

ENDOWMENT FOR EQUAL JUSTICE
Three-Year Strategic Plan: 2022-2024

Purpose: Why We Exist

The Endowment for Equal Justice exists to provide long-term unrestricted funding for Washington’s civil legal aid network.

Mission: What We Do and How We Do It

The Endowment for Equal Justice cultivates a broad community of engaged donors and stewards their gifts to enable civil legal organizations and those they serve to overcome individual injustices and dismantle systemic barriers to equitable justice in Washington State.

Vision: Where We are Going

We envision a healthy community where all individuals can thrive and realize their full potential, supported by an equitable justice system.

Values: Principles that Guide Our Work:

Rule of Law and Access to Justice: We believe that the rule of law provides the foundation for our democracy and the means to fulfill the promise of our nation. We recognize that governmental support for civil legal aid has excluded certain populations from having equal access to legal assistance and barred use of appropriate legal tools such as class actions, legislative access, and organizing, and we see our role as redressing these inequities. Upholding the rule of law requires that *all* individuals have full and effective representation in the courts and that the policies and practices that create and perpetuate inequities are dismantled.

Racial Justice: We acknowledge the legal system’s role in creating and sustaining systemic inequities and disadvantages based on race. We are committed to eliminating this ongoing injustice, both in the impact we have externally and in how we operate and conduct ourselves as an organization.

Intersectional Justice: We recognize that individuals who are experiencing poverty are at heightened risk to their person and their rights and that risk is compounded for those who are oppressed based on gender, race, ethnicity, sexual orientation, and disability. We believe that the justice system has too often denied justice to these individuals and communities and we seek to support them in dismantling systemic injustice.

Collaboration and Engagement: We are committed to working collaboratively with the Legal Foundation of Washington, civil legal aid providers, and the Alliance for Equal Justice in Washington State to build capacity and to amplify their work within our community of donors and stakeholders. We will actively engage with and listen to the individuals and communities we ultimately seek to support. And, we will structure our organization and our work to ensure that we include individuals who provide a diversity of viewpoints, perspectives, and lived experiences.

Transparency and Accountability: We embrace full transparency regarding management of the Endowment for Equal Justice and stewardship of our funds. We are accountable to our donors, the organizations our funding supports, and the individuals and communities that we aim to benefit to ensure that our actions are guided by and consistent with our mission.

GOALS, OBJECTIVES, AND TACTICS FOR 2022-2024

GOAL #1: Position the Endowment to grow its endowed fund to at least \$40M by 2030.

Objectives:

1. Annually raise at least \$500,000 in 2022, 2023, and 2024 in new gifts and pledges.
2. Increase donor base by 10% annually.
3. Expand donor base outside the legal community.
4. While complying with the Endowment's spending policy, strive to provide at least \$1 million annually to the Legal Foundation of Washington in support of civil legal aid.
5. Lay the foundation to launch a major multi-year fundraising campaign in 2025.

Tactics:

- Develop stewardship plans for current Endowment donors and those who have completed Reach 20 pledges including face-to-face meetings, events and house parties.
- Identify potential new Endowment contributors with capacity to give \$1,000+ with use of Donor Search program and the Campaign for Equal Justice ("C4EJ") pipeline.
- Explore corporate outreach and education in partnership with C4EJ with the goal of working with corporate counsel to encourage support of the Endowment directly and through their law firm partners.
- Conduct a feasibility study and build a case statement for a 2025-2029 fundraising campaign to increase the endowed fund to between \$40M and \$50M.
- Develop and initiate special projects that deepen and expand civil legal aid's importance to support thriving communities.
- Continue to increase visibility and awareness of the Endowment in the legal community through the annual Voices for Justice concert, other Endowment-specific events, the Goldmark event, and C4EJ community events.
- Develop compelling stewardship experiences that draw the legal and non-legal community closer to the Endowment's mission, provide inspiration to give, and increase the understanding of the breadth and significance of legal issues faced by people experiencing poverty.
- Create a robust communications program to increase potential donors' understanding of the role of civil legal aid and the Endowment in creating stable, healthy communities in Washington State.
- Work with an external communications firm, with the Legal Foundation of Washington ("LFW"), and C4EJ to create a detailed communications plan, timeline and materials that can serve multiple stakeholder audiences.
- Provide training to strengthen fundraising capabilities of staff and Board members in collaboration with LFW and C4EJ.
- Deepen fundraising collaboration and alignment with C4EJ, including coordinating with C4EJ's major donor program.
- Support C4EJ's goal of increasing its donor base within the legal community to 25% from 17% in order to further develop the pipeline of Campaign to Endowment donors.

GOAL #2: Expand membership in the Justice Society from 35 to 200 members.

Objectives:

1. Reach 100% Board participation in the Justice Society.
2. Position the Endowment for Equal Justice as the legacy/bequest charity of choice in the legal community and beyond.
3. Build a lasting outreach, recognition, and stewardship program to deepen and strengthen the support of Justice Society members for the Endowment and civil legal aid.

Tactics:

- Embed legacy giving into all fundraising activities and maintain constant presence in the legal community through ads, presentations, board member outreach, and deeper engagement with the estate planning section of the Washington State Bar Association (“WSBA”) and local Estate Planning Councils.
- Engage philanthropic and financial advisors across the region, educating them and providing materials they need to educate their clients when there is potential value alignment.
- Consider ways to incentivize Justice Society membership and engage our top donors by sharing the unique benefits of legacy giving.
- Consider the creation of a Planned Giving Council to assist the Endowment with complex gifts and share best practices from the estate planning community.
- Engage a consultant who will help us achieve our objective of building a lasting legacy donor outreach, recognition and stewardship program by:
 - Reviewing and advising on current planned giving marketing materials, donor communications and recognition program.
 - Reviewing and advising on donor base of current planned giving donors, most loyal donors and other planned giving prospects, profiles of current and emeritus board members and other strong champions and review wealth screening information where available.
 - Identifying and prioritizing individuals suitable for conversations about planned giving.
 - Revitalizing case statement outreach strategies.
 - Involving and training staff and board members to engage and steward planned giving prospects.
 - Creating ways to “relaunch” the Justice Society through multiple channels.

GOAL: #3: Racial Justice. Apply a race equity framework to all aspects of our work, including our organization, our fundraising, our programming, and our impact.

Objectives:

1. Increase the Board’s racial diversity.
2. Continually provide the Board with tools and training to identify and embed pro-equity/anti-racist strategies into the Endowment’s internal and external activities including onboarding with an emphasis on racial equity.
3. Advance racial equity in our investment portfolio activities.

Tactics:

- Modify our Board membership criteria, job description and expectations using an anti-racist lens.
- Engage the Board in a year of learning to lay the foundation for understanding cultural competence, organizational power, and white supremacy culture to ensure that our Board has the language and knowledge necessary to establish and sustain a culture of antiracism and equity. Incorporate this training into onboarding for new Board members and identify an approach to engage the Board beyond the “year of learning” on a regular basis with these topics.
- Consider and evaluate how the Endowment can responsibly steward its investment fund while advancing the Endowment’s mission and values, including our commitment to race equity, e.g., through the selection of investment managers and fund managers as well as specific approaches to investment such as possibly investing in BIPOC organizations and businesses in Washington State.
- Conduct an annual demographic survey in conjunction with LFW and C4EJ to better understand current Board demographics and continually evaluate our success in meeting diversity goals.
- Continue to lead the Racial Equity Series to take place quarterly each year.
- Engage donors/stakeholders on curated trips to EJI in Montgomery, AL to deepen our collective understanding of the legacy of slavery and its role in fostering deep and lasting inequities in our current legal system.
- Curate and share current and historical racial equity resources with stakeholders regularly.
- Participate regularly in Alliance for Equal Justice activities.
- Engage with those BIPOC communities most harmed by structural racism, who know best what must change, and who are often furthest from power to effectuate the necessary changes.

GOAL #4: Strengthen and expand our community partnerships. Nurture and strengthen relationships with our stakeholders (including the Advisory Council, the Legal Foundation of Washington, the Campaign for Equal Justice, the Access to Justice Board, the Alliance for Equal Justice, local Bar Associations, and the Washington State Bar Association), while partnering with community organizations that share our goals but are not specifically focused on civil legal aid.

Objectives:

1. Deepen the Endowment's engagement with LFW and C4EJ to drive greater alignment in purpose and maximize our collective impact.
2. Create opportunities for the Endowment and Endowment board members to engage with the ATJ Board, the Alliance, and Alliance members (including the communities served by civil legal aid providers) to listen and learn about the needs of the community to inform how Endowment might better fulfill its mission.

Tactics:

- Maintain our current governance and organizational relationship with LFW based on the existing Articles of Incorporation and Bylaws, Memorandum of Understanding, and Statement of Shared Principles, while continuing to monitor with LFW whether any of the terms of these documents should be updated.
- Encourage cross pollination of LFW, C4EJ, and Endowment board members on committees and as liaisons, including the creation of opportunities for the Endowment to deepen its understanding of the LFW grantmaking process and decision making.
- Collaborate with LFW/C4EJ on board recruitment strategies, board orientation, ongoing board education, and sharing of information on a pipeline of donors and potential board members.
- Explore the possibility of developing a Legal Services Funder Network in collaboration with LFW.
- Partner more closely with LFW/C4EJ in fundraising activities and goals and consider joint solicitations.
- Partner with community organizations that share our goals but are not currently focused on civil legal aid, including other systemic reform funders like Washington Women's Foundation, United Way, and the Seattle Foundation to encourage their participation in funding and otherwise supporting legal aid in Washington.
- Present to the WSBA Board of Governors and meet with appropriate WSBA sections to raise visibility for civil legal aid in general and among a younger demographic.
- Collaborate with Alliance members to engage law students and law school staff about the need to support legal aid including both financially and through the provision of pro bono services.
- In partnership with KCBA and WSBA, create ways to connect with new bar members.
- Develop annual presentations to help raise visibility with the Washington Leadership Institute and WSBA Affinity Bar Associations.

GOAL #5: Foster Organizational Excellence and Trust. Ensure that our organizational culture and infrastructure drives and supports impact while remaining grounded in our values.

Objectives:

1. Embed transparency and accountability in our strategy and goals, operations, and decision-making.
2. Assure appropriate staff resources to execute effectively on goals.
3. Grow, diversify, and strengthen our Board and Advisory Council.

Tactics:

- Continue the bi-annual board survey to determine board member satisfaction with the activities, governance, and other operations of Endowment, its committees, and its relationship with partners.
- Grow the Endowment Board to 24-27 members by 2024 and diversify Board membership to include such factors as lived experience, geographic range, intergenerational representation, race, ethnicity, disability, religion, social class, sexual orientation, Indigenous group membership, national origin, and gender identity.
- Develop roles and opportunities as well as mentorship and other support structures within the Board to ensure that all members have opportunities to contribute in meaningful ways.
- Continue annual Advisory Council meetings and other interactions with an expanded and diversified Council to create opportunities to share the work of Endowment and to receive insights and advice on how Endowment might better serve its mission.
- By means of quarterly updates in The Brief or Endowment-specific communications, regularly share with donors and other stakeholders information about Endowment activities and insight into the growth of the Endowment assets and status of annual distributions.
- Create annual scorecards to measure outcomes and regular reporting tools such as dashboards for use throughout the year.
- Expand and enhance use of existing communications channels including website, social media, newsletters.
- Recruit and retain excellent staff in order to continue providing timely, high-quality work to advance the mission of the Endowment and ensure continued alignment with LFW.
- Add staff and technology resources as needed to support increase in board membership and committee activities, fundraising strategy implementation, event management, justice society, and overall stewardship.
- Make adjustments to goals, objectives and tactics as needed to respond to changing needs and circumstances.