Request for Proposals

Consultant for LSC Pro Bono Innovation Fund Planning Grant

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Summary

Legal Aid of North Carolina seeks proposals from consultants to work with our Pro Bono Programs team to complete a six-month, targeted, internal assessment of our pro bono program.

We seek proposals only from consultants who have experience working with recipients of Planning Grants or Transformation Grants from the Legal Services Corporation's Pro Bono Innovation Fund.

Our goal for the assessment is to gather and analyze the information necessary to develop a plan for the full integration of pro bono into our firm's advocacy strategy and operations at the field office level, thereby achieving our vision of a pro bono program that helps meet our clients most pressing legal needs. At a time when our staff advocates are stretched thin, we believe that pro bono volunteers are an under-utilized resource and a potential solution to meeting the overwhelming needs of our clients.

The scope of work will include:

- Conducting online surveys, focus-group discussions and one-on-one interviews with LANC staff and possibly some external stakeholders;
- Gathering and analyzing case and volunteer statistics from our case management system; and

- Analyzing information gathered from the aforementioned sources, including comprehensive intermediate and final reports.

Proposals are due September 2, 2024. LANC will select a consultant and notify proposal submitters of its decision on September 9, 2024. The assessment will run from October 1, 2024, through March 31, 2025. The final assessment report is due March 31, 2025.

Background

Legal Aid of North Carolina (LANC) is a 501(C)(3) nonprofit law firm that provides free legal services in civil (non-criminal) matters to low-income and vulnerable residents of all 100 North Carolina counties.

We fulfill our mission primarily by employing a large corps of staff attorneys, paralegals and other advocates, who serve clients from our 20+ offices located throughout the state. Since our staff cannot meet the overwhelming demand for our services, we supplement their work with the services of pro bono attorneys, paralegals and law students, who allow us to serve more clients than we could with our staff alone.

Our pro bono program is administered primarily by our central Pro Bono Programs team, which operates a slate of statewide pro bono programs and supports pro bono activities undertaken by local field offices and special projects.

Director of Pro Bono Programs	1 attorney	1.0 FTE	Raleigh
Supervising Attorneys	2 attorneys	.5 FTE each	Charlotte and Greensboro
Staff Attorney	1 attorney	.8 FTE	Fully remote
Communications Manager	1 non-attorney staff	1.0 FTE	Raleigh
Case Coordinators	6 non-attorney staff	1.0 FTE each	Raleigh

In addition to the Pro Bono Programs team, four LANC field offices have staff members who spend a portion of their time managing pro bono activities in their office’s service area. This work is being done by longtime staff who had these job responsibilities since before pro bono was largely centralized in the Pro Bono Programs team in 2011. These positions will expire when their current occupants leave LANC. Additionally, some of our special projects, which are discrete advocacy units focused on a specific area of law or unique client population, engage in their own pro bono activities for which the Pro Bono team provides case management.

Our pro bono program faces certain internal challenges, chief among which is the fact that it is insufficiently integrated into both the firm's overall advocacy strategy and its operations at the field office level.

Historically, LANC's pro bono program has focused on low-priority practice areas or case types, and advice-only or brief-service cases. While this has begun to change in recent years, pro bono still plays too small of a role in our highest-priority practice areas, domestic violence and housing—especially the highest priority cases within those practice areas—and makes a minimal contribution to the firm's extended-service caseload.

In part, this low-priority focus has been shaped by our perception of the needs of volunteers, who we believe generally prefer brief-service cases without deadlines that allow for remote service. On the other hand, our top-priority cases—especially Domestic Violence Protective Order and eviction cases—involve extended, in-person, deadline-driven service.

The fact remains, however, that our staff cannot meet client demand for service in our top-priority practice areas. Most critically, we recently lost a substantial amount of funding for our domestic violence/family law work, which comprised 37.5% of our cases opened in 2023 yet has long been a practice area with little to no pro bono involvement. Domestic violence cases almost always have tight deadlines and require extended service, including court representation, meaning they are seen as not “pro bono friendly.”

Domestic violence cases, in which lives are often literally at stake, are far too important to our clients to allow such concerns to prevent us from engaging the private bar in this work. We have an obligation to seek to employ pro bono to bridge this gap and similar gaps in our other top-priority practice areas.

Pro bono is also insufficiently integrated into our field offices. Before LANC centralized pro bono in 2011, it was managed at the field-office level by pro bono coordinators responsible for the office’s service area, who reported to the office's managing attorney. Collaboration and communication among local coordinators was informal and ad hoc, administrative practices varied from office to office, and successful programs were not scaled up to the regional or statewide level.

Centralizing pro bono solved some of these problems, but it also created a disconnect between pro bono and field offices. It is difficult for a centralized program based in Raleigh to maintain the personal relationships and on-the-ground presence necessary to foster active, regionally responsive pro bono at the statewide level. While active efforts are currently underway to remedy this disconnect, field offices still currently play a small role in volunteer recruitment, case referrals and management, and the identification of client needs that could be met by pro bono.

Earlier this year, we received a Planning Grant from the Pro Bono Innovation Fund of the Legal Services Corporation, a Washington, D.C., organization that distributes federal grants to civil legal aid nonprofits around the country.

Assessment goals

Our Planning Grant allows us to conduct a six-month internal assessment of our pro bono program. Our goals for the assessment and the questions we would like it to answer are:

- To have a clear plan for integrating pro bono into our advocacy strategy. What do the firm's executive leaders, practice-area leaders, managing attorneys and project directors think is the proper role for pro bono in our firm's advocacy strategy? How can we overcome resistance to using pro bono to address our top-priority cases?
- To have a strong understanding of what local offices and projects want and need regarding pro bono and have a plan for sustained relationships with offices and projects, and to develop internal communication plan for broader organization engagement. What is the greatest unmet need in each office's service area and each project's practice area? What do managing attorneys and project directors think they can do and want to do to increase pro bono service in their areas? What do managing attorneys and project directors want the central Pro Bono Programs team to do to help them increase pro bono service in their area?
- To find a staffing model that supports our needs and maintains engaged relationships with local offices and projects statewide. What staff does the central Pro Bono Programs team need, and what staff do offices and projects need to increase pro bono engagement and impact throughout the firm? What staff should report solely to either a managing attorney or project director, or the Director of Pro Bono Programs, and what staff should have dual-reporting responsibilities?
- To have a strong process for receiving cases from local offices and projects and making case referrals outside of events, including by use of Pro Bono Go, a shared platform with other legal services organizations statewide. What currently prevents office and project staff from identifying cases for pro bono referrals and informing the central Pro Bono Programs team? What will the central team have to do to empower office and project staff to routinely identify cases for pro bono referral? What role should the central team play in individual case referrals from offices and projects to volunteers?

Following the assessment, an internal working group will continue to meet monthly—without the participation of the consultant—to implement a workplan for the transformation of our pro bono program based on the findings of the assessment. The workplan will set specific, measurable goals and include a plan for applying for a Transformation Grant from LSC's Pro

Bono Innovation Fund. Our Director of Pro Bono Programs will lead the working group and appoint members to serve as point people for completing different parts of the workplan.

Scope of Work

The consultant will work with LANC's Director of Pro Bono Programs and members of her team to design and execute a six-month assessment that will meet the goals laid out above.

Completing the assessment will likely involve:

- Creating, distributing, and providing a written analysis of the findings of online surveys of LANC staff and possibly some external stakeholders;
- Designing, conducting, and providing a written analysis of the findings of 15-20 interviews with key informants and small groups;
- Conducting 3 process analysis and planning sessions with the project team and other stakeholder groups as needed to map processes used by the Pro Bono Program at LANC and identify areas of opportunity;
- Conducting an Ideation session (approx 30 attendees) with the project team and other stakeholder groups as needed to build consensus and seek input as to the changes needed to optimize the Pro Bono Program at LANC;
- Gathering, reviewing and providing a written analysis of information—case and volunteer-recruitment statistics, for example—provided by our Director of Pro Bono Programs and members of her team, and other LANC staff.
- Holding regular check-in meetings with our Director of Pro Bono Programs and members of her team;
- Maintaining an accurate, up-to-date timeline of the assessment;
- Maintaining shared files in a cloud-based location accessible to the consultant and LANC staff, e.g., a Microsoft Teams channel or Google Drive folder.
- Producing comprehensive written intermediate and final reports that detail the activities conducted, respectively, during the first three months and the entire six months of the assessment, summarizes and analyzes the information gathered from each activity, summarizes and analyzes the total information gathered, and analyzes how that information can be used to meet the assessment's goals.

Timeline

2024

- SEP 02: Proposals due to LANC
- SEPT 09: LANC selects consultant and notifies proposal submitters of its decision

- OCT: Phase 1: Discovery and Planning
    - Kickoff meeting with assessment team and consultant to refine assessment goals, scope, and methodology
    - Meet with LSC Pro Bono Innovation Fund Program Counsel
    - Identify stakeholders necessary to overall success of the project
    - Identify appropriate team members for segmented working groups
    - Define and gain access to available data and information
- NOV and DEC: Phase 2: Research, Information Gathering, and Analysis
    - Analyze in-scope information sets (internal & external)
    - Identify needs and gaps in information and determine if further information is required
    - Design and conduct 15-20 interviews with key informants and small groups
    - Conduct 3 Process Analysis and Journey and Empathy Mapping sessions with the project team and other stakeholder groups as needed to map processes used by the Pro Bono Program at LANC and identify areas of opportunity
    - Conduct an Ideation session (approx 30 attendees) with the project team and other stakeholder groups as needed to build consensus and seek input as to the changes needed to optimize the Pro Bono Program at LANC
    - Assess current technology capabilities and use cases to determine the ability of systems to address gaps and future state use cases for pro bono at LANC
    - Mid-grant meeting with LSC PBIF Program Counsel (DEC)

2025

- JAN: Continue any remaining work from Phase 2 and Begin Phase 3: Impact Measures and Key Performance Indicators
    - Develop recommendations for improving, expanding, and optimizing the processes and structures to help meet the needs identified throughout the surveys, evaluation interviews, and working sessions
    - Build Roadmap Action Plan for implementation of high priority recommendations
    - We will work with the project team to develop relevant metrics to be used for reporting on the progress of the implementation of the recommendations over time
    - Review current measures and KPIs
    - Identity any gaps in the current metrics related to actual measures or tracking and reporting on those measures
    - Recommend set of KPIs and baselines to be used moving forward to measure progress

- FEB: Phase 4: Documentation and Presentation
    - Consultant analyzes findings and identifies preliminary recommendations for feedback
    - Conduct internal working sessions with the project team to review information and findings from the first 3 phases
    - Develop draft Report for review with LANC leadership prior to final delivery of report to the broader project team and stakeholders
- MAR:
    - Work on assessment concludes
    - Formal presentation of Findings
    - Final assessment report submitted
    - Debrief final assessment with PBIF Team.

Selection Criteria

We will base our selection of a consultant on:

- The consultant's experience working with recipients of LSC PBIF Planning or Transformation grants;
- The consultant's experience working with statewide legal services organizations with many offices;
- The extent to which the consultant's proposal meets the requirements laid out below;
- The resources the consultant intends to use to complete the assessment; and
- The cost of services.

Proposal requirements

Your proposal should contain:

- **An overview of your company**, including the number of years you have been in business; your brief biography; a list of the names, titles and physical locations (city and state, or city and country if outside the U.S.) of your full- and part-time employees; and the URLs of your company's website and LinkedIn page.
- **An outline of the human resources you will devote to this project,** which should include brief biographies and explanations of the services each person will provide.
- **A detailed explanation of how you will complete the work outlined in the Scope of Work section of this document.** The explanation should include detailed descriptions of all the services and deliverables you will provide and a detailed timeline for delivering or providing them.

- **A summary of the services you provided to each LSC grantee with which you worked on a PBIF Planning Grant or Transformation Grant.** For Transformation Grant recipients, focus your summary on the services you provided during the assessment phase of the grant.
- **References,** including the name, title, email address and phone number of your primary contact at each LSC grantee with which you worked on a PBIF Planning or Transformation Grant.
- **A detailed budget,** which breaks down expenses by line-item.

Submission process

Please email proposals and questions to:

Allison Constance
Director of Pro Bono Programs
probono@legalaidnc.org

The deadline to submit your proposal is September 2, 2024.