

## LCL Three-Year Strategic Plan

July 1, 2025 to June 30, 2028

Year 1	July 1, 2025 – June 30, 2026
Year 2	July 1, 2026 – June 30, 2027
Year 3	July 1, 2027 – June 30, 2028

<b>Goal 1: Ensuring the Stability of LCL's Operation &amp; Governance</b>				
<b>Strategic Area "A": The Board</b>	<b>Action Items</b>	<b>Next Steps</b>	<b>Responsible</b>	<b>Milestone Status Update</b>
1.1 Composition and structure	1.1.1 Review committee structure & membership	N&G to review	N&G, Chair	Annual
	1.1.2 Define strategic goals for Board composition, including broad-based representation and skillsets.	Continue efforts	BD, N&G	Ongoing
1.2 Board duties and engagement	1.2.1 Maintain compliance with Charities Review Council standards and requirements	Review policies to ensure compliance every 3 years	ED, BD	Year 1, and every 3 years thereafter
	1.2.2 Ongoing review, implementation, and compliance with Council on Nonprofits Standards, as applicable	<ul style="list-style-type: none"> <li>Continue to share</li> <li>Enhance incoming Board training to better reflect Principles and Practices for Nonprofit Excellence</li> </ul>	ED, BD	Ongoing
	1.2.3 As needed, review LCL policies	Annual review	N&G, ED	Annual
	1.2.4 Define Board roles	<ul style="list-style-type: none"> <li>Define stakeholders (in particular, membership)</li> </ul>	N&G, Board	Year 1
	1.2.5 Evaluate the Executive Director per the Council of Nonprofit Standards requirements, including Executive Director salary	<ul style="list-style-type: none"> <li>Consider method of evaluation</li> </ul>	Board	Annual
<b>Strategic Area "B": Staff</b>				
2.1 Optimum staffing plan	2.1.1 Evaluate staff functions and needs	Continually	ED	Ongoing

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	2.1.2	Evaluate staff salaries & benefits/fringe benefits	Bi-annually (prior to 2-year budget submission)	ED	Annual	
	2.1.3	Growth areas: Fund development	Evaluate specific needs, create justification (see also Goal 4: Increase Diversify, & Stabilize LCL's Financial Resources)	ED, Exec. Committee, BD	Ongoing	
2.2	Succession planning	2.2.1	Understand ED duties	<ul style="list-style-type: none"><li>• Documentation</li><li>• Training</li></ul>	ED	Year 1
		2.2.2	Support leadership continuity	<ul style="list-style-type: none"><li>• Introduce new ED to stakeholders</li><li>• Joan to train new ED</li></ul>	ED	Year 1
Strategic Area "C": Strategic Positioning & Leadership						
3.1	Name & identity review	3.1.1	Consider broader name change	Board meeting	BD	Year 3
3.2	Build partner connections	3.2.1	Strengthen industry collaborations & address health & well-being	Continue efforts	ED, BD	Ongoing
		3.2.2	Continue partnerships with MSBA & other legal entities	Continue efforts	ED, BD	Ongoing
3.3	Maintaining LCL as a primary resource	3.3.1	Continue to solidify reputation as the go-to for lawyer well-being and support	Continue efforts	BD, ED	Ongoing
Measures of Success: <input type="checkbox"/> Year 1 <input type="checkbox"/> Year 2 <input type="checkbox"/> Year 3						

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<b>Goal 2: Identify, Provide, &amp; Direct Quality Services</b>				
<b>Strategic Area “A”: Services for the Individual</b>	<b>Action Items</b>	<b>Next Steps</b>	<b>Responsible</b>	<b>Milestone Status Update</b>
4.1 Individual	4.1.1 Ensure the continuity of high-quality direct services through the Executive Director transition	Ongoing	ED, BD	Ongoing
	4.1.2 Consideration of future needs strike force	Board Meeting	ED, BD	Year 2
	4.1.3 Consideration of success metrics	Board Meeting	ED, BD	Year 2
4.2 Groups	4.2.1 Support transitions across all ages, with an emphasis on senior lawyers and new leaders.	Ongoing	ED, BD	Ongoing
4.3 Founder’s Fund Policy	4.3.1 Review Founder’s Fund Policy	Cases & Interventions to review and bring to the Board	C&I, BD	Year 1
<b>Strategic Area “B”: Services for Organizations</b>				
5.1 Programming	5.1.1 Define and enhance well-being initiatives to meet the challenges of the profession.	Organizations now have well-being budgets that can be utilized to pay for (donate to, in the case of LCL) mental health and well-being programming	ED	Annually
5.2 Consulting	5.2.1 Consult with & provide support to organizations around what services LCL provides to individuals (employees, etc.)	Ongoing	ED	Ongoing
5.3 Feedback	5.3.1 Provide surveys after our in-house CLE programming	Develop	ED	Years 2 & 3
	5.3.2 Survey current and former clients	Develop	ED	Years 2 & 3

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Measures of Success:

- ☐ Year 1
- ☐ Year 2
- ☐ Year 3

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<b>Goal 3: Increase Visibility &amp; Understanding of LCL's Services</b>				
<b>Strategic Area "A": Education</b>	<b>Action Items</b>	<b>Next Steps</b>	<b>Responsible</b>	<b>Milestone Status Update</b>
7.1 Strengthening the understanding of LCL's services and benefits	7.1.1 Evaluate proactive and restorative programming types	Continual	ED, Staff, E&O	Ongoing
	7.1.2 Aligning our website with the strategic plan and services that we offer	Review changes to be made	ED, Staff	Year 2 or 3
	7.1.3 Restructure, refresh, and update LCL's website	Staff to spearhead	Staff	Year 2 or 3
	7.1.4 Telling LCL's story	Using marketing and branding to promote inclusivity and organizational value  Explore the possibility of testimonials that use full names  Review LCL promotion language & refresh testimonials in LCL's literature	BD, ED, Staff, E&O  E&O  E&O, Staff	Year 1  Year 1  Year 1
<b>Strategic Area "B": Outreach</b>				
8.1 Regional & Greater Minnesota focus	8.1.1 Establish task forces or committees for rural outreach	Create	BD, N&G, E&O	Year 1
	8.1.2 Include regional representatives and outstate reps	Obtain	BD, N&G, E&O	Year 3
8.2 Judicial focus	8.2.1 Tailor services and programming	Ongoing	ED, Staff	Ongoing
	8.2.2 Strengthen ties with the judiciary	Ongoing	ED, Staff	Ongoing

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8.3 Senior lawyer focus; Legal Professional focus; Families of lawyers focus; and Law students & young lawyers focus	8.3.1 Tailor services and programming	Ongoing	ED, Staff	Ongoing
Measures of Success: <input type="checkbox"/> Year 1 <input type="checkbox"/> Year 2 <input type="checkbox"/> Year 3				

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<b>Goal 4: Increase, Diversify, &amp; Stabilize LCL's Financial Resources</b>				
<b>Strategic Area "A": Funding and fundraising</b>	<b>Action Items</b>	<b>Next Steps</b>	<b>Responsible</b>	<b>Milestone Status Update</b>
9.1 Donating to LCL	9.1.1 Organizational gifts—Institutionalize breakfast fundraising	Ongoing	BD, ED, Events	Ongoing
	9.1.2 Individual gifts—Increase donor options, particularly legacy gifts	Ongoing	BD, ED	Ongoing
	9.1.3 Increase awareness and visibility of legacy gift-giving options	Ongoing	BD, ED	Ongoing
9.2 Fundraising	9.2.1 Diversify resources through investments	Investments	BD, ED	Ongoing
		Events	ED, Staff, Events	Ongoing
	9.2.2 Consider adding to development capacity (fundraising consultant)	Board Meeting	BD	Year 1
	9.2.3 Evaluate committee structure & consider inclusion of fundraising	N&G to review	N&G	Year 1
	9.2.4 Review & update fundraising plan	Events committee to review	BD, Events	Year 2
9.3 Financial Processes	9.3.1 Review financial processes and procedures	Ongoing	BD, ED, Treasurer	Annually
<b>Strategic Area "B": LSAC/SCAO Transition Management</b>				
10.1 Ensure smooth funding and operational transitions	10.1.1 Maintain & strengthen connection with the SCAO	Continual	ED	Ongoing
Measures of Success: <input type="checkbox"/> Year 1 <input type="checkbox"/> Year 2 <input type="checkbox"/> Year 3				