



NORTH CAROLINA
IOLTA

NCIOLTA.ORG

OVERVIEW of NC IOLTA STRATEGIC PLAN 2021-2025

Summary of the process

The Preamble of the North Carolina Rules of Professional Conduct calls on all lawyers to devote professional time and resources to the improvement of the law, access to the legal system, and the administration of justice.

It is this professional obligation of all lawyers which was central to the creation of the North Carolina Interest on Lawyers' Trust Accounts (NC IOLTA) program in 1983 by the North Carolina State Bar, with the approval of the North Carolina Supreme Court. This principle remains central today.

In January 2021, NC IOLTA initiated a strategic planning process to create a clear road map to guide IOLTA's work in the coming years, consistent with the program's founding principles and building upon achievements made since inception. The Executive Committee of the board led the process, with the participation of the full board and staff and the support of consultants Stephanie Choy and Lonnie Powers. The process also included 19 stakeholder interviews and a community forum for feedback on the draft plan. The board approved the strategic plan on June 23, 2021. NC IOLTA looks forward to working with you and other stakeholders to pursue our shared goals in the coming years.

VISION

A North Carolina where all people can effectively meet their legal needs.

MISSION STATEMENT

To improve the lives of North Carolinians by strengthening the justice system as a leader, partner, and funder.

VALUES

INTEGRITY Our organizational policies and practices engender trust from stakeholders.

STEWARDSHIP We ensure funds received from any and all sources are used effectively and efficiently to make improvements in the quality of justice, with a focus on civil justice.

EQUITY We pursue equity through an inclusive process with diverse voices with a view to ensuring that investments support access to legal services for all persons and communities regardless of race, color, ethnic identity, national origin, sexual orientation, geography, age, gender identity, gender, disability, immigration status, lack of income or wealth, or religious beliefs.

LEADERSHIP As a funder, we have a unique role within the civil justice community and the bar to work towards improvement of the justice system. We lead by example, using our voice and knowledge to educate and add value to the justice community.

PARTNERSHIP We recognize that the whole is greater than the sum of its parts, and the community is stronger working collaboratively. We seek to deepen our partnerships not only with legal aid organizations and statewide justice partners, but also financial institutions, foundation funders, law schools, the private bar, and corporations.

For more information about NC IOLTA, visit WWW.NCIOLTA.ORG.

GOAL 1: Be a responsive and responsible grantmaker that engages in effective stewardship of funds to advance its mission.

GOAL 2: Solidify, increase, and diversify NC IOLTA funding.

GOAL 3: Heighten communications about the benefits produced by IOLTA and the need for increased civil legal aid.

GOAL 4: Embrace IOLTA's leadership role in the justice community.

GOAL 5: Build organizational capacity to pursue identified priorities, support sustainability, and address new issues as they arise.