

Legal Services Trust Fund Commission

Five-Year Strategic Plan
2024-2028



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Introduction

On behalf of my fellow commissioners and staff, I am pleased to introduce the Legal Services Trust Fund Commission's strategic plan for 2024–2028, which will serve as our organizational roadmap to guide our public service in the coming years. The North Star for this plan is the commission's commitment to closing the California justice gap by increasing equitable access to legal services for low-income and underserved communities.

Over the last 10 years, the commission has grown from providing approximately \$30 million in grants to authorizing over \$150 million across an increasing number of grants it oversees to support legal aid services in communities statewide. We take this growth and stewardship responsibility seriously, and we do not provide these grants in a vacuum.

Several organizations and leaders contribute to and complement the commission's efforts, which is why, as part of creating this strategic plan, with our consultants, we conducted extensive outreach to inform an inclusive and transparent process. We conducted a survey of more than 100 grantees to better understand their perceptions of what's working and what can improve. We surveyed commissioners and staff and held multiple public meetings, including a strategic planning workshop, to obtain additional feedback. And we convened a series of in-depth interviews with legislative staff, commission grantees, and community-based and nonprofit organizations to dig deeper into the issues and needs that the commission should address. In addition, we formed a working group of commissioners, staff, and consultants to ensure we considered all of the input that we gathered.

We are extremely grateful for the feedback we received throughout this process. Each suggestion, concern, and idea was carefully considered and aided the shaping of this strategic plan, resulting in a plan that is not only ambitious but also grounded in the real-world experiences and the expectations of our stakeholders.

As we embark on this journey, we remain committed to maintaining the transparency and inclusivity that have been the hallmarks of our planning process.



Erica Connolly, Chair
Legal Services Trust Fund Commission

Commission Mission and Purpose



Mission

The Legal Services Trust Fund Commission is dedicated to closing the justice gap in California by increasing equitable access to legal services for low-income and underserved communities.

Purpose

The commission responsibly administers grant programs that fund local and statewide civil legal aid organizations to advance its mission. As a commission of the State Bar of California, our work advances the State Bar's efforts to support greater access to, and inclusion in, the legal system.

STRATEGY 1

Increase Access to Legal Aid to Advance the Commission's Mission

Adopt and communicate a mission statement that defines and guides the commission's work.



VISION

The commission's work embodies and advances its mission

FIVE-YEAR PLAN STRATEGIES



Effectiveness and Accountability

Assess practices and procedures to ensure alignment with the commission's mission.



DEI and Equitable Access

Communicate the commission's mission with internal and external audiences to increase awareness and understanding.



Organizational Policy and Systems Change

Establish the commission's place in the legal aid funding ecosystem – including affirming roles, functions, and opportunities to collaborate with other entities that provide similar or related services.

IMPLEMENTATION STEPS

- ✓ Communicate the commission's mission statement consistently with relevant stakeholders, such as grantees, Judicial Council, and the State Legislature.
- ✓ Incorporate the commission's mission statement into relevant materials and spaces, such as on the State Bar website and in grant request for proposals.

STRATEGY 2

Increase Access to Legal Aid by Serving Communities More Efficiently and Effectively

Assess opportunities to enhance organizational processes and roles for commission members and staff to better support legal service to California communities in need.



The commission is recognized as effective, efficient, and equitable internally and externally.

FIVE-YEAR PLAN STRATEGIES



Effectiveness and Accountability

Create a working group that will develop a proposed framework and implementation plan, with input from the commission, to formalize functions and roles, and map out how the commission will advance them.



DEI and Equitable Access

Identify opportunities to bring more diverse voices to the table to advance the commission's mission.



Organizational Policy and Systems Change

Implement the approved framework and make organizational changes to assure increased efficiency and effectiveness in the commission's grantmaking.

IMPLEMENTATION STEPS

- ✓ Create an infrastructure working group comprising commissioners and staff charged with developing recommendations on the organization of the commission's subcommittee structure and how to define staff versus commission roles more clearly.
- ✓ Explore how technology can enhance the delivery of legal services.
- ✓ Keep abreast of trends and innovations in legal services and bring that knowledge back to the commission and greater legal aid community.
- ✓ Create and launch an evaluations working group to develop recommendations for an updated evaluation and reporting framework.
- ✓ Formalize new grantee onboarding and orientation procedures and materials.

STRATEGY 3

Increase Access to Legal Aid Through Greater Accountability, Transparency, and Visibility

Establish processes and protocols to increase accountability, transparency, and awareness around the commission's work.



VISION

The impact of the commission's work is understood by internal and external audiences throughout the state.

FIVE-YEAR PLAN STRATEGIES



Effectiveness and Accountability

Improve data collection and tracking around outcomes for grantees and programs supported by the commission, including tools for grantee outcomes evaluation and reporting.



DEI and Equitable Access

Increase awareness and understanding of the legal aid resources available to low-income and underserved Californians and the impact of these resources in communities throughout the state.



Organizational Policy and Systems Change

Utilize new and existing data to enhance communications around grantee and program outcomes to demonstrate the commission's impact to internal and external audiences.

IMPLEMENTATION STEPS

- ✓ Develop a communication and outreach plan to raise awareness of the commission's work and the availability of legal aid resources among key audiences, including grantees, policymakers, and Californians in need of legal aid statewide.
- ✓ Analyze legal aid data collected over the past five years and report summary findings, including trends and service impacts.
- ✓ Develop grant-specific fact sheets and engage with relevant stakeholders to advance policy and systems change.
- ✓ Develop training and technical assistance support to help grantees with compliance issues.

STRATEGY 4

Increase Access to Legal Aid Through Greater Collaboration and Coordination with a Diverse Range of Voices

Establish a series of collaborative discussions with partner organizations to collect input and share feedback to identify best practices and opportunities to advance the commission's mission.



The commission's work reflects the diverse, wide-ranging legal aid needs of low-income and underserved Californians.

FIVE-YEAR PLAN STRATEGIES



Effectiveness and Accountability

Establish the commission as a proactive convener of collaborative discussions and efforts focused on increasing access to legal aid.



DEI and Equitable Access

Engage a diverse range of voices in collaborative efforts, inclusive of organizations representing and supporting communities of different sizes, demographics and regions of the state.



Organizational Policy and Systems Change

Incorporate learnings from collaborative efforts and discussions into commission functions and roles.

IMPLEMENTATION STEPS

- ✓ Host a series of convenings with California State agencies to foster collaboration, build partnerships, and leverage legal aid to address the justice gap.
- ✓ Host conferences and convenings to bring together legal aid stakeholders to share best practices, provide training, and solicit feedback on commission programs and initiatives.
- ✓ Engage with the American Bar Association/Interest on Lawyers' Trust Accounts community on the national level to learn trends and share developments in California.
- ✓ Develop relationships with external legal services funders and explore opportunities for increased collaboration.

STRATEGY 5

Increase Access to Legal Aid Through New Opportunities to Enhance Commission Impact

Explore new avenues for the commission to enhance its impact on closing the justice gap for underserved and low-income Californians.



The commission effectively reaches more low-income and underserved Californians with more legal aid resources.

FIVE-YEAR PLAN STRATEGIES



Effectiveness and Accountability

Determine what role, if any, the commission should play in the advocacy space, and how the commission will establish itself in that role.



DEI and Equitable Access

Enhance efforts and resources to support increased equitable access to legal services in communities throughout the state.



Organizational Policy and Systems Change

Identify opportunities to increase resources and enhance impact by diversifying sources of funding and diversifying grant fund distributions.

IMPLEMENTATION STEPS

- ✓ Work in consultation with the Legal Aid Association of California to conduct regular surveys of grantees on priorities.
- ✓ Increase and incentivize attorney participation in pro bono legal services in coordination with State Bar efforts to expand the Pro Bono Practice Program and expand awareness of additional pro bono opportunities.
- ✓ Expand capacity of grantees/legal aid nonprofits statewide through training and technical assistance initiatives.
- ✓ Explore new funding opportunities, including public/private partnerships and federal grants.
- ✓ Ensure DEI principles and practices are incorporated into new grant programs.
- ✓ Develop technical assistance and training initiative with a focus on DEI.