

ENDOWMENT *for*

 EQUAL
JUSTICE

Reach 20 Plan

August 2016

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I. Introduction

The Endowment for Equal Justice is on a mission to secure justice for future generations by providing stable, permanent funding for civil legal aid in Washington State. The Endowment was founded in 2000 to address the growing unmet needs of low-income families and the unpredictable nature of civil legal aid funding. Today, the Endowment for Equal Justice is the largest civil legal aid endowment in the nation, with a corpus in excess of \$15.4 million as of August 2016.

In 2014, the Endowment made its first annual grant to the Legal Foundation of Washington, which funds 23 civil legal aid organizations throughout the state. The following year, in 2015, the Washington Supreme Court released the Civil Legal Needs Study that identified the growing and changing civil legal needs of low-income families and children in Washington State. In response to this alarming study, the Endowment's Board of Directors expressed a clear desire to do more to help low-income people meet their civil legal needs and honor the fundamental American value of justice for all. To that end, the Endowment Board decided at its July 20, 2016 meeting to launch a fundraising initiative called **Reach 20**, with the goal of raising \$5 million from donors in order to reach \$20 million in corpus by the year 2020. By doing so, the Endowment expects to be able to distribute at least \$1 million a year to address the growing civil legal aid needs of Washington residents.

In early 2016, the Endowment undertook a feasibility study to determine whether there was sufficient potential support in the community to raise \$5 million from individuals over the next three years, to bring the Endowment corpus to \$20 million by 2018. The results of the feasibility study showed that the Endowment for Equal Justice has important foundational work to do in order to identify and mobilize a sufficient number of donors who are willing and able to contribute at the levels necessary to reach a \$5 million goal. The study recommended that we take the following specific steps to create the conditions for success:

- Strengthen and diversify board leadership
- Increase visibility and understanding of the Endowment
- Address the confusion among donors about multiple funding entities
- Expand the donor base and build a robust major gifts program
- Invest in developing legacy giving program
- Explore the possibility of select law firms providing lead/principal gifts

The study recommended that we focus on these priorities over the next 12 to 18 months to strengthen the fundraising program and create the conditions for campaign success. The EEJ Board decided to move forward with launching the **Reach 20** Initiative with a three-phase structure: (1) **Planning Phase**, (2) **Legal Network Phase**, and (3) **Community Phase**. Relationship building, donor stewardship and fundraising will be ongoing from 2016 through 2020, but the **Reach 20** Initiative's focus will evolve from phase to phase, once key benchmarks are reached.

The purpose of this **Reach 20** plan is to outline all of the necessary phases and strategies for achieving the Initiative's goals. The plan serves as a procedural roadmap for Initiative leaders and volunteers, prioritizing and sequencing key strategies and actions. In order for the Initiative to succeed, it must be treated as the highest priority for the organization.

II. Goals for the *Reach 20* Initiative

GOAL #1:

The Endowment for Equal Justice's primary goal is to **reach \$20 million by the year 2020 by raising \$5 million in outright gifts and pledges from donors between January 2016 and December 2020**. These cash and pledge contributions, when coupled with cy pres awards and investment earnings, will enable to the Endowment to distribute \$1 million annually for civil legal aid.

Below is a sample gift chart illustrating the likely size and number of gifts needed to achieve the goal. Gifts to the *Reach 20* Initiative will not mirror this chart exactly, but the chart demonstrates the importance of large philanthropic investments to the success of the Initiative.

Gift Type	Gift Amount	Number of Gifts Needed	Category Total	% of Total
Principal Gift	\$1,000,000	1	\$1,000,000	20%
Lead Gifts	\$500,000	1	\$500,000	10%
	\$250,000	4	\$1,000,000	20%
	\$100,000	10	\$1,000,000	20%
Major gifts	\$50,000	10	\$500,000	10%
	\$25,000	20	\$500,000	10%
	\$10,000	30	\$300,000	6%
Community gifts	\$5,000	40	\$200,000	4%
TOTAL		116	\$5,000,000	100%

GOAL #2:

As part of the *Reach 20* Initiative, the Endowment will seek to **increase membership in the Justice Society from 20 to 100 members**. Members of the Justice Society make the ultimate statement of their values by including the Endowment in their estate plans.

III. Leadership: Board & Staff Roles

Having a strong and effective leadership structure is essential to any successful fundraising effort and must be established early in the planning process. The leadership structure clarifies the roles and responsibilities of campaign volunteers and key staff members. In this case, the Board and development staff of the Endowment will have primary responsibility for conducting all three phases of the Reach 20 Initiative.

- a) 100% of the Endowment's Board members will be actively involved in donor relations (introductions, cultivation, solicitation, and stewardship); and,
- b) The Chief Development Officer will spend at least 75% of her time externally focused on major gift prospects and the Executive Director of the Legal Foundation of Washington will spend, on average, five hours per week on the Initiative.
- c) So that the Board and Chief Development Officer may focus externally and with maximum effectiveness, the Development Coordinator will take the lead on logistics and planning for all stewardship and engagement activities and will provide data base support and staff support for the Board.

Board Leadership in Fundraising

- Board members will engage and steward a **portfolio of 5-8 donors** annually
- Board members will **introduce new people to the Endowment** and invite them to engagement events
- Board members will **host Reach 20 Dinners** in partnership with other key leaders
- Board members will **solicit gifts from individual donors and law firms**
- Board members will play **lead role in thanking donors** personally for gifts
- Board members will participate in **ongoing training** to be effective in donor relations

Staff Leadership in Fundraising

- The CDO will serve as **co-strategist** with Initiative Co-Chairs
- The CDO will **solicit gifts** as appropriate in partnership with Board members and Chairs
- Staff will lead prospect research and **provide briefings** to Board prior to donor meetings
- Staff will **organize engagement events** (*Reach 20* Dinners, Grantee Spotlights, and Speakers)
- Staff will **manage internal systems** for communication, stewardship, and gift processing

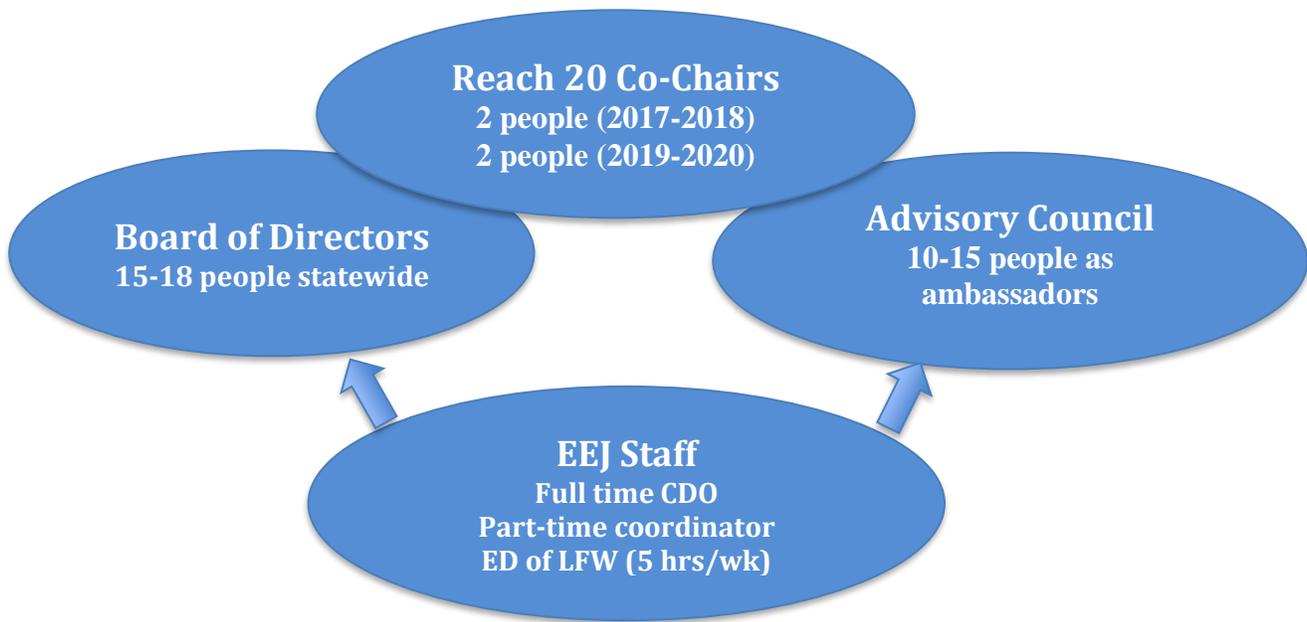
Initiative Co-Chairs

In order to lend credibility and momentum to *Reach 20*, we will recruit a team of two leaders in the legal community to co-chair the effort from 2017 through 2018. We will then recruit a new team of co-chairs for the second half of the campaign, 2019 and 2020. These individuals may or may not be Board members. Their primary roles will be to serve as co-strategists with the CDO, open doors, engage prospective donor, solicit gifts, and speak at events.

Advisory Council

In addition to the Board and co-chairs, the Endowment will recruit and deploy a 15-20 person Advisory Council comprised of legal and community leaders for outreach and awareness raising efforts beginning immediately in 2016. Their role is primarily ambassadorial and they will not be expected to solicit gifts, but rather to help make connections and raise awareness about the Endowment.

It's important to note that the *Reach 20* Initiative will be Board-led and staff supported.



IV. Outline of Initiative Phases & Timeline

This fundraising initiative will have three distinct phases. Each phase will have different goals and priorities, and require careful planning and execution.

Planning Phase: This initial 8-12 month phase is where the Endowment will lay the groundwork, create a communications plan and recruit the people necessary to ensure a successful fundraising effort. The fundraising focus in this phase will be targeted to current board members and loyal Endowment leadership contributors.

Legal Network Phase: From mid 2017 through 2018, outreach and solicitation will be focused on two groups of prospects: former members of the Endowment, Campaign for Equal Justice and LFW; and the broader legal community including loyal campaign supporters from around the state, King County Bar Foundation supporters, attorneys from supportive law firms, and donors to other organizations dedicated to equal justice such as the ACLU, Center for Youth Justice and Seattle University Law School.

Community Phase: This final phase of the campaign, which we anticipate will begin in 2019, will be launched after we have reached 80% (\$4M) of the \$5M goal in cash and pledges. This phase will focus on fundraising from those in the broader community (both legal and non-legal) who support the goal of equal justice for all.

V. Key Strategies & Activities in Each Phase

This section outlines the high-level strategies and activities for each phase of the Initiative with an understanding that the strategies will be adjusted and revised appropriately, as the Initiative unfolds over ti

A. PLANNING PHASE

1. Strengthen and Diversify Board leadership

- a) Recruit at least 5-6 new Board members with philanthropic capacity, fundraising experience, connections in key circles of influence, and under-represented groups.
- b) Prioritize candidates with racial diversity, age diversity, and geographic/regional diversity.
- c) Include candidates from law firms not represented on the Board.

2. Solicit Board Gift Commitments

Each Board Member will be personally invited to make his/her gift commitment. The Board's early and generous giving sets the pace and the tone for others in the community to follow. Each Board Member will receive a personal solicitation from the Board Chair and/or Campaign Co-Chair.

3. Secure Campaign Co-Chairs & Gift Commitments

- a) Invite 2 people to serve as Co-Chairs for the first 2 years of the campaign.
- b) Provide support to these two leaders to ensure their success.
- c) Second set of Co-Chairs TBD once lead gifts are identified.

4. Recruit Advisory Council

Under the direction of the Board Support Committee, recruit an Advisory Council that will help enhance The Endowment's credibility, both for purposes of the Initiative and more generally. Dave Andrews, Joel Benoliel, Greg Dallaire, Don Horowitz, and Ada Shen-Jaffe have agreed to serve on this Council, and there should be a significant number of other candidates who are committed to the Endowment's mission and have high credibility in the community, but who do not have the time or inclination to serve on the Board, at least for now. We will convene the Advisory Council at least annually for enjoyable and meaningful events and will enlist help from Advisory Council members as needs and opportunities arise.

5. Create and implement a marketing and communications plan that increases the Endowment's and the Reach 20 Initiative's visibility and addresses confusion about the Endowment's unique role in supporting civil legal services:

- a) Immediately form a Communications Committee within the Board that will work with staff to develop and help implement a marketing and communications plan.
- b) Update the Initiative case statement, including addressing the feedback provided by feasibility study participants as reported at pages 22-23 of Cornerstone's feasibility study report.
- c) Undertake significant work on the communication and public relations fronts to substantially raise visibility of the Endowment and its unique position in the civil legal aid funding landscape as the only entity focused on building an endowment in support of funding civil legal services programs, and why the Endowment is an effective strategy to assure long-term, sustainable funding for civil legal aid.

6. Implement a successful donor engagement and stewardship plan to expand the Endowment's donor base and build a pipeline of major donor prospects to support a \$5M Initiative.

- a) Develop a repertoire of compelling donor engagement experiences that give donors an opportunity to see the Endowment's mission in action and learn about its impact (See Details in Section VI. Examples include Reach 20 Dinners, Grantee Spotlight Tours, Quarterly Speaker Series).
- b) Provide outstanding stewardship to donors to express appreciation, showcase the impact of their investment, and strengthen relationships with past donors (See Details in Section VIII, which includes examples at various gift levels).
- c) Develop a "moves management" process with Top 25 donor prospects and create an engagement plan for them over the next 12-18 months. Moves Management refers to an intentional targeting of a group of donors who are cultivated, stewarded and 'moved' to a greater level of giving.
- d) Provide ongoing training to the Board on the key steps in donor engagement and the artful process of asking for a major gift.
- e) Consider creating named funds within the Endowment for people who wish to create a legacy in this way to honor someone special.

7. Invest in expanding the legacy giving program:

- a) Develop a marketing plan for legacy giving prospects and solicit for legacy gifts.
- b) Create a communications strategy for raising awareness of Justice Society among attorneys, with a special focus on attorneys over 55 with a giving history to the C4EJ.
- c) Promote Justice Society recognition in ways that are meaningful to attorneys.
- d) Start with inner circle first, inviting current and former Board members of C4EJ, the Endowment, and LFW to join the Society.
- e) Create a permanent Planned Giving Council comprised of attorneys and estate planning experts who will help raise awareness and provide strategic advice to the staff and Board in the development of a robust planned giving program.
- f) Consider a Justice Society recruitment effort targeted to sitting and retired judges.

8. Consider approaching 4-5 law firms for principal or lead gifts:

- a) Identify which law firms would be the most promising candidates for making a principal or lead gift (or joining a pool of firms to do so), including identifying law firms that have a track record of making significant philanthropic contributions in the community.
- b) Explore the possibility of a pooled fund from these firms to make up the principal gift or lead gifts.
- c) Develop a menu of recognition benefits for firms that would be meaningful to them and help to inspire their investment.
- d) Develop a plan for who is best to approach those firms and with what request.

9. Explore with LFW a possible impact fund:

In partnership with LFW, explore the development of a giving opportunity to create an endowment sub-fund, the income from which would support focused projects that have the potential to make impactful and long-lasting change for those who are living in poverty.

B. LEGAL NETWORK PHASE

All of the previous activities from the Planning Phase continue in this phase.

In addition, the focus is now on **active fundraising from top prospects** within the legal community, as well as providing outstanding stewardship to donors who have made campaign commitments.

- a) Donor engagement experiences happening monthly.
- b) Board Members are playing an active role in individual donor cultivation, solicitation, and stewardship.
- c) Board Members are soliciting top donor candidates on a regular basis.
- d) Board Members are playing active role in cultivating law firms and asking for gifts.
- e) Staff are providing outstanding support to Board Members and Campaign Co-Chairs, setting them up for success.

C. COMMUNITY PHASE

In this phase, the Endowment will have ideally raised 80% of the campaign goal or \$4 million. Board leaders will have already asked the EEJ's closest allies and highest rated prospects for gifts. In this third phase, the organization will cast a wider net outside of the legal community to engage people who care about equal justice and support organizations that pursue equal justice, but have not yet given directly to support civil legal aid.

The strategies and tactics in the Community Phase will be informed and shaped by the progress made in the first two phases. In planning for this phase, the Endowment will explore the possibility of soliciting a matching fund as a catalyst for community phase gifts.

VI. Engagement & Solicitation Strategies

Creating powerful engagement and solicitation strategies will be an essential part of our Initiative's success. Historically, the Endowment has not provided donors with opportunities to see the impact of their giving and learn more about the Endowment's vision. The strategies below are designed to deepen donor relationships and prepare for successful solicitations.

Reach 20 Engagement Strategies	Phase 1: Planning	Phase 2: Legal Network	Phase 3: Community
Campaign Dinners (8-24ppl)			
Monthly Grantee Spotlight			
Serving on Advisory Council			
Quarterly Speaker Series			
Private Lunches and Dinners			

In addition, one-on-one meetings with donors will be a key part of the overall donor engagement strategy. Board Members will play a central role in securing and attending these meetings with top prospects.

Attendance Goals

Engagement Activity	Annual # of People Engaged	Total Engagement Experiences
Reach 20 Dinners	15 people/dinner x 6/yr = 90 people	90 people x 3 yrs = 270
Grantee Spotlight Tour	6 people/ tour x 10 tours = 60 people	60 people x 3 yrs = 180
Speaker Series	50 people/event x 4/yr = 200 people	200 people x 3 yrs = 600
Private Lunches/Dinners	10 people/mo x 12 mos= 120 people	120 people x 3 yrs = 360

Reach 20 Initiative Dinners

These dinners will be designed for 8-24 guests in a board member or major donor's home. The goal of the dinner will be to introduce people to the Endowment's *Reach 20* Initiative and engage them in conversation about the state of civil legal needs in the community and the role that the Endowment plays in meeting those needs. Guests will not be asked to make a gift that evening. Rather, the host will invite them to become involved in some way and will let them know that the organization will be following up with them for a personal conversation about their participation.

Monthly Grantee Spotlight Tours

Once a month, the Endowment will invite a select group of donors and prospects to visit with/tour an organization that is receiving a grant from LFW, the Endowment's single grantee. (Examples include NWIRP, Columbia Legal Services, and TEAM Child). Donors will have an opportunity to hear first hand how funds from the Endowment/LFW are being used by the grantees to transform the lives of people in our community. Donors will also have an opportunity to meet other philanthropists who share their values and care about ensuring justice for all.

Service on the Endowment Advisory Council

A select group of leaders in the legal community will be invited to serve on the Advisory Council. Members of this council will lend their credibility to the Endowment’s *Reach 20* Initiative, provide an endorsement of the Endowment’s work, and open doors/make introductions to others who are likely to support the cause. The role of the Advisory Council is not to fundraise directly. The members’ credibility and endorsement are paramount.

Quarterly Speaker Series

Four times a year, the Endowment and the Campaign for Equal Justice will co-host a speaker series on a topic relevant to civil legal aid. The Speaker Series model is already underway and is a collaborative effort between LFW, C4EJ and the Endowment. The series will serve to engage current donors and prospects in learning more about civil legal aid issues and the role the Endowment plays in addressing them. Topics may include any of the following:

- The role of civil legal aid in the housing crisis
- How legal aid keeps kids on track and out of the system
- How effective legal aid can reduce caseloads in the criminal system
- The critical role legal aid plays in the lives of domestic violence survivors and their families

Currently, the vision is to ask law firms to host the speaker series, providing the venue, food and drink. The law firm would receive recognition on the invitation, on the website, and at the podium during the event.

NOTE: We have already secured Allison Holcombe, director of the ACLU’s national campaign to end mass incarceration called Smart Justice, and Ben Danielson, the director of Odessa Brown Children’s Clinic and founding co-director of the Medical Legal Partnership, as our first speakers.

SOLICITATION STRATEGIES

Historically, we have not had a robust individual giving program. This Initiative provides an opportunity to actively invite people to make a philanthropic investment that will create a legacy of justice for generations to come.

Solicitation Strategies	Phase 1: Planning	Phase 2: Legal Network	Phase 3: Community
Board In-Person w/ Individuals			
Board In-Person w/ Law Firms			
Matching Funds @ Events or In-Person			

Below is a sample solicitation schedule for the Initiative. While the schedule won’t look exactly like this, this schedule illustrates how important securing the larger gifts are in the first few years of the fundraising effort.

The early gifts in FY 16 will come from the Endowment Board and its closest major donors. Since no principal gift donor prospect was identified in the study, we need time to cultivate relationships and engage potential donors at this level, which is why that gift doesn't appear until FY 17. Similarly, the majority of Lead Gifts need more time to develop, and thus they are reflected in FY 17 and FY 18.

Gift Type	Gift Level	FY16	FY17	FY18	FY19-20
		# of Donors			
Principal Gift	\$1,000,000	0	1	0	0
Lead Gifts	\$500,000	0	1	0	0
	\$250,000	2	2	0	0
	\$100,000	2	3	4	1
Major Gifts	\$50,000	3	5	1	1
	\$25,000	5	6	6	3
	\$10,000	2	8	10	10
Community Gifts	\$5,000	0	0	20	20
Total = 116		14	26	41	35

Law Firm Solicitation Strategy: In order to determine the viability of this potential revenue source, the Endowment Board will need to strategize about whom to approach, with what message, when and for how much. This strategy session should take place early in the Planning phase.

VII. Constituency Groups / Prospect Pool

Each of the following groups will need thoughtful engagement and solicitation strategies to deepen their connection to the Endowment and prepare them for an inspiring gift request. Some of these groups may be initially approached together and then followed-up with individually. For example, the LFW Board may be invited to a special Campaign Dinner event just for them, with private one-on-one meetings with Endowment Board Members the following month.

Reach 20 Initiative Prospect Pool
Board Members
Current Endowment Board
Former Endowment Board
Current & Former LFW Board
Current & Former Campaign Board
Donors & Prospects
Current Endowment Donors
Former Endowment Donors

Current C4EJ Donors
Former C4EJ Donors
Current Justice Society Donors
Law Firms/Corporate Donors
Legal Community Non-Donors
Non-Legal Community Prospects
Other Prospects
ACLU Donors
UW & SU Law School Donors
CCYJ Donors
KCB Foundation Endowment Donors

1. **LFW Board:** Co-Chairs and/or the Endowment President give initial presentation to LFW Board, followed by *Reach 20* Dinner just for LFW Board Members, followed by personal one-on-one solicitations.
2. **Campaign for Equal Justice Board:** Two Endowment Board Members can make a presentation to C4EJ Board about *Reach 20* and its potential impact on civil legal aid fundraising and grantmaking. Follow that with a special *Reach 20* Dinner and personal solicitations.
3. **Retired and Sitting Judges:** Seek Justice Gerry Alexander’s advice on the best way to approach current and former members of the bench to invite them to participate in *Reach 20* by making an outright and/or legacy gift.
4. **King County Bar Foundation Endowment Givers:** There is great affinity and some overlap between the Endowment donors and the KCBF Endowment contributors. Review this list with the Board and make a plan to engage this group in meaningful ways through menu of donor engagement experiences. Solicit these donors individually or in small groups accentuating the different uses and impacts of the two endowment funds.
5. **CCYJ Donors:** Our work with Team Child, CLS and NWIRP will resonate with these donors, many of whom are members of the legal community with connections to Bobbe Bridge. Review list and assign outreach to individual board members. Create specific materials to appeal to these donors.
6. **UW and SU Law School Donors:** Review top individual givers and legacy society members with Endowment Board to make connections and grow the Endowment prospect pool for the Community Phase of *Reach 20*.
7. **ACLU Donors:** Review Annual and Endowment top donors with our board to reveal connections and grow the prospect pool for the Community phase of *Reach 20*.

VIII. Recognition & Stewardship Guidelines & Goals

This Initiative is a special opportunity to provide outstanding stewardship to the Endowment’s donors. Historically, Endowment donors have not received much celebration, communication or recognition for their gifts. This Initiative will set a new standard for creatively and meaningfully honoring donors in appreciation for their generosity and commitment. The following stewardship matrix illustrates how gifts to the Initiative could be recognized and stewarded.

Stewardship Experience	\$10K	\$25K	\$100K	\$250K	\$500K+
Personal Call from Board Member					
Gift of Book (Just Mercy or Evicted)					
VIP Reception Prior to Goldmark					
Recognition at Goldmark Event					
Website recognition w/ testimonial					
Native America Art Piece (TBD)					
Private Dinner w/ Co-Chairs/Board					
Group Dinner for Major Donors					

Stewardship Goals

- All Board members will participate in donor stewardship by writing personal notes, making thank you calls, or hosting stewardship dinners or lunches.
- All guests will receive a personal thank you and follow up for attending engagement events.
- All donors will receive a personal thank you touch within 72 hours of their gift received.
- All donors will be listed in the Annual Report with special recognition for major donors.

IX. Benchmarks for Readiness to move from Planning to Legal Network Phase

- Board has met recruitment goals for diversity, fundraising experience and gift capacity (adding 5-6 members in the next 12 months, per this plan).
- Board members have all made their personal **Reach 20** gift commitments.
- Prioritize the cultivation of an individual or group Leadership Gift of \$1M.
- Targeted engagement of LFW and C4EJ Boards and key prospects from study has taken place
- Communications plan is developed and underway, helping to increase visibility for Endowment.
- 10+ new or upgraded major donors giving \$5,000 or more annually to the C4EJ (currently 5 people give \$5K or more).
- 4-6 well-attended engagement experiences for major donor prospects have taken place and at least 60 individuals have attended and agreed to a next step.

X. Benchmarks for Readiness to move from Legal Network to Community Phase

- Individual or group Leadership Gift of \$1M secured.
- Pledges of \$4M or 80% of **Reach 20** goal secured.
- Second team of co-chairs secured.
- Planned Giving Program is ongoing with all marketing materials in place, and the Planned Giving Council membership growing which will help raise awareness among wealth advisors and estate planning attorneys about the Endowment as a compelling opportunity for a legacy gift.

XI. Communications & Public Relations

The Endowment has three main communications challenges, which must be addressed in order for the **Reach 20** Initiative to be successful: (1) low visibility and lack of awareness about the Endowment as a giving opportunity for civil legal aid; (2) limited donor communication in the past, keeping donors in the dark about the positive impact of their contributions; and, (3) confusion and conflation within the legal community about other similar and competing fundraising efforts.

The feasibility study found that the Endowment has an excellent reputation among a small group of people in the legal community who know about it. However, most people said the Endowment has very low visibility within the legal community and many lawyers are not aware of the Endowment and what it does.

In order to address these challenges and to access expert communications counsel, the Endowment has contracted with Teresa Moore of Moore Ink to provide the following services:

- 1. Brand Development:** Moore Ink will research and produce a comprehensive and actionable strategy and plan to brand the Endowment and its **Reach 20** Initiative.
- 2. Message Development:**
 - Create a brand platform to serve as the foundation for consistent, compelling communications for all audiences and across all vehicles.
 - Work with staff and the Endowment's Communications Committee to build upon the previous message platform created by Moore Ink. in 2013 for the Endowment.
 - Develop new messages to articulate the impact and goals of **Reach 20** Initiative.
- 3. Fundraising Materials Development**
 - Case statement of various lengths and mediums (website, newsletters, appeals).
 - Comprehensive major donor leave-behind packet.
 - Campaign video highlighting civil legal aid needs with grantee and donor testimonials.
 - 2016 annual report.

NOTE: A full communications plan is not included in this document. Moore Ink will be creating that plan and supporting the Endowment as it moves forward with communicating key messages about the Endowment and the **Reach 20** Initiative.

XII. Initiative Materials

Every campaign/initiative needs to develop ways to convey its vision to prospective donors in compelling ways. The Endowment will invest resources into creating inspiring materials for ongoing donor education, engagement, and solicitation. Priority pieces include:

- **Reach 20** Case for Support.
- Refreshed and Compelling Endowment for Equal Justice website.
- **Reach 20** Video (to use at house parties and law firms).
- **Reach 20** Major Donor Packet.
- **Reach 20** Newsletter (to update donors and legal network about progress).
- Collection of Grantee Impact Stories to use throughout the campaign to illustrate the impact of philanthropy on real people's lives, as well as systemic change work.
- **Reach 20** Pledge Forms.

XIII. Prospect Research on Top Donor Prospects

Engage a prospect research service to help us identify the following attributes for all major donor prospects:

1. Gift capacity rating based on past giving amounts
 - a. Political giving
 - b. Charitable giving (civil rights, environment, religion, education, etc.)
 - c. Inclination to give rating based on past giving to EEJ and other organizations and past giving relative to capacity to give.
2. Wealth Capacity
 - a. Real estate holdings
 - b. Stock information
 - c. Business revenue and pension information
3. Strength of Relationship: how recently prospect has given, how frequently and total amount of giving.

XIV. Gift Counting Guidelines

Because we are raising funds for endowment, some donors will likely make multi-year pledges and planned gifts. The following are gift counting guidelines for the Board to consider.

A. Date of gifts:

All gifts and pledges made during the period from January, 2016 through December, 2020 will be counted toward the **Reach 20** \$5M goal.

B. Gift commitments:

Cash gifts: All charitable gifts contributed in the form of cash, checks, money orders, electronic fund transfers, and credit and debit card transactions will be counted at face value at the time the gift is made.

Pledges: Multiple year pledges (up to three years) received before December 2020 will be counted at face value at the time the donor signs the proper documentation.

Securities: Gifts of publicly traded securities will be counted based on the full fair market value of the securities on the date the donor relinquishes control of the asset. We credit the donor with the average price of the stock on the day it arrived at our brokerage or with the actual sale price, whichever is greatest because the donor is entitled to write off the fair market value of the stock the day it is gifted. Gifts of closely held stock will be counted at the fair-market value placed on them by a qualified independent appraiser.

Realized Bequests: Bequests that mature during the campaign will be counted at full market value, unless the bequest intention was counted toward a previous campaign.

XV. Internal Systems

The **Reach 20** Initiative represents a significant increase in face-to-face donor engagement and solicitation. Thus we will need to implement key systems to ensure our success. The following are systems we will put in place to increase organizational efficiency and ensure that donors are receiving the highest level of communication from us and that we are making the best use of everyone's time.

- Donor database will be used to track all moves and communication with donors.
- Thank you communications will be highlighted and tracked for the Board on a regular basis.
- A portfolio management system will be implemented to organize and prioritize top donor prospects assignments.
- Prospect research will be uploaded into the database and will be used to inform ask amounts.
- Contact reports will be completed within 72 hours of substantive donor contact.
- A development dashboard will be used to track monthly progress towards goals.

XVI. Budget Explanation

Running this Initiative is not “business as usual” and requires a thoughtful investment by the Endowment. The Initiative budget outlines the cost of operationalizing the campaign effort. The budget includes, among other categories:

- Staffing
- Board Training
- Prospect Research
- Donor Engagement and Solicitation Strategies
- Initiative Materials/ Donor Collateral
- Communications, Messaging, Mailings

It is important to keep in mind that while the Initiative plan is an invaluable guide, it may evolve over time as the Initiative moves forward. There are many factors that can impact a campaign plan and the organization may need to adapt to changing situations as they arise.

XVII. APPENDIX

1. Calendar
2. Budget