Committee. Identify required governance steps, including whether a Board resolution is needed and impacts on Executive Committee membership.	IDEA Committee Chair; Governance Committee; Executive Director
<b>Measurable</b>	<b>Produce a written analysis summarizing bylaw requirements, committee charter implications, recommended committee structure, and necessary Board actions.</b> Present final recommendations to the Board.	IDEA Committee Chair; Governance Committee
<b>Achievable</b>	Leverages existing SLA Bylaws, current IDEA Charter, and collaboration with Governance and Executive Committees to determine appropriate committee designation and processes for structural change.	IDEA Committee; Governance Committee
<b>Relevant</b>	Ensures clarity of committee authority, alignment with governance standards, and supports effective oversight of IDEA priorities within organizational leadership structures.	Board of Directors; Governance Committee; IDEA Committee
<b>Time-Bound</b>	Complete review and recommendations within 6 months; present a proposed resolution to the Board during the next available meeting with quorum after completion.	IDEA Committee Chair; Governance Committee Chair

