



Request for Proposals (RFP) Strategic Planning Consulting Services

Issue Date: September 17, 2026

Proposal Due: October 16, 2026

I. About the Delaware Bar Foundation

The Delaware Bar Foundation is an independent charitable organization dedicated to improving access to justice, promoting the administration of justice, and fostering public understanding of the law throughout Delaware. The Foundation administers Delaware's Interest on Lawyer Trust Accounts (IOLTA) Program on behalf of the Delaware Supreme Court while also serving as a grantmaker, convener, educator, and philanthropic leader for Delaware's legal community.

II. Purpose of this RFP

The Foundation seeks an experienced strategic planning consultant to facilitate development of a three-to-five-year strategic plan that will provide a clear roadmap for organizational priorities, measurable outcomes, governance, fundraising, communications, partnerships, and implementation.

III. Current Strategic Context

The Foundation is entering a period of significant opportunity. Strong IOLTA revenue has expanded the Foundation's impact while also creating an opportunity to strengthen its long-term philanthropic role. The Board has recently evaluated its governance structure, enhanced IOLTA oversight and compliance, developed new communications emphasizing attorneys' ability to maximize their impact by understanding their IOLTA interest rates, strengthened partnerships with the Delaware Supreme Court, the Delaware State Bar Association, DELREC, financial institutions, and legal aid providers, and begun building a coordinated fundraising strategy.

The strategic planning process should help the Foundation determine how to:

- Diversify revenue beyond IOLTA while preserving the integrity of the Court-administered program.
- Expand charitable fundraising and donor engagement.
- Increase public awareness of the Foundation's mission and impact.



- Strengthen governance, board leadership development, and committee effectiveness.
- Position the Foundation as a statewide leader in access-to-justice innovation.
- Evaluate opportunities involving artificial intelligence, technology, and data to improve access to justice.
- Deepen partnerships across Delaware’s legal community.
- Develop measurable outcomes and an implementation framework for Board oversight.

IV. Strategic Questions for the Planning Process

The Delaware Bar Foundation seeks a consultant who will serve not only as a facilitator, but as a strategic thought partner. While the planning process should be informed by stakeholder engagement and organizational assessment, the Foundation expects the selected consultant to help the Board thoughtfully address several fundamental questions about its future direction. These questions are intended to guide rather than limit the planning process.



- A. Organizational Identity and Mission
 - 1. What unique role should the Delaware Bar Foundation play within Delaware's legal community over the next five to ten years, particularly in advancing access to justice and promoting the administration of justice?
 - 2. How can the Foundation most effectively balance its responsibilities as administrator of Delaware's Supreme Court-authorized IOLTA Program with its broader charitable and philanthropic mission.
- B. Leadership in Access to Justice
 - 1. Where can the Foundation have the greatest impact as a funder, convener, and partner in advancing access to justice and supporting a strong legal community in Delaware?
 - 2. What role should the Foundation play in fostering collaboration and innovation among legal aid organizations, the private bar, the courts, educational institutions, and community organizations?
- C. Philanthropy and Financial Sustainability
 - 1. How should the Foundation diversify its revenue beyond IOLTA while preserving the integrity and public confidence of the Court-administered IOLTA Program?
 - 2. What fundraising and philanthropic model best fits the Foundation's mission, relationships, and role within Delaware's legal community?
- D. Partnerships and Community Engagement
 - 1. How can the Foundation deepen strategic relationships across Delaware's legal community and with other partners while increasing awareness of the Foundation's mission and impact?
- E. Innovation and Future Opportunities



1. How should the Foundation evaluate and pursue emerging opportunities, including artificial intelligence, technology, and data, to advance access to justice, legal services, law-related education, and public understanding of the law?

F. Governance and Organizational Capacity

1. What governance, board leadership, staffing, organizational capacity, and external partnerships will be necessary to successfully pursue the Foundation's strategic priorities?

G. Measuring Success

1. How should the Foundation define and measure success, including the outcomes and indicators the Board should use to evaluate organizational impact and progress over time?

V. Scope of Work

The consultant should facilitate stakeholder engagement; conduct an environmental scan; interview board members, staff, judiciary, legal aid organizations, donors, and partners; facilitate one or more strategic planning retreats; prepare a draft and final strategic plan; and develop an implementation roadmap with measurable objectives, timelines, and accountability.

VI. Desired Qualifications

Demonstrated experience leading strategic planning engagements for nonprofit organizations, foundations, bar associations, access-to-justice organizations, or similarly situated institutions; expertise in board governance, stakeholder engagement, facilitation, fundraising strategy, and organizational development. Familiarity with IOLTA, civil legal services, court systems, bar foundations, or the broader access-to-justice community is preferred. Ability to translate broad strategic priorities into practical, measurable implementation plans.

VII. Deliverables

Project work plan; stakeholder engagement summary; environmental assessment; retreat facilitation; draft strategic plan; final strategic plan; executive summary; implementation roadmap; presentation of the final plan to the Board.



VIII. Proposal Requirements

- Firm or consultant overview and qualifications.
- Relevant strategic planning experience, particularly with foundations, legal organizations, statewide nonprofits, or access-to-justice organizations.
- Description of the proposed approach, methodology, stakeholder engagement process, and facilitation style.
- Identification and biographies of the consultant(s) who will perform the work.
- Proposed work plan and project schedule.
- Examples of comparable engagements and at least three references.
- Detailed fee proposal, including consulting fees, travel, facilitation, materials, and any optional services or anticipated expenses.

IX. Evaluation Criteria

Criteria	Weight
Relevant experience and demonstrated results	30%
Understanding of the Foundation's mission and strategic context	20%
Quality and appropriateness of proposed methodology	20%
Qualifications of consultant team	15%
Budget and overall value	15%

X. Anticipated Timeline

Milestone	Anticipated Date
RFP Issued	September 17, 2026
Proposals Due	October 16, 2026
Interviews, if needed	November 2026
Consultant Selected	December 2026
Project Begins	Q1 2027
Strategic Planning Retreat	Q1 2027
Draft Strategic Plan	Q2 2027
Final Plan Presented for Adoption	June 2027

XI. Submission Information

Proposals should be submitted electronically in PDF format by the deadline stated above to:

Megan Semple Greenberg
Executive Director



Delaware Bar Foundation
mgreenberg@delawarebarfoundation.org
302-658-0773

The Foundation looks forward to identifying a strategic planning partner who can help shape its next chapter of service to Delaware's legal community and justice system.



Appendix A: Current Organizational Snapshot

The following information is provided to give prospective consultants a concise overview of the Foundation and the scope of its work. Figures may be updated before the RFP is issued.

Organization	Delaware Bar Foundation
Organization Type	Independent Delaware nonprofit charitable organization; IRC §501(c)(3)
Board of Directors	12 directors
Staff	2 part-time staff
Core Responsibilities	Administration of Delaware's IOLTA Program; charitable and community grantmaking; law-related education; fundraising; publications; professional education; strategic partnerships
IOLTA Role	Administers the Delaware Supreme Court-authorized Interest on Lawyer Trust Accounts Program and distributes IOLTA funds consistent with governing requirements
Annual IOLTA Funding	Approximately \$4 million in recent annual grantmaking; amount varies with interest rates and account balances
Community Grants	Approximately \$60,000 annually in recent charitable grantmaking
Key Partners	Delaware Supreme Court; Delaware State Bar Association; DELREC; Delaware civil legal aid organizations; participating financial institutions; law firms; judiciary and community organizations
Current Strategic Priorities	IOLTA revenue optimization and compliance; access-to-justice impact; charitable fundraising; governance; communications; partnerships; innovation and technology
Geographic Scope	Statewide – Delaware