

NAIP/Foundation Leadership Mini-Grant Summit Report

April 1, 2016

Representatives from the 11 states involved in the Public Welfare Foundation-funded NAIP/Foundation Leadership Mini-Grants met to debrief the results from their individual projects and make recommendations about how to move forward. They were joined by six national representatives from foundations, IOLTA programs and the American Bar Association. The assessment of the various states' experiences is described below, followed by recommendations for "next steps," based on the experiences that cut across most or all states:

What worked really well with the mini-grants?

- **IOLTA leaders becoming personally involved** with regional associations of grantmakers, including as dues paying members, accessing their resources, staff, affinity group involvement, membership. The grant period allowed time to get started with these initiatives, but not enough time to realize the full benefits of involvement.
- **Looking at the data** related to core social issues to explain the role civil legal aid plays (something some IOLTA programs hadn't been good at in the past).
- Using the **power of client stories** to help people become viscerally involved with the issue and understand the contribution of legal help in human services goals.
- IOLTA leaders reaching out to the philanthropy partners helped develop a "**co-commitment**"; it was important to have this ongoing "personal touch."
- The process caused IOLTA programs to examine their work with new eyes (e.g. talking about the benefits of viewing legal aid grantees as part of the holistic ranged of social service providers) and to **explain what IOLTA grantees do in a different way**.
- The **ROI on investing in civil legal aid** is greater than the "typical" ROI for nonprofits (which is \$3 for every \$1 invested, according to information Lara Kalwinski shared; also see Alabama's legal aid economic impact study.)
- The **speakers** brought in by some states were excellent and very compelling, including Public Welfare Foundation Director Mary McClymont, who set an example for other foundations.

What didn't work so well with the mini-grants?

- **Webinars** didn't reach as many people as hoped.
- **Marketing IOLTA's work as "civil legal aid"** rather than "justice" made it harder to get people's attention. (Related to this issue, some believed that marketing their work around a particular issue – e.g. immigration – rather than "civil legal aid" would have been more beneficial in obtaining a broader understanding by foundations of the human service impact of the legal role.)
- The logistics for **putting the messages together** was sometimes complicated (e.g. getting the right people lined up, ethical issues with using some materials.)
- Having a **lack of data** to work with was challenging.

- All should try to **identify the foundations that are working on civil legal aid** and how they are doing so, e.g. individual grants or broader involvement.
- It was **difficult to reach out to everyone** who really needs to know about this (all organizations, local government, etc.)
- **Time!** The grant period was too short to achieve all of the results the IOLTA programs had hoped for. They discovered they couldn't do all of what had been envisioned because they needed to cover the "basics" first with philanthropy partners, which meant that the topics sometimes shifted from the original plan.
- The **size of some states** (Texas, Montana) made it difficult to reach out as broadly as desired.
- **Tailoring the message** to particular stakeholders.
- Developing **joint outcomes** for success – measures mutually understood by both IOLTA and other foundations who integrate access to justice in their work or fund legal aid
- This is not a "one and done" – it requires **ongoing effort to sustain the partnerships**.

Biggest opportunities revealed through the mini-grants:

- Having the opportunity to make connections between IOLTA foundations/grant makers helped **each become a resource to the other** and opened the door to other opportunities and connections, including other government funders, other allies in civil legal aid work.
- **Remaining a member** of the philanthropy organization will help IOLTA programs become more engaged and connected with the broader philanthropy world and vice versa.
- **Communicating to lawyers** (through bar foundations and boards of other foundations in which they participate) about how broader philanthropy is an important part of the access to justice world.
- **Developing relationships makes it easier** to get to the right people to gather useful data.
- **Educating funders** who are unfamiliar with legal aid about the unique issues of "lawyering" and of the breadth and reach of the services provided through IOLTA programs **helps "connect the dots."**
- **Changing IOLTA's "typical" mode of communicating about its work** (e.g. talking about "justice" vs. "civil legal aid," focusing branding based on values and national research, and messaging on outcomes rather than outputs, including how broader foundation goals are met by supporting legal aid.)
- Sharing what was learned with **other IOLTA programs and funders**.
- Defining a common set of indices of **social return on investment** in civil legal aid.
- IOLTA programs now realize that **foundations offer lots of resources in addition to funding!**
- There's a potential to use **community foundations as the holder of funds** for justice/legal aid.
- **Collateral materials** developed through the grant were of great value to legal aid groups in "making asks" and in explaining the role of legal help in meeting social service goals.

Biggest challenges highlighted through the mini-grants:

- Getting the right people together to talk about issues **takes time and personal invitations/connections**, which makes it a longer-term process. If you're impatient, you need to realize that you have to "put in the time" to get to a successful outcome.
- IOLTA programs didn't realize **who all was funding civil legal aid** prior to the grant.
- IOLTA programs need to **make a shift to see themselves as "philanthropy"** and begin speaking the same language as other funders.
- The **needs in the community remain great**, even though our work has helped.
- This is a **time-intensive effort**, which makes it "expensive"; thus the **ongoing sustainability of the effort is of concern**.
- The cost of joining the philanthropy organizations is **expensive for the IOLTA programs**; perhaps philanthropy groups could look at foundations distributing public money differently when pricing membership dues? RAG leaders participating in the mini-grants may be helpful; also look to the group membership example in the SE.
- Realizing that **it will take ongoing efforts** to not only be "invited to the party," but "asked to dance."
- Going forward, IOLTA programs should avoid the impression that this effort competes with grantees and instead become **leaders in helping them obtain more resources directly** from other foundation grants or because other foundations are affirmatively integrating civil legal aid into their projects.
- Communicating a broader identity for legal aid and IOLTA may be a **challenge with the bar** in order to convey that IOLTA-funded civil legal aid is not narrowly "legal" but holistically part of a range of services with intersecting impacts on poor people's lives.

Recommended next steps, based on the analysis of the results:

The group's suggestions were clustered into the three basic categories below, along with a recommendation to develop and seek funding for a Phase II of the initiative. Additional "next steps" are listed on the following pages as well – recommendations for what each individual state can do to build on the momentum developed through the mini-grant and more tactical activities IOLTA and philanthropy organizations can do in the immediate future.

- **Data:**
 - Conduct a national "social return on investment" in civil legal aid study.
 - Perhaps create a "data center" for social justice with state-by-state comparisons.
 - It should also include data about what levels/types of civil legal aid foundations are already supporting, perhaps building off of ABA's Access to Justice work.
 - It should include a common template to present data that can be used with funders, policy-makers, etc. (This could be customizable for each state.)
- **Partnership development:**
 - Develop a partnership between the Forum of Regional Associations of Grantmakers and NAIP to push education of philanthropic funders (including IOLTA programs) to a deeper level of holistic support for civil legal aid.

- Ideas might include sharing materials, conferences and other sessions in each group’s gatherings.
 - Develop a regional network to continue the conversations started through the mini-grants, developing additional connections and personal touches.
 - Regional associations should encourage other state IOLTA programs to join their regional philanthropy associations because it will strengthen their work and relationships. (Results from the mini-grants validate this claim!)
 - The IOLTA community should develop strategies also to encourage IOLTA programs to join and participate in their regional and/or statewide philanthropy associations.
- **Communications:**
 - Share learnings from the mini-grants with states that didn’t participate in the mini-grant process. (We might need to “unpack” more about the 11 states in the cohort in order to understand any nuances.)
 - Identify a smaller group to continue working on the issue of how to best communicate “civil legal aid” to non-IOLTA funders.
 - This group, potentially connecting with Voices for Civil Justice, would be “translators” who would develop issue-specific talking points as well as a possible “national brand.” (“Because fairness matters” is the tagline Maine has been using.)
 - From this group’s work, develop a communications toolkit to present at IOLTA workshops and to foundations.
- **Seek Phase II funding**
 - For the 11 mini-grant states to further develop relationships, including implementing strategies that succeeded in other states?
 - For other states who weren’t part of the first round of funding?

Individual state “next steps”

Each state’s IOLTA/philanthropy team developed its own “next steps” strategies:

Alabama:

- Keep talking with each other!
- IOLTA and other funders throughout the state work together to increase capacity in the legal aid system (modeled after how summer learning institute initiative works).
- Find a project that organizations can collaborate on in order to make it stronger with everyone’s services.

Georgia/Louisiana:

- Make connections via Southeastern Council of Foundations with philanthropy leaders. (Integrate with affinity groups).
- Do PR about the mini-grant and its impact, including an article in the Bar Journal co-written with a philanthropy leader – or, perhaps, an article by Mary McClymont about the results. And publish information in the SECF vehicles.

- Educate the Bar Foundation Board about the grant and its outcomes.
- Develop a new strategic plan for the Bar Foundation that syncs with the State Bar’s strategic plan. (Access to Justice is an important part of the Bar’s plan – which is great for the Bar Foundation to capitalize on.)

Indiana:

- Continue leadership roles in both organizations (Bar Foundation represented on Indiana Philanthropy Alliance (IPA) board, IPA represented on Bar Foundation board).
- Collaborate on areas of interest.
- Partner in education efforts for members, grantees, legislature.
- Create awareness opportunities for both sides (e.g. education sessions at each other’s conferences.)
- Collaborate on data collection to demonstrate economic impact. (Perhaps work with IU Public Policy Institute to do the research.)
- Conduct a “civil legal aid needs of the poor” study.
- Talk about “economic self-sufficiency” rather than “fairness” or “justice” – language would resonate more in Indiana.
- Use Justice Shepard as an advocate/educator.

Maine:

- Create understandable (jargon-free), value-based (from the donor’s perspective) communications and messaging.
- Continue to build relationships between IOLTA and other foundation leaders through one-on-one meetings and identifying areas of common interest/potential collaborations.
- Tie in these steps with all of our development work.

Maryland:

- Introduce community foundations to legal aid programs in their jurisdictions. (Association of Baltimore Area Grantmakers (ABAG) convenes a group quarterly; identify the program people and make presentations. Maryland Legal Services Corporation (MLSC) can propose education programs to be considered.)
- Conduct member-sponsored briefings. ABAG spreads the word.
- Add MLSC grantees to other program topics.

Massachusetts:

- Establish a group of trained spokespeople (e.g. legislators, grantees, philanthropists, IOLTA program staff) to educate others about civil legal aid.
- Make relevant by issue area.
- Draft a clear, short definition of the benefits of civil legal aid.
- Develop a comprehensive catalog of foundation funding for legal aid (starting with grantees and regional associations.)

Minnesota:

- Collaborate around community economic development at the Forum this summer.

- Utilize Minnesota Council on Foundations (MCF) networks and affinity groups that don't require membership.
- (MCF is developing membership for government/public funders as part of its strategic plan, which may help alleviate concerns about the cost of membership for IOLTA.)
- IOLTA director can be part of panels on relevant topics at MCF meetings/conferences.
- Share Minnesota Bar Association ROI study when complete and compare results to other states.

Montana:

- Revisit the relationship with Philanthropy Northwest, including a conversation about the cost of membership, and the opportunity to facilitate all state IOLTA programs in the Pacific Northwest under a single membership fee.
- Include the Montana Community Foundation as an input stakeholder (e.g. Bank of America settlement funds).
- Research who's who in Montana foundations.
- Be hyper-inclusive (e.g. Native populations).
- Identify issues that cross groups (e.g. healthcare, medical/legal partnership, etc.)
- New IOLTA director to explore her leadership relative to the Bank of America funds?
- Look at the ATJ Commission's data ("gaps and barriers" study), talk about "why we do this" and look at how to use the mini-grant presentation materials again.

Ohio:

- Incorporate civil legal aid into Pathways for Student Success 10-year review.
- Through a targeted communications program for selected foundations, increase the visibility of civil legal aid in the philanthropy community.
- Put one-pagers together!

Texas:

- Strategize which committees of Philanthropy Southwest would be most valuable for IOLTA to be part of (e.g. conference planning committees, educational/programmatic panels).
- Write articles for quarterly newsletters of both groups.
- Secure a special grant to send information re: LASSA.
- Explore a possible joint data project announcement.
- Put a link to the quarterly newsletter of the Texas Access to Justice Foundation webpage; promote through social media.
- Jointly go to the other states in the region to promote membership/engagement of IOLTA with philanthropy.
- Co-sponsor regional committees.

Communications Going Forward

In thinking about how best to share the learnings from the mini-grant process with others, the group was asked to identify the "best practices," the most promising tools that could help further the work and how best to communicate this information more broadly with the IOLTA and philanthropy communities.

Best (or at least “promising”) practices:

- Developing one-on-one relationships between IOLTA and philanthropy:
 - IOLTA programs joining regional grantmaker groups
 - Shared cross-over leadership
 - Getting to know the “other side” (educating each other about language/jargon, creating awareness of opportunities.) and creating personal relationships
 - Identifying attorneys who are members of philanthropic foundation boards to determine if they could assist in delivering the message about the importance of funding civil legal aid as part of a comprehensive strategy.
- Positioning civil legal aid as part of broader concerns addressed by philanthropy.
- Developing and sharing mutually valuable data.
- Understanding the importance of communication (e.g. storytelling)
- Developing partnerships around specific issues and programs.

Top tools to maximize successful partnerships:

- A “making the case” piece/speakers bureau, PowerPoint in audience-focused, user-friendly language that includes:
 - Definitions
 - Data about the need
 - ROI of investing in CLA
 - Client stories
- Identifying opportunities for relationship-building.
- A repository of articles/stories that are curated to be relevant and current.

How best/promising practices can be communicated to both IOLTA and philanthropy:

- Through IOLTA conferences and meetings and conferences of broader philanthropy
- Regional IOLTA conversations will help reach states who were not part of this grant.
- July 2016 national conference with all regional associations could include civil legal aid information.
- Using our own newsletters, blogs and social media to help “beat the drum” about civil legal aid’s impact on vulnerable people. Create a list of story ideas.
- Share success stories of projects that have integrated CLA.
- Identify regional champions and leaders and set up peer-to-peer meetings; involve them in programming and make them part of your “kitchen cabinet.”
- Focus on educating foundation boards as well as staff.

Immediate Next Steps:

To close out the conversation for the day, the group was asked to recommend some “next steps,” which are mostly tactical activities that take advantage of opportunities in the immediate future. (The longer-term/more strategic activities are listed on page 3.)

- *Dialogue* article in Fall 2016
- San Francisco ABA meeting (IOLTA information shared)

- Seek funding for further development of the ideas/partnerships identified in the first round of grants.
- Implement activities each state team identified they should undertake (listed above).
- Improve communications between the Access to Justice and IOLTA communities, perhaps by hosting a joint meeting at the ABA Equal Justice Conference.
- Look at the dues structures in the various regional associations; share the learnings from this mini-grant with the regional groups to stress the importance of involving IOLTA programs as members.