

PHILADELPHIA BAR FOUNDATION

Promoting Equal Access to Justice

Strategic Plan 2013-2017 October 2012

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Overview

Amid systemic changes in the Philadelphia legal community as well as the exponentially growing need to ensure access to justice, the Philadelphia Bar Foundation was driven to develop a contemporary set of strategies that would usher in a new era for the Foundation. This Strategic Plan honors Philadelphia's public interest community – a national model of quality, collaboration, creativity and import – by elevating its unique, value-added role in serving that community. The Strategic Plan is designed to be carried out in a five-year time horizon (from 2013 through 2017) in order to ensure sustainable change. While the implementation of some initiatives will be relatively straightforward, the Bar Foundation's key plans are ambitious. Accordingly, recurring themes throughout the Strategic Plan are impact, focus, and innovation.

Impact Throughout Philadelphia's non-profit legal community, the gap between the need and the dollars currently being invested to address the need is still incredibly large, and heightened as a result of the economic recession. Looking back on nearly five decades of success (see [Appendix A: History](#)), the Bar Foundation is uniquely positioned to make a palpable difference over the next several years. As a guardian for legal services, it has great insight into the community. Most important, the Bar Foundation has the potential to generate significant resources that will put commitment to access to justice into action.

Focus The Bar Foundation's great legacy to the Philadelphia region has been the provision of millions of dollars to legal services organizations (see [Appendix B: 2011 Grantees](#)). Going forward, the Bar Foundation will work in earnest to raise more funds on an annual basis, more funds to build its endowment, and if necessary and appropriate, funds to support the development of a Civil Justice Center. Carrying out these ambitious plans will require focused attention, clear roles and responsibilities, and the greater engagement and coordination of a larger group of supporters and advocates.

Innovation A changing world calls for different responses and new initiatives. Accordingly, this Strategic Plan is particularly timely, coming at an important juncture for the Bar Foundation. The Foundation has been less visible than merited given the value of the organization and the impact that it has had on the Philadelphia legal community (both for profit and non-profit). The Bar Foundation will capitalize on the unique opportunity to raise both funds and awareness, which is afforded by the upcoming 50th anniversary. Equally important, the recent investment in a dedicated fund-raising professional will enable the Bar Foundation to better support volunteers in their fund-raising efforts as well as to use analytics and best practices to increase the efficiency and effectiveness of those efforts.

In summary, this Strategic Plan is both a road map for the future as well as an invitation to take part in supporting Philadelphia's public interest community in new and important ways.

Guiding Principles

As a value-based non-profit organization, the Bar Foundation's guiding principles are vital to its ability to implement this Strategic Plan. Collectively, the Bar Foundation's mission, vision and values will ensure the focused development and execution of initiatives as well as serve as a vigilant screening mechanism for future decision making and policy setting.

Mission

The Philadelphia Bar Foundation is dedicated to promoting access to justice for all people in the community, particularly those struggling with poverty, abuse and discrimination. The Foundation is the embodiment of the Philadelphia legal community's commitment to this fundamental principle.

Vision

The Philadelphia Bar Foundation will become...

- A significant source of financial support and other assistance to the legal services community in order to ensure that it has an even greater impact on grantee organizations' ability to carry out their important mission.
- The preeminent philanthropic body in the eyes of the Philadelphia legal community.
- An inspiration to *all* lawyers in Philadelphia to focus their philanthropic and volunteer efforts on access to justice.

Core Values

The Philadelphia Bar Foundation recognizes its ethical obligation to donors, stakeholders, and the public to conduct activities with strict accountability and transparency. Core values include:

- A commitment to excellence
- Managing and applying resources effectively and fairly
- Adhering to the highest ethical standards in its governance and administrative management.
- A commitment to diverse representation on the Board of Trustees

Relationship between the Bar Foundation and the Bar Association

Central to the Bar Foundation's heritage is its relationship to the Philadelphia Bar Association. As in the past, this Strategic Plan honors the connection between the two organizations and recognizes that both organizations will need to work in collaboration in order to continue to promote and attain access to justice for all in Philadelphia.

Summary of Goals & Initiatives

The Bar Foundation embarked upon a strategic planning process in January 2012. Facilitated by Edward F. Swenson & Associates, Inc. (EFS), an independent management consulting firm, the process enabled the Board and staff to reflect on their vision and goals for the Foundation. EFS interviewed stakeholders, worked closely with a Steering Committee and the Executive Director, and engaged the Board and as a whole in several extended sessions. See [Appendix C: Acknowledgements](#) for a list of the people who were involved in the process.

The resulting strategies are described throughout the bulk of this document, and can be summarized within the following goals and major initiatives:

Goal 1: Increase the Philadelphia Bar Foundation’s tangible support of Philadelphia’s public interest community.

Initiative 1.1 – Increase the financial resources provided to legal services organizations annually.

Initiative 1.2 – Lead the development of a Civil Justice Center (if deemed feasible).

Initiative 1.3 – Enhance the Bar Foundation’s interactions with Philadelphia’s non-profit legal community.

Goal 2: Position the Philadelphia Bar Foundation as the preeminent philanthropic entity in the eyes of Philadelphia’s legal community.

Initiative 2.1 – Enhance the Bar Foundation’s marketing and communications activities.

Initiative 2.2 – Develop targeted approaches to segmented groups within the Philadelphia legal community.

Initiative 2.3 – Position the Bar Foundation as one of the consistent and valued forces throughout every Philadelphia attorney’s career.

See also [Appendix D: Strategic Implementation Guide](#) for a chart that frames how these strategies will be operationalized by plotting out areas of focus for each year for this five-year plan.

Strategies

The following narrative provides a context for the first goal. Initiatives, objectives, and actions are described in the chart on subsequent pages, and were created by the Bar Foundation Board and staff to focus the organization's priorities for the next several years.

Goal 1: Increase the Philadelphia Bar Foundation's tangible support of Philadelphia's public interest community.

The recent economic recession has affected everyone. It was an important factor in changing the way that many law firms conduct business. With few exceptions non-profit organizations, particularly the Bar Foundation's grantee organizations, have struggled under the pressure of reduced funding while striving to meet the exponentially greater needs of their clients. Accordingly, during the strategic planning process, the Bar Foundation challenged itself to make a significantly larger impact in support of this community in the years ahead.

Annual & Endowment Fund Raising

Over the next several years, diversifying the Bar Foundation's funding base will be crucial to its success in providing more financial resources to grantee organizations. The implications of this led to three major thrusts: **1)** raise more money to add significantly to the Bar Foundation's annual resources **2)** reduce the Bar Foundation's overreliance on Cy Pres funds and its main fund-raising events (the gala and the golf outing) and **3)** focus more attention on acquiring commitments of planned/deferred gifts to build the Bar Foundation's endowment substantially.

Simply put, these thrusts require the Bar Foundation to change the way it raises money. It is clear that conducting business as usual going forward will not enable the Bar Foundation to realize significantly more of the philanthropic potential of the Philadelphia legal community. Some of the initiatives planned are grounded in fund-raising best practice. Others require cultural change, opening doors for innovation. Having recently hired a dedicated fund development professional, the Bar Foundation is well positioned. The Executive Director and the Director of Development will support a Board dedicated to using its networks for peer to peer solicitations in law firms and corporate legal departments, and help the organization capitalize on the upcoming 50th anniversary of the Foundation, which will occur in 2014. The 50th anniversary provides a unique platform for the Bar Foundation to elevate its fund-raising and awareness-building activities across the full spectrum of the Philadelphia legal community.

Civil Justice Center

Over the next several years, the Bar Foundation will continue to pursue the establishment of a Civil Justice Center; and if approved by the Board, take steps to make the Center a reality. While still in the developmental stages, the Center's extraordinary potential to enhance the efficiency of and collaboration among many of the region's legal services organizations is universally evident. The Bar Foundation's efforts are fueled by the knowledge that this kind of tangible support complements direct grants by providing a long-term solution targeted at smoothing out gaps in service delivery.

The Bar Foundation's decades of experience as a grant-making organization makes it uniquely qualified to be a lead collaborator in this effort. It has listened to grantee identification of potential areas of synergy and ideas on how the Center could be used to leverage even greater collaboration. Goal setting, prospecting, and approaches will be highly coordinated with the primary work of the Bar Foundation. While the extent of fund raising that might be needed is unclear at this time, if there is a decision to embark upon a campaign, the Bar Foundation trustees will ensure that a campaign will be conducted thoughtfully, with a commitment to good planning and execution, and in ways that will not dilute the Bar Foundation's annual fund-raising activities.

Interactions with Philadelphia's Nonprofit Legal Community

The Bar Foundation is highly valued for its unrestricted support, which is so critical to each recipient organization. Over the next several years, the Bar Foundation will build on this strength, and strive for even greater relevance in its interactions with the non-profit legal community. Strengthening collaboration with the Philadelphia Bar Association, including sharpening communication between the Delivery of Legal Services Committee (DLSC) and the Bar Foundation will be important. Institutionalizing the Bar Foundation's grant making both in terms of refining the process as well as in terms of ensuring greater engagement of the Bar Foundation Board members in the process also will be key. The ultimate goal is consistent with the Bar Foundation's founding intentions – to support Philadelphia's public interest community by providing additional resources to enable excellence in all its forms.

Goal 1: Increase the Philadelphia Bar Foundation’s tangible support of Philadelphia’s public interest community.

Initiative 1.1 – Increase the financial resources provided to legal services organizations annually.

<p>Objective 1.1.1 Consolidate, clarify, and innovate the Bar Foundation’s traditional fund-raising activities.</p>	<p>Objective 1.1.2 Diversify the sources of the Bar Foundation’s annual fund raising by undertaking new activities.</p>	<p>Objective 1.1.3 Develop a concentrated endowment fund-raising campaign that focuses on attracting commitments of deferred gifts.</p>
<ul style="list-style-type: none"> • Simplify the Bar Foundation’s giving structure and giving options. • Review the purpose, structure, and scope of the golf outing and gala for future relevance, effectiveness, and efficiency. Revisit conduct of these events accordingly. • Revamp the solicitation process to emphasize peer-to-peer and face-to-face solicitations, especially at the partner level. • Elevate advocacy efforts for the Bar Foundation to be a beneficiary of Cy Pres funds. • Enhance the effectiveness of alternative giving mechanisms (e.g., payroll deductions and on-line giving). • Evaluate the effectiveness of giving to the Bar Foundation as an option on the Bar Association dues payment. Revisit and refine accordingly, and develop an associated awareness campaign to increase support. • Develop a master calendar of fund-raising activities to ensure holistic analysis, planning, and implementation. • Secure and utilize a central database to support the Bar Foundation’s gift management and other fund-raising activities. 	<ul style="list-style-type: none"> • Set priorities and multi-year dollar goals in order to ensure strong coordination between raising funds for the annual operating budget, 50th anniversary initiatives, endowment, and the Civil Justice Center. • Capitalize on the Bar Foundation’s 50th anniversary by developing a series of special fund-raising initiatives, including those specifically focused on engaging attorneys who are not attracted to the golf outing, gala, or YLD events. • Work with the Young Lawyers Division to codify its fund-raising efforts. • Consider challenge appeals to increase giving from corporations and firms. • Evaluate the investment required to initiate new fund-raising activities against the existing expense structure in order to ensure the capacity is in place to carry out existing and new initiatives successfully. 	<ul style="list-style-type: none"> • Develop a Case for Support specific to giving to the endowment, including dollar goal and nature of impact. • Recruit a small volunteer team with expertise and connections who are dedicated to this effort. • Identify and focus on a short list of top prospects targeted based on their historic connection to the Bar Foundation, estimated financial capacity, and prominence in Philadelphia’s legal community. • Craft recognition and stewardship activities to encourage the continued (ideally increased) support of past endowment donors. • Strengthen the Bar Foundation’s promotional and outreach activities around deferred and planned giving.

Initiative 1.2 – Lead the development of a Civil Justice Center (if approved by the Bar Foundation Board).	
Objective 1.2.1 Commit to pursuing the establishment of a Civil Justice Center.	Objective 1.2.2 Secure the necessary resources for establishing a Civil Justice Center.
<ul style="list-style-type: none"> • Provide the necessary data and analysis for the Bar Foundation Board approval to proceed. • Support the development of a separate Board to govern the Civil Justice Center, and the development of an independent management structure. • Support the attainment of an affordable piece of land or building that is easily accessible by public transportation. • Support the legal services organizations in resolving their existing rental/ownership arrangements. • Support the legal services organizations in developing a unified intake system. • Conduct an analysis that outlines and quantifies the pros and cons of having the Bar Foundation and/or the PBA housed at the Civil Justice Center. 	<ul style="list-style-type: none"> • Solidify agreements with partners and other key collaborators. • Quantify the amount of desirable contributed income. • Leverage naming rights for the building in order to raise money as feasible and appropriate. • Develop and implement a Campaign Plan, including volunteer leadership, staffing and infrastructure, and strategies. Coordinate with endowment fund-raising efforts.
Initiative 1.3 – Enhance the Philadelphia Bar Foundation’s interactions with Philadelphia’s non-profit legal community.	
Objective 1.3.1 Strengthen the Bar Foundation’s collaboration with the non-profit legal community.	Objective 1.3.2 Refine the grant-making process to ensure the Bar Foundation’s ongoing relevance and continued high standards, solid programs, and innovation.
<ul style="list-style-type: none"> • Establish an ad hoc committee to discuss the relationship between the Foundation and the Association, and to develop protocols that guide and govern that relationship. • Work more closely with grantees in targeted ways, including identifying needs and areas of potential synergy. • Refine the Bar Foundation’s role with the DLSC in order to ensure value-added interventions and support. • Increase communication from the DLSC Committee via the Executive Director to the Bar Foundation Board and/or Grants Committee depending on the content of the information. 	<ul style="list-style-type: none"> • Revise and refine the written grant-making policy. • Evaluate the historic process of grant making to existing and new grantees. Revise process and grant guidelines accordingly. • Develop steps to get more trustees more involved in the grant-making process, including increased communication and more advance notifications.

The following narrative provides a context for the second goal. Initiatives, objectives, and actions are described in the chart on subsequent pages, and were created by the Bar Foundation Board and staff to focus the organization's priorities for the next several years.

Goal 2: Position the Philadelphia Bar Foundation as the preeminent philanthropic entity in the eyes of Philadelphia's legal community.

In order to provide significantly greater tangible support to Philadelphia's non-profit legal community, the Bar Foundation needs to build its own organizational strength.

Case for Support & the Bar Foundation Brand

Only a small percentage (5-10%) of the Philadelphia Bar supports the Bar Foundation with financial gifts. Equally important, too few fully understand the Bar Foundation's unique and valued-added role within the Philadelphia legal community. Over the next several years, the Bar Foundation will rearticulate its role with the confidence that greater financial support will come with greater insight and understanding. A refined Case for Support will lay out the Bar Foundation's impact on providing access to justice for people in need throughout the Philadelphia region. Initiatives to build the Bar Foundation's brand will be bolstered by highly-visible 50th anniversary activities, and enriched by a marketing plan that will be systematically developed by professionals in partnership with seasoned the Bar Foundation volunteers.

Broadening & Diversifying the Base of Support

Over the next several years, the Bar Foundation's outreach and communications will be designed to broaden and diversify its base of support. This is in response to changes in the nature and scope of the Bar Foundation's traditional supporters. For example, while a number of the City's largest firms may have had their home office in Philadelphia for decades, many of these same firms have grown to become global businesses. Many attorneys and firms increasingly face the pressures of the economic downturn and limited time. In addition, the growing trend to hire in-house counsel is creating a significant pool of attorneys who operate outside the Bar Foundation's historic fund-raising umbrella. Finally, young attorneys are emerging as a new source of support, and the Bar Foundation needs to develop and implement strategies that resonate with their interests and ways of interacting with their communities.

Education on Issues and Philanthropy

Over the next several years, the Bar Foundation will develop and implement initiatives to provide education around the issues that grantee organizations are addressing as well as on the need for Philadelphia's legal community to be highly-engaged in philanthropy. This perspective harkens back to the Bar Foundation's founding principles. The Bar Foundation is uniquely-positioned to play a leadership role in ensuring that attorneys of all ages understand their responsibility to support access to justice, and how they can put that responsibility into action by providing the resources to make that possible.

Board of Trustees

Board members selected the Bar Foundation because of their commitment to the cause. Over the next several years, the Bar Foundation will attend to initiatives designed to help the Board carry out its commitment in ways that have a significantly greater impact on grantee organizations than in the past.

Executive Director

As the current Executive Director steps down, there is an opportunity to refine the role in alignment with the Strategic Plan for the new Executive Director. Starting as soon as the new Executive Director is hired, and building over the next several years, the Bar Foundation will raise the profile of the Executive Director. The goal is to foster a leadership role such that the Executive Director becomes more visible to the Philadelphia community. Specifically, the Bar Foundation believes that its fund-raising effectiveness and continuity could be enhanced if the status and responsibilities of the Executive Director were elevated to give him or her greater latitude and authority to represent the Bar Foundation; to lead volunteers through the fund-raising process; and to lead efforts to reach out to associations and attorneys.

Goal 2: Position the Philadelphia Bar Foundation as the preeminent philanthropic entity in Philadelphia’s legal community.

Initiative 2.1 – Enhance the Bar Foundation’s marketing and communications activities.

<p>Objective 2.1.1 Refine and disseminate the Bar Foundation’s Case for Support.</p>	<p>Objective 2.1.2 Define and build the Bar Foundation’s brand.</p>	<p>Objective 2.1.3 Educate the Philadelphia legal community on the issues that Philadelphia’s legal services organizations are addressing.</p>
<ul style="list-style-type: none"> • Illustrate how giving to the Bar Foundation “changes the world,” including the impact on the City of Philadelphia and its citizens. • Differentiate the Bar Foundation’s valued-added role from the Philadelphia Bar Association and from legal services organizations. • Enhance fund-raising appeals and presentations by clarifying the uses of the Bar Foundation funds, and the impact of those funds. • Ground case messages in the Bar Foundation’s strategic thinking and future direction. • Design approaches to spread the word of the Bar Foundation’s case, including use of social networking and new media. 	<ul style="list-style-type: none"> • Engage the services of a professional (paid or pro bono) marketing firm to guide the Bar Foundation in this effort. • Promote the Bar Foundation’s mission and work whenever there is a captive audience at fund-raising events as well as other gatherings of attorneys or law students (as appropriate). • Enhance the website as a dynamic tool for communications, fund raising, and engagement in the Bar Foundation’s mission and work. • Leverage the Bar Foundation’s 50th anniversary to heighten awareness of the Bar Foundation’s mission and raise the visibility of the organization. • Recruit high-profile attorneys to serve as champions, advocates, and endorsers for the Bar Foundation. • Profile and honor the Bar Foundation stalwarts so that other may emulate their support. • Host full-firm meetings at targeted law firms to promote the Bar Foundation’s mission and work. • Target opportunities where legal services organizations come together (e.g., Pro Bono Day) or other high-visibility activities (e.g., Denim Day) to promote the Bar Foundation’s mission and work. • Evaluate the effectiveness of organizing a “Community Service Day” that features the Bar Foundation and grantee organizations. Follow through accordingly. 	<ul style="list-style-type: none"> • Increase the consistency and frequency of social media activities. • Host CLE sessions designed to increase understanding of key issues. • Enhance the dissemination of the Bar Foundation materials to key outlets. • Enhance the Board Observer Project.

Initiative 2.2 – Develop targeted approaches to segmented groups within the Philadelphia legal community.		
Objective 2.2.1 Increase the participation of young attorneys as the Bar Foundation donors and ambassadors.	Objective 2.2.2 Reach out to and engage corporate attorneys in supporting the Bar Foundation.	Objective 2.2.3 Reach out to and engage attorneys from small and non-litigation firms in supporting the Bar Foundation.
<ul style="list-style-type: none"> • Set aside two seats on the Bar Foundation Board specifically for young attorneys. • Accept a young attorney from the Board Observer Project to the Board as a visiting member. • Develop and implement mechanisms for understanding and responding to the interests and needs of young attorneys. Revise outreach and communications accordingly to ensure relevance and effectiveness. • Design outreach activities that take place where young attorneys congregate. • Capitalize and piggyback on young attorneys' interest in community service. • Integrate a social component into interactions with young attorneys, and into their fund-raising activities. • Introduce, connect with, and welcome law students into philanthropic roles within the Philadelphia legal community by partnering with the pro bono programs at law schools. • Promote the Bar Foundation as “we are the consistent thread throughout your career.” 	<ul style="list-style-type: none"> • Analyze the composition of the Bar Foundation Board, and recruit accordingly to ensure representation of corporate attorneys. • Identify corporations that demonstrate mission affinity with the Bar Foundation, and dedicate time and resources toward developing relationships and mutually-beneficial initiatives. • Partner with DELVACCA to determine the most effective outreach approaches and messages. • Refine the Bar Foundation communications to ensure that the messages resonate with corporate law departments, and that the means of dissemination is effective. • Encourage nominations for the awards program beyond traditional law firms. • Connect in-house attorneys to the work of grantee organizations, facilitating their first-hand experiences and understanding. 	<ul style="list-style-type: none"> • Analyze the composition of the Bar Foundation Board, and recruit accordingly to ensure representation of small and non-litigation firms. • Partner with targeted associations (e.g., American Association for Justice) to determine the most effective outreach approaches and messages to various segments of the legal community. • Broaden outreach to extend beyond the current litigation firm emphasis.

Initiative 2.3 – Position the Bar Foundation as one of the consistent and valued forces throughout every Philadelphia attorney’s career.

<p>Objective 2.3.1 Empower the Board to be a more powerful and productive force in advancing the Bar Foundation’s mission, vision, and strategic objectives.</p>	<p>Objective 2.3.2 Empower the Executive Director to play a more visible role on behalf of the Bar Foundation, to elevate policy and strategic discussions, and to provide continuity of leadership.</p>	<p>Objective 2.3.3 Instill a stronger sense of philanthropy in the Philadelphia legal community.</p>
<ul style="list-style-type: none"> • Review and refine the committee structure to align with the strategic plan and to encourage the active participation of every Board member in committee work. • Clarify each committee’s charge, and encourage each committee to develop annual work plans that advance the Bar Foundation’s strategic objectives in measurable ways. • Revamp the structure and design of Board meetings to focus on strategic thinking and policy-level discussion as well as to receive committee reports that highlight areas for full-Board review and decision making. • Oversee the development of income projections to maximize dollars given to grantees. • Include in-depth discussions and understanding of the Bar Foundation’s fiscal health in the annual retreat. • Develop and execute a systematic recruiting and nominating process. • Develop and execute targeted and ongoing outreach activities to ensure that the composition of the Bar Foundation Board reflects the face of the Philadelphia legal community in terms of age, gender, ethnicity, and practice area. • Develop steps to get more trustees more involved in the grant-making process, including increased communication and more advance notifications. • Evaluate the role of the Mission, Vision, Action Committee in the context of the Strategic Plan, and refine accordingly. 	<ul style="list-style-type: none"> • Encourage the Executive Director and the President to be co-communicators with leaders in the legal community. • Ensure that the Executive Director is an important player in face-to-face interactions, especially transition meetings. • Support the Executive Director in building relationships and in being a spokesperson throughout the legal community. • Charge the Executive Director with being a driver in carrying out the Bar Foundation’s strategic objectives. 	<ul style="list-style-type: none"> • Promote messages that underscore the belief that attorneys have a responsibility to support the legal services community. • Educate the Philadelphia legal community on the issues that Philadelphia’s legal services organizations are addressing, and their need for financial support. • Facilitate the placement of young attorneys into legal services organizations, including the Board Observer Project, and encourage them to be ambassadors for charitable support within their firms or corporations. • Build loyalty to the Bar Foundation through programming and targeted messages. • Increase the awareness of the value of the Bar Foundation as a recipient of memorial and tribute gifts.

Key Performance Indicators (KPIs)

This Strategic Plan calls for the Bar Foundation to undertake ambitious goals. Inherent in these goals is using the Bar Foundation's 50th anniversary as a springboard for various initiatives. Leading up to the 50th anniversary, the Bar Foundation will focus on realizing incremental growth in annual resources, obtaining significant legacy commitment to build the endowment, and building the Bar Foundation's base of support. Subsequently, the Bar Foundation will leverage the higher visibility and support gained by 50th anniversary activities, embarking upon more ambitious goals for generating annual resources.

Abiding by the adage – that which gets measured gets done – the following Key Performance Indicators (KPIs) were identified to measure the Bar Foundation's strategic implementation progress. The Board's periodic reviews will either affirm or redirect activities as appropriate.

- **Annual operating dollars raised** (absent of Cy Pres, gifts to the endowment, and any gifts to the Civil Justice Center). Targets: 25% increase by Year 5, totaling about \$900,000 in 2017. *Underlying considerations within this KPI are more diversification of funding sources and increased profitability (particularly with regard to special events).*
- **Dollars provided in grants to legal services organizations.** Target: Increase of 4.5% a year. *An underlying consideration within this KPI is increasing the percentage of every dollar received that goes toward direct grants to legal services organizations.*
- **New commitments to the endowment.** Target: \$2 million by Year 5, including new indications that the Bar Foundation is in estate plans. *Underlying considerations within this KPI is increased effectiveness at getting members of the legal community to include the Bar Foundation in their estate planning.*
- **New pledges to the endowment.** Target: a minimum of \$50,000 in new cash pledges each year, totaling \$250,000. *An underlying consideration within this KPI is continuation of the Hamilton Circle.*
- **Number of members of the Philadelphia Bar who make gifts to the Philadelphia Bar Foundation.** Currently 632 members of the Philadelphia Bar give to the Bar Foundation annually. Target: doubled to 1,200 by Year 3. *An underlying consideration is the diversity of the representation in the donor pool. Key groups are young attorneys, corporate attorneys, and attorneys from small and non-litigation firms.*
- **Number of attorneys whose Bar Association dues payments include the option to make a gift to the Philadelphia Bar Foundation each year.** Currently 583 attorneys take this option. Target: increased to 3,000 by Year 5.
- **Unique visitors to the website, Facebook interactions, and Twitter followers.** The Bar Foundation has recently upgraded its website, and will begin to track this information.

Appendices

Appendix A: History

The Philadelphia Bar Foundation was incorporated as a non-profit corporation in 1964. While its charter calls for the Bar Foundation to operate separately from and independent of the governing body of the Philadelphia Bar Association, the two organizations enjoy a collaborative relationship on many levels.

The Bar Foundation's early years were very much developmental. The first causes it sponsored were Philadelphia Legal Services for Juveniles Project and Philadelphia Bail Project in 1965. Subsequently, it contributed to the Free Law School of Philadelphia, a consumer protection project, the Office for Juveniles of Community Legal Services, and a pilot project of the training of Court Administrators.

The 1970s ushered in an era of growth, solidifying and institutionalizing the Bar Foundation's role. The Bar Foundation was a leader in supporting minorities in the legal community. Book awards and a revolving loan library for minority law students followed soon after Sadie T.M. Alexander became the first woman officer of the Bar Foundation when the Trustees elected her as Secretary of the Foundation in 1970. The beginning of the Bar Foundation's second decade, in 1974, witnessed a move toward involvement in new projects and new avenues of community action. In 1979, the first Andrew Hamilton Ball was held, focusing the attention of the profession and the public on the work of the Bar Foundation.

Throughout the 1980s, the Bar Foundation continued to fund many worthwhile community projects, including direct services, information dissemination, and research. Other programs focused on educating judges, police officers, arresting officers, probation officers, and prison personnel regarding the enormous impact of the drug problem on the criminal justice system. It began a transitional period, broadening beyond direct services in order to focus its support more on legal services.

This movement gained ground in the 1990s, and the Bar Foundation continued to grow. Government funding cutbacks made it more challenging for law-related public interest agencies. To meet the need for more resources, it responded by organizing an annual Golf Classic, asking attorneys to make payroll deductions, and encouraging IOLTA (Interest on Lawyer Trust Accounts) funds to provide additional revenue. To build its endowment, it established the Hamilton Circle in the mid-1990s. In the inaugural year, 50 people joined the Circle by committing to give \$10,000 over ten years. In 1996, the Greitzer challenge accelerated endowment-building efforts. Currently, there are 121 active members and 222 people have finished their ten-year pledge.

The new millennium brought a series of organizational developments designed to build capacity and sharpen the Bar Foundation's identity. The size of the staff increased while the size of the core Board of Trustees was reduced. Since its founding, it has awarded nearly \$11 million in grants to a full spectrum of programs focused on access to justice in the Philadelphia region. In recent years, it consistently supports more than 30 organizations a year with direct grants.

Appendix B: 2011 Grantees

ACLU of Pennsylvania
AIDS Law Project
Atlantic Center for Capital Representation
Community Legal Services
Consumer Bankruptcy Assistant Project
Court Appointed Special Advocates
Custody and Support Assistance Clinic
Defenders Association – Capital Representation Project
Disabilities Rights Network
Education Law Center
Esperanza Legal Services
Face to Face Legal Clinic
Friends of Farmworkers
HIAS and Council Migration Service of Philadelphia
Homeless Advocacy Project
Juvenile Law Center
Legal Clinic for the Disabled
Mazzoni Center Legal Services
Nationalities Service Center
PA Health Law Project
PA Immigration Resource Center
PA Innocence Project
PA Institutional Law Project
Pennsylvanians for Modern Courts
Philadelphia Legal Assistance
Philadelphia Volunteers for the Indigent Program
Philadelphia Volunteer Lawyers for Arts
Public Interest Law Center of Philadelphia
Regional Housing Legal Services
SeniorLAW Center
Society Created to Reduce Urban Blight
Support Center for Child Advocates
Women Against Abuse Legal Center
Women’s Law Project
Women Organized Against Rape

Special Project

Tenants Union Representative Network

Appendix C: Acknowledgments

The full Board of the Philadelphia Bar Foundation participated in several strategic thinking sessions during the planning process, and will be the leaders in the implementation of the initiatives.

Philadelphia Bar Foundation Board of Trustees – 2012

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Many thanks also to the following people who were of particular assistance to the full Board of the Philadelphia Bar Foundation in the development of the Strategic Plan.

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Appendix D: Strategic Implementation Guide

This guide assigns “responsible parties” to the strategic objectives. The lead responsible party (often a relevant Board committee) is charged with taking the lead in initiating work, engaging the appropriate people to support the work, and monitoring progress. This guide also indicates when major work on each objective will be initiated. Much will need to be accomplished in the first couple of years so that higher-level work can be undertaken in earnest in later years. In many cases, work is ongoing once initiated although it is likely to gain weight or focus over time. In some cases, certain objectives will have an end point.

Goal 1: Increase the Philadelphia Bar Foundation’s tangible support of Philadelphia’s public interest community.					
Initiative 1.1 – Increase the financial resources provided to legal services organizations annually.					
Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	Responsible Parties
Objective 1.1.1 – Consolidate, clarify, and innovate the Bar Foundation’s traditional fund-raising activities.					
<ul style="list-style-type: none"> • Simplify the Bar Foundation’s giving structure and giving options. • Elevate advocacy efforts for the Bar Foundation to be a beneficiary of Cy Pres funds. • Develop a master calendar of fund-raising activities to ensure holistic analysis, planning, and implementation. 	<ul style="list-style-type: none"> • Revamp the solicitation process to emphasize peer-to-peer and face-to-face solicitations, especially at the partner level. • Review the purpose, structure, and scope of the golf outing and gala for future relevance, effectiveness, and efficiency. Revisit conduct of these events accordingly. 	<ul style="list-style-type: none"> • Enhance the effectiveness of alternative giving mechanisms (e.g., payroll deductions and on-line giving). • Evaluate the effectiveness of giving to the Bar Foundation as an option on the Bar Association dues payment. Revisit and refine accordingly, and develop an associated awareness campaign to increase support. 	<ul style="list-style-type: none"> • Secure and utilize a central database to support the Bar Foundation’s gift management and other fund-raising activities. 		

Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	Responsible Parties
Objective 1.1.2 – Diversify the sources of the Bar Foundation’s annual fund raising by undertaking new activities.					
<ul style="list-style-type: none"> • Set priorities and multi-year dollar goals in order to ensure strong coordination between raising funds for the annual operating budget, 50th anniversary initiatives, endowment, and the Civil Justice Center. • Capitalize on the Bar Foundation’s 50th anniversary by developing a series of special fund-raising initiatives, including those specifically focused on engaging attorneys who are not attracted to the golf outing, gala, or YLD events. • Evaluate the investment required to initiate new fund-raising activities against the existing expense structure in order to ensure the capacity is in place to carry out existing and new initiatives successfully. 	<ul style="list-style-type: none"> • Work with the Young Lawyers Division to codify its fund-raising efforts. 	<ul style="list-style-type: none"> • Consider challenge appeals to increase giving from corporations and firms. 			

Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	Responsible Parties
Objective 1.1.3 – Develop a concentrated endowment fund-raising campaign that focuses on attracting commitments of deferred gifts.					
<ul style="list-style-type: none"> Recruit a small volunteer team with expertise and connections who are dedicated to this effort. Develop a Case for Support specific to giving to the endowment, including dollar goal and nature of impact. 	<ul style="list-style-type: none"> Identify and focus on a short list of top prospects targeted based on their historic connection to the Bar Foundation, estimated financial capacity, and prominence in Philadelphia’s legal community. Strengthen the Bar Foundation’s promotional and outreach activities around deferred and planned giving. 	<ul style="list-style-type: none"> Craft recognition and stewardship activities to encourage the continued (ideally increased) support of past endowment donors. 			
Initiative 1.2 – Lead the development of a Civil Justice Center (if approved by the Bar Foundation Board).					
Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	Responsible Parties
Objective 1.2.1 – Commit to pursuing the establishment of a Civil Justice Center.					
<ul style="list-style-type: none"> Provide the necessary data and analysis for the Bar Foundation Board approval to proceed. Support the development of a separate Board to govern the Civil Justice Center, and the development of an independent management structure. 	<ul style="list-style-type: none"> Support the legal services organizations in resolving their existing rental/ownership arrangements. Conduct an analysis that outlines and quantifies the pros and cons of having the Bar Foundation and/or the PBA housed at the Civil Justice Center. 	<ul style="list-style-type: none"> Support the legal services organizations in developing a unified intake system. 			

<ul style="list-style-type: none"> Support the attainment of an affordable piece of land or building that is easily accessible by public transportation. 					
<p style="text-align: center;">Year 1 2013</p>	<p style="text-align: center;">Year 2 2014</p>	<p style="text-align: center;">Year 3 2015</p>	<p style="text-align: center;">Year 4 2016</p>	<p style="text-align: center;">Year 5 2017</p>	<p style="text-align: center;">Responsible Parties</p>
Objective 1.2.2 – Secure the necessary resources for establishing a Civil Justice Center.					
<ul style="list-style-type: none"> Solidify agreements with partners and other key collaborators. 	<ul style="list-style-type: none"> Quantify the amount of desirable contributed income. 	<ul style="list-style-type: none"> Leverage naming rights for the building in order to raise money as feasible and appropriate. Develop and implement a Campaign Plan, including volunteer leadership, staffing and infrastructure, and strategies. Coordinate with endowment fund-raising efforts. 			
Initiative 1.3 – Enhance the Philadelphia Bar Foundations’ interactions with Philadelphia’s non-profit legal community.					
<p style="text-align: center;">Year 1 2013</p>	<p style="text-align: center;">Year 2 2014</p>	<p style="text-align: center;">Year 3 2015</p>	<p style="text-align: center;">Year 4 2016</p>	<p style="text-align: center;">Year 5 2017</p>	<p style="text-align: center;">Responsible Parties</p>
Objective 1.3.1 – Strengthen the Bar Foundation’s collaboration with the non-profit legal community.					
<ul style="list-style-type: none"> Establish an ad hoc committee to discuss the relationship between the Foundation and the Association, and to develop protocols that guide and govern that relationship. 	<ul style="list-style-type: none"> Work more closely with grantees in targeted ways, including identifying needs and areas of potential synergy. 				

<ul style="list-style-type: none"> • Increase communication from the DLSC Committee via the Executive Director to the Bar Foundation Board and/or Grants Committee depending on the content of the information. 	<ul style="list-style-type: none"> • Refine the Bar Foundation’s role with the DLSC in order to ensure value-added interventions and support. 				
Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	Responsible Parties
Objective 1.3.2 – Refine the grant-making process to ensure the Bar Foundation’s ongoing relevance and continued high standards, solid programs, and innovation.					
<ul style="list-style-type: none"> • Revise and refine the written grant-making policy. • Evaluate the historic process of grant making to existing and new grantees. Revise process and grant guidelines accordingly. 	<ul style="list-style-type: none"> • Develop steps to get more trustees more involved in the grant-making process, including increased communication and more advance notifications. 				
Goal 2: Position the Philadelphia Bar Foundation as the preeminent philanthropic entity in the eyes of Philadelphia’s legal community.					
Initiative 2.1 – Enhance the Bar Foundation’s marketing and communications activities.					
Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	Responsible Parties
Objective 2.1.1 – Refine and disseminate the Bar Foundation’s Case for Support.					
<ul style="list-style-type: none"> • Illustrate how giving to the Bar Foundation “changes the world,” including having an impact on the City of Philadelphia and its citizens. 	<ul style="list-style-type: none"> • Differentiate the Bar Foundation’s valued-added role from the Philadelphia Bar Association and from legal services organizations. 	<ul style="list-style-type: none"> • Ground case messages in the Bar Foundation’s strategic thinking and future direction. 			

<ul style="list-style-type: none"> • Enhance fund-raising appeals and presentations by clarifying the uses of the Bar Foundation funds, and the impact of those funds. 	<ul style="list-style-type: none"> • Design approaches to spread the word of the Bar Foundation’s case, including use of social networking and new media. 				
<p style="text-align: center;">Year 1 2013</p>	<p style="text-align: center;">Year 2 2014</p>	<p style="text-align: center;">Year 3 2015</p>	<p style="text-align: center;">Year 4 2016</p>	<p style="text-align: center;">Year 5 2017</p>	<p style="text-align: center;">Responsible Parties</p>
Objective 2.1.2 – Define and build the Bar Foundation’s brand.					
<ul style="list-style-type: none"> • Promote the Bar Foundation’s mission and work whenever there is a captive audience at fund-raising events as well as other gatherings of attorneys or law students (as appropriate). • Evaluate the effectiveness of organizing a “Community Service Day” that features the Bar Foundation and grantee organizations. Follow through accordingly. 	<ul style="list-style-type: none"> • Engage the services of a professional (paid or pro bono) marketing firm to guide the Bar Foundation in this effort. • Enhance the website as a dynamic tool for communications, fund raising, and engagement in the Bar Foundation’s mission and work. • Recruit high-profile attorneys to serve as champions, advocates, and endorsers for the Bar Foundation 	<ul style="list-style-type: none"> • Leverage the Bar Foundation’s 50th anniversary to heighten awareness of the Bar Foundation’s mission and raise the visibility of the organization. • Profile and honor the Bar Foundation stalwarts so that other may emulate their support. • Target opportunities where legal services organizations come together (e.g., Pro Bono Day) or other high-visibility activities (e.g., Denim Day) to promote the Bar Foundation’s mission and work. 	<ul style="list-style-type: none"> • Host full-firm meetings at targeted law firms to promote the Bar Foundation’s mission and work. 		

Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	Responsible Parties
Objective 2.1.3 – Educate the Philadelphia legal community on the issues that Philadelphia’s legal services organizations are addressing.					
<ul style="list-style-type: none"> • Increase the consistency and frequency of social media activities. 	<ul style="list-style-type: none"> • Host CLE sessions designed to increase understanding of key issues. • Enhance the Board Observer Project. 	<ul style="list-style-type: none"> • Enhance the dissemination of the Bar Foundation materials to key outlets. 			
Initiative 2.2 – Develop targeted approaches to segmented groups within the Philadelphia legal community.					
Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	Responsible Parties
Objective 2.2.1 – Increase the participation of young attorneys as the Bar Foundation donors and ambassadors.					
<ul style="list-style-type: none"> • Set aside two seats on the Bar Foundation Board specifically for young attorneys. • Accept a young attorney from the Board Observer Project. • Develop and implement mechanisms for understanding and responding to the interests and needs of young attorneys. Revise outreach and communications accordingly to ensure relevance and effectiveness. • Promote the Bar Foundation as “we are the consistent thread throughout your career.” 	<ul style="list-style-type: none"> • Design outreach activities that take place where young attorneys congregate. • Capitalize and piggyback on young attorneys’ interest in community service. 	<ul style="list-style-type: none"> • Integrate a social component into interactions with young attorneys, and into their fund-raising activities. 	<ul style="list-style-type: none"> • Introduce, connect with, and welcome law students into philanthropic roles within the Philadelphia legal community by partnering with the pro bono programs at law schools. 		

Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	Responsible Parties
Objective 2.2.2 – Reach out to and engage corporate attorneys in supporting the Bar Foundation.					
<ul style="list-style-type: none"> Analyze the composition of the Bar Foundation Board, and recruit accordingly to ensure representation of corporate attorneys (ongoing). Partner with DELVACCA to determine the most effective outreach approaches and messages. 	<ul style="list-style-type: none"> Identify corporations that demonstrate mission affinity with the Bar Foundation, and dedicate time and resources toward developing relationships and mutually-beneficial initiatives. Encourage nominations for the awards program beyond traditional law firms. 		<ul style="list-style-type: none"> Refine the Bar Foundation communications to ensure that the messages resonate with corporate law departments, and that the means of dissemination is effective. 	<ul style="list-style-type: none"> Connect in-house attorneys to the work of grantee organizations, facilitating their first-hand experiences and understanding. 	
Objective 2.2.3 – Reach out to and engage attorneys from small and non-litigation firms in supporting the Bar Foundation.					
<ul style="list-style-type: none"> Broaden outreach to extend beyond the current litigation firm emphasis. 	<ul style="list-style-type: none"> Analyze the composition of the Bar Foundation Board, and recruit accordingly to ensure representation of small and non-litigation firms. Partner with targeted associations (e.g., American Association for Justice) to determine the most effective outreach approaches and messages to various segments of the legal community. 				

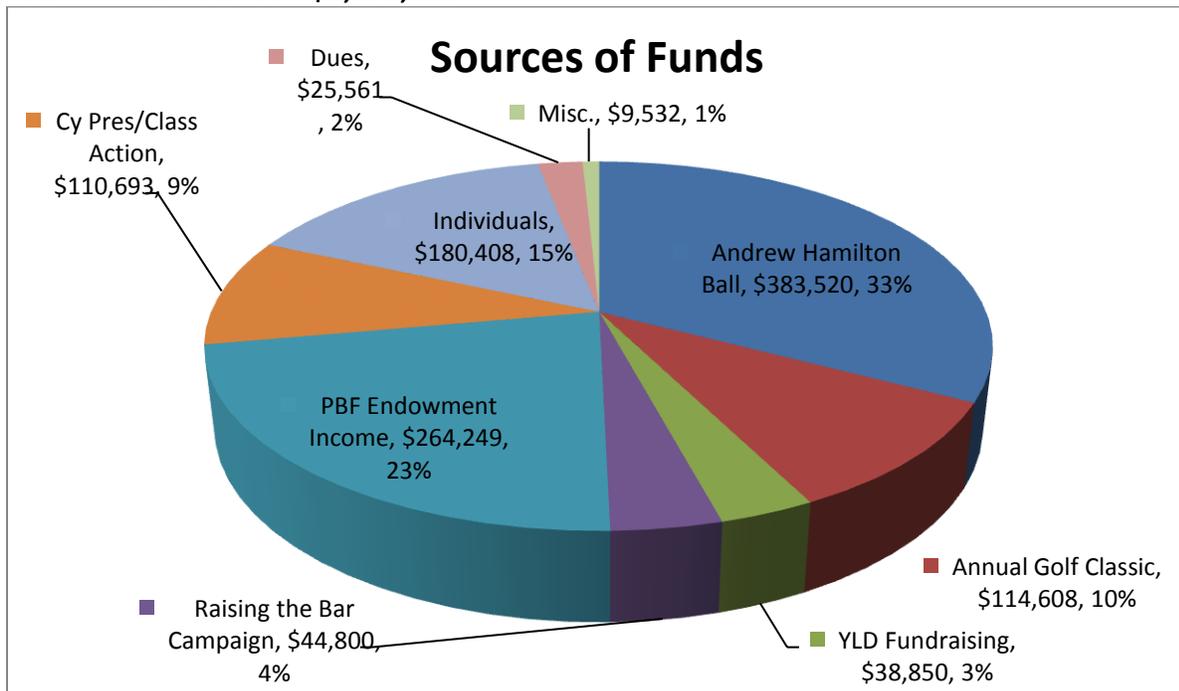
Initiative 2.3 – Position the Bar Foundation as one of the consistent and valued forces throughout every Philadelphia attorney’s career.					
Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	Responsible Parties
Objective 2.3.1 – Empower the Board to be a more powerful and productive force in advancing the Bar Foundation’s mission, vision, and strategic objectives.					
<ul style="list-style-type: none"> Review and refine the committee structure to align with the strategic plan and to encourage the active participation of every Board member in committee work. Clarify each committee’s charge, and encourage each committee to develop annual work plans that advance the Bar Foundation’s strategic objectives in measurable ways. Revamp the structure and design of Board meetings to focus on strategic thinking and policy-level discussion as well as to receive committee reports that highlight areas for full-Board review and decision making. Include in-depth discussions and understanding of the Bar Foundation’s fiscal health in the annual retreat (ongoing). 	<ul style="list-style-type: none"> Oversee the development of income projections to maximize dollars given to grantees. Develop and execute a systematic recruiting and nominating process. Develop steps to get more trustees more involved in the grant-making process, including increased communication and more advance notifications. Evaluate the role of the Mission, Vision, Action Committee in the context of the Strategic Plan and refine accordingly. 	<ul style="list-style-type: none"> Develop and execute targeted and ongoing outreach activities to ensure that the composition of the Bar Foundation Board reflects the face of the Philadelphia legal community in terms of age, gender, ethnicity, and practice area. 			

Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	Responsible Parties
Objective 2.3.2 – Empower the Executive Director to play a more visible role on behalf of the Bar Foundation, to elevate policy and strategic discussions, and to provide continuity of leadership.					
<ul style="list-style-type: none"> • Encourage the Executive Director and the President to be co-communicators with leaders in the legal community. • Ensure that the Executive Director is an important player in face-to-face interactions, especially transition meetings. 	<ul style="list-style-type: none"> • Support the Executive Director in building relationships and in being a spokesperson throughout the legal community. • Charge the Executive Director with being a driver in carrying out the Bar Foundation’s strategic objectives. 				
Objective 2.3.3 – Instill a stronger sense of philanthropy in the Philadelphia legal community.					
<ul style="list-style-type: none"> • Promote messages that underscore the belief that attorneys have a responsibility to support the legal services community. 	<ul style="list-style-type: none"> • Educate the Philadelphia legal community on the issues that Philadelphia’s legal services organizations are addressing, and their need for financial support. • Increase the awareness of the value of the Bar Foundation as a recipient of memorial and tribute gifts. 	<ul style="list-style-type: none"> • Facilitate the placement of young attorneys into legal services organizations, including the Board Observer Project, and encourage them to be ambassadors for charitable support within their firms or corporations. • Build loyalty to the Bar Foundation through programming and targeted messages. 			

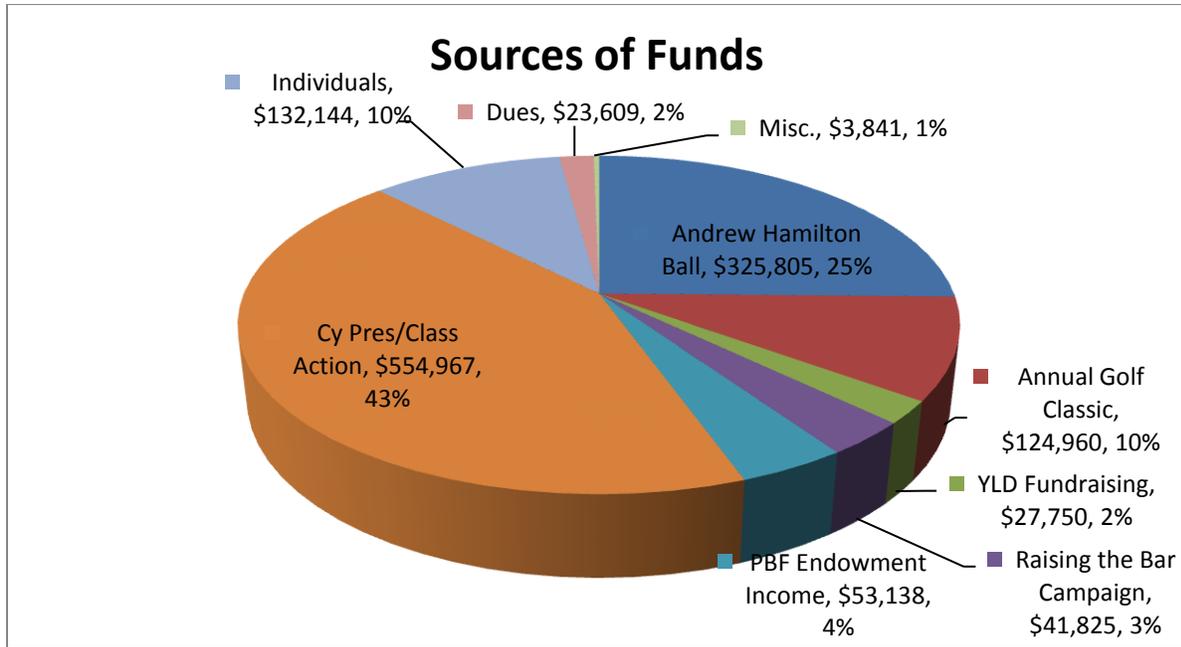
Appendix E: FY 10 and FY 11 Sources of Support

The following charts provide an overview of the Bar Foundation's sources of support in the past two complete fiscal years. They also illustrate the profound effect that Cy Pres funds had on the Bar Foundation's ability to increase grants in FY 11 without drawing as much from the endowment as it did in FY 10. The Alexander Hamilton Ball and Annual Golf Classic continue to be important sources of support as well as vehicles for face-to-face engagement of the legal community and others in supporting the Bar Foundation's mission. Nevertheless, proportionately, these events make up too much of the Bar Foundation's support base. Over the next several years, opportunities to increase individual and corporate support will be embraced to enable the Bar Foundation to expand its impact in a sustainable way.

FY 10 – Total Sources – \$1,172,221*



FY 11 – Total Sources – \$1,288,039*



*Does not include PBA in-kind support for space, financial services, human resources, etc.