



08/30/2022

Addendum #1

RFP for Pro Bono Innovation Fund Transformation Grant Consultant

This serves as Addendum No. 1 and becomes part of the original Request for Proposals package. It must be signed and returned with your RFP response.

NOTE: The Proposal deadline has changed and will now be due on September 23rd, 2022 by 12:00PM Pacific Time.

Acknowledgement of Receipt of Addendum #1

Company Name/Contact Name

Date

Phone Number

Signature



Request for Proposal

Pro Bono Innovation Fund Transformation Grant Consultant

1. OVERVIEW

Inland Counties Legal Services, Inc. (“ICLS”) is soliciting proposals from consultants to work with our staff to engage in a comprehensive internal and external assessment of our Pro Bono Program. ICLS is a recipient of a three-year Pro Bono Innovation Fund (PBIF) Transformation Grant from the Legal Services Corporation (“LSC”). A key component of a Transformation grant is an in-depth assessment of ICLS’s pro bono program, which identifies of key areas in need of improvement and provides recommendations to strengthen and integrate pro bono throughout ICLS’s program. ICLS is seeking a consultant who is experienced in conducting assessments of legal services pro bono programs.

ICLS is a nonprofit legal services organization providing services to the communities of Riverside and San Bernardino Counties in Southern California—a service area of 27,263 square miles with a population of more than 4.5 million. ICLS serves a combination of urban, suburban, and rural communities. Since its founding in 1958, ICLS has evolved into a full-service non-profit law firm with eight practice groups, providing services via four branch offices and numerous outreach locations. Legal assistance is provided in areas including housing; family; consumer; tax and bankruptcy; public benefits, Social Security; healthcare access; immigration, education rights and systemic impact litigation.

ICLS is funded in part by the Legal Services Corporation (LSC). LSC is a federally funded grant making organization that supports civil legal aid providers across the country. Its mission is to expand access to justice by funding high-quality, free attorneys for low-income Americans in basic civil matters like divorce, child custody, and eviction. It does not provide direct legal services itself.

2. PURPOSE AND DESCRIPTION OF PROJECT

Despite its long history, ICLS is new to pro bono. Until 2019, the organization’s pro bono effort was entirely farmed out to sub-grantees. In that year, ICLS created an in-house pro bono program for the first time. Since then, ICLS’s Pro Bono Program has grown substantially. The

unit is currently staffed by three Pro Bono Coordinators and supervised by the Deputy Director of Community Engagement. Prior to the PBIF grant start date, a Director of Pro Bono will be in place to oversee the general pro bono program and PBIF grant.

Over the past three years, a series of challenges have slowed the program's growth. Those challenges include the fact that staff at the organization are new to working with pro bono volunteers and are unsure how it relates to their work; the local bar consists of solo practitioners and small firms that have thin profit margins and limited bandwidth for pro bono; much of ICLS's service area is rural or otherwise difficult to reach for potential volunteers; and because the organization is still relatively new to pro bono, it has not had the internal expertise or bandwidth to create, grow, and manage a substantial pro bono program. At this point in the process, a rigorous assessment is essential to ensure intentional growth and development.

2.1. Scope of Work

ICLS will engage the consultant to undertake a thorough assessment of its pro bono program to obtain an understanding of the opportunities, challenges, and possibilities for the organization's transformed pro bono program. The assessment will include both internal and external components—starting with staff interviews and review of ICLS systems, programs, and data, followed by a more limited exploration of the interests and possibilities presented by the volunteer pool that ICLS is able to access. ICLS will work closely with the consultant to guide their vision and exploration and ensure that they have full access to the data and individuals necessary to ensure a thorough and honest review.

Qualitative elements of the review will include interviews with a range of ICLS staff, leadership, and members of the private bar. Quantitative components will include analysis about the legal needs and characteristics of the private bar in the region, and full access to ICLS data about pro bono cases, volunteers, and projects.

Optional Additional Proposal: Vendors have the option to submit an additional, related proposal for the following work. Any additional proposal will not be part of the overall review and determination of contract award, but must accompany a proposal for assessment consulting in order to be considered. **Optional additional work:** In addition to conducting an in-depth assessment and producing a written report with recommendations, the consultant will help ICLS to apply report recommendations, plan and execute a pilot pro bono project, make improvements to and scale the pilot project, and provide expert guidance on an as-needed basis during the first year of the Transformation Grant (Oct. 1, 2022-Sept. 30, 2023).

3. RFP TIMELINE

RFP Released	August 22, 2022
Amended RFP Released	August 30, 2022
Deadline: Proposals due	September 23, 2022, at 12:00 pm PST
Evaluation period, including potential interviews with consultants	September 26-October 14, 2022
Award of contract	October 17, 2022
Contract signed and project begins	October 24, 2022
Assessment Report Due	June 16, 2023

3.1. Timeline for Completion

The assessment should be completed in a 6-month period following project commencement date. The final assessment report is due no later than June 16, 2023.

3.2. Payments: Payments will be made upon receipt of invoice from Consultant. Invoices must describe the work performed, dates and number of hours worked, and the total amount due for the invoiced time period.

4. GENERAL INSTRUCTIONS

4.1. RFP Coordinator

Upon release of this RFP, all vendor communications concerning this acquisition must be directed to the RFP Coordinator listed below. Any oral communications will be considered unofficial and nonbinding on ICLS. Only written statements issued by the RFP Coordinator may be relied upon.

Tori Praul Hedrick, Esq.
Deputy Director of Community Engagement
Inland Counties Legal Services
1040 Iowa Ave., Ste. 106
Riverside, CA 92507
951-774-4402
tpraul@icls.org

4.2. Questions

All questions must be directed to the RFP Coordinator by email at the email address listed in Subsection 4.1.

4.3. Submission Response Time and Format: The proposal must be sent electronically via email in Adobe PDF format to RFP coordinator by email at the email address listed in Subsection 4.1 of this RFP. The email subject should specify, “Pro Bono Transformation Consulting Proposal.” Please copy **Rachel Arroyos**, rarroyos@icls.org on the submission email.

4.3.1. The vendor’s response, in its entirety, must be received by the RFP Coordinator by the deadline noted above in Section 4: September **23**, 2022, at 12:00 pm PST. Late responses will not be accepted and will be automatically disqualified from further consideration.

4.3.2. Proposals that exceed 20 pages (excluding supporting documents) will not be accepted.

4.4. Response Requirements and Content:

Vendors must respond to each question/requirement contained in Exhibit A, Vendor Response. In preparing their response, vendors should restate each requirement and then give their response.

4.5. Costs of Preparing Responses

ICLS will not pay any vendor costs associated with preparing responses, submitted in response to this RFP.

4.6. Responses Property of ICLS

All responses, accompanying documentation and other materials submitted in response to this RFP shall become the property of ICLS and will not be returned.

4.7. Proprietary Information/Public Disclosure

All responses received shall remain confidential until the evaluation is completed, and the vendor is selected and approved. Thereafter responses shall be deemed public records.

4.8. RFP Amendments/Cancellation/Reissue/Reopen

ICLS reserves the right to change the RFP Schedule or issue amendments to this RFP at any time. ICLS also reserves the right to cancel or reissue the RFP. All such actions will be posted on ICLS's website.

4.9. Minor Administrative Irregularities

ICLS reserves the right to waive minor administrative irregularities contained in any response.

4.10. Inability to Enter Contract

ICLS reserves the right to eliminate from further consideration any vendor that ICLS, because of legal or other considerations, is unable to contract with at the time responses are due in accordance with the schedule contained in Section 3 above.

4.11. No Obligation to Enter a Contract

The release of this RFP does not compel ICLS to enter any contract.

4.11.1. ICLS reserves the right to refrain from contracting with any vendor that has responded to this RFP regardless of whether the vendor's response has been evaluated and regardless of whether the vendor has been determined to be qualified. Exercise of this reserved right does not affect ICLS's right to contract with any other vendor.

4.11.2. ICLS reserves the right to permit an interview with any vendor and/or a demonstration from any vendor prior to entering a contract with that vendor. If a vendor declines the request for an interview or demonstration for any reason, the vendor may be eliminated from further consideration.

4.12. Multiple Contracts

ICLS reserves the right to enter contracts with more than one vendor as a result of this RFP.

4.13. Non-Endorsement

The selection of a vendor pursuant to this RFP does not constitute an endorsement of the vendor's services. The vendor agrees to make no reference to ICLS in any literature, promotional material, brochures, sales presentations, or the like without the express written consent of ICLS.

4.14. Contract Payment Limitations

Vendors should anticipate payment at the end rather than the beginning of the invoice period in which they provide services or after they submit any deliverable for which a payment is due.

5. PROPOSAL EVALUATION CRITERIA

- 5.1.** ICLS Evaluation Team (Team) of at least two (2) people will evaluate the responses to this RFP. The Team may also consider past contract performance and check references beyond those listed in the vendor's response.
- 5.2.** As part of the evaluation process, at the discretion of the Team, vendors may be asked to clarify specific points in their response. However, under no circumstances will the vendor be allowed to make changes to the response.
- 5.3.** Proposals will be evaluated upon the consultant's responsiveness to the RFP, qualifications, demonstrated experience with similar projects, and the total prices quoted for all items covered by the RFP.
- 5.4.** Award of the contract resulting from the RFP will be based upon the most responsive contract that is most advantageous to ICLS in terms of cost, functionality, experience, and quality of past work.
- 5.5.** ICLS ideally seeks a consultant that understands its needs as a nonprofit and legal services organization and its mission to ensure access to the civil justice system for those most in need.
- 5.6.** Not all evaluation factors are of equal importance and will be weighted in accordance with ICLS priorities.

6. POST EVALUATION

- 6.1. Notification of Selection of Successful Vendor:** The successful Vendor and Vendors whose responses have not been selected for further negotiations or award will be notified via email on or before October 17, 2022.
- 6.2. Contract Award/General Terms and Conditions:** ICLS Board of Directors may be required to approve entering a contract with the selected vendor in accordance with ICLS' procurement procedures. Any proposals exceeding \$25,000 will require prior approval from LSC before ICLS may contract with vendor. A vendor selected to provide

application services will be expected to sign a contract with ICLS on or before October 24, 2022.

6.3. Appeals: Requests to appeal the rejection of a bid must be made to the RFP Coordinator in 4.1 above by email as soon as possible after the announcement of the award.

6.4. Time is of the Essence in requesting an appeal as a contract may be signed prior to the contract deadline in Section 3 above.

6.5. Compelling Business Reason: Requests for an appeal must set out a compelling business reason why the appeal should be considered.

6.6. Discretionary Consideration: Appeals of bid rejections may be accepted or rejected at the sole discretion of ICLS management.

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PBIF Transformation Grant
Pro Bono Program Evaluator/Consultant

EXHIBIT A - VENDOR RESPONSE

Responses must contain the following information in the following format. Please number your responses to correspond with the information requested here.

1. Vendor's name, address, federal tax identification number or Social Security Number (SSN), Uniform Business Identifier (UBI) number, and a description of the vendor's legal status, e.g., corporation, sole proprietor, etc. Additionally, if applicable, address of corporate headquarters, state of incorporation and business insurance information.
2. Vendor's contact name, telephone number, fax number and email.
3. A statement that guarantees that the response constitutes a firm offer valid for sixty (90) days following receipt, and that ICLS may accept any time within the 90-day period.
4. A statement on whether the vendor or any employee of the vendor is related by blood or marriage or current or former business association to an ICLS employee or resides with an ICLS employee. If there are such relationships, list the names and relationships of said parties. Include the position and responsibilities within the vendor's organization of such vendor employees.
5. State whether the vendor has been a party in any litigation during the past five (5) years, all such incidents except employment-related cases must be described, including the other parties' name, address, and telephone number. Present the vendor's position on the matter.
6. Provide two (2) references for programs for other assessment projects **or similar projects** you have completed. Provide references of customers only of similar size, scope, and service offerings. Please include a phone number or email address of the referenced customer and contact so he/she may be contacted. Also, provide a sample contract or service agreement.
7. Overview summary of the project services to be rendered.
8. General description of the Consultant's approach to pro bono program evaluation.

9. Provide a list of project deliverables to be created with detailed timelines for the deliverable, check-ins, and overall project completion.
10. A detailed explanation of how the consultant will address the issues identified in the Scope of Work (Section 2.1 and Exhibit B).
11. A detailed budget that breaks out expenses per line item.
12. State your assurance that you can complete the scope of work described in 2.1 above and that you agree to conduct all stated fact gathering and interviews, ~~assistance with launch of pilot project~~ and submit the assessment report no later than June 16, 2023.
13. If possible, provide examples of prior pro bono evaluations completed for LSC-funded programs or any additional descriptive literature or work samples.

OPTIONAL ADDITIONAL PROPOSAL: Proposals for additional work described in section 2.1 will be considered if vendor has submitted a proposal for the assessment consulting project. Standalone proposals for optional work will not be considered. Please respond to the following questions:

1. Overview summary of the project services to be rendered.
2. General description of the Consultant's approach to launching pilot projects.
3. Provide a list of project deliverables to be created with detailed timelines for the deliverable, check-ins, and overall project completion.
4. A detailed budget that breaks out expenses per line item.

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Pro Bono Innovation Fund Transformation Grant
Pro Bono Program Evaluator/Consultant

EXHIBIT B – Scope of Work

1. Assessment Plan

The Consultant must produce a detailed plan with scheduled milestones explaining how they will conduct the assessment and what input and materials ICLS must provide.

2. Assessment Content

The Consultant will work with ICLS to explore the following strategic questions:

- What cases and projects are a good fit for pro bono support, and which present opportunities for scaling up to a meaningful size?
- How can ICLS recruit, utilize, and retain volunteers, including remote volunteers from large law firms?
- How can ICLS effectively train and mentor volunteers to secure the best outcomes possible for clients?
- How can ICLS develop a culture of pro bono within the organization, and integrate pro bono support into the organization's key practice areas?
- What are the best practices for pro bono, and how can they be applied at ICLS?
- What systems should ICLS develop to effectively manage its pro bono program?

3. Assessment Report

The Assessment Report will provide a detailed analysis of the information gathered during the assessment period and provide recommendations and strategies to address the questions above.