Ultimate Goal | Overarching Strategies | Main Activities | Supporting Activities | Strategic Goals | Strategic Priorities | Action Plan
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Economic Justice | Grants to support Strategic Litigation | Economic Justice | | Increase maximum grant size for all programs to $50K and increase grantmaking | Secure additional resources and increase total grantmaking from $262,500 in FY2017/18 to: FY2018/19: $700,000 FY2019/20: $800,000 FY2020/21: $900,000 FY2021/22: $1,000,000 | FY2018/19: Research ways to clarify the grant award process at GAC meetings. FY2019/20: Create a plan for grant award processes and secure financial resources for implementation with Fluxx. FY2020/21: Implement changes, document new procedures, and incorporate into GAC training materials.

Environmental Justice | | Environmental Justice | Analyze data from grant program to better serve Impact Fund and program constituents | | FY2018/19: Prospect for potential research partner(s) and funding sources. FY2019/20: Identify research partner(s), secure funding, and hire researcher.

Social Justice | | Social Justice | | | FY2020/21: Define needs and scope of study, prepare data for analysis, and commence research. FY2021/22: Conclude research, analyze data, and apply results.

Education and Training to support Strategic Litigation | | Education and Training to support Strategic Litigation | Expand both substantive and geographic scope of training program | Review existing training modules to increase interactions between experienced and newer attorneys, including developing new trainers. | FY2018/19: Conduct needs assessment of constituents. Define constituents, create survey instrument**, deploy survey instrument and analyze results. FY2019/20: Set up ad-hoc committee (consisting of both board and non-board members) to inventory and review existing training modules and submit a report for suggested improvements to the Director of Litigation and Training by 06.30.20. FY2019/20: Investigate the formation of a NextGen committee (consisting of both private bar and legal services people) to drive training innovation and supplemental governance/development objectives. FY2020/21: Director of Litigation & Training to consider ad-hoc report and implement changes. FY2021/22: Review results of changes.

Other Trainings | | Other Trainings | | Expand training substantially to other litigation skills and areas besides class actions, as well as to underserved geographic areas. | FY2018/19: Conduct needs assessment of constituents. Define constituents, create survey instrument*, deploy survey instrument and analyze results. FY2019/20: Identify appropriate partners to create a web-based or hybrid training on e.g. litigation as part of a strategy for social change. FY2020/21: Director of Litigation and Training by 06.30.20. FY2021/22: Review results of changes.

Advocacy | | Advocacy | Expand Litigation Portfolio | Prioritize new litigation (not just class actions) that includes significant impact, helps develop less experienced lawyers in the community, prioritizes California, and creates a focused role for IF staff. | FY2018/19: Identify and commit to one new case evaluate staffing needs. FY2019/20: Evaluate amicus program and priorities. FY2020/21: Develop a systematic pipeline for potential cases. FY2021/22: Evaluate at least one active case at all times. FY2021/22: Evaluate 3-5 potential cases/year.

AMICI | | AMICI | | | FY2018/19: Develop partnership proposal model where partner organizations like ACLU, BerkeleyLaw, SPIC, IDEF, CREED, Rutgers, and Towards Justice host the Training Institute. FY2020/21: Pilot the model with key partner. Review findings and tailor partnership model. FY2021/22: Launch partnership model with two trainings.

Issue Advocacy | | Issue Advocacy | | | FY2021/22: Evaluate 3-5 potential cases/year.

Governing Board | | Governance | Changes in structure to facilitate incremental growth | Fully populate board to ensure adequate resources for effective oversight, staff support, and development. | FY2018/19: Create strategic board development plan that nurtures the growth of leadership, translates board matrix into a simple set of guidelines, reflects the experience and intuition of executive leadership, and primes pipeline with qualified prospects. FY2020/21: Implement plan and grow board to 15 members. FY2021/22: Continue to implement plan and grow board to maximum size.

Administrative Resources & Structure | | Administrative Resources & Structure | | | FY2018/19: Create the ideal staffing model that represents the full scope of the vision of the strategic plan that includes FTEs and interns. FY2019/20: Translate the staffing model into a year-by-year plan and budget for the hire of additional people and team building and commence the hire of staff that aligns with the year-by-year plan.
2019 - 2022 Impact Fund Strategic Plan - Logic Table V3.0

**ON**

- **Equipment**
  - Physical Assets
  - Digital Assets
- **Facilities**
  - Office
  - Venues
- **Visual Image**
  - Website
  - Collateral Materials
- **Internal Communications**
  - Style Guide
- **External Communications & Public Relations**
  - Media Relations
  - Digital Marketing
  - Practitioner Blog
  - Social Justice Blog
- **Individual Donors**
  - Appeals & Campaigns
  - Cultivation
- **Institutional Support**
  - Registing
  - State Bar
- **Firm Support**
  - Annual Event
  - Conference
  - Cy Price

**LEGEND**

- **Higher Priority**
- **Lower Priority**

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**ON**

- **ON 1**
  - Develop Succession Plan for Key Roles in both emergency situations and long-term
  - FY2018/19: Deputy Director to develop a draft emergency succession plan.
  - FY2019/20: Executive Director and Executive Committee to implement long-term succession plan.

- **ON 2**
  - Implement technology to enable scaling up of paper processes
  - FY2018/19: Initial moves to cloud consequent upon office move.
  - FY2019/20: Develop a data strategy plan for both internal and external purposes, that builds on Clearing House Project.
  - FY2020/21: Phase 1 implementation - beta testing.
  - FY2021/22: Phase 2 implementation - transfer of all available functions to paperless and cloud-based.

- **ON 3**
  - Create new materials to communicate work
  - FY2018/19: Review programs and create inventory of key facts/messages to communicate.
  - FY2019/20: Create communications plan, which calls out non-coastal content, to deploy materials containing key facts/messages across communications channels and commence with 2019 annual report.
  - FY2020/21: Continue implementation of communications plan.
  - FY2021/22: Continue implementation of communications plan.

- **ON 4**
  - Create materials to improve public perceptions of class actions
  - FY2018/19: Create Class Action Story Tool (CAST) and preview with Class Action Conference Brain Trust.
  - FY2018/19: Create Model Class Action Notice (CAN) and test with key stakeholders.

- **ON 5**
  - Raise funds for expansion of Training Program
  - FY2018/19: Create prospect list of sources of support and development calendar.
  - FY2019/20: Apply for funds.

- **ON 6**
  - Create opportunities for increased networking/alumni gatherings
  - FY2018/19: Establish ad-hoc events working group to brainstorm ideas and develop a sustainable calendar of events.
  - FY2019/20: Deploy events calendar.

- **ON 7**
  - Renew existing sources of grant funding and target expansion of support for Economic Justice and Social Justice grantmaking
  - FY2018/19: Create prospect list of sources of support and development calendar.
  - FY2019/20: Apply for funds.

- **ON 8**
  - Seek for general operating and capacity building support
  - FY2018/19: Research and develop a three-year plan to add 75 millenial donors by 06.30.22.

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**Action Plan is contingent upon available resources**

Questions to assess the need for: more skill-based/public interest focus offerings | online/in-person offerings and hybird trainings | train the trainer program/accreditation | the needs of non-urban and other underserved communities | resource needs (databases of judges, arbitrators, experts, mentors, and connectors)

Office move may cause some activities to move from 2018/19 to 2019/20