

# Senior Citizens' Legal Services

## Strategic Plan 2022-2024



*Free Legal Services to Elderly Residents of Santa Cruz and San Benito  
Counties since 1972*

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## **Our History**

Senior Citizens' Legal Services (SCLS) was founded in 1972 by a small group of local activists that obtained funding from the U.S. Office of Aging to provide seniors with free legal services. This group of senior community activists recognized that the elderly were unable to obtain legal aid that addressed their unique problems. They believed that the elderly needed and deserved a program designed to meet their special needs.

This group of activists included Claire McAdams, Ezetta Dawson, Connie Keafhauer, and Richard McAdams (who later became Justice McAdams of the Sixth Appellate District Court of California).

Since 1972, SCLS has been at the forefront of providing legal protections for the elderly in Santa Cruz and San Benito Counties.

SCLS was founded in part on the theory that senior volunteers could best relate to the unique needs of senior clients. The office quickly became a model project for the creation of hundreds of similar law offices for older people throughout the country. For almost 50 years, SCLS has worked to develop expertise in legal problems that relate to aging. Today, SCLS continues to leverage its small staff and low budget with the extensive use of student, law student, paralegal and attorney volunteers and also continues to try to utilize senior volunteers in the office.

Since its founding, SCLS has represented seniors before government agencies at the local, state, and county level, as well as in the courts. As for a description of achievements, SCLS has secured legislation protecting rents in mobile home parks; litigated denials of unemployment benefits for seniors who were receiving social security retirement benefits, which in the federal government rewriting harmful laws discriminating against seniors. SCLS has also litigated against coercive medical rules, expanded the rights of the retired and disabled, and has continually sought to protect the elderly from consumer fraud.

## **Senior Citizens' Legal Services Vision and Mission**

### *Our Vision*

All elders feel respected and secure – regardless of economic status, race, gender, or ability – and have equal access to legal services.

### *Our Mission*

Senior Citizens' Legal Services (SCLS) provides free legal services to defend the rights of the elderly to quality housing, government benefits, and protection from exploitation and discrimination.

## **Our Values**

### **Respect**

We have a deep respect for the elders of our community and, as an organization, we believe in treating clients, donors, volunteers, staff, and community partners with respect and care. We believe in supporting our elders and advocating for systems that support them.

### **Compassion**

We believe every person should be treated with compassion. We believe in presenting information to our clients with honesty and authenticity. Our staff and volunteers will practice patience and empathy so that clients feel heard, connected, and helped.

### **Equity**

We believe in fair and equal access to support services regardless of race, ethnicity, age, gender, sexual orientation, region, economic status, health, or ability status. We are committed to equitable treatment of community members and elimination of discrimination in all its forms.

### **Professional Integrity**

We strive for excellence and integrity in all that we do. We intend to communicate and advocate with professionalism within the organization, with our clients, and within the community at large. We believe in honesty and transparency. We select knowledgeable staff and volunteers who embody our commitment to continued education.

## **SCLS Structure and Function**

Senior Citizens' Legal Services, a 501(c)(3) organization, is governed by a Board of Directors of 9 to 11 attorneys and community members. The current board is comprised of nine members. Officers include President, President-Elect, Treasurer, and Secretary. The Board has several committees to carry out specific board functions:

- Executive Committee
- Finance Committee
- Governance Committee
- Development Committee
- Strategic Planning Sub-Committee

SCLS has a staff of eight employees as of March 2022:

- Executive Director
- Managing Attorney
- Staff Attorneys
- Paralegals
- Legal and Executive Assistant
- Office Manager
- Bookkeeper and Grants Manager

### **Services:**

SCLS's staff and volunteer attorneys provide direct representation, assistance with self-representation, legal advice, community education and outreach, and referrals to other community resources. We provide free legal assistance to low-income seniors over age 60 in Santa Cruz and San Benito Counties in the following areas:

- Housing Law
  - Evictions, primarily tenant's rights
  - Some elderly landlords with evictions of tenants in their own homes
  - Section 8 housing voucher issues
  - Age or Disability Discrimination cases, and requests for reasonable accommodations
  - Mobile Home Rent Protection
  - Nursing home, residential care facilities & general patient rights
- Public Benefits/Income Maintenance Cases
  - Maintaining or improper denial Medi-Care and Medi-Cal
  - Maintaining, improper denial, overpayment of Social Security & SSI
- Consumer Issues/Elder Abuse
  - Powers of Attorney and Advance Health Care Directives

- Restraining Order Elder Abuse cases
- Debt Collection and financial exploitation defense
- Scams/Consumer Problems
- Grandparent Issues (visitation/guardianship).

## **Goals and Objectives 2022-2024**

In addition to the everyday tasks of running Senior Citizens' Legal Services and ensuring excellent client service, the Board of Directors and staff has identified the following goals and objectives to help ensure organizational sustainability and growth.

### Our Goals

- Triple SCLS's budget through diversifying its funding sources.
- Increase SCLS visibility in the community to support fundraising and program efforts.
- Increase the legal capacity of the organization to serve more clients better.

### ***GOAL 1:***

***Within three years, triple SCLS's budget through diversifying its funding sources.***

SCLS has a strong reputation among its partners and current donors. The Board and staff believe, in order to maintain the infrastructure necessary for our programming, it is important to diversify fundraising efforts and to build a diverse donor base with the addition of private foundation and donor support to ensure reliable, flexible general operating funds.

#### **Objective 1A:**

**Increase private donor support for SCLS operations by the following targets – \$25,000 for 2022, \$30,000 for 2023, & \$40,000 for 2024.**

Actions for implementation include:

- See Objective 1C & 1D.
- Follow-up on leads identified.
- Create giving tiers and recognition program for donors.

#### **Objective 1B:**

**Strengthen the grant writing and management capacity of the organization by December 2022.**

Actions for implementation include:

- Contract with, or hire, a grant coordinator.
- Research diversity grants.

- Research and apply to 3-5 private foundation grants for operations support.

**Objective 1C:**

**Track leads for private and business donors by establishing and using a donor database by June 2022.**

Actions for implementation include:

- Research and procure cost-effective donor tracking software.
- Identify staff or a volunteer who will research leads and populate database.
- Establish regular check-in on leads with ED.

**Objective 1D:**

**Establish an annual fundraising drive for private and corporate donor support by Dec 2022.**

Actions for implementation include:

- Identify current board members and volunteers with connections to local large corporate donors.
- Equip board members and volunteers with knowledge about SCLS services and needs and help them feel comfortable asking for a donation.
- Identify a volunteer to manage the fundraising drive and create social media and other marketing materials for participants.

**Objective 1E:**

**Ensure adequate informational materials (digital and print) are created and available to support SCLS fundraising efforts by June 2022.**

Actions for implementation include:

- Establish key messages for donors by target audience.
- Partners with Design Hub or other entity for low-cost or pro bono design assistance.
- Establish and promote reduced fee estate planning for those who make SCLS a beneficiary of their estate planning.
- See Objective 2F.

**GOAL 2:**

***Within three years, increase SCLS visibility in the community to support fundraising and program efforts.***

SCLS has a strong reputation among its partners and current donors. However, the broader community is less aware of SCLS and the services it provides. The organization would benefit from targeted outreach to specific audiences in order to increase visibility and brand recognition.

Better branding and increased, targeted marketing will help the organization reach future clients and build its supporter, donor, and volunteer base.

**Objective 2A:  
Increase visibility in the local media by Dec 2023.**

*Target - At least two articles on SCLS and its cases per year in local media.*

Actions for implementation include:

- Develop relationships with local reporters, associated tv and print media.
- Identify a local radio show to host the ED and Managing Attorney as guests.
- Promote workshops in local print media (Sentinel and Good Times) and radio. Ensure they are added to any community calendars.
- Develop press releases on how the need for services have increased for the Santa Cruz Sentinel newspaper and the Bar Briefs publication.

**Objective 2B:  
Increase use of social media to reach target audiences and generate more community buzz about SCLS by Dec 2022.**

*Targets – 1 post per week on LinkedIn, Facebook, and Instagram (all three), and increase number of likes and followers.*

Actions for implementation include:

- Promote workshops on social media.
- Follow and like other like-minded organizations on social media.

**Objective 2C:  
Increase outreach to local businesses who serve local seniors Dec 2022.**

Actions for implementation include:

- Reach out to various bar groups (litigation, EP, real estate).
- Develop a list of businesses to send marketing materials to (banks, reverse mortgage lenders, hospitals, nursing homes)
- Send fundraising marketing materials to financial advisors and professional fiduciaries.
- Provide marketing materials re: SCLS services to geriatric doctors in the area.
- Consider joining the Santa Cruz Chamber of Commerce for networking and marketing to business owners.
- Send ED or Managing Attorney as guest speaker to local Rotary or Chamber of Commerce events.

**Objective 2D:  
Increase outreach to other nonprofits who serve local seniors by Dec 2023.**

Actions for implementation include:

- Increase networking with Senior Network Services and groups focusing on housing and health care issues for the elderly so they can make referrals appropriately, and to promote our services and fundraising.

**Objective 2E:**

**Strengthen relationships with County and City officials**

Actions for implementation include:

- ED and Board to create relationships with local elected officials to support funding for senior legal services.

**Objective 2F:**

**Develop separate marketing materials for fundraising and general outreach, including short video, that is consistently branded by June 2022.**

Actions for implementation include:

- See Objective 1E.
- Establish key messages by target audience.
- Partners with Design Hub or other entity for low-cost or pro bono design assistance.
- Consider utilizing assistance from Cabrillo Community College or UCSC for pro bono production or access to low-cost student support.
- Ensure consistent branding across all marketing materials.
- Create Annual Report for donors.
- Create a short, informational marketing video for social media and our website.
- Enhance success stories on our website (make compelling stories with great visuals).

**Goal 3:**

***Within three years, increase the legal capacity of the organization to serve more clients better.***

SCLS's ability to serve the community continues to be constrained by its number of staff and volunteer resources, as well as current funding. With the hope of future additional operating funds from efforts under goals 1 and 2, the organization hopes to increase capacity. For example, we would like to provide more extensive representation ourselves and by partnering with large law firms on impact litigation.

**Objective 3A:**

**Hire 4-7 more licensed attorneys by 2024. (Approximately 2 additional attorneys per year.)**

**Objective 3B:**

## **Work with National and State elder organizations.**

Work with National Organizations such as the Center for Medicare Advocacy, the National Center on Elder Abuse, The USC Center on Elder Justice, Justice in Aging (both on state and national issues), National Center on Law & Elder Rights, Elder Justice Coalition, ABA Commission on Law and Aging and the National Academy of Elder Law Attorneys. Attend the National Law and Aging annual Conference. Participate in webinars offered by these groups. Strategize with other state providers and participate in specific webinars related to SCLS areas of service.

### **Objective 3C:**

**Create a more streamlined form and checklist database by Dec 2022.**

### **Objective 3D:**

**Research and purchase new case management software by June 2022.**

### **Objective 3E:**

**Obtain more grants that provide more secure funding for current staff and add additional staff. Goal of 7-10 grants by 2024.**

## **Evaluating and Celebrating Our Successes**

Senior Citizens' Legal Services' mission is to provide free legal services to defend the rights of the elderly to quality housing, entitlement benefits, and protection from abuse, exploitation, and discrimination. Over the years, the organization has continued to grow its programs and increase the clients it can serve. The goals and objectives laid out in this plan will help the organization increase reliable support for its operating costs, continue to grow its services, and expand its reach in the community.

Within 3 years, Senior Citizens' Legal Services hopes to:

- Triple its budget.
- Increase its private donor support by 30%.
- Increase staffing by 50%.
- Ensure the organization is providing a living wage to staff.
- Ensures access to adequate general operating funds.

We will use the following metrics to help track our success:

- Annual financial budget year to year showing growth

- Monthly and annual donor giving figures
- Overall donor count (cash and in-kind)
- Client statistics by program and area of issue
- Referral statistics

We are committed to being transparent in tracking our progress on our goals within this plan, internally, on a quarterly basis, and report to our supporters, donors and volunteers on an annual basis in an annual report. The Board and staff will celebrate reaching our milestones at the end of each year. We look forward to celebrating with our supporters, donors and volunteers at our annual fundraising event.