

# Strategic Planning for Self Represented Litigation Innovation

South Central Conference on Pro Se Litigation

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## Outline

- Perspectives on Strategic Planning
- The Two Parts of the Process
  - Deciding on the Direction of the Potential Plan
  - The Plan itself
- What Happens with the Plan –Using It as a Base
- Reporting Back

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## Perspectives on Strategic Planning

- The importance of models/laboratories
- The importance of diffusion and engagement
- The importance of motivation
- The importance of staffing
- The importance of leadership
- The importance of geographic strategy

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## The Three Parts

- Developing the Focus of the Potential Plan
- Planning to Plan
- Developing the Detail of the Potential Plan

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## Developing a Focus for the Potential Plan

- Where in the path to access to justice are those in need most likely to get “off the track?”
- What stakeholders are most likely to be interested in changing systems so that people will not get “off the track?”
- What stakeholders are critical to an approach and are they on board?
- The Problem – Stakeholder Grid: One View
- Planning to Plan

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## Planning to Plan

- Who is needed to plan
- What are the barriers to planning
- How to overcome those barriers

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## The Details of the Plan

1. What are the pro-se assistance programming needs you have identified and which are the highest priority?
2. What are you going to do to address your priority need(s) (i.e., what is your programming goal)?
  - What target group(s) will ultimately be served?
  - What kinds of services will be offered?
  - Are you going to start with a pilot program? If yes, give details.
  - If you plan to proceed without a pilot program, give details.
3. With whom will you collaborate to develop your program (e.g., individuals, organizations)?

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## The Details of the Plan

4. Where will the key strategic support come from, and how can it best be mobilized?
5. Which individuals or groups might be resistant to your plan?
  - What is your strategy for dealing with this reluctance?
6. What will it cost to establish your program?
  - What funds would you ideally like to have?
  - To what extent can you accomplish your goal with minimal funding, by, for example, shifting resources or collaborating with attorney volunteers, paralegals, law students, social service providers and others? Explain.

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## Details of the Plan

7. What staff will you need for your planned program?
  - What skills and training will staff require?
8. What kinds of technology will you utilize to implement your program?
  - How will you obtain and deploy it?
9. Will the program require physical space? If so, where will it be housed?
  - What will be required to make space available?
10. Who will have primary responsibility for moving this action plan toward implementation? Who will they report to?

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## The Plan as a Base

- Locking it in
- Giving it a home
- Ensuring Accountability
- Broadening Buy In

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## Introduction to Reporting Back

- The Questions
- Five Minutes Each
- Listening for Patterns – Help Make the Case
- Listening for Differences – Enhance the Whole
- Listening for Opportunities to Network and Share

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## Reporting Back

- The **main focus** of your plan which will assist the self-represented
- One **major barrier** to accomplishing your plan and how you will address it
- One **initial step** you will take to implement your plan by October 7, 2006.
- One **innovative idea**
- One **thing you would like help with**

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## State by State:

Five Minutes Each

Alabama  
Arkansas  
Georgia  
Kentucky  
Louisiana  
Mississippi  
Oklahoma  
Texas  
Tennessee

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## Initial Members of the SRLN

- American Judicature Society
- California Administrative Office of the Courts
- Harvard Law School Bellow Sacks Project on the Future of Access to Justice
- Law School Consortium Project
- Maryland Administrative Office of the Courts
- National Center for State Courts
- National Association for Court Management
- National Association of IOLTA Programs
- National Council of Juvenile and Family Courts
- State Justice Institute

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## The Working Groups of the SRLN

- **Information, Marketing and Outreach Working Group**
- **Research and Evaluation Working Group**
- **Best Practices and Models of Excellence Group**
  - Promotion of Self Help Offices and Services Subgroup
  - Promotion of Attorney and Volunteer Participation and Discrete Task Representation Subgroup
  - Promotion of Forms, Document Assembly and Electronic Filing Subgroup
  - Promotion of Courtroom Services and Support Subgroup
  - Promotion of Judicial Training, Educational Materials and Networking Subgroup
- **Problem Assessment/Triage Working Group**
- **Appropriate Relief Working Group**
- **Overall System Working Group**
- **Funding Working Group**

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