



Strategic Plan 2015 - 2020

Vision: Everyone has access to high-quality civil legal aid

Mission: OneJustice brings life-changing legal help to those in need by transforming the civil legal aid system

OneJustice

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**The challenge is great.
The potential is greater.
The time is now.**

OneJustice has been honored to serve and support the California legal aid delivery system for the past 36 years. With that honor comes great responsibility and the need to rigorously evaluate both our impact on the sector and the sector's impact on the lives of low-income Californians. This plan is the result of an unflinching look at our purpose, programs, and what we hope to achieve in the future.



There is no doubt that the challenge is great. Between eight and twelve million Californians are eligible for legal aid services, and most of them will face one to three legal barriers to basic necessities each year. Due to lack of resources, the state's civil legal aid system can employ only approximately 1,000 staff attorneys, far too few to respond to this overwhelming demand for assistance. Only one-third of those in need will actually receive legal aid services. Too many suffer, needlessly, from solvable legal problems.

The potential power of our sector is greater. We believe the provision of civil legal assistance to those in need can transform lives. We know that the current delivery system is powerful and can also be so much more – with increased resources, volunteers, collaboration, and support. We see first-hand the willingness of the private sector to be true partners in this movement for justice.

To reach its full potential, our sector must continue to transform. We are called on to increase the supply of legal aid services to respond to this tremendous need. To do so, we must fully leverage the power of technology and partnerships with the private sector. We must hone our nonprofit management practices, adopt key lessons from other sectors, and be fiercely committed to collective impact. Just as we challenge the societal systems that reinforce poverty, we must also challenge our own assumptions about our statewide system, its components, and how we manage finances, resources and talent – as a truly statewide system. By working together, we can move our sector into its next phase of development, reaching its full impact by ending needless suffering for those struggling with legal problems and thereby transforming lives.

With this plan, OneJustice affirms its commitment to you – participants in California's civil legal aid system – and most of all to the millions of Californians facing pressing legal problems while waiting for our sector to reach them. It is these Californians who stand at the heart of OneJustice's quest to bring life-changing legal help to those in need by transforming the civil legal aid system.

Many thanks,

A handwritten signature in blue ink that reads "Julia R. Wilson".

Julia R. Wilson
Chief Executive Officer

OneJustice: Who We Are and What We Do

Recognized as a national thought leader in pro bono justice, **OneJustice has served for over three decades as the backbone for the civil and social justice legal infrastructure in California.** Through this strategic plan OneJustice builds on a rich history of creativity, strong relationships, and excellent programming to establish ourselves as a sustainable Innovation Lab for legal aid ideas and demonstration projects that transform the legal aid system.

OneJustice's expertise is in its analysis of systems and strategy, and in understanding the most pressing issues and how the system can address them. While individual staff may hold substantive expertise in support of a specific project, as an organization we are systems-level experts on effective legal aid management and delivery.

We are a strategic partner across the spectrum of civil legal aid provision. OneJustice uses its systems expertise to support continuing transformation of the legal aid safety net, making it more effective and cohesive on behalf of clients. We:

- Create space and tools that promote innovative thinking
- Import creative ideas and practices from other sectors
- Convene thought leaders from across the sector to tackle issues
- Test, model and incubate new projects and delivery techniques
- Develop services and partnerships that address the complexity of clients' issues
- Train, coach, and support professionals across the sector

In order to:

- Increase the supply of high-quality civil legal aid
- Improve the capacity and sustainability of civil legal aid nonprofits
- Ensure the availability of attorneys and other advocates for the type of services needed

Resulting in an effective, efficient, coordinated system of civil legal aid and ultimately the delivery of justice for the most under-served communities.

OneJustice believes that equal access to justice depends on a coordinated system of vibrant, effective civil legal aid nonprofits. These nonprofits are necessary to the system, though not the only key component. We have learned that their success depends on:

- Skillful, creative leadership and management
- A sustainable business model, including reliable funding and healthy relationships
- Efficient use of resources, including technology and pro bono services
- Statewide and regional coordination of services and systems

OneJustice works side-by-side with these organizations to strengthen the success factors and improve the *system* that connects them with private firms and law schools in order to serve low-income clients.

Context for Planning

OneJustice has a rich history of strategic leadership and planning. In 2007, during strategic planning, we (then Public Interest Clearinghouse) learned that stakeholders were unclear about our purpose, activities, and impact. This launched a process of assessment, decision-making, and reorganization.

As a result, we began differentiating roles with our partner organization the Legal Aid Association of California (LAAC), made significant changes in our program structure and focus, and rebranded our work under the name OneJustice in 2009. In 2011 the board re-emphasized strengthening its governance function as well as expanding members' roles in fundraising, leading to increased individual giving and national recognition from BoardSource.

As part of its ongoing effective governance practices, in the fall of 2014 the OneJustice board completed an organizational self-assessment, and identified a series of issues for attention. It became clear that with the re-branding and executive leadership transition complete, the time was ripe for a fresh strategic planning process – the first for OneJustice as a stand-alone organization.

The board formed a strategic planning committee and tasked them to address the following issues, as articulated by the Nominating and Governance Committee in a September 8, 2014 memo:

- **Mission & Vision:** The time is ripe for OneJustice to revisit its mission, vision, and philosophy underpinning its program strategies. It is not clear whether OneJustice has clear descriptions of all three, or whether all Directors (and staff) are in agreement about them.
- **Program Oversight:** There is uncertainty about how OneJustice should define “success” in its work, which makes it difficult to set organizational goals and objectives... There is also a sense that the board might need more or different information about the program work.
- **Lack of Clarity about OneJustice “stakeholders”:** There is some confusion around how OneJustice would define its “stakeholders” (or whom we exist to serve). Who are our “clients”? And once we clarify who the “stakeholders” are, does the board have an independent sense of what their needs are? How does the board interact with stakeholder groups to gain that information?

The committee designed and led a seven-month planning process in partnership with a consultant and the senior management team.* The board, advisory board and staff participated in a variety of settings. 97 program stakeholders completed an online survey; 37 external stakeholders and funders shared insights through interviews; the management team and board completed financial and fund development analyses; the staff participated in two full-day retreats; and the board came together for another day-long retreat.

The planning process deliberately integrated with activities to prepare for the CEO's sabbatical, scheduled to begin immediately following approval of the plan in June 2015.

This strategic plan articulates a bold next phase of growth for OneJustice, building on its recent history of excellent programming, uniquely addressing the needs of the broader system, and changing internal structure and processes to intentionally expand impact and ensure mission sustainability. The plan provides the direction and strategies that will guide decision making around programs and operations for the next five years and beyond. The process of developing the plan has energized the board and staff around a shared commitment to expanded justice.

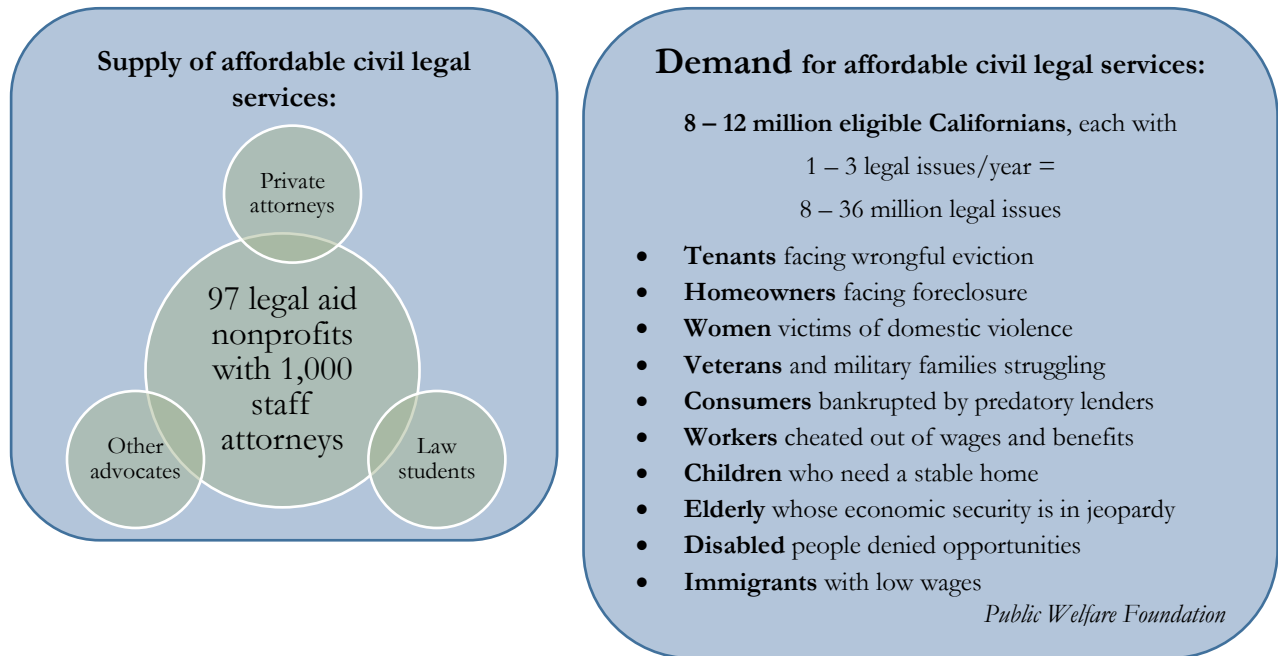
With strong financial metrics in profitability, liquidity, and solvency; a focused revenue model that has led to the doubling of revenue over six years; a dynamic and respected leadership team; and high-quality programming, OneJustice is an organization poised for and ready to deliver a greater impact – increased justice for low-income and disenfranchised Californians. This plan establishes the path forward.

** See Appendix for more information on the planning process.*

Civil Legal Aid System

OneJustice's new mission statement raises up our unique role to *transform the civil legal aid system*. This work is essential since the **demand for high-quality affordable civil legal aid far outstrips supply**.

The legal aid delivery system is made up of organizations (including nonprofit organizations, private law firms and law schools) and individuals (including attorneys, other advocates and law students) coming together to deliver quality civil legal services. OneJustice works to strengthen the organizations and transform how all the parts work together in the delivery of civil justice.



Successful transformation of the system is seen at multiple levels:

- **Policy level:** advocacy results in policies that support access to quality services
- **System-wide level:** component organizations see themselves as an integrated system
- **Organization level:** legal aid nonprofits have effective management, leadership and use of resources
- **Supply level:** working toward a system that offers an effective and sufficient supply of attorneys and other advocates with appropriate skills and training to meet the demand
- **Level of low-income people with civil legal needs:** Individuals are able to
 - Identify that they have a problem that can be addressed with a legal solution;
 - Know where to turn to receive help;
 - Receive that help, resulting in a just resolution.

Collectively, our highest concern is the low-income individual or family in need of legal assistance. In situations where components of the system have conflicting interests, the needs of low-income people in need are primary. OneJustice endeavors to always be respectful of the needs and interests of the components of the system, but will also, at all times, view **the needs of low-income people as its highest priority**.

Five-Year Strategic Direction

Now is the time for OneJustice to move from a project-implementation orientation to focus on systems transformation. While we are recognized across California for our quality programming and nationally for our thought leadership, our growth to date has often been reactive. Through this strategic plan, OneJustice seeks to intentionally tie all our work to larger system change, institutionalize our innovative thinking, and strengthen our revenue model to support increased impact and sustainability.

Over the next five years, OneJustice will continue to strengthen the delivery of services through Healthy Nonprofits projects and to grow the supply of services through Pro Bono Justice projects. Our first priority is to support what works in the existing service delivery system to close the greatest gaps in legal aid. In addition, OneJustice will test new models and pilot new approaches to lead to system transformation. At times, OneJustice will facilitate the provision of direct services for limited periods of time, working with partners based on an intentional plan for building others' capacity and spinning off project leadership.

OneJustice balances its work to focus on California while fully leveraging opportunities to learn, share and lead nationally. Transforming the legal aid system in California is our core purpose. In the near term, we will focus on succeeding with our Southern California expansion and expanding our reach in underserved communities across the state. We will continue our national work as a thought partner and resource, sharing what we have found works, supporting efforts to change policy and systems at a national level, and identifying effective practices from outside the state, resulting in both the import and export of innovative ideas. We do not plan to establish offices outside of California in the next five years.

Above all, OneJustice addresses the largest gaps in quality legal aid services in ways that will have the greatest impact. We prioritize work that reaches the “justice deserts” that can be found in urban areas as well as in rural and other geographically isolated communities.

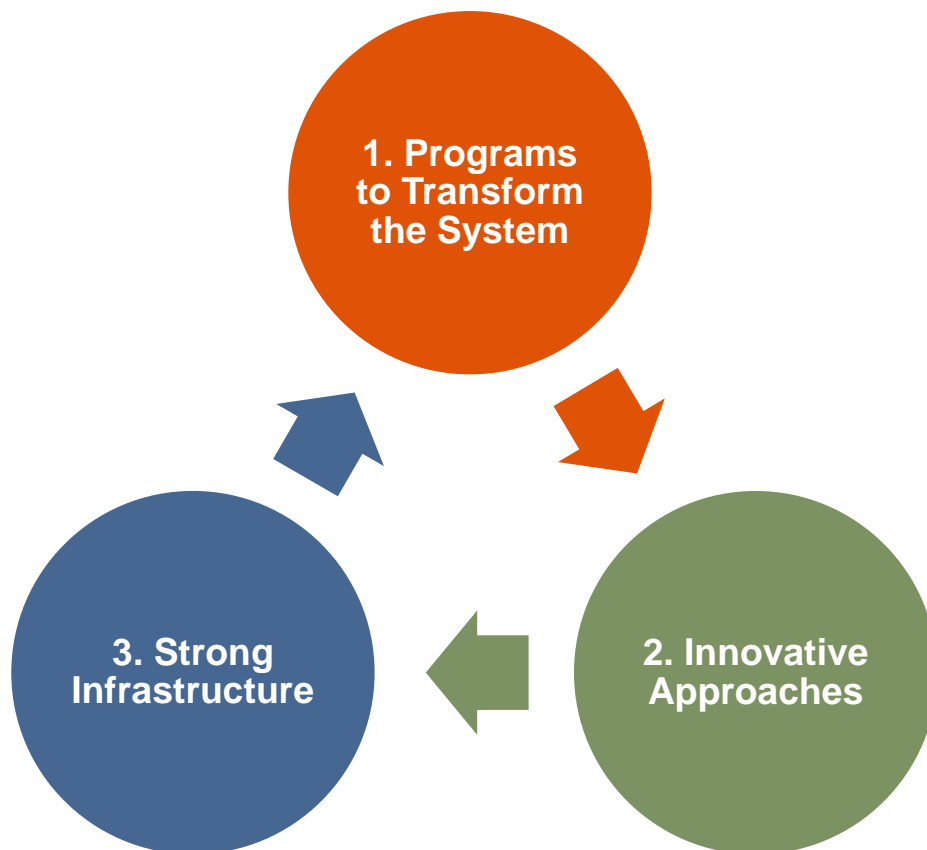
Appropriate to this stage of its development, OneJustice is restructuring staff roles and responsibilities to support and sustain this strategic direction. The staff directors' team is shifting from a strong CEO model to an intentional distributed leadership structure, under which the CEO takes a more outward-looking mix of executive functions, with a greater emphasis on fund development and external relations. The director team will continue to build their leadership of program delivery and daily operations. This internal structural redesign provides the shared leadership platform from which to implement and sustain the ambitious goals of this strategic plan.

Strategic Priorities and Goals

OneJustice has established three areas of strategic priority for the next three to five years:

1. Sustain and expand **quality programming** to best advance the mission and **transform the system**;
2. Develop and launch **innovative approaches** to further advance the mission; and
3. **Strengthen infrastructure** to support mission delivery.

These three pillars ground the plan in OneJustice's effective programming while institutionalizing innovation and addressing the need for sufficient infrastructure to sustain the mission. For each **Strategic Priority**, the board and staff have identified a small number of **Goals** to accomplish in the next three years, along with **Objectives** for the initial one to two years. Staff will prepare annual implementation plans to organize the activities to advance these Priorities, Goals and Objectives. The board will review and refresh the Goals and Objectives over time. *See Funding and Implementation.*



1. Sustain and expand **quality programming** to best advance the mission

Over the past six years, OneJustice has built a portfolio of excellent projects organized under Healthy Nonprofits and Pro Bono Justice programs. Stakeholders recognize and appreciate the quality of OneJustice's programming, along with its thought leadership, strategic partnership, advocacy voice, and effectiveness at bridging the components of the legal aid system. Given the significant imbalance between demand for and supply of legal aid, our first strategic priority focuses on quality programming.

With a nearly endless and continuously changing list of worthy projects and activities, this plan establishes the intention, strategies and priorities needed to choose which projects to sustain, end, and launch. Through 2016, staff will use criteria articulated in the project assessment tool (*see Appendix*) and the many opportunities identified through the planning process to create a program plan for the next three to five years.

All program analysis and planning from here forward will be grounded in our mission of transforming the civil legal aid system.

Goals and Objectives:

- 1.1. Deliver an **effective mix of projects** to **transform the legal aid system**
 - 1.1.1. Expand the reach and effectiveness of the Southern California office – *June 2015*
 - 1.1.2. Incorporate emerging technologies to further strengthen existing projects – *September 2015*
 - 1.1.3. Build shared understanding among staff of current projects, partner organizations, and the functioning of the legal aid system – *by December 2015*
 - 1.1.4. Assess current projects based on the strategies and using the evaluation tool developed in this plan (*see Appendix*) to determine which to continue and which to phase out – *January - June 2016*
 - 1.1.5. Increase connection across and balance between Healthy Nonprofits and Pro Bono Justice services – *July – December 2016*
 - 1.1.6. Develop a three to five year program plan including regular assessment of impact – *report to the board by December 2016*
- 1.2. Take California's rightful place at the **national policy** table to proactively change systems affecting Californians
 - 1.2.1. Expand staffing and shift national policy and advocacy role from CEO to Healthy Nonprofits team – *by June 2015*
 - 1.2.2. Rebuild active participation in NLADA and ABA federal advocacy and policy structures and activities – *beginning fall 2015*
 - 1.2.3. Establish and engage a statewide network of supporters of civil legal aid to advocate on national policy issues impacting legal aid funding and delivery– *by June 2016*
 - 1.2.4. Develop and launch a multi-year strategy to educate the California congressional delegation about the important role of civil legal aid nonprofits in meeting constituent needs – *Launch plan by June 2016 with objectives for the next 3-5 years*

2. Develop and launch **innovative approaches** to further advance the mission

Building upon the excellent and highest-impact programming established in the first priority, this second strategic priority institutionalizes innovation and intentional expansion. There are two key components in this strategy for innovative approaches: an Innovation Lab model to generate and test *new* approaches for transforming the civil legal aid system, and Project Replication to expand the *proven* approaches.

The **Innovation Lab** is a cross-organizational embodiment of creative thinking and action that creates a pipeline for and transforms OneJustice's work. The Lab institutionalizes OneJustice's effective product development work that has resulted in successful projects, such as the Executive Fellowship, and the community planning that led to the projects such as the Rural Justice Collaborative, and goes *beyond* by focusing on our mission of systems change. In addition, the Innovations Labs address questions of revenue, business model and sustainability from the beginning, establishing agreements about OneJustice's exit strategy.

Sample questions the Innovation Lab could explore:

- How to close the gaps in geographic areas with no civil legal aid presence
- How to incentivize and expand the supply of pro bono resources
- How to export technological and programmatic innovations from non-legal fields to increase the supply of legal services

See Appendix for more details on the design and approach of Innovation Labs.

Project Replication: Since 2007, OneJustice has developed and launched a variety of effective projects with possibilities of replication including the Justice Bus, Rural Justice Collaborative, IMPACT LA, Executive Fellows, and Nonprofit Management Consulting. Organizations from across the country express their interest in introducing successful OneJustice projects. Through this goal we will develop a method to package for replication the content, approach, requirements and measurement of select projects.

Successful project replication holds the possibility, though not requirement, of a dual bottom line: advancing the mission while also generating positive net revenue to support other programming. Replication may happen within California, reaching additional underserved populations. This is also a way in the next five years for OneJustice to expand its impact beyond California. Though a significant positive net revenue is not required for all project replication, any work outside of California is expected to at least cover its total costs.

See Appendix for more details on project replication.

Goals and Objectives:

- 2.1. Formalize an **Innovation Lab** to identify, develop, incubate, test, and spin off projects that transform the civil legal aid system
 - 2.1.1. Develop and define the Innovation Lab concept: establish procedures, criteria, participation, timing and decision making that can vary based on the project under consideration (*see Appendix*) - *by June 2016*
 - 2.1.2. Conduct a broad analysis of the statewide legal aid delivery system to identify opportunities to significantly improve reach and effectiveness – *by June 2016*
 - 2.1.3. Hold Innovation Labs to address key questions and assess new opportunities – *starting in June 2016*
 - 2.1.4. Report results of Innovation Labs to the board, updating the program plan accordingly – *semi-annual reports to the board*

- 2.2. Introduce a **Project Replication Initiative** with new partners, resources and board leadership to study, package and sell successful OneJustice projects
 - 2.2.1. Continue as a participant in broader national conversations of best practices and innovative programs (e.g. at Equal Justice Conference, PBI, LSC and NLADA events) – *ongoing*
 - 2.2.2. Articulate and assess staff capacity to package and market successful projects; expand staff as appropriate – *by March 2016*
 - 2.2.3. Establish financial and mission criteria and analysis to assess project replication possibilities (*see Appendix*) – *by March 2016*
 - 2.2.4. Identify a small number of OneJustice projects that are most promising for replication based on financial and mission criteria – *by June 2016*
 - 2.2.5. Establish a business plan for project replication based on analysis of the short list of promising projects and addressing issues including quality control, financial sustainability, and measured impact – *by September 2016*
 - 2.2.6. Implement the project replication business plan – *in first half of 2017*

3. Strengthen infrastructure to support mission delivery

OneJustice must have strong leadership, structure and systems to sustain its effective projects and innovations. Through this third strategic priority, we focus on three areas that warrant attention and development in the coming years: strong and effective staff, strong and effective board, and continued evolution of the revenue model.

Every stakeholder group raised the issue of succession planning as a top concern for OneJustice. Best practices call for a strong management team and distributed leadership in preparation for either planned or unplanned executive transition. For OneJustice, staff restructuring made possible through the CEO sabbatical in 2015 is chronologically the first step upon which this plan is built.

The OneJustice board won national recognition for its governance in 2013 and seeks to continue its growth and improvement through this plan. In 2011, OneJustice established a revenue model (described in the Appendix to this plan) that has proven effective. The final planning goal seeks the continued refinement of that model to respond to changes in the funding environment and to fund the incremental costs of this strategic plan.

Goals and Objectives:

- 3.1 Sustain strong and effective **staff**
 - 3.1.1 Encourage and recognize creativity, innovation and initiative across the team – *beginning June 2015*
 - 3.1.2 Implement sabbatical plan for a strong management team with distributed leadership – *June 2015*
 - 3.1.3 Sustain senior staff restructuring to allow the CEO to dedicate over 50% of her time to fund development and external relations – *October 2015*
 - 3.1.4 Restructure program staff roles, work flow, and job descriptions to foster “change master” skills and optimize innovation – *January 2016*
 - 3.1.5 Invest in SoCal office infrastructure – *January 2016*

- 3.1.6 Review a multi-year plan for increasing staff compensation with a focus on challenging the legal aid status quo through a competitive salary scale and strong focus on professional development and career advancement – *plan by June 2016*
- 3.1.7 Ensure that the performance management system incorporates the importance of system-level expertise, analyst skills, and participation in the Innovation Lab – *December 2016*
- 3.2 Sustain strong and effective **board**
 - 3.2.1 Engage board members in building relationships with foundations – *beginning September 2015*
 - 3.2.2 Develop board membership with the knowledge, relationships, resources, and leadership to successfully implement this strategic plan – *recruit in fall 2015 to appoint in January 2016*
 - 3.2.3 Establish multi-year cycle of board training on governance, revenue generation, and best practices – *by January 2016*
 - 3.2.4 Further expand board members’ collective fundraising results - *\$169,000 in FY1516*
- 3.3. Continue to refine and evolve the **revenue model** to increase fundraising effectiveness to over \$5 return for every \$1 spent
 - 3.3.1. Expand funding from foundations with the support of a grants consultant and development of necessary internal staffing and systems – *hire consultant by May 2015*
 - 3.3.2. Increase major gifts through increased donor cultivation by the CEO – *November –2015 – June 2016*
 - 3.3.3. Develop a major gifts program, possibly with the support of a consultant - *July 2016*
 - 3.3.4. Generate incremental earned income from project replication – *based on business plan, projected revenue to begin no earlier than second half of 2017*

Funding and Implementation

This strategic plan joins OneJustice’s collection of tools for planning and monitoring the organization’s progress. The annual budget in particular activates the values and direction of this plan. The staff and finance committee have begun to use a three-year budget to recognize the longer-term implications and inter-relatedness of strategic decisions. The board and staff will use the annual budgeting process and quarterly financial report reviews as opportunities to implement and monitor this strategic direction.

The board executive committee leads the organization’s activities to monitor the implementation of the strategic plan, ensuring regular opportunities for reflection and learning, and leading revision of the plan based on changing environment and opportunities. Twice annually the executive committee will bring reports of progress across priorities to the board for discussion – once in the second quarter to contribute to the budgeting process; and again in the fourth quarter to contribute to setting objectives for the coming calendar year.

The staff will integrate the strategic priorities, goals and objectives into the existing goal tracking system as a way to detail the action steps, responsible people, and timeline for moving forward. Throughout the year, staff and committees will reference the strategic goals in their reports to the board, indicating where progress is being made, connecting their work to the strategic plan, and reflecting on the effectiveness of significant changes including staff restructuring.

Throughout, the board’s governance responsibility is to ask how progress toward the goals and objectives in this plan advances OneJustice’s mission, transforms the civil legal aid system, and ultimately results in more people receiving the assistance required to resolve their legal problems.

Appendix: The Planning Process

Strategic planning committee:

Board Members: Maureen Alger, Mitch Kamin, Toby Rothschild, and Cristin Zeisler
 Staff: Julia Wilson and Michael Winn
 Consultants: Elizabeth Sadlon and C Reed

Strategic planning process: November 2014 – June 2015

Input and Activities	Results
Strategic planning committee	Monthly meetings to guide the process
Board members	Interviewed 21 of 24 board members in Dec 2014 and Jan 2015 Generative discussion at February board meeting; planning retreat April 14; Review of the plan June 16; approval and implementation discussion June 26
Advisory Board	12 Advisory Board members participated in a strategic planning discussion
Staff	All staff members participated in full-day retreats on Feb 9 th and May 13 th
Program participants	97 stakeholders responded to an electronic survey in February Respondents came from across California’s geographic regions, and represented Executive Fellows; Executive Directors, pro bono managers and board members at legal aid nonprofits; pro bono directors at law firms/ corporations; law school deans; and others
External stakeholders	Consultants and board members conducted a total of 31 external stakeholder interviews in January and February Interviewees came from legal aid organizations, law schools, courts, CBOs, private sector, and peer group organizations
Funders	Six funders participated in interviews with consultant or board member
Resource development and finance analysis	Four OneJustice board members provided their expertise in nonprofit fund development Staff and consultant analyzed fund development and financial data to support the strategic planning

Appendix: Current Programs and Projects

OneJustice projects are organized in two inter-related programs: Healthy Nonprofits and Pro Bono Justice. Staff has identified the opportunity to improve connections between the programs and across multiple projects. Over time, the mix of OneJustice programs will change based on needs in the community, successful incubation of new projects, and other factors.

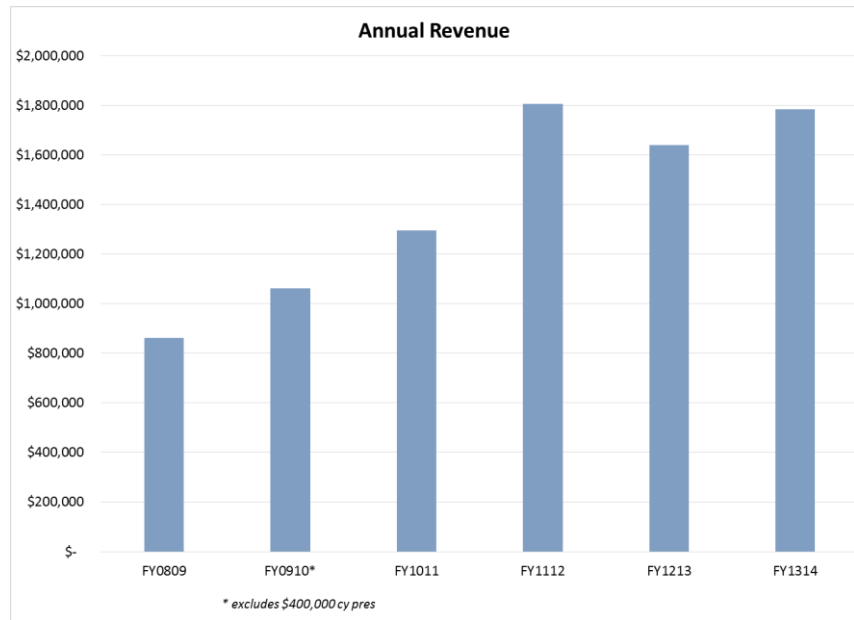
Through this strategic plan, OneJustice articulates a process for prioritizing among existing and potential projects (*see Appendix*).

Active Projects May 2015

	Level of Transformation			
	State and Federal	Sector-Wide	Nonprofit Providers	Delivery to Clients
Healthy Nonprofits	<ul style="list-style-type: none"> Federal Advocacy on Legal Aid Funding & Issues Californians for Legal Aid 	<ul style="list-style-type: none"> Legal Services Funders Network Project Directors Association Public Interest/ Public Sector Career Day Executive Fellowship (including Alumni & Law Students) 	<ul style="list-style-type: none"> Equal Justice Works AmeriCorps Fellowships Coaching, Consulting and Training on Nonprofit Management 	
Pro Bono Justice	<ul style="list-style-type: none"> Federal and state advocacy on pro bono policies 	<ul style="list-style-type: none"> Immigration Pro Bono Network Pro Bono Training Institute Structural Support: Best Practices, Trainings, Websites Strategic Planning (convening, conferences) 	<ul style="list-style-type: none"> Coaching, Consulting and Training on Pro Bono Design & Management 	<ul style="list-style-type: none"> IMPACT LA Law Student Pro Bono Project Rural Justice Initiative <ul style="list-style-type: none"> Justice Bus Rural Justice Clinics & Tech Rural Immigration

Appendix: Financial Health

OneJustice has experienced steady and substantial growth over the last six years, including more than doubling the size of its budget.



In Fiscal Year 2014-2015 (ending June 30, 2015), OneJustice has a \$2 million budget, and its financial ratios, calculated using FY1314 audited financials, demonstrate its strengths in profitability, liquidity, and solvency.

<i>Financial Ratio</i>	<i>FY1314</i>	<i>Standard</i>	<i>Assessment</i>
Profitability (surplus at year-end)	2.6%	Over 3%	Nearing standard, and surpassing our internal 2% target
Liquidity (current assets compared to liabilities)	3.0	Over 2.0	On target
Efficiency (percentage of expenses spent on overhead)	17%	15-30%	Low overhead reflects <u>under</u> investment in infrastructure
Fundraising Effectiveness (dollars raised for each \$1 spent on fundraising)	\$3.60	Over \$5	Strategy focused on increasing the number of small donors has been expensive; growth is possible through major gifts and foundations
Solvency (number of months reserves can cover)	4.2	3-6 months	On target with board resolution; will need to add funds as the budget continues to grow

Analysis of recent performance shows OneJustice's financial health is stable with room for growth through the following strategic opportunities:

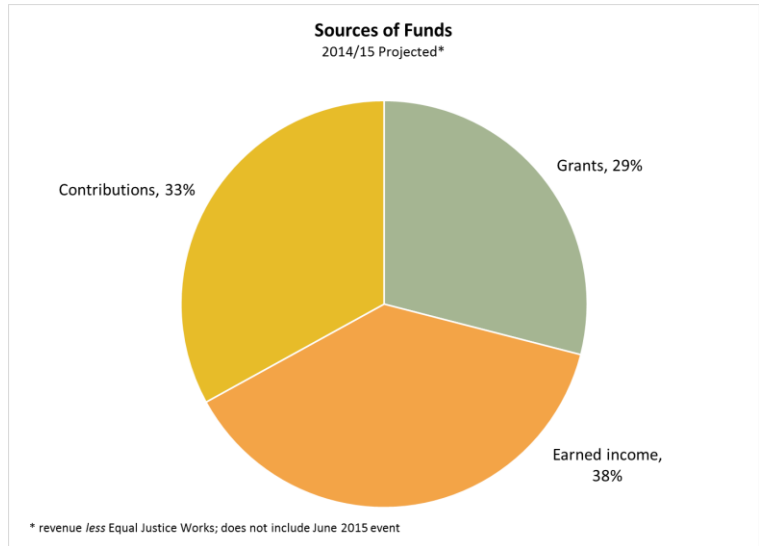
- Increase profitability through earned income and new business development;
- Selectively expand infrastructure to sustain recent growth and maintain quality; and
- Improve fundraising effectiveness by leveraging our high quality donor stewardship system to secure larger gifts and increase the donations of existing donors.

Appendix: Revenue Model

OneJustice projects are funded by a mix of revenue sources. Appropriately, most draw from unrestricted funds (such as dollars raised through charitable donations). In December 2011, the board set a strategic revenue model based on a sector scan, analysis of similar organizations' revenue, natural match to OneJustice mission, and growth potential. The resulting strategy emphasized earned income and charitable giving, specifically from individuals and one fundraising event, while maintaining existing foundation grants. Results have been successful, with increased earned income and revenue from charitable giving. Charitable support from law firms increased by \$70,000 and other charitable contributions increased by more than \$100,000 from FY1011 to FY1314. Earned income increased by almost \$300,000 during the same time period.

Key takeaways from the last three years to sustain moving forward:

- Seek funding that is a natural match to mission and to the specific programs we aim to support
- Use external data to determine growth potential
- Invest in internal capacities (both staffing and external expertise when needed)
- Grow the total amount of funds directed to legal aid efforts overall without negatively impacting giving to civil legal aid nonprofits



Looking ahead, based on experience and changes in the giving environment since 2011, OneJustice's revenue strategy aims to expand the entire amount raised to support our programs and operations. We will dedicate more resources to grant seeking and major giving where we have strong potential for increased revenue building on existing relationships and systems. For longer-term growth, we will explore and build additional earned income streams. *See Goal 3.3, page 12.*

Appendix: Project Assessment Tool

Staff leads the assessment of potential new projects, in collaboration with others in an Innovation Lab as appropriate, guided by the information below. The tool is designed to identify the issues to be considered in assessing projects, in support of the right team coming to an informed conclusion.

The **overall purpose** of the project assessment tool is to assure:

- a) Mission alignment: the project transforms the system so more people have quality civil legal aid
 - b) Strategic alignment: the project addresses a OneJustice strategic priority
- 1) Unique contribution to the field
 - a) Meets a verified unmet need for an underserved group(s); fills a gap
 - b) OneJustice is uniquely qualified
 - c) Best way to meet this need
 - 2) Outcomes and impact
 - a) Addresses the imbalance between civil legal aid supply and demand
 - b) Improves the effective operations of component(s) of the civil legal aid system
 - c) Number of people impacted
 - d) Depth and longevity of impact for the direct clients
 - e) Imparts skills that can be used later (learn to fish)
 - 3) Expected project longevity and commitment (select one)
 - a) Incubation project (to be spun off and sustained externally)
 - b) Lasting project (to sustain internally)
 - c) Time-limited project
 - d) Replication project
 - 4) Use of resources/ opportunity cost
 - a) Needed resources are quantified and identified (financial, human, relational)
 - b) Is the highest-impact use of those available resources
 - c) Has reliable partner(s) with sufficient capacity
 - d) Effective use of technology
 - e) If replication: extent and cost of necessary adaptation
 - 5) Assessment and exit strategy
 - a) Measures of success
 - b) Frequency and method to review success
 - c) Possible barriers and costs to exit or spin off
 - d) Exit strategy
 - 6) Financial analysis
 - a) Pricing (if any) based on market conditions
 - b) One-time startup costs
 - c) Annual direct costs, including direct staff time
 - d) Annual indirect costs, including all staff time
 - e) Projected annual revenues, from what sources
 - f) Return on investment, over what time period
 - g) Reliability and longevity of projected revenues
 - h) Fundraising or other revenue implications beyond the time and cost of the project
 - 7) Branding
 - a) Impact on OneJustice visibility, recognition
 - b) Opportunities for favorable media coverage, including possible investigative journalism
 - 8) Risk management
 - a) Ability to protect intellectual property; open source versus proprietary

Appendix: Innovation Lab

WHAT the Innovation Lab Does

- ASSESS NEED and DATA: the mutual responsibility of all OneJustice staff and leadership (including board) to be identify and analyze needs in the civil legal aid delivery system, which includes the production and careful analysis of DATA to document and better understand the needs
- CREATIVE DESIGN: by supporting continuous learning, questioning, perspective, creativity and the early adoption of methods and practices from other sectors, OneJustice demands that its staff and leadership continually look for fresh, non-traditional and innovative responses to identified needs
- CONVENING and COMMUNITY PARTICIPATION – when possible, the development of these ideas involves multiple perspectives and community input
- DEVELOPMENT and if appropriate INCUBATION of those new designs – through piloting and testing with rigor and discipline about criteria of success.

HOW we do this work

- *All* staff, regardless of position, are active partners in innovative leadership
- The organization’s infrastructure supports continuous learning, perspective and creativity
- Office space is physically and virtually organized to support innovation at all times
- Staff lead and engage a broad range of voices in Innovation Labs
 - Staff can organize a Lab based on an idea or issue, bringing together people across teams to think outside the box, tapping technology to support the discussion and advance the work
 - Ranging from small numbers of people to large; short duration to long
 - The Board of Directors and Advisory Board identify their generative work as part of the Innovation Lab efforts; staff can bring questions and puzzles to these groups
 - External groups and expertise from across sectors can be invited to think about big issues, those that touch large numbers of people or parts of the system, and/or that are outside OneJustice’s areas of existing expertise
- Results of the Innovation Lab are threaded throughout all OneJustice work
 - Every clinic, training, retreat, project explicitly draws upon innovation skills
 - Labs are used to vet possible new project ideas, whether generated internally or brought from outside the organization, using a rubric of criteria; some may be vetted quickly in a staff member’s mind; others may bring in multiple perspectives for a more formal conversation
 - For those deemed viable and high priority, the Lab leads project design and testing
- OneJustice can develop and/or lead Innovation Labs for others for a cost, as long as the work contributes to transforming the system

Over time, the institutionalization of innovation at OneJustice will foster and support these kinds of activities and creative thinking across the system, in legal aid nonprofits as well as other providers, firms, and schools.

WHO might be involved with staff in various Innovation Lab discussions, as appropriate

- Funders / sponsors
- Project partner(s) / stakeholders
- (Ideally) beneficiary – if applicable
- The Association of Pro Bono Counsel (APBCo)
- “Silicon Valley” resources / Hackathons (idea “jamathons”)
- University’s creative resources – Stanford, USC
- Partners to test it with (if not test on our own)
- Law schools – inject business management and nonprofit education into courses to plant the seed of legal aid thinking

Appendix: Project Replication

OneJustice will package and sell the content, approach, requirements and measurement of select projects; when appropriate, technical assistance can be provided. The project models may be based on fee-for-services, or may rely on the provider generating grant or unrestricted funds to support the operations. From OneJustice's perspective, revenue is provided for the know-how.

In order to be effective, OneJustice will have to expand its staff skillset to include product packaging and sales, as well as business analysis and management. An investment in these skill sets will ensure that OneJustice's current staff can maintain its focus on excellent product development and service delivery.

Already recognized as a national leader, OneJustice has many invitations to expand its reach beyond California. Through Project Replication, effective programs will reach more people while OneJustice continues to emphasize its work within California.

OneJustice is open to a variety of roles through its Project Replication, including but not limited to:

- Training and coaching other organizations in effective project development, management, replication;
- Developing curriculum and methodology;
- Convening groups; and
- Licensing effective projects and materials.

On the other hand, OneJustice wants to avoid roles that may divert it from its mission and expertise, which include but are not limited to:

- Operating office(s) outside of California;
- Providing information technology support;
- Conducting front-line service delivery and program implementation outside California;
- Monitoring intellectual property;
- Extending personal presence and travel outside of California; and
- Substantially customizing products for specific local needs and uses.

Partnerships will be a rich method for replicating successful projects. OneJustice will build upon its strong relationships with aligned national nonprofit organizations such as Equal Justice Works, Management Information Exchange, NLADA, ABA, Skadden Fellowship Foundation, and APBCo; as well as with national law firms, other legal nonprofits, law schools, and other providers who target similar populations. OneJustice will draw lessons and practices from other fields to identify models for replication, such as mobile medical or library services.

- Develop expectations from the beginning that our partners will replicate
- Explore possibilities of replication through law firms as delivery leaders (don't focus only on the legal aid nonprofits for replication)