



# PHILADELPHIA BAR FOUNDATION

Promoting Equal Access To Justice Since 1964

2021 – 2023

## STRATEGIC PLAN

PRESENTED BY:

WWW.COLABLANCASTER.COM  
533 JANET AVENUE, SUITE D  
LANCASTER, PA 17601





**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

- All people should have equal access to justice and the right to legal representation.
- When we work to provide an equitable and inclusive playing field, we make our legal system fairer and our society more just.
- It is our responsibility to advocate for equal access to justice, to drive change and to provide legal services to underserved communities.
- It is our place to champion the unique value that the Philadelphia Legal Aid community provides our city and region.
- It is our privilege to recognize, support, and celebrate the efforts of partners and collaborators who further these principles and to show that the whole is bigger than the sum of its parts.



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## PROCESS OVERVIEW & SUMMARY

The Philadelphia Bar Foundation began in 1964, and remains the only foundation in the City 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. 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 holds tremendous promise for the future of the Philadelphia Bar Foundation. With these strategic priorities in mind, the Trustees and Foundation staff



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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.

In March 2018, when this plan was originated, the Bar Foundation was fundraising to build a physical Equal Justice Center (“EJC”), until the COVID-19 pandemic took the legal world virtual. In keeping with the overall goals of the project, we pivoted to a set of virtual EJC initiatives (“the EJC initiatives”), including things like community-based justice hubs with navigators and a 2021 data/technology initiative. In the future, the Bar Foundation may elect to add other EJC programs or projects (“the EJC projects”) as appropriate.



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## STRATEGIC PRIORITY + GOALS OVERVIEW

### STRATEGIC INITIATIVE: PHILANTHROPY

*Ground the Foundation's fundraising and giving in race, social, and economic equity to enhance -sector-wide capacity and stimulate systemic changes to remove inequities in the justice sector.*

GOAL #1: Strengthen Foundation Fundraising

GOAL #2: Maximize Effective Giving, (including Grantmaking, Programs; EJC Initiatives)

### STRATEGIC INITIATIVE: SUSTAINABILITY & CAPACITY

*Strengthen the Philadelphia Bar Foundation by improving organizational sustainability*

GOAL #1: Ensure adequate and appropriate organizational staffing in light of strategic initiatives and goals

GOAL #2: Build Board capacity to achieve anti-racism, equity and inclusion goals

### STRATEGIC INITIATIVE: PARTNERSHIPS

*Increase and strengthen transparent, mutually beneficial partnerships across all areas of the Bar Foundation's activities including partnerships around the EJC initiatives and projects*

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: ADVOCACY & AWARENESS

*Center racial equity in identifying, understanding, and overcoming barriers to equal access to justice*

GOAL #1: Identify and understand barriers to equal justice within communities in Philadelphia

GOAL #2: Drive innovation and collaboration to build system-wide capacity and increase awareness of, and deliver resources to, the legal aid sector

GOAL #3: Position the Foundation and the EJC initiatives as a leading informational resource on racial, social, and economic equity issues and how such inequities impede equal access to justice



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## STRATEGIC INITIATIVE: PHILANTHROPY

Ground the Foundation's fundraising and giving in race, social, and economic equity to enhance sector wide capacity and stimulate systemic changes to remove inequities in the justice sector.

### GOAL #1: Strengthen Foundation Fundraising

#### *Tactics:*

*2021*

- Examine existing endowment growth initiatives and evaluate growth strategy
- Begin development of a planned giving strategy
- 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, Friends of the Foundation, and dues check-offs
- Leverage Access to Justice Awards Benefit as one of the Foundation's primary fundraising efforts
- Support a Young Lawyers Division joint fundraiser
- Secure funding for understanding community civil justice needs within the Philadelphia community as a prelude to the co-creation of community-based justice hubs (with navigators)

*2022*

- Evaluate new opportunities/initiatives for growing the endowment
- Complete the planned giving strategy
- Evaluate Unified Giving, Individual Giving, and Events to determine which methods to prioritize
- Explore funder collaboration to support EJC initiatives

*2023*

- Implement planned giving strategy
- Continue evaluation of unrestricted fundraising activities
- Strengthen funder collaboration to ensure sustainability of EJC initiatives



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## GOAL #2: Maximize Effective Giving (Including Grantmaking; Programs; EJC Initiatives)

### *Tactics:*

*2021*

- Explore ways to prioritize racial equity in the evaluation of grantmaking process
- Explore ways to Increase transparency of grantmaking process for non-profit partners
- Identify systems for efficiency in application and administration of grants process
- Consideration of multi-year grants
- Commit resources through EJC initiatives to enhance collaboration, drive innovation and increase the public's access to legal aid services

*2022*

- Grants committee to continue to evaluate current grantmaking process
- Continue exploring and implementing 2021 tactics

*2023*

- Measure implementation of refined grantmaking process
- Measure impact and ensure sustainability of EJC initiatives and giving efforts





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## STRATEGIC INITIATIVE: SUSTAINABILITY & CAPACITY

*Strengthen the Philadelphia Bar Foundation by improving organizational sustainability*

### GOAL #1: Ensure adequate and appropriate organizational staffing in light of strategic initiatives and goals

#### *Tactics:*

*2021*

- Continue HR committee of the Board of Trustees
- Work with staffing expert to assess required organizational staffing in light of strategic initiatives and goals including EJC initiatives
- Define other EJC projects and priorities
- Define structure for engaging and compensating community partners
- Develop hiring policy with criteria that center on racial equity
- Form a small ad hoc taskforce to examine office space needs and options for PBF

*2022*

- Based on staffing assessment, enhance targeted professional development opportunities and hire additional staff as necessary
- Implement the recommendations of the ad hoc office space taskforce.

*2023*

- Evaluate HR function and respond to changing environment
- Develop Organizational Succession Plan

### GOAL #2: Build Board capacity to achieve anti-racism, equity and inclusion goals

#### *Tactics:*

*2021*

- Continue to diversify Board membership including mechanisms to create a pipeline of potential candidates
- Improve active Trustee engagement with new Trustees
- Engage with broader Philadelphia community for Board representation
- Form and begin the work of an Anti-Racism Task Force



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*2022*

- Enhance efforts of the Board Development Committee by creating an Advisory committee of the Board composed of members of the grantee community and members from communities who are disadvantaged by the existing system
- Identify key volunteers with specific expertise



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## STRATEGIC INITIATIVE: PARTNERSHIPS

*Increase and strengthen transparent, mutually beneficial partnerships across all areas of the Bar Foundation's activities including partnerships around the EJC initiatives*

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

#### *Tactics:*

*2021*

- Continue partnership with Philadelphia Bar Association, its sections and committees, and Young Lawyers Division
- Continue to grow the Board Observer Program
- Build relationships to leverage corporate expertise through Trustee connections with corporate in-house counsel
- Begin to explore a structure to build relationships among Bar Foundation and members of nonprofit partner boards
- Strengthen Affinity Bar relationships
- Continue relationships with Philadelphia law firms to build support for fundraising and to advance racial justice goals and EJC initiatives

*2022*

- Begin to convene meetings with nonprofit partner Board members
- Build and strengthen relationships with law schools, government legal departments, judges and courts
- Consider new legal partnerships based on the EJC initiatives
- Incorporate regular updates from Affinity Bar Leaders into Board meetings
- Explore expanded joint activities with Affinity Bars
- Explore with Bar Association Public Interest Section and Civil Gideon Taskforce re-launching Kenneth Shear Civil Gideon Legal Justice Scholarship

*2023*

- Continue to expand legal partnerships in support of Bar Foundation objectives including EJC initiatives



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

### *Tactics:*

*2021*

- Form a working group focused on developing strategic non-legal relationships to strengthen the Foundation's ability to achieve its strategic goals. Partnerships to consider include:
  - a. Philanthropic leaders
  - b. Community partners and influencers
  - c. Academic Institutions
  - d. Elected Officials
- In conjunction with the Foundation's anti-racism goals, ensure deliberate effort to identify and partner with organizations that are led by diverse leadership
- In conjunction with the EJC initiatives, facilitate discussions with industry and academic experts

*2022*

- Continue intentional engagement with strategic partners
- In conjunction with the 2021 EJC data/technology initiative – convene funders to collaborate on streamlining and standardizing data collection
- Begin the co-creation of community justice hubs with community-based partners

*2023*

- Solidifying and strengthening partnerships to expand the community justice hub network



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**Existing partnership programs:**

ACCGP Diversity Corporate Internship Program

Board Observer Program

International Law Lyon Internship Fund

Kenneth Shear Civil Gideon Legal Justice Scholarship Fund (dormant)

LexisNexis Research Grant

Judge Alfred L. Luongo Fund

Judge William M. Marutani Fellowship

The Honorable Albert W. Sheppard Scholarship Fund



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## STRATEGIC INITIATIVE: **ADVOCACY & AWARENESS**

*Center racial equity in identifying, understanding and overcoming barriers to equal access to justice*

### **GOAL #1: Identify and understand barriers to equal justice within communities in Philadelphia**

*Tactics:*

- 2021**
  - Identify potential research partners to quantify unmet legal needs that prohibit thriving communities
  - Identify external grant and philanthropic opportunities based on data and research outcomes
  - Leverage nonprofit partners' data to identify areas on which to focus in Philadelphia's civil legal aid system
  
- 2022**
  - Conduct and publish results of effort to co-create solutions to addressing the unmet needs that prohibit thriving communities
  - Publish results of data assessment and benefits of centralized intake system
  
- 2023**
  - Implement research outcomes from this process to refine EJC initiatives

### **GOAL #2: Drive innovation and collaboration to build system-wide capacity and increase awareness of, and deliver resources to, the legal aid sector**

*Tactics:*

- 2021**
  - Establish structure for regular communication and consultation with legal aid entities and court-based help centers
  - Collect and appropriately share sector-wide data on organizational issues of interest to the legal aid sector (e.g., staffing and salary data)
  - Continue regular communication and consultation with funders and other stakeholders



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- 2022*
- Work to identify and develop impact metrics and tools that will help the Foundation and nonprofit partners document need and demonstrate successes
  - Leverage relationships among the Foundation and members of nonprofit partner boards to further advocacy efforts

- 2023*
- Continue efforts to drive innovation and collaboration
  - Begin to implement impact metrics and tools

**GOAL #3: Position the Foundation and the EJC initiatives as a leading informational resource on racial, social, and economic equity issues and how such inequities impede access to justice**

*Tactics:*

- 2021*
- Continue to develop relationships with the media and other stakeholders in order to disseminate information about the work of the Foundation

- 2022*
- Begin to plan thought-leadership programming/speaker series for 2022 launch including focus on racial justice and economic equity
  - Identify opportunities to apply for relevant recognition awards

- 2023*
- Launch thought leadership programming
  - Enhance programming and speaker series



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**Existing programs promoting advocacy and awareness:**

The R. Nicholas Gimbel Fund for Legal Excellence

Morris M. Shuster Public Interest Fellowship Program

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