



PHILADELPHIA BAR FOUNDATION

Promoting Equal Access To Justice Since 1964

2019 - 2023

STRATEGIC PLAN

PRESENTED BY:

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PHILADELPHIA BAR FOUNDATION
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VISION

A Philadelphia community in which everyone has equal access to justice.

MISSION

Through programs, grants, and partnerships, the Philadelphia Bar Foundation removes barriers to justice, engages the community in support of civil legal aid, and builds system-wide capacity in order to strengthen the provision of quality legal services and to ensure that all individuals understand their rights to equal justice under law.

CORE VALUES

- We believe all people should have equal access to justice and the right to legal representation.
- We believe in a just and fair society; when we work to provide an equitable and inclusive playing field, we make our legal system fairer.
- We believe in our responsibility to advocate for equal access to justice wherever possible, to drive change and provide legal services to underserved communities.
- We believe in recognizing, supporting, and celebrating the efforts of partners and collaborators who further these principles; the whole is bigger than the sum of its parts.
- We believe in amplifying the unique value that the Philadelphia Legal Aid community provides.



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PROCESS OVERVIEW & SUMMARY

The Philadelphia Bar Foundation began in 1964, and remains the only foundation in Philadelphia solely dedicated to the legal services community. In the last 5 years, the Bar Foundation has awarded over \$3 million in grants and other assistance to nearly 40 organizations and the individuals they serve throughout the greater Philadelphia area.

In March 2018, coLAB conducted a Sustainability Assessment with the Bar Foundation. With funds allocated for strategic planning, coLAB and the Foundation began an 8-month process to identify opportunities for organizational growth and improvement. Amidst launching the Equal Justice Center capital campaign, this plan is the culmination of efforts with Philadelphia Bar Foundation leadership and Trustees to define a roadmap for the immediate and long-term future.

Through robust stakeholder engagement and data collection, coLAB explored the Bar Foundation's current and future role in the legal aid community. Findings from this phase are detailed in the Stakeholder Report, shared with the Board of Trustees Executive Committee and Strategic Planning Committee during a half day retreat in April 2018; this session laid the groundwork for a full day retreat facilitated by coLAB in May 2018 with the full Board of Trustees and Bar Foundation staff.

During the retreat, the Board of Trustees participated in a frank discussion about the core areas, identifying the scope for this plan. With insights gathered through breakout sessions and tactical work sessions with staff and partners, coLAB and the Bar Foundation leadership crafted this five-year strategic plan. In addition to newly defined Vision, Mission, and Core Values, the Board of Trustees, with input from Foundation staff and community stakeholders, identified the following strategic priorities:

- Philanthropy
- Partnerships
- Advocacy & Awareness
- Sustainability & Capacity

Goals and tactics for these priorities were developed to address both internal and external community needs. Increasing the focus on equal access to justice and long term sustainability, in light of immediate capital campaign demands, holds tremendous promise for the future of the Philadelphia Bar Foundation. However, even with all the right resources, including leadership, time, and funding, a successful new venture of this magnitude will take many years. With these strategic priorities in mind, the Trustees and Foundation staff can support long-term success while navigating a radical shift in impact and definitions of equal access to justice for everyone in the Philadelphia community.



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The staff and board leadership is committed to making this critical pivot. In order to measure successful implementation, coLAB is working with the Philadelphia Bar Foundation to create a Strategic Plan Dashboard, that will enable the team to track their progress in this areas and demonstrate change over time.





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STRATEGIC PRIORITY + GOALS OVERVIEW

STRATEGIC INITIATIVE #1: PHILANTHROPY

Increase sustainability and consistency of financial support to legal aid partners

- GOAL #1: Execute successful \$50 million capital campaign
- GOAL #2: Grow endowment to support the mission of the Bar Foundation
- GOAL #3: Analyze and prioritize grantmaking process

STRATEGIC INITIATIVE #2: SUSTAINABILITY & CAPACITY

Strengthen the Bar Foundation by improving Organizational Sustainability

- GOAL #1: Develop and expand the human resources function
- GOAL #2: Strengthen Board diversity and inclusion, and enhance volunteer management
- GOAL #3: Develop the EJC Business Plan

STRATEGIC INITIATIVE #3: PARTNERSHIPS

Increase and strengthen transparent, mutually beneficial partnerships across all areas of the Bar Foundation including partnerships around the EJC initiative

- GOAL #1: Cultivate and strengthen relationships with more members of the local and regional legal community
- GOAL #2: Cultivate and strengthen relationships with community-based partners, regional businesses, non-legal organizations, and elected officials

STRATEGIC INITIATIVE #4: ADVOCACY & AWARENESS

Transform the legal aid community through advocacy and awareness

- GOAL #1: Position the Equal Justice Center as the leading resource for low-income Philadelphians who need legal advice
- GOAL #2: Understand emerging and unmet civil legal needs in the Philadelphia Community
- GOAL #3: Drive innovation and increase resources to civil legal aid



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STRATEGIC INITIATIVE #1: PHILANTHROPY

Increase sustainability and consistency of financial support to legal aid partners

GOAL #1: Execute successful \$50 million capital campaign

Tactics:

- Year One***
 - Collaborate with Fairmount Ventures to launch and execute capital campaign
 - 100% trustee participation at kick-off of campaign
 - 100% Trustee participation as ambassadors and educated stewards of the campaign
 - 100% solicitation of past Bar Foundation Presidents, Association Chancellors and other Bar leaders
 - Identify individual major donor prospects working with the Capital Campaign Committee and Trustees
 - Identify regional and national foundations working with the Capital Campaign Committee and Trustees
 - Target goal of \$18 million for the EJC closing

- Year Three***
 - Continue successful campaign by executing campaign strategy
 - Create sustainable strategy for Bar Foundation and the EJC business and operations

- Year Five***
 - Implement final phase of campaign strategy in support of both the Bar Foundation and the EJC
 - Target goal of \$50 million for capital campaign



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GOAL #2: Grow endowment to support the mission of the Bar Foundation

Tactics:

- Year One**
 - Maintain current grantmaking activities for Non-Profit Partners
 - Focus will remain on the capital campaign for the EJC while considering long-term goal to increase endowment
 - Develop strategy for planned giving
- Year Three**
 - Evaluate strategy for capital campaign and build strategy for Bar Foundation endowment
- Year Five**
 - Evaluate success of the EJC Capital Campaign and implement and execute strategy to raise the Bar Foundation's endowment to support grantmaking.

GOAL #3: Analyze and prioritize grantmaking process

Tactics:

- Year One**
 - Grant committee to evaluate effective functioning of current grantmaking process
 - Increase transparency of grantmaking process for Non-Profit Partners
 - Identify systems for efficiency in application and administration of grant process
- Year Three**
 - Consideration of multi-year grants
 - Re-evaluate grantmaking process based on results of year one committee review
- Year Five**
 - Measure implementation of refined grantmaking process
 - Leverage NPP data to enhance the impact of grantmaking process on Philadelphia's civil legal aid system



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STRATEGIC INITIATIVE #2: SUSTAINABILITY & CAPACITY

Strengthen the Philadelphia Bar Foundation by improving Organizational Sustainability

GOAL #1: Develop and expand the human resources function

Tactics:

- Year One*
 - Develop HR committee of the Board of Trustees
 - Evaluate current committee structure
 - Revise HR policies and procedures
 - Revise onboarding process for Trustees
 - Review strategic organizational structure with the EJC initiative
- Year Three*
 - Enhance professional development opportunities
- Year Five*
 - Evaluate HR function and respond to changing environment

GOAL #2: Strengthen Board diversity and inclusion, and enhance volunteer management

Tactics:

- Year One*
 - Develop strategy to further diversify Board including mechanisms to create a pipeline of potential candidates
 - Enhance infrastructure of the Board Development Committee to steward volunteers
 - Identify key volunteers with specific expertise
 - Implement new volunteer onboarding process
 - Increase engagement with young lawyers
- Year Three*
 - Engage with Non-Profit Partners for Board representation in the context of development with the EJC
 - Engage with broader community for Board representation
 - Execute strategy to further diversify Board including mechanisms to create a pipeline of potential candidates



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GOAL #3: Develop the EJC Business Plan

Tactics:

- Year One***
- Understand organizational and staffing needs of the Bar Foundation and the EJC
 - Commence planning process for the EJC
 - Design staffing plan, management and HR functions for the EJC
 - Commence development of the EJC Board and policies
- Year Three***
- Develop a plan to implement the EJC shared service model
 - Identification of services for *pro se* litigants
 - Update the EJC business plan based on relevant changes
 - Finalize and begin implementation of the EJC Board and policies
 - Develop strategy in partnership with area law schools to create an Incubator Project to help newly minted Philadelphia lawyers learn the business of being a lawyer while helping to address civil legal needs of Philadelphians in need of legal aid
- Year Five***
- Provide enhanced support services for Non-Profit Partners based on needs of the organizations
 - Update planning process based on current needs of the EJC
 - Implement strategy to create Incubator project



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STRATEGIC INITIATIVE #3: PARTNERSHIPS

Increase and strengthen transparent, mutually beneficial partnerships across all areas of the Bar Foundation including partnerships around the EJC initiative

GOAL #1: Cultivate and strengthen relationships with the local and regional legal community

Tactics:

- Year One**
 - Maintain Philadelphia Bar Association representation on the Bar Foundation Board of Trustees
 - Continue partnership with Philadelphia Bar Association and Young Lawyers Division
 - Form Board committee focused on strategic legal community relationships
 - Continue to grow the Board Observer Program
 - Build relationships through Trustee connections with corporate in-house counsel

- Year Three**
 - Build partnership plan to develop and strengthen relationships with law schools, government legal departments, judges and courts
 - Develop and strengthen Affinity Bar relationships

- Year Five**
 - Consider new legal partnerships based on the EJC initiative



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GOAL #2: Cultivate and strengthen relationships with community-based partners, regional businesses, non-legal organizations, and elected officials

Tactics:

- Year One*
 - Form a Board committee focused on strategic non-legal community relationships
 - Continue engagement with Chinatown community groups
 - Invest in relationships with elected and appointed officials (Mayor, Council)

- Year Three*
 - Identify and cultivate relationship with non-legal Influencer(s)

- Year Five*
 - In conjunction with the EJC, facilitate discussions with graduate schools and medical and legal professionals



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STRATEGIC INITIATIVE #4: ADVOCACY & AWARENESS

Transform the legal aid community through advocacy and awareness

GOAL #1: Position the Equal Justice Center as the leading resource for low-income Philadelphians who need legal advice

Tactics:

- Year One***
 - Develop a plan to position the EJC as a leading resource for legal advice in partnership with Non-Profit Partners
 - Launch public campaign to promote the EJC as the central clearing house for legal aid

- Year Three***
 - Partnership with judiciary and other entities to increase understanding of the EJC and make appropriate referrals

- Year Five***
 - Implementation of programming within the EJC to promote emerging legal issues impacting access to justice

GOAL #2: Understand emerging and unmet civil legal needs in the Philadelphia Community

Tactics:

- Year One***
 - Drive understanding and consistent approach to addressing unmet needs
 - Identify potential research partners to quantify unmet civil legal needs

- Year Three***
 - Conduct research effort to identify unmet civil legal needs
 - Identify external grant opportunities based on data and research outcomes

- Year Five***
 - Implement research outcomes from this process to refine grantmaking based on most critical needs
 - Measure impact on unmet needs and continue to identify trends effecting those needs



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GOAL #3: *Drive innovation and increase resources to civil legal aid*

Tactics:

- Year One*** - Continue current efforts of the EJC infrastructure and operational systems in tandem with the Capital Campaign

- Year Three*** - Continue to develop tools such as the Economic Benefits Calculator

- Year Five*** - Leverage research outcomes to continue to develop and implement systems together with Non-Profit Partners