



# 2024-2026 Strategic Plan

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*Updated January 2024*



**FOUNDATION** of the  
**FEDERAL BAR ASSOCIATION**



## MISSION STATEMENT

*To promote and support legal research and education; advance the science of jurisprudence; facilitate the administration of justice; and foster improvements in the practice of Federal law.*

## OVERVIEW

The intent of the strategic planning initiative is for Foundation leaders to articulate how the Foundation makes a difference, can increase its visibility among stakeholders, and effectively build and deploy its resources. The critical question is, “How can the Foundation maximize its impact?”

The Foundation Board’s strategic planning retreat was facilitated by Elizabeth Derrico, who is the principal at Elizabeth Derrico & Associates, a firm devoted to building organizational capacity. She is an experienced bar professional with over 30 years of experience, including 20 years as the associate director of the ABA Division for Bar Services and three years as associate executive director of the New York State Bar Association. She has facilitated more than 150 board development, strategic planning, and staff development sessions.

Prior to the Foundation Board’s strategic planning retreat in January 2023, an electronic survey was sent to Fellows of the Foundation. While the response rate was not statistically significant, the results provided insight. The survey distribution excluded Foundation Board members and FBA leadership Fellows. The survey findings revealed that nearly all respondents consider being a Fellow an honorable distinction. Additionally, a significant majority of more than two-thirds view Fellowship as a source of meaningful recognition. While half of the respondents feel that their contributions are adequately recognized and valued, there is room for improvement in this area. In terms of awareness and understanding, 65% of Fellows have some comprehension of the Foundation’s grantmaking priorities, while 35% are uncertain or unaware. Similarly, a little over a third of respondents possess only partial familiarity with the impact of the Foundation’s grants, whereas a little over a third are either familiar or very familiar, and a quarter are unfamiliar. When considering grantmaking priorities, Fellows prioritize chapter funding as the most important, followed by civics education, scholarships, diversity, equity, and inclusion. Research studies on the Federal courts and judiciary ranked last in terms of priority.

During the strategic planning retreat, the Foundation Board reviewed assumptions and survey results, discussed its vision, and identified opportunities. The Board explored the “why” of the Foundation and assessed whether its mission areas align with the impact it aims to make. Success indicators for the vision were examined, identifying what needs to be achieved and how success will be measured.

Four goals were identified through the process:

1. Raise the Visibility of the Foundation
2. Deepen the Pride, Prestige, and Engagement of Foundation Fellows
3. Engage in Programming that Deepens and Broadens the Foundation’s Impact
4. Engage in Best Practices in Governance and Financial Stewardship

A call for volunteers to serve on strategic planning working groups was circulated to all Fellows in April 2023. Those who volunteered were appointed to work alongside Foundation Board members and determine measures of success, tactics for implementation, resource requirements, and priority setting for each goal of the strategic plan.



## IMPLEMENTATION DIRECTION

The Board of Directors will be guided by the following to implement the strategic goals.

- Prioritize impact and vision
- Leverage leadership and Fellows as brand champions
- Support standing committees and working groups and provide implementation oversight
- Address policies and review of governance documents

## RESOURCE REQUIREMENTS FOR IMPLEMENTATION OF THE STRATEGIC PLAN

- Volunteer time through committee service
- Outside professional assistance
- Impact proposition and vision statement
- Strategic communications plan
- Surveys and tools to solicit feedback
- Funding
- Collaboration with the Federal Bar Association national and chapter leadership

## NEW COMMITTEES ESTABLISHED FOR SUPPORTING STRATEGIC INITIATIVES

### *Publicity Committee Charge*

The Publicity Committee is responsible for raising awareness about the Foundation and its mission and showcasing its work and achievements through the development and implementation of effective publicity strategies that will engage and inspire Fellows, FBA members, and the broader legal community to support the Foundation's initiatives.

### *Development (Fundraising) Committee Charge*

The Development Committee is responsible for developing and implementing effective fundraising strategies, building strong relationships with current and potential donors, and seeking new opportunities for generating support and revenue.

### *Fellows Committee Charge*

The Fellows Committee is responsible for identifying and recruiting individuals who embody the highest standards of professionalism, integrity, and leadership and who are committed to advancing the mission of the Foundation and strengthening the Foundation through financial support and volunteering. The Fellows Committee shall develop and implement effective recruitment and communication strategies that will engage FBA members and inspire them to become Fellows and plan events or activities which are desirable and appropriate for Fellows' participation, enjoyment, and support. The committee will communicate the benefits and responsibilities of being a Fellow clearly and, through its activities, will enhance the prestige and visibility of the Fellows.

## EVALUATING THE STRATEGIC PLAN

Each goal includes specific and measurable tactics that will be monitored quarterly by the Board of Directors. Progress will be reported to the stakeholders at each FBA National Council Meeting and to the Fellows and FBA membership through other communication channels. Financial data will also be used to monitor achievements to financial benchmarks.



# GOAL 1: TO RAISE THE VISIBILITY OF THE FOUNDATION OF THE FBA

## MEASURES OF SUCCESS

- Increased awareness of the Foundation among FBA members
- Increase grant applications received from chapters to at least one-third of all FBA chapters
- Increase total contributions revenue by 25%
- Increased diversity of the donor base
- Increase dues check-off donations by \$30,000
- Increase number of donors by 60%
- Increase year-end donations by 50%

## TACTICS FOR IMPLEMENTATION

### *Objective 1: Develop and implement a comprehensive, integrated branding and communications plan focusing on the unique role of the FFBA and the impact of its funding*

- Finalize Vision Statement: The Foundation of the Federal Bar Association is a catalyst for elevating and improving the Federal practice of law and the system by helping lawyers, legal communities, and the Federal Courts do their best work.
- Engage with marketing consultant to develop strategic communications plan
- Incorporate personal stories and impact into messaging
- Develop Annual Report: Print and mail to all FBA members
  - » Send with print magazine (insert, bagged, reverse back cover)
- Hold an annual state of the Foundation meeting (virtual--30 minutes) open to all members
- Use The Federal Lawyer as a communication tool
  - » Publish Foundation column in each issue of The Federal Lawyer
  - » Determine feasibility with TFL staff to plan and publish Foundation-themed issue with cover
  - » Include donation-ask advertising in each magazine
- Send targeted updates to Fellows focusing on Foundation impact
- Redesign FFBA website and move off FBA site
  - » Develop new branding and link to/from FBA website
  - » Redesign grants and awards listings on website
- Develop FFBA social media presence
  - » Post personal presentations from award, grant, and scholarship winners

### *Objective 2: Focus on creating awareness among chapters, divisions, and sections about the Fellows, grants, scholarships, and awards available through the Foundation*

- Activate Fellows in each chapter as ambassadors with talking points
- Create opportunities and tools for Board officers to serve as Foundation spokespersons
  - » Develop engaging National Council presentations for both Midyear and Annual meetings
  - » Create "Foundation 101" awareness program for FFBA president to present at FBA member events
  - » Arrange for FBA and FFBA presidents to speak together at chapter events
  - » Arrange for president/officer to speak with leaders at Leadership Summit and Annual Meeting,



- including table at meetings to engage with FBA leaders with pop-up banner and swag
- Showcase grant and scholarship winners through all FFBA and FBA communication channels
- Engage non-Fellows in Foundation work
- Foundation president to meet quarterly with Circuit Vice Presidents and S/D Council and S/D Leadership

**Objective 3: Diversify the donor base and income streams by creating ongoing development opportunities**

- Develop a donor cultivation plan
  - » Develop messaging that increases the “personal touch” with donors
  - » Study feasibility of part-time development director to assist with contribution acquisition
  - » Include donation asks with all speaking opportunities
- Develop and implement targeted donor campaigns to increase diversity of the donor base and overall giving
  - » Develop year-end donation initiative
  - » Create Planned Giving program and guidelines for bequests and publicize fully
  - » Develop corporate donors campaign (could include sponsor of TFL issue or annual report printing)
  - » Develop membership renewal donation campaign (dues check-off)

## GOAL 2: DEEPEN THE PRIDE, PRESTIGE, AND ENGAGEMENT OF FOUNDATION FELLOWS

### MEASURES OF SUCCESS

- All Fellows fulfill their pledges in three years or less
- Increase sustaining life Fellows to 25% of all Fellows
- Increase Fellows Invitation acceptance rate to 75%
- Increase Fellows annual giving rate to operating fund to 50% of all Fellows
- Increase percentage of Fellows who participate in Foundation activities to 10%
- Increased net promoter score

### TACTICS FOR IMPLEMENTATION

**Objective 1: Raise the Profile of the Foundation's Impact among Fellows**

- Define impact and vehicles for communicating with Fellows
  - » Create value proposition
  - » Develop biannual Fellows engagement survey
  - » Create communications plan as part of larger strategic communications plan (including pledge follow-up)



- Recruit Fellows to serve as Foundation ambassadors
  - » Develop ambassador responsibilities/volunteer pledge
  - » Develop recruit plan
  - » Assign regional coordinators
- Expand presence of Fellows on FFBA Committees
- Develop orientation materials for Fellows
- Review structure of Fellows program
  - » Study firm membership
  - » Study higher-level tier based on lifetime donation amount
  - » Study reducing pledge amount for younger members
  - » Create a past presidents cohort and study offering a reduced pledge amount
  - » Study reducing pledge amount for solo practitioners
- Strengthen community among Fellows with regular celebration and focused communication
  - » Develop a Fellows distribution list or e-group for communications
  - » Spotlight individual accomplishments of Fellows in FBA media (TFL, newsletter, social)
  - » Hold regional events
  - » Hold annual Fellows meeting (determine what business should be conducted)
  - » Add Fellows Directory to website
- Increase diversity of Fellows through chapter representation and demographic considerations by seeking out prospects from underrepresented Chapters/Circuits

### ***Objective 2: Enhance the prestige of being a Fellow***

- Develop systematic outreach to section, committee, and chapter leaders to become Fellows
- Examine and restructure setting, cost, and programming of annual in-person Fellows events (midyear dinner, annual meeting luncheon and toast)
  - » Study Separate Dinner from Leadership Summit events
  - » Include high-profile speaker at events and conduct press outreach
  - » Honor Fellows with special recognition and seating at events
  - » Give an annual “Outstanding Fellow” award
- Emphasize the honor associated with being a Fellow in regular communications
  - » Publish list of Fellows by levels of giving in Annual Report
  - » Profile individual Fellows in regular communications
- Induct high-profile Fellows
  - » Create special committee to select honorary Fellow (justice/public servant) for annual induction
  - » Recruit Fellows from former members of the executive and legislative branches who are attorneys
- Extend personal invites to attend annual meeting and Fellows events



## GOAL 3: ENGAGE IN PROGRAMMING THAT DEEPENS AND BROADENS THE FFBA'S IMPACT

### MEASURES OF SUCCESS

- Strengthened programming impact
- Increased grant and scholarship applications
- Expanded representation of FBA entities in grant applicants
- Increased awareness among internal and external stakeholders
- National recognition

### TACTICS FOR IMPLEMENTATION

#### *Objective 1: Leverage existing mission-focused community outreach, civics education, grants, scholarships, and programming*

- Expand administration and presentation of scholarships
  - » Award honorable mentions
  - » Present awards in person (national or local/chapter events)
  - » Follow up with scholarship winners for progress reports
  - » Expand outreach for marketing scholarships (i.e., law schools)
- Expand existing grant programs
  - » Present awards in person (national or local/chapter events)
  - » Align grant cycles (one per year)
  - » Revise grant guidelines to minimize duplication
  - » Expand outreach for marketing grants to FBA chapters
- Increase collaboration with national FBA and local chapters for civics education planning and programs, especially bringing students into courtrooms to interact with attorneys and judges
  - » Coordinate Justice Camps to introduce high schoolers to the justice system (see New Orleans Chapter program)
- Increase collaboration with national FBA and local chapters for education for new attorneys about how to practice federal law, the rules of practice and procedure, and appearance in court that can be presented/hosted by Circuit, in-person and virtual
- Develop surveys to measure impact of programming
- Add personal stories and impact statements to all grant and scholarship communication

#### *Objective 2: Develop a national signature program(s)*

- Expand civics education footprint
  - » Study the creation of a teacher institute program to teach about civics education or a joint sponsorship with Federal Courts
  - » Study the creation of civics education for the public
  - » Study the creation of civics education videos
- Develop federal practice/rule of law symposium (start virtually)



- » Assign a program working group to study topics
- Study designation of funding for justice and democracy centers
- Develop grant/scholarship funding for legal intern stipends (law students, legal aid)
  - » Explore possibility of funding Judicial Intern Academy within court requirements
  - » Explore possibility of funding public service internships for executive branch
  - » Explore possibility of funding public service internships for legal services programs
- Appoint a task force to study topics and determine funding for publishing white papers and other research

## GOAL 4: ENGAGE IN BEST PRACTICES IN GOVERNANCE AND FINANCIAL STEWARDSHIP

### MEASURES OF SUCCESS

- Annual financial donation by 100% Foundation Board members
- Increased interest in Board service
- Increased diversity of Board members (demographics, geography, leadership/experience)
- Active participation of committee members
- Minimized risk to Foundation corpus with steady growth long-term

### TACTICS FOR IMPLEMENTATION

#### ***Objective 1: Build Board Capacity and develop next-generation Board leadership balancing continuity and experience with fresh perspectives and diverse voices within federal practice***

- Identify entry points of Leadership
- Develop a portrait of a leader and communications plan for recruitment
- Conduct personal outreach to identify potential Board members
- Develop and conduct annual Board orientation and training
- Conduct annual Board evaluation
- Review Board structure and governance documents
  - » Study term limits and current Board terms
  - » Study leadership ladder
  - » Review Bylaws
  - » Review Board policies

#### ***Objective 2: Activate and engage Foundation Committees***

- Strengthen Fellows Committee
  - » Create charge, distribute call for interest along with presidential outreach, and appoint committee members





- » Create action plan
- Establish Development (Fundraising) Committee
  - » Create charge, distribute call for interest along with presidential outreach, and appoint committee members
  - » Create action plan
- Establish Publicity Committee
  - » Create charge, distribute call for interest along with presidential outreach, and appoint committee members
  - » Create action plan

***Objective 3: Optimize the impact of Foundation funds***

- Revise presentation of interim financial reporting
- Review charge of Finance Committee
- Review Investment policy statement
- Review spending policy
- Review additional financial policies regarding corpus and disbursements