



Request for Proposal for

Pro Bono Innovation Fund (PBIF) Planning Grant Consultant

Introduction

AppalReD Legal Aid is soliciting proposals from consultants to work with our staff to engage in a comprehensive internal assessment of our Pro Bono Program. AppalReD Legal Aid is a recipient of a six-month Pro Bono Innovation Fund (PBIF) planning grant from the Legal Services Corporation (LSC). A key component of a Planning grant is to “support a rigorous and extensive assessment of an LSC grantee’s pro bono program, the identification of best practices in pro bono delivery that are best suited to that grantee’s needs and circumstances, and the development and implementation of short- and long-term improvements to organizational policies, management, and operations.” AppalReD Legal Aid is seeking a consultant who is experienced in conducting assessments of legal services pro bono programs. In particular, AppalReD is seeking to evaluate how we can integrate pro bono more fully into the legal service delivery model we offer across all field offices to effectively engage more volunteers and expand the type of pro bono projects we offer, while improving services to clients across eastern and south-central Kentucky and meeting their needs in a client-centered way. We are committed to utilizing the findings of the assessment to create short (and quickly actionable) and long-term goals for improving the Pro Bono Program, which will be incorporated into strategic planning.

Background Information

AppalReD Legal Aid has five regional offices. We are the only LSC funded legal services program in eastern and south-central Kentucky where more than 200,000 low-income people are eligible for our services.

Historically, AppalReD Legal Aid's pro bono program has been viewed as a separate entity from AppalReD Legal Aid and was called "Volunteer Lawyers for Appalachian Kentucky" or VLAK. VLAK was largely known as the coordinator of legal representation of victims of the Eric C. Conn social security fraud. At one time, VLAK recruited and coordinated 560 attorneys across the country. However, this success has led to the program being primarily associated with Conn cases, overshadowing the need for local providers to address other urgent legal needs.

A key component of our pro bono program is bi-monthly family law pro se clinics hosted at rotating locations throughout the service area and virtually. These clinics serve about 150 people each year. In Spring 2024, AppalReD added wills clinics to our clinic offerings, after heirship and title issues became urgent issues for survivors of the July 2022 flood. (AppalReD Legal Aid's service area has had two FEMA-declared floods since 2021.)

AppalReD Legal Aid's Pro Bono Program also places cases with volunteers. Referrals come through Central Intake, with limited communication between field offices and the pro bono program. The pro bono director or pro bono assistant then calls a list of 30 attorneys who take cases on a low bono basis.

Recent leadership transitions have increased internal capacity and support for the Pro Bono Program. A new executive director took the helm of AppalReD Legal Aid in September 2023, while the first new Pro Bono Director joined AppalReD in 13 years. A new Pro Bono Program Assistant was also onboarded in December 2023. The clinic coordinator position, which was added three years ago, has fluctuated between part-time and full time as grant funding ebbs and flows.

AppalReD Legal Aid has never comprehensively assessed our Pro Bono Program. The Pro Bono Director will be primarily charged with working with the consultant to complete the assessment along with the Executive Director, two pro bono staff, and Central Intake Directing Attorney, All Directing Attorneys of field offices, members of the Administrative Team, and the Disaster Response Project Director will be available to engage with the consultant.

With vital leadership capacity and a desire to meet critical client needs, AppalReD Legal Aid is poised to move forward with growing and strengthening our pro bono program. A comprehensive assessment and action plan will allow the Pro Bono Program to engage in strategically integrated and transformative pro bono work across our whole program and, ultimately, increase capacity to serve more clients.

Scope of Work

The consultant selected for this project is expected to guide AppalReD Legal Aid in developing an action plan for how AppalReD Legal Aid can transform our Pro Bono Program to more strategically engage pro bono volunteers to meet high-priority needs of clients in a manner that is client-centered and supportive of volunteers. AppalReD seeks to connect services across geographic barriers to better serve low-income eastern Kentuckians, regardless of where they live. AppalReD Legal Aid envisions a modern and impactful pro bono program that serves as a centralized hub for pro bono volunteers, significantly increasing access to justice for 200,000 low-income individuals in our rural service region. This vision involves (1) integration of pro bono across our program, (2) identifying pro bono projects and areas of law most needed for clients and (3) establishing the necessary systems to grow into a centralized hub and ensuring program scalability and sustainability.

The consultant will undertake a thorough assessment of the Pro Bono Program to obtain an understanding of the opportunities, challenges, and possibilities for AppalReD Legal Aid's Pro Bono Program. Generally, we expect that the consultant will help AppalReD to refine our vision, establish a framework for an assessment to accomplish this vision, develop the tools needed to perform the assessment, and synthesize the findings from the assessment within a written report, providing concrete and realistic recommendations for improvements to meet our vision and goals. AppalReD Legal Aid also anticipates that the consultant will facilitate working sessions with AppalReD Legal Aid Leadership, pro bono staff, and external stakeholders to further the assessment process and increase buy-in on the developed recommendations.

We wish the consultant to structure the assessment process around the following key questions:

- How can the pro bono program integrate more fully into the programs and operations of

AppalReD Legal Aid? Is the workflow between intake and Pro Bono and the field offices streamlined and consistent?

- Are the current processes of the pro bono office effective? What are our strengths? What are our weaknesses?
- What are pro bono best practices or models that will meet the challenges of the rural area and our client population?
- Are these same models useful for disaster response? How can we incorporate future disaster response needs into our workflow?
- What are other client needs besides family law that the pro bono office might service?
- How can the pro bono program best utilize technology and other innovations given the region's lack of quality internet?

Specifically, AppalReD Legal Aid is seeking a consultant to provide the following services:

- Conduct a comprehensive assessment of AppalReD's internal practices, with an emphasis on identifying how AppalReD can better integrate pro bono within our whole organization's work.
- Evaluate and suggest a process for our intake system to better identify and target pro bono cases.
- Identify opportunities to use Justice Server to meet pro bono needs.
- Identify best practices or models that will meet the challenges of the rural area and our client population, including how to best incorporate disaster response into the workflow.
- Identify and recommend technology improvements needed for internal and external efficiency for pro bono work.
- Work closely with the Pro Bono Director throughout the assessment process to ensure access to AppalReD staff, systems, policies, and practices to enable a thorough evaluation.
- Identify opportunities to grow pro bono volunteer pool and meet volunteer client needs.
- Provide preliminary findings and recommendations based on the assessment,

providing AppalReD Legal Aid’s leadership and pro bono staff an opportunity for review, discussion, and recommendation.

- Provide a final comprehensive assessment report for implementation to AppalReD Legal Aid.

The maximum amount of payment for all work performed for the project is \$45,000.

Timeline: AppalReD Legal Aid will select a consultant by or before October 11, 2024. A kickoff meeting with the consultant and assessment team will occur in October. AppalReD envisions working with the selected consultant to develop the assessment process and plan during October and November 2024. In, December, January, and February, AppalReD will work with the consultant to actively engage in the assessment. By March 1, 2025, the consultant would develop preliminary findings and engage in discussions with AppalReD to finalize a report. The final comprehensive assessment report and action plan should be submitted to AppalReD by **March 31, 2025.**

Selection Criteria: In awarding a contract for services to conduct a comprehensive assessment of AppalReD Legal Aid’s Pro Bono Program, AppalReD Legal Aid will examine several factors and criteria including:

- The extent to which the consultant’s response addresses the assessment needs identified in the Scope of Work section;
- The specific plans to be used to perform the services;
- Qualifications and experience in business process analysis for pro bono legal services programs funded by LSC; and
- Total cost for providing services.

Response Process

Response Schedule:

- Request for Proposal Released on August 12, 2024.

- Response due no later than August 30, 2024.
- Successful Vendor selected – on or before September 13, 2024.
- Contract signed and work commences, on or before Monday, October 30, 2024.

Response Format: The proposal should be sent via email.

Response Requirements and Content: Please address the areas noted below:

- (a) A brief overview summary of the project services to be rendered;
- (b) A general description of the consultant’s approach to business process analysis and pro bono program evaluation;
- (c) A detailed explanation of how the consultant will address the issues identified in the Scope of Work;
- (d) A list of project deliverables to be created with detailed timelines for the deliverable, check-ins, and overall project completion;
- (e) A detailed budget that breaks out expenses per line item;
- (f) Three references; and
- (g) If possible, provide examples of prior pro bono evaluations completed for LSC-funded programs, including a rural program and/or a program with disaster legal services.

Submission Contact Information and Questions:

Submit the proposal electronically by email as a Word Document or PDF. Please include subject line “RFP PBIF Planning Consultant.”

Submit proposals or any questions to:

Charnel Burton, Pro Bono Director

CharnelB@ardfky.org