Pro Bono Partnership of Atlanta

Strategic Plan
March 2019
Executive Summary

Pro Bono Partnership of Atlanta (PBPA) has accomplished so much in its 13 years of existence and approached this Strategic Planning process from a place of great strength. PBPA diligently followed their 2015-2018 Strategic Plan and achieved all of its goals. This next Strategic Plan builds upon PBPA’s solid foundation and brings the organization to the next level.

Part of what propels organizations to the next level and greater impact is the ability to envision their success in the future. LevelSmart and the Strategic Planning Committee spent significant time at the beginning of the process defining a future vision for the organization and then revising the mission statement to match that vision. With those tenets in place, PBPA’s leadership organized priorities into 4 major areas:

- **Nonprofits**: Continues high-quality services to the nonprofits that PBPA serves to ultimately allow them to be more mission-focused.

- **Attorneys**: Expands PBPA’s attorney volunteer base to have the capacity to have the desired impact to nonprofits in Greater Atlanta and to provide meaningful and productive volunteer opportunities to lawyers.

- **Sustainability**: Enables the long-term continuity of PBPA by providing the resources needed to thrive as an organization.

- **Organizational Excellence**: Ensures the PBPA has the infrastructure—especially for professionals, volunteers, and technology—to sustain successful operations and implement strategic initiatives.

While the plan is organized into these distinct categories, each area works together and is intertwined. The outcomes of one area can be dependent upon strategies in another area. New approaches to technology, outreach, fundraising, and human resources permeate each area. By capitalizing on the PBPA’s strengths and truly challenging some of the assumptions that have guided the organization since inception, PBPA can help create a stronger nonprofit community in Greater Atlanta and a positive experience for pro-bono attorneys through the implementation of this Strategic Plan.
Every organization’s development of long-term strategy requires thoughtful consideration and extensive dialogue by people who are invested in its future. We want to acknowledge and thank the following members of the PBPA Strategic Planning Committee and PBPA Professionals who provided insight, inventive ideas and a voice of realism during the planning process:

**Strategic Planning Committee**

- Jared Brandman**, National Vision
- Alex Drummond, Seyfarth Shaw LLP
- Creighton Frommer, Relx
- Heather Howdeshell, Delta
- John Mills, Taylor English LLP
- Faith Myers**, McKesson
- Cheryl Naja, Alston & Bird LLP
- Tim Phillips**, American Cancer Society
- Darcy White, Paul Hastings LLP

**PBPA Board Members**

**PBPA Professionals**

- Rachel Spears, Executive Director
- Laurie Nichols, Development Director
- Laura Coats, Development and Communications Manager
About LevelSmart

We are a boutique consulting firm that develops strategy and builds organizational capacity for public/private collaborative ventures, philanthropic institutions and nonprofit organizations. We work with clients of all sizes and across multiple sectors, from start-ups to world-renowned companies. We address the problems that people often tap dance around. We build alignment among stakeholders with disparate viewpoints and create meaningful conversations that catalyze growth and transform organizations.

Jennifer Bush, Founder and CEO
A keen strategist, Jennifer brings more than 30 years of management consulting experience to collaborative ventures across the private, nonprofit and public sectors. She creates strategic customized solutions for start-up and growth-oriented organizations that want lasting social change. Long term clients include the Atlanta BeltLine Partnership, The Patterson Foundation, Southeastern Council of Foundations and SC Center for Fathers and Families. Jennifer’s unique way of understanding an organization’s challenges and strengths allows her to create effective solutions for a variety of industries. Clients laud her ability to synthesize disparate points of view into thoughtful, productive conversations that lead to sustainable results.

Before launching Level Smart, Inc. in 2000, Jennifer gained valuable expertise in the health care, beverage and real estate industries with The Coca-Cola Company, BOC Health Care, Glasrock Division, and MRB & Associates, a commercial real estate firm. A community leader, Jennifer was a founding board member of City Cares of America, which ultimately became the HandsOn Network Division of Points of Light Institute. She graduated Magna Cum Laude from Emory University and earned her Master’s in Human Resource Development at Georgia State University. She is an active volunteer at The Temple, Atlanta Hospice and The Galloway School.

Lara Dorfman, Consultant
Lara Aronoff Dorfman provides creative solutions to nonprofit organizations and philanthropic institutions to build organizational capacity. Lara is a terrific resource in many areas of nonprofit management and operations, especially strategic planning, meeting facilitation, fundraising and program evaluation and research. Lara has over 20 years of nonprofit and social service experience and has spent the last 4 years as part of the LevelSmart Consulting team. Prior to consulting, Lara served as the Executive Director of the Jewish Educational Loan Fund. Lara has also worked with a variety of social service, educational and faith-based organizations including the Jewish Federation of Greater Atlanta (JFGA) and the Partnership Against Domestic Violence. Lara received a Bachelor’s Degree in Jewish Studies from the University of Maryland and a Master’s Degree in Social Work from Georgia State University. Lara, a native Atlantan, is on the Board of Temple Sinai, serves on the JFGA Camp Committee and is an active volunteer for Second Helpings, Atlanta.
Background and Context

About Pro Bono Partnership of Atlanta (PBPA)

The PBPA’s mission is to “maximize the impact of pro bono engagement by connecting a network of volunteer attorneys with nonprofits in need of free business legal services”. Established in 2005, PBPA assists 501(c)(3) tax-exempt nonprofit organizations that serve low-income or disadvantaged individuals and are unable to pay for legal services by matching eligible organizations with volunteer attorneys from the leading corporations and law firms in Atlanta.

In 2017, PBPA provided $4.5 million (estimated value) of free legal services donated by attorneys. 723 attorneys volunteered with 246 nonprofits on 796 legal matters\(^1\). In addition, 97% of clients were satisfied with the legal assistance they received from volunteer attorneys and 98% of volunteers were satisfied with their nonprofit client matches\(^2\). The chart below displays numbers for major service areas with the current strategic plan goals.

![5 Year Service Trend](image)

The organization has been led by Rachel Spears, Executive Director, since its launch, and has a professional team of 9 individuals.

\(^1\) PBPA 2017 Annual Report
\(^2\) 2017 Nonprofit and Volunteer Surveys
Greater Atlanta Nonprofit Landscape
Over 5,500 501(c)(3) human service nonprofits exist in the Greater Atlanta region. A little over 25% of Georgia nonprofits classify themselves as human services, according to the Georgia Center for Nonprofits.

Nonprofits in Georgia employ almost 10% of the workforce.

PBPA focuses on community-based organizations that serve low-income or disadvantaged individuals. Current clients range in size from under $50K to over $5M. Forty-six percent (46%) have annual revenues under $250,000.

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3 Nonprofits that filed forms 990 or 990-N under Health or Human Services in the 30 county Greater Atlanta area.
4 The Economic Impact of Georgia’s Nonprofit Sector. Georgia Center for Nonprofits, April 2012.
Common legal needs from nonprofit clients include:

- Revise Bylaws
- Advise on Best Practices in Corporate Governance
- Assist with Nonprofit Mergers
- Draft and Review Contracts and Leases
- Register Trademarks and Copyrights
- Assist with Employee Benefits Issues
- Classify Exempt/Non-exempt Staff
- Advise on Revenue Generating Activities
- Prepare Partnership and Joint Venture Agreements
- Draft and Review Employee Handbooks
- Manage Volunteer Liability and Other Risks
- Protect Tax-Exempt Status
- Draft Waivers and Releases
PBPA clients are concentrated in Fulton, DeKalb, Cobb and Gwinnett Counties. PBPA has served clients in other areas of the state as the map below demonstrates.
Pro Bono Legal Services in Greater Atlanta

The American Bar Association estimates that there are 32,800 lawyers in the state of Georgia, up 20% in the past 10 years. In terms of in-house attorneys, The Association of Corporate Counsel reports 1,100 members in Georgia\(^6\). National Association of Law Placement data estimates that among Top 40 law firms in Atlanta with one or more volunteer lawyers at PBPA, there are 3,500 attorneys overall\(^7\). PBPA estimates that of this number, 65% are transactional attorneys and 35% are litigators.

In the Greater Atlanta area, more than 25 nonprofits (listed to the right) provide different types of legal services to various target audiences. For example, Atlanta Volunteer Lawyers Foundation (AVLF) and Atlanta Legal Aid Society provide pro bono legal services to individuals. Other organizations provide legal aid to a specific audience, such as Georgia Lawyers for the Arts or the Asian American Legal Advocacy Center.

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6 The Association of Corporate Counsel, www.acc.org
7 National Association of Law Placement, www.nalp.org/research
Strengths, Challenges, Opportunities and Threats

The internal and external conditions that PBPA faces are represented in the following analysis of Strengths, Challenges, Opportunities, Threats (SCOT). A SCOT analysis is a frequently used tool in the assessment stage of strategy development. LevelSmart compiled and analyzed the items listed in the SCOT interview conversations and organizational observations.

**Strengths**

- Strong Leadership
- Smooth Operations
- Fiscal Stability

**Challenges**

- Distance from an (Identified and Quantified) Impact
- What Growth to Pursue - and at What Speed?

**Opportunities**

- More and Diversified Funding
- Governance Structure Composition
- Technological Advances
- Brand Awareness

**Threats**

- Lack of Succession Planning
- External Environmental Factors
Strategic Planning Timeline

PBPA asked LevelSmart to help them define their future vision and strategic direction. The process included:

<table>
<thead>
<tr>
<th>Timing</th>
<th>Who</th>
<th>What</th>
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<tr>
<td>August 2018</td>
<td>PBPA leadership</td>
<td>Decided to embark on journey to clarify its future vision and refine strategic direction(^8)</td>
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<tr>
<td>September/October 2018</td>
<td>LevelSmart PBPA Staff</td>
<td>Conducted comprehensive Environmental Scan(^9)</td>
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<tr>
<td>November 2018</td>
<td>PBPA Board, PBPA Staff, and Strategic Planning Committee</td>
<td>Strategic Planning Retreat</td>
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<tr>
<td>December 2018 – March 2019</td>
<td>PBPA Strategic Planning Committee</td>
<td>Met four times to discuss strategic issues facing PBPA</td>
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<tr>
<td>March 2019</td>
<td>PBPA Board</td>
<td>Approve Strategic Plan 2019-2022</td>
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<tr>
<td>April – June 2019</td>
<td>PBPA Leadership</td>
<td>Create Implementation Plan</td>
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\(^8\) Appendix A – Questions PBPA Wants the Strategic Plan to Answer

\(^9\) Appendix B – Environmental Scan Interviewees
Strategic Planning Assumptions

PBPA leadership and LevelSmart outlined the following assumptions about the Strategic Plan:

- The plan must focus both on the needs of volunteer attorneys and the needs of nonprofit clients.
- The plan timeframe will begin upon approval in 2019 and goals should be accomplished by the end of 2022.
- Annual plans and budgets will be created to support the PBPA Strategic Plan implementation. The PBPA Strategic Plan will not be an operational document. It will be used to guide the implementation plan and as a dashboard for monitoring success.
PBPA Mission

PBPA created the revised mission statement to more accurately reflect their impact:

*Pro Bono Partnership strengthens our community by engaging volunteer attorneys to provide nonprofits with business legal services.*

PBPA Vision

The Strategic Planning Committee created a vision statement to articulate their desired outcomes:

*PBPA unlocks the power of pro bono services, enabling nonprofits to thrive and transactional attorneys to have meaningful pro bono experiences.*
Guiding Principles

Several key principles guided the Strategic Planning Committee’s thinking about the PBPA’s future direction:

1. We approach this Strategic Plan from a place of strength and stability.
2. We have huge opportunity for growth but need to pace the growth.
3. We are fiscally conservative.
4. The nature of serving organizations and doing preventative work is challenging.

Key Strategic Areas

The PBPA has organized the 2019 – 2022 Strategic Plan into four strategic areas. Each area is intertwined and intentionally overlaps to support overall organizational goals.

**Nonprofits** continues PBPA’s work in strengthening nonprofit capacity. This goal allows the nonprofits to focus more on their missions and ultimately have a great impact on the populations they serve. Critical focus areas include providing continuing education, enhancing PBPA’s internal capacity to better measure nonprofits served, prevention efforts and maintaining relationships with past clients.

**Attorneys** expands PBPA’s strong volunteer base and encourages recruitment of more PBPA ambassadors, experts in specific legal areas and outreach to targeted legal groups. Essential to this strategic area are new partnerships, additional outreach and increased technology capability to track volunteer efforts.

**Sustainability** enables long-term financial security for the organization. This area also finances the strategic initiatives throughout the plan. This strategic area is built upon the key revenue streams, each embodied as a strategy in the plan:

- 15th Anniversary Campaign
- Strengthened individual giving
- Expanded foundation giving

**Organizational Excellence** ensures the PBPA has the infrastructure to sustain successful operations and implement strategic initiatives. Acknowledging that PBPA must always be an example to the nonprofits it serves, PBPA has the opportunity to set the standard for nonprofit excellence. Areas of focus include governance structures (including the Board of Directors, the Advisory Committee and SpringBoard), human resources and technology.
### PBPA Strategic Plan Overview 2019 – 2022

<table>
<thead>
<tr>
<th>Mission</th>
<th>Pro Bono Partnership strengthens our community by engaging volunteer attorneys to provide nonprofits with business legal services.</th>
</tr>
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<tbody>
<tr>
<td>Vision</td>
<td>PBPA unlocks the power of pro bono services, enabling nonprofits to thrive and transactional attorneys to have meaningful pro bono experiences.</td>
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#### Goals

<table>
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<tr>
<th>NONPROFITS: Ensure nonprofits flourish through legal services and education.</th>
<th>ATTORNEYS: Engage attorney volunteers to handle every PBPA client legal need.</th>
<th>SUSTAINABILITY: Ensure financial sustainability for PBPA for short and long term success.</th>
<th>ORGANIZATIONAL EXCELLENCE: Set the standard for nonprofit excellence.</th>
</tr>
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<tr>
<td>1. Increased nonprofit overall legal health. Continue to accept 50 new nonprofit clients annually. 2. Increase # of clients receiving direct legal services annually to 265 (12% increase). 3. Increase # of Legal Check Up clients to 60 (12% increase), but continue to prioritize matters for each client. 4. Increase # of nonprofits served through education to 600 (12% increase), especially those we don’t serve directly as clients.</td>
<td>1. Increase annual # of attorney volunteers to 880 (20% increase). 2. Increase volunteer retention / implement enhanced volunteer retention tracking capabilities.</td>
<td>1. Increase annual donations to $1,000,000 (25% increase). 2. Increase annual individual donor revenue to $116,000 (20% increase). 3. Increase annual foundation donations to $250,000 (67% increase). 4. Increase annual corporate and law firm donations to $492,000 (13% increase).</td>
<td>1. Board, Advisory Committee, and Springboard composition meets agency needs. 2. Succession plans are in place. 3. PBPA is staffed appropriately for growth. 4. PBPA consistently meets strategic / operational goals while maintaining staff satisfaction and retention.</td>
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#### Results (over course of plan)

| Strategies | 1. Provide continuing education to nonprofits. 2. Better measure nonprofits served through education. 3. Maintain relationships with existing clients so they come back to us with legal needs. | 1. Activate a broader base of champions to advocate on PBPA’s behalf. 2. Expand the pool of volunteers and target areas of needed expertise. 3. Establish effective means to measure attorney retention and work to increase it. | 1. Conduct 15th Anniversary Campaign in 2020. 2. Strengthen individual giving program. 3. Expand outreach to foundations. 4. Expand annual campaign from Q4 activity to year-round engagement and solicitation. | 1. Assess & optimize governance structures. 2. Create succession plans for key staff positions. 3. Ensure appropriate staffing levels. 4. Invest in technology infrastructure that supports day to day operations & growth. |

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**PBPA Strategic Plan**

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404-633-9529 [www.levels.com](http://www.levels.com)
## PBPA Strategic Plan continued

### NONPROFITS

Ensure nonprofits flourish through legal services and education.

#### Results:

1. Increased nonprofit overall legal health. Continue to accept 50 new nonprofit clients annually.
2. Increase # of clients receiving direct legal services annually to 265 (12% increase).
3. Increase # of Legal Check Up clients to 60 (12% increase), but continue to prioritize matters for each client.
4. Increase # of nonprofits served through education to 600 (12% increase), especially those we don’t serve directly as clients.

#### Strategies

1. Provide continuing education to nonprofits.

#### Initiatives

- Focus educational efforts on mitigating legal risks.
- Explore whether to charge for workshops and/or webcasts and implement changes as needed.

2. Better measure nonprofits served through education (especially via website).

#### Initiatives

- Invest in any necessary technology and set up systems to track use.
- Determine impact of use of PBPA website and education on nonprofits.

3. Maintain relationships with existing clients so they come back to us with legal needs.

#### Initiatives

- Ask clients to update their applications so we have updated information and stay in touch.
- Invite eligible clients to Legal Check Up every 4 years.
## PBPA Strategic Plan continued

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<th>ATTORNEYS</th>
<th>Engage attorney volunteers to handle every PBPA client legal need.</th>
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| **Metrics:** | 1. Increase annual # of attorney volunteers to 880 (20% increase).  
2. Increase volunteer retention / implement enhanced volunteer retention tracking capabilities. |

<table>
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<tr>
<th><strong>Strategies</strong></th>
<th><strong>Initiatives</strong></th>
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| 1. Activate a broader base of champions to advocate on PBPA’s behalf. | a. Identify a “leader” at each attorney-feeder institution (e.g., law firm, in-house legal department).  
b. Coordinate with Board, Advisory Board and Springboard.  
c. Provide leaders with tools to recruit volunteers and track their progress. |
| 2. Expand the pool of volunteers and target areas of needed expertise. | a. Recruit and develop programs for specific attorney groups (retirees, new lawyers, high demand practice areas).  
b. Make at least 12 presentations each year at firms, legal departments, bar sections and practice groups.  
c. Conduct both general and targeted recruiting events to increase engagement.  
d. Create more partnerships between in-house attorneys and law firm attorneys. |
| 3. Establish effective means to measure attorney retention and work to increase it. | a. Develop and utilize a database with retention tracking capabilities.  
b. Set goal to increase retention.  
c. Increase communication with past volunteers through postcards, calls and emails.  
d. Recognize repeat volunteers. |
### SUSTAINABILITY

**Ensure financial sustainability for PBPA for short and long term success.**

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<th>Metrics:</th>
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<td>1. Increase annual donations to $1,000,000 (25% increase).</td>
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<th>Strategies</th>
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<tr>
<td></td>
<td>b. Recruit campaign leadership from Board, Advisory Committee and SpringBoard.</td>
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<td></td>
<td>c. Begin conversations now with law firms/corporations with goal of increasing their gift size by 2020 (currently at $6,700 and 14,900 on average, respectively).</td>
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<tr>
<td>2. Strengthen individual giving program.</td>
<td>a. Expand individual giving program with focus on converting volunteers to donors, expanding giving circles, and increasing gifts from clients.</td>
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<tr>
<td></td>
<td>b. Continue to improve measures for individual giving (retention rates, active donors, and average gift).</td>
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<tr>
<td></td>
<td>c. Utilize attractive benefit packages including challenge match for 15th anniversary.</td>
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<tr>
<td></td>
<td>d. Improve marketing to individuals to ensure a “high touch” experience.</td>
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<tr>
<td>3. Expand outreach to foundations.</td>
<td>a. Target five new prospects annually with goal of 10 new funders by 2022.</td>
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<tr>
<td></td>
<td>b. Develop compelling program stories in alignment with foundation priorities.</td>
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<td></td>
<td>c. Include client support in narrative of grant proposals.</td>
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<tr>
<td>4. Expand annual campaign from Q4 activity to year-round engagement and solicitation.</td>
<td>a. Target 20 law firm/corporation prospects annually with goal of 10 new donors by 2022.</td>
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<tr>
<td></td>
<td>b. Improve pipeline from presentations at law firms/corporations to fully engage volunteers and obtain annual contributions.</td>
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<td></td>
<td>c. Continue to expand corporate sponsorships for special events (goal of 56% increase by 2022).</td>
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<td></td>
<td>d. Continue to increase support from law sections and associations (goal of 11% increase by 2022).</td>
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## ORGANIZATIONAL EXCELLENCE

**Set the standard for nonprofit excellence.**

**Metrics:**

1. Board, Advisory Committee, and SpringBoard composition meets agency needs.
2. Succession plans are in place.
3. PBPA is staffed appropriately for growth.
4. PBPA consistently meets strategic/operational goals while maintaining staff satisfaction and retention.

<table>
<thead>
<tr>
<th>Strategies</th>
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| 1. Assess & optimize governance structures (Board/committees, Advisory Committee and SpringBoard). | a. Implement self-assessments for Board (and its committees) as well as advisory bodies.  
b. Be explicit about the need for exemplary nonprofit governance.  
c. Review composition/structure of Board (and its committees), Advisory Committee and SpringBoard.  
   - Consider non-lawyers Board candidates with needed expertise (as determined by strategic plan).  
   - Evaluate current state of Advisory Committee and consider changes to membership, activities and expectations.  
   - Ensure SpringBoard membership, activities and expectations align with strategic goals. |
| 2. Create succession plans for key staff positions. | a. Establish a more formal succession planning framework.  
b. Develop short-term (emergency) and long-term succession plans for key staff positions. |
| 3. Ensure appropriate staffing levels. | a. Review and align compensation, benefits and staff resources.  
b. Analyze staffing levels given projected growth & incorporate this process into the annual budget cycle.  
c. Provide professional development for staff.  
d. Measure staff satisfaction. |
| 4. Invest in technology infrastructure that supports day to day operations and growth. | a. Engage technology consultants as needed.  
b. Budget for necessary technology upgrades/purchases/subscriptions.  
c. Define, prioritize and set timeline for technology needs.  
d. Implement recommendations. |
Appendix

Questions PBPA Wants the Strategic Plan to Answer (September 2018)

1. Should PBP/Atlanta expand? What might growth look like and what is the expansion strategy? Does PBPA want to change the language to “Georgia?”

2. What are revenue streams for growth? How can PBP/Atlanta explore new or additional revenue streams?

3. What is the ideal role and purpose of the Advisory Committee? What should its expectations be and how is it managed?

4. What does optimal board governance at PBP/A look like? What is the ideal Board composition and how does it best serve PBP/Atlanta? Should we conduct a Board Assessment and if so, how? How can it best serve our needs?

5. Should PBP/Atlanta take on more clients and do less legal work? Or take on fewer clients and do more legal work?

6. What is our volunteer recruitment and retention strategy? How do we engage attorneys in a volunteer and donor pipeline where they are (retiring, new professional, corporate, etc.)?

7. How does PBP/Atlanta retain and attract the best staff? What are our staff retention strategies including compensation and benefits? How does PBPA “scale up?”

8. How is the legal field changing and what are the implications for PBP/Atlanta?

9. How does PBP/Atlanta better match supply and demand on the volunteer side?

10. How do we contingency plan? For example, prepare for the next recession? What is the plan if PBP/Atlanta needs to move its offices? What if growth exceeds our expectations?

11. How can we deal with the fact that there are 25 nonprofits in the legal field in Atlanta? How do we communicate our uniqueness to various constituencies?
Appendix B – List of Interviewees

Stakeholder Interviews

- Jared Brandman, National Vision, Inc., PBPA Board Member
- Briley Brisendine, SiteOne Landscape Supply, PBPA Board Member
- Tamara Caldas, Kilpatrick Townsend
- John Fleming, Eversheds Sutherland
- Ben Garren, The Coca-Cola Company, PBPA Board Member
- Betsy Griswold, UPS Corporate Legal Department, PBPA Board Member
- Julia Houston, Equifax, PBPA Board Member
- Frank Landgraff, GE Power, PBPA Board Member
- Lita Pardi, The Community Foundation for Greater Atlanta
- David Weitnauer, The Dobbs Foundation
- Tom Rawls

Focus Group Participants

- Jessica Caldas, PBPA Program Manager
- Laura Coats, PBPA Development & Communications Manager
- Sireesha Ghanta, PBPA Counsel
- Lola Ibitoye, PBPA Operations Manager
- Robyn Miller, PBPA Senior Tax Counsel
- Laurie Nichols, PBPA Development Director
- Lori Shapiro, PBPA Employment Counsel
- Rachel Spears, PBPA Executive Director
- Randi Zelcer, PBPA Client Manager
Appendix C – Stakeholder Interview Questionnaire

Introduction and Organizational Assessment

- Please tell me about you and your involvement with PBP/A.
- When you think of PBP/A, in a nutshell, what comes to mind?
- What does PBP/A do really well?
- What are PBP’s biggest challenges?
- What opportunities might PBP be missing?
- What could derail PBP/A?

Strategic Questions

I’d now like to ask you some questions regarding specific issues with which the PBP is grappling during this planning process.

- What do you think PBP/A should accomplish by 2025? What might growth look like?
- PBP/A wants to expand its revenue base and explore additional revenue strategies to fund growth. What additional revenue strategies should be considered? What do you think they should consider?
- Should PBP/Atlanta take on more (a higher volume) clients and do less (in quantity) legal work? Or take on fewer clients and do more legal work? Should PBPA continue to focus on the Greater Atlanta area while also taking some clients from other parts of Georgia? Or should it expand or contract its geographic reach?
- How can we best recruit and retain volunteers? How do we engage attorneys in a volunteer and donor pipeline when they are (retiring, new professionals, corporate, etc.)?
- In the Greater Atlanta area, more than 25 nonprofits provide legal services to various audiences. One example is Atlanta Volunteer Lawyers Association (AVLA) - they provide bono legal services to individuals. They provide different services to different target audiences. And at the same time, we compete with each other for financial and human resources. What is the unique value PBP/A provides? What makes PBP/A different from other similar organizations? (both in terms of their actual work and in terms of why attorneys should invest their time and money with PBP/A.)
- What, if anything, should PBP/A stay away from?
For Board Members Only

- What does the Board do really well? What are the Board’s challenges?
- What would you like the Board, specifically, to achieve in the next 5 years? What, if anything, needs to be considered about future board composition in order to achieve this? How does the Board’s composition as only in-house counsel advance or deter the Board’s effectiveness?
- How does PBP/Atlanta better match supply and demand on the volunteer side? For example, certain types of legal matters it is difficult to find a legal volunteer because the specialty required is not abundant (example – tax law), on the other hand, you have plenty of real estate attorneys and little need from the nonprofit community.
- What contingencies does the organization need to plan for? For example, prepare for the next recession. What if growth exceeds our expectations? What does that contingency planning look like to you?
- The advisory committee is currently comprised of approximately 60 attorneys whose firms give to PBPA or past board members who still want to have a role in the organization - they are representatives from law firms (not in-house like the Board) and they meet quarterly for updates and to give advice, as well as solicit their firms. What are your thoughts about the way the Advisory Committee currently works? What is the ideal role and purpose of an Advisory Committee?
- What are your thoughts about PBP/Atlanta’s current ability to attract and retain staff? What do you believe will be needed to accomplish the results you want to achieve by 2025?

For Funders Only

- Why does your organization invest in PBP/A? Where does PBP/A fit in your portfolio of giving?
- How would you describe your relationship with PBP/A?

Conclusion

Anything else you’d like to tell me about the PBP/A?
Anything that I haven’t asked that you think I should ask?