



PHILADELPHIA BAR FOUNDATION

Promoting Equal Access To Justice Since 1964

2019 - 2023

STRATEGIC PLAN

PRESENTED BY:

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PHILADELPHIA BAR FOUNDATION
Promoting Equal Access To Justice Since 1964

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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STRATEGIC PRIORITIES VISUAL





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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: Strengthen unrestricted fundraising activities
- GOAL #3: Grow endowment to support the mission of the Bar Foundation
- GOAL #4: Analyze grantmaking process

STRATEGIC INITIATIVE #2: SUSTAINABILITY & CAPACITY

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



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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 \$22-30 million for the EJC closing (projected for September 2019)

- 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

GOAL #2: Strengthen unrestricted fundraising activities

Tactics:

- Year One***
 - Sustain robust Unified Giving campaign throughout year for institutional funding
 - Continue to support Individual Giving initiatives including but not limited to the annual appeal, memorial and tribute gifts, arbitration donations, Jeans for Justice, dues check-offs
 - Support a Young Lawyers Division joint fundraising event



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GOAL #3: 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 #4: Analyze grantmaking process

Tactics:

- Year One**
 - Grants 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 grants 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



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

Existing partnership programs:

Board Observer Program
Judge William M. Marutani Fellowship
ACCGP Diversity Corporate Internship Program
International Law Lyon Internship Fund
The Honorable Albert W. Sheppard Scholarship Fund
Samuel T. Gomez Award



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STRATEGIC INITIATIVE #4: ADVOCACY & AWARENESS

Transform the legal aid community through advocacy and awareness

GOAL #1: 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

GOAL #2: 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



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GOAL #3: 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 Nonprofit 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

Existing programs promoting advocacy and awareness:

The R. Nicholas Gimbel Fund for Legal Excellence
Morris M. Shuster Public Interest Fellowship Program
LexisNexis Research Grant
Kenneth Shear Civil Gideon Legal Justice Scholarship Fund (dormant)
Judge Alfred L. Luongo Fund
Philadelphia Bar Foundation Award
Pro Bono Award of the Philadelphia Bar Foundation
Honorable Louis H. Pollak Champion of the Public Interest Award
Trailblazers for Justice