



PISGAH
LEGAL SERVICES

October 4, 2022

Request for Proposal: Consultant for Diversity, Equity, and Inclusion (DEI) Organizational Priorities and Strategies

Summary

Pisgah Legal Services (PLS) seeks proposals from consultants to help guide its efforts to increase diversity, equity, and inclusion across all aspects of our non-profit legal aid organization.

Who We Are

Pisgah Legal Services is a community-based non-profit corporation governed by a local Board of Directors. PLS has an annual budget of \$11 million from a multitude of funding sources. Located in the Blue Ridge Mountains of Western North Carolina, Pisgah Legal Services (PLS) provides free civil legal assistance to low-income people in the region. PLS has offices in Asheville, Brevard, Burnsville, Hendersonville, Highlands-Cashiers, Marshall, Newland, and Rutherfordton. With a dedicated and growing staff of 122, including thirty-nine attorneys plus supporting staff, and an active pro bono panel of 300 private attorneys, the program provides free services to assist more than 20,000 people per year to meet their basic needs, primarily in the poverty law areas of housing, public benefits, domestic violence prevention, health care, immigration, and consumer law. The organization also has a Community Economic Development Program and a WNC Health and Economic Opportunity Program. For more information about our work, please visit our website at www.pisgahlegal.org.

Background

In 2018-19 Pisgah Legal Services began taking deliberate steps towards increasing diversity, equity, and inclusion in various aspects of our work. Some of our efforts related to DEI are outlined below to provide context for the work that we seek to undertake with a consultant. We humbly note that we have much to do on this journey towards equity and inclusion and acknowledge that we have made mistakes along the way.

Our efforts to increase diversity, equity and inclusion include:

- Made explicit our commitment to DEI in our statement of our Mission, Vision & Values (Appendix A).
- PLS Board of Directors has made DEI a top long-term priority for the organization and is invested in the process.
- Identified expanding our focus and work on equity, diversity, and inclusion as a priority in our most recent Strategic Plan (2019-2021) and seek to enhance our focus in our upcoming strategic plan.
- Created DEI Program Co-Director positions in 2020. Two staff leaders were provided a stipend to

devote a portion of their time to DEI planning and initiatives, as we worked towards securing funding for more staffing of DEI efforts.

- Created a DEI Committee consisting of 8-10 staff members from various parts of the organization, including the COO, HR Director, two DEI Program Co-Directors, and other staff members. The committee met monthly to plan and implement DEI efforts. Committee members decided in August 2021 to suspend their meetings until PLS has engaged a consultant to guide and support their efforts. One Co-Director has left the organization to become an Executive Director of another organization and the second Co-Director transitioned into a new role as Director of a different PLS program.
- Engaged in staff training & education related to Equity, Diversity, and Inclusion
 - Hosted an all-staff “Groundwater” training facilitated by the Racial Equity Institute in 2019. Newer staff attended in October 2021. Staff hired since October 2021 have not attended.
 - Some staff have attended the 2-day Racial Equity Institute Phase 1 Training.
 - Some supervisors participated in a training for white managers by Yejin Lee in 2021.
 - Some staff have participated in Desiree Adaway’s Whiteness at Work trainings.
 - Many individual staff have attended various other trainings related to DEI.
- Worked with consultants on building DEI into HR recruitment & hiring in 2020. We began implementing steps to increase diversity, equity, and inclusion in these areas.
- Created and filled a new HR Position to provide support for DEI in October 2021.

Project Overview & Scope of Work

Pisgah Legal Services is seeking the services of a consultant across a period of at least twelve months to:

- Provide insight and knowledge on DEI best practices as related to our organization as a non-profit law firm operating under the North Carolina State Bar regulations and within the civil court system.
- Help us gather and analyze relevant data and input from staff and other constituents.
- Work with staff and board members to identify key priorities for promoting diversity, equity, and inclusion within Pisgah Legal Services based on data gathered and analyzed.
- Work with staff and board to create a workplan and strategies to implement key priorities, including an ongoing training program for staff and volunteers, including Board members.
- Help us develop methods for evaluating our progress and the impact of our DEI initiatives and areas for continued growth and development.
- Provide training, coaching, and appropriate support for management and the Board of Directors in the roles of directing a legal aid corporation that prioritizes, supports, and invests in DEI work as we take steps to accomplish DEI objectives.
- Help us develop a training program for staff, volunteers, Board members and possibly provide (or at least recommend) some of the training in-person, remotely, and in recorded format so that later hires and volunteer recruits can view basic training to further DEI objectives.
- Support the development and implementation of affinity groups.
- Help us with to recruit, support, and retain a diverse staff and volunteer base.
- Provide guidance and support regarding counseling for staff who feel that it is not safe to report aggressions through supervisory channels and help us with training and coaching to create an atmosphere where microaggressions can be called out in real time to reduce the incidence of them.

Key areas we have noted for our work at this point on which we would seek a consultant's guidance and support include:

- Improving relationships and trust between all PLS employees at all levels including the Board, management, staff members, and volunteers.
- Coaching to PLS management and supervisors in effective supervision and communication strategies with a DEI lens.
- Designing an ongoing training program for staff and volunteers on such topics as: equity, implicit bias, legal compliance, cultural sensitivity, strategies to promote inclusion, meaningful support for our BIPOC co-workers, and possibly other topics recommended by the data.
- Assistance in staffing our DEI initiatives.
- Organizational development to support increased equity, diversity, and inclusion.
- Recruitment, hiring, and staff retention.
- Reducing/eliminating harm to staff, volunteers, and clients of color, and those identifying as women, LGBTQ+, individuals with disabilities, and other groups that experience discrimination, exclusion, or oppression.
- Recommend changes to PLS policies, procedures, and governance methods related to, but not limited to, HR practices such as recruitment, hiring, retention, promotion, prevention of discrimination & harassment, employee grievances, board committees, and incorporating DEI into onboarding & training.
- Advice regarding formal internal structures for DEI involvement from staff including how/when to re-start the DEI committee, or create other structures like caucuses or affinity groups, and how to promote the voice, influence, and success of these groups.

Qualifications of Consultants

- Considerable experience in developing and executing organization-wide DEI assessment, planning, and implementation efforts for large nonprofits.
- Demonstrated understanding and/or experience with issues and challenges of a nonprofit civil legal aid organization engaged in social justice advocacy.
- Experience conducting diversity and inclusion surveys, analyzing survey data, and implementing effective action plans at various organizational levels.
- Experience reviewing and drafting corporate policies relating to human resources and other areas to incorporate best practices for diversity, equity, and inclusion.

Proposal Activities & Deliverables

Pisgah Legal Services is committed to creating a culture that is inclusive and promotes a collective mixture of similarities and differences. We seek to conduct a Diversity, Equity, and Inclusion assessment to assist Pisgah Legal Services with developing a comprehensive DEI Strategic Plan that will align with Pisgah Legal Services' strategic objectives. The scope of this assessment will be comprehensive. At a minimum, the scope will include a review of operational and comparative measures, opinions, and industry applicable analysis. The analysis and assessment will:

- Include the review of the culture of current operations.
- Address racial, gender, identity, age, and other inequities that may impact the workforce.
- Identify industry best practice models.

- Include benchmarks for the future
- Identify Pisgah Legal Services' strengths and areas of opportunity to assist with developing DEI strategies that support workforce diversity and organizational strengthening.

The comprehensive Diversity, Equity, and Inclusion (DEI) assessment should include the information listed below and other applicable industry best practices that will provide Pisgah Legal Services with a high-quality DEI Strategic Plan.

- Conduct pre-assessment activities/meetings with executive leadership and Board members.
- Work with leadership and other designated staff to develop DEI goals, objectives, and strategies.
- Integrate DEI into internal processes across the organization to support Pisgah Legal Services' strategic objectives.
- Identify gaps in workforce engagement involving diversity, equity, and inclusion and recommend how to improve/close the gaps.
- Use information from the assessment to assist with determining what areas need culturally specific trainings and employee engagement. Example: the construct of race and racism, understanding needs of the LGBTQ community, and inclusion of all regardless of their abilities or disabilities.
- Ensure that Pisgah Legal Services staff and volunteers understand the importance of having a diverse and inclusive culture that supports all staff, volunteers, and WNC residents who need our services.
- Provide guidance to assist Pisgah Legal Services with attracting and retaining a talented and diverse workforce with the ability to work collaboratively across differences to achieve organizational objectives.
- Assist Pisgah Legal Services in learning how to establish and implement a comprehensive DEI program infrastructure that creates and sustains an inclusive workplace that embraces diversity.
- Assist Pisgah Legal Services with developing agency wide metrics to track the impact and effectiveness of DEI strategies on Pisgah Legal Services' workforce culture.
- Provide a resource plan that includes identifying staff, finances, technology, and operational resources needed to implement the DEI Strategic Plan

Implementation of the Diversity, Equity and Inclusion Strategic Plan will occur after the assessment process has been successfully completed. The implementation of a strategic plan may or may not be implemented by the same company that conducts the DEI assessment.

- Collaborate with Pisgah Legal Services' HR department to develop and implement improved recruitment efforts.
- Assist the organization with implementing industry best practices as it relates to workforce DEI employee resource groups, mentoring, and coaching.
- Provide technical assistance to executive leadership and Board members to establish DEI strategies or programs that address identified gaps that align with Pisgah Legal Services' strategic objectives.
- Provide guidance on the development of key performance indicators, and/or future assessment tools, and analyze and share observations regarding programmatic practice, internal and external diversity and inclusion metrics, and organizational culture and practice.
- Assist Pisgah Legal Services with implementing an employee led DEI Committee comprised of representatives of PLS' service delivery programs. This committee would provide ongoing awareness of bias, advise about training needs, and present recommendations on how to resolve issues.

DEI Training Plan

Assist Human Resources staff with developing an accessible and usable DEI training plan that Pisgah Legal Services can commit to for continuous learning that includes, at a minimum, the following topics:

- Understanding implicit bias and its effects.
- Building a common language and shared knowledge of DEI.
- The importance of building an inclusive workplace and facilitating/fostering workplace change.
- Use of information from assessments to assist with developing training plans for the workforce to support the DEI Strategic Plan.
- Implement training listed in the DEI Strategic Plan and other comparable training as needed.

Deliverables

- A project plan with timelines that includes cost.
- Develop and help produce a comprehensive Diversity, Equity, and Inclusion analysis of the organization, i.e., and organizational DEI needs assessment.
- A comprehensive DEI Strategic Plan that blends into the upcoming overall Strategic Plan, or that can be incorporated by reference to that plan.
- A leadership readiness assessment that is conducted, analyzed, and interpreted.
- Conduct staff leadership and separate Board DEI education workshops.
- Develop and execute a training and education strategy that will increase the awareness, knowledge, and skills of our staff as it pertains to DEI.
- Identify opportunities for improvements with suggestions regarding how to operationalize those improvements.
- Provide knowledge and insight on best inclusion practices in the field.
- Improved recruitment plan.
- Develop and implement appropriate DEI dashboard/performance measures.
- Develop a strategy and plan for implementation of a Diversity, Equity, and Inclusion Advisory Committee, and support that committee as it begins its work.
- Develop a long-term DEI roadmap (if the DEI Strategic Plan is for a shorter period) that is aligned with Pisgah Legal Services' strategic objectives and will ensure that barriers to inclusion continue to decrease, while internal awareness, knowledge and skills continue to increase.

Budget

PLS is committed to investing time and resources to this organizational priority. The initial annual budget is \$120,000 and includes support for training, consultants, planning, and related activities. Proposals should outline anticipated costs of any or all components requested in this RFP. Non-profit discounts are welcomed.

Submission of Proposals

PLS will accept proposals until November 30, 2022 at 5pm EST via email to Sam Galloway, PLS Director of Human Resources, humanresources@pisgahlegal.org. If you feel you/your firm are a good fit for this work, but the proposal deadline creates a challenge, please contact us to discuss. Any proposal should specify when the consultant or consulting firm is available. Tapered involvement by a consultant is an option that we will consider. If your proposal is not for the full body of work sought, please specify in your response where your expertise and experience fit best.

For consideration, please submit proposals in PDF format with the following Information:

- Contact information
- Summary of Approach and Frameworks for DEI: please include specific examples of strategies, training content, and descriptions of key activities
- Scope of Work and Timeline
- Cost information that includes a rate sheet, the estimated number of hours and cost per hour for the consultant staff for each of the components of the work, and the estimated time investment for PLS Board and staff
- Key personnel information for consultant or firm
- Three professional references, preferably at least one from a non-profit legal aid organization.

For inquiries, please contact Sam Galloway at humanresources@pisgahlegal.org.

Appendix A: Mission, Vision, and Values

Our Mission

Pisgah Legal Services pursues justice to improve lives for low-income people in Western North Carolina through legal assistance and advocacy.

Our Vision

Pisgah Legal Services envisions a community where all people have access to civil legal assistance when they need it to protect their basic rights and secure essentials, such as housing, health care, income, and safety from abuse. We envision a community with policies and services in place that reduce poverty and injustice and ease the burdens of poverty on our neighbors.

Our Core Values & Guiding Principles

❖ **Dignity & Respect:** We honor, respect and strive to protect the value, worth and dignity of *all* people by recognizing the history and institutions that contribute to racism in our community.

❖ **Compassion:** We strive to create a culture of compassion and nonjudgment, working to be approachable, accessible, and accepting. Self-care and self-compassion are important aspects of our work and critical in building a resilient staff, workplace, and community.

❖ **Empowerment:** We recognize that the effectiveness of our work depends upon having input, involvement and leadership from our clients and community partners. Effective solutions to poverty and injustice must include leadership from the people most affected by these problems. In our work with our clients, we seek to support their self-determination.

❖ **Equitable Access to Justice:** We strive to build a legal system that ensures equitable access to justice because we believe everyone should have an opportunity to thrive and meet their basic needs.

❖ **Equity, Diversity & Inclusion:** We commit to creating equity, diversity, and inclusion within our organization and promotion of it in our region.

❖ **Innovation:** We embrace innovation. In order to thrive, PLS must proactively develop new and relevant approaches, services, and community relationships in an ever-changing world. We will take risks as innovators, challenge ourselves and others, and embrace the learning that comes from mistakes made along the way.

❖ **Professionalism:** We commit to providing the highest quality of professional services. We provide legal services in a comprehensive, holistic manner to resolve underlying causes of poverty and injustice.

❖ **Trust:** The core value in all that we do is trust. We commit to creating and maintaining a workplace that is built upon trust among staff, volunteers, clients, community partners, and donors/funders.