

FY 26-28

Strategic Plan



THE LEGAL SYSTEM IS...
Beyond difficult to navigate
without support!

I DELIVER LEGAL FIRST AID BECAUSE ...
I want people to
feel supported.

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EXECUTIVE SUMMARY

Legal Link removes legal barriers that prolong poverty.

We have a strong theory of change that guides our work:



If we train frontline providers to identify and address early stage legal issues among their clients



Then those workers will remove legal barriers

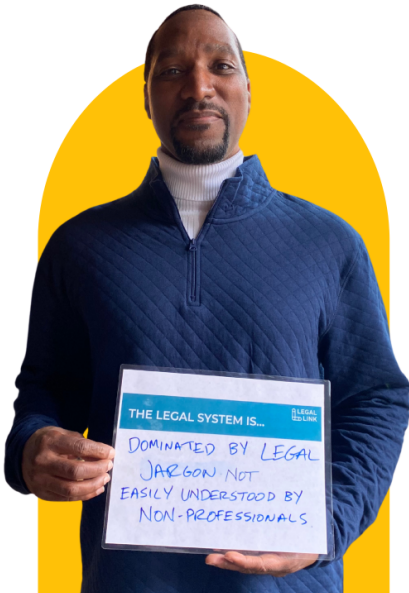


So that low-income people have increased economic stability.

Over the next three years Legal Link will train at least 2,000 frontline workers across the country to implement its Legal First Aid model, equipping them to identify and address early stage legal issues among their clients.

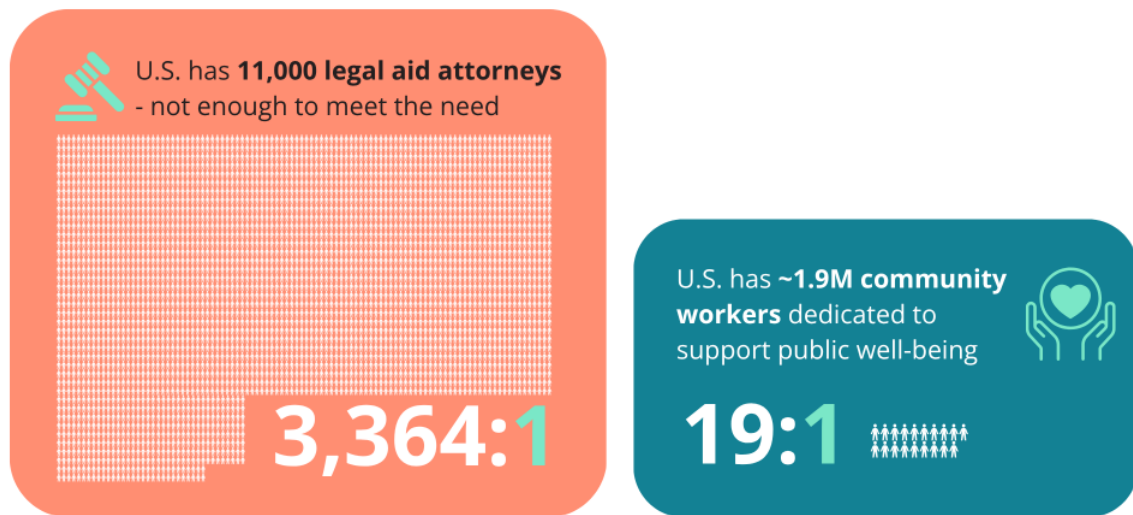
The opportunity

America’s lowest income individuals face tens of millions of legal issues each year, and with only 11,000 legal aid attorneys across the US, the legal aid network is not robust enough to meet the need. Furthermore, even once states enact reforms that allow non-lawyers to provide certain legal services, there will always be a massive population of individuals who are ineligible for



legal aid. The inability to solve these issues ultimately keeps people in poverty.

Legal Link solves for this problem by training an untapped network of community service providers (some 1.9M across the US) to spot and mitigate legal problems before they require a lawyer, or source a lawyer when needed. Once trained, these community services providers employ the Legal Link model to address a variety of issue areas across housing, immigration, income maintenance, and more, to remove legal barriers that keep low-income people in dire economic straits.



A refined Legal Link model

This strategic plan guides Legal Link’s work for the next three years (2026-2028) and repositions the organization from one that relies on philanthropic revenues to fund its critical work to one that contracts with sites and organizations that need a cost-effective way to address the problems their clients face. Under this new model, philanthropy helps support organizational infrastructure, and funders who wish to bring the Legal Link model to their region or to a particular agency can pay for county, organization, or issue-specific contracts.

This new model benefits the organization in several important ways:

1. It reduces the reliance on an increasingly scarce and volatile philanthropic sector and creates a more stable market-based revenue stream to sustain the work.
2. It positions Legal Link to meet the needs of the most vulnerable communities today, absent UPL reform, and in the future, should reform occur.
3. It prepares Legal Link to build a national community of practice around its model, conferring extra value on the certification
4. It leaves the door open for Legal Link to merge with a law school or other larger scale organization, should that benefit the model or in the event the economy experiences future volatility.

Expansion strategy

In FY26, Legal Link will codify its 2-part training, then build out a standard fee for service model to provide the Legal First Aid training to frontline workers across California and the US. Under this model, the entity pays for the services Legal Link delivers at a standardized cost that increases based on the number of trainees. Alternatively, a site or entity can pay Legal Link to train the trainers at that site, so they can train their own frontline workers. In addition, Legal Link will continue to raise philanthropic funding from institutions and major donors to support organizational infrastructure.

To make this happen, Legal Link will invest in building a diversified sales pipeline that includes:

- National service organizations or systems with frontline workers across the country
- County social service or health departments
- States undergoing regulatory reform
- States/counties with limited legal aid providers
- Community foundations that already support family service agencies in a particular region
- Health systems

To that end, Legal Link will hire a Partnerships Director who will be tasked with developing and implementing a promotion strategy specific to each audience, engaging in prospective outreach to national associations of county health and social service professionals, community foundation conferences, and the like to present on the Legal Link model and promote it as a solution to the access to justice crisis among their client base.

By the end of the three year period, Legal Link will pilot an annual convening of trained frontline workers from across the country, offering inspirational speakers and new tools to deepen participant skills.

Metrics

Legal Link currently collects pre/post self-assessed legal capability data for the frontline workers they train. Going forward, Legal Link will also conduct outcomes based evaluation to assess social return on investment for specific regions and issue areas, looking at case disposition for frontline worker interventions, and connecting these outcomes to financial savings and other long term outcomes for each client.

Management and staffing

Legal Link was founded and is led by an entrepreneurial and seasoned team with deep legal experience and networks in the access to justice space. In addition to the Executive Director, the management team will include a Development Director and a Partnerships Director, who will source, sign and manage contracts with new and existing sites and agencies. As the organization transitions to its new model, Legal Link will also build out a nationally recognized Board of Directors who can act as ambassadors for the mission and assist Legal Link staff in sourcing new contracts and philanthropic investments.

Path to financial sustainability

Legal Link has developed a sustainable growth model that primarily relies on fee for service contracts to drive growth. Under this new model, revenue sources shift

dramatically over the next three years to shift reliance on grants to reliance on earned income. Over that time period:

- Institutional philanthropy shrinks from 54% to 27% of revenues
- Individual giving grows from 11% to 17% of revenues
- Fee for Service contracts grow from 30% to 56% of revenues

Philanthropic institutions that want to bring the Legal Link model to a particular service area or region can still do so, by funding the cost of a contract to Legal Link directly, or by funding the agency to contract with Legal Link. Ultimately, this transition allows contracts to drive expansion.