

# LEGAL ACTION OF WISCONSIN

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## Legal Action of Wisconsin – Technology and Innovation Grant:

### Request for Proposals

### Knowledge Management Platform with AI and Automation Integrations

**ISSUE DATE: April 1, 2025**

**RESPONSE DEADLINE: April 30, 2025**

Legal Action of Wisconsin (hereinafter, “Legal Action”) is initiating this Request for Proposals (RFP) to solicit responses from vendors interested in providing technological expertise in the creation and maintenance of a searchable knowledge management platform with AI and Automation integrations for daily use by Legal Action staff members.

#### **Background:**

Legal Action provides free civil legal services to eligible clients and has six offices throughout its 39- county service area. Legal Action provides services in Wisconsin’s largest urban centers and remote rural counties. The Legal Services Corporation awarded Legal Action a two-year Technology and Innovation Grant to develop and implement an internal knowledge management system to improve efficiency in gathering and searching for the highest quality materials and resources needed for effective client service delivery. The system will incorporate emerging trends such as Artificial Intelligence and automation to improve functionality. The project is led by the Director of Knowledge Management, a newly created position that will remain in place beyond the life of the grant.

#### **Project Goal and Objectives:**

The project goal is to deliver the highest quality legal services to clients by creating and utilizing an internal knowledge management system that leverages Artificial Intelligence and automation, fostering staff unity across our six offices, and increasing staff efficiency.

The project objectives are to:

- Develop and publish two searchable knowledge hubs for internal (administrative) and external (client services) documents.
- Explore and integrate Artificial Intelligence and automation for system optimization.
- Test and refine the knowledge management system for maximum usability.

- Foster staff unity through training, accessibility, engagement and consistent system use.
- Submission of detailed grant reporting and evaluation documentation, including progress updates, outcomes achieved, challenges encountered, and data supporting project impact, to assess project effectiveness.

**Purpose:**

Legal Action seeks a vendor with technological expertise in AI and Automation to assist us in building a searchable internal knowledge management platform ('Platform') with two hubs, one for administrative materials such as grants and accounting materials, and a second hub for client services materials, to include, for example, a brief bank, training materials, and programmatic files. The Platform is expected to be quickly and easily searchable to increase staff efficiency and to reduce the spiderweb of independent SharePoint sites created by staff for a variety of purposes. The Platform will include a natural language search tool based on AI. The vendor will work with an internal steering committee (led by the Director of Knowledge Management), an external evaluator, and staff stakeholders. External stakeholders such as pro-bono partner law firms and other LSC-funded legal agencies who have implemented similar systems will help to inform our decisions.

Legal Action looks forward to working with the successful vendor to produce the following:

- A user-friendly, accessible, and easy to navigate knowledge management platform for use by Legal Action staff for both client services and administrative purposes. Legal Action is an Office365 subscriber and has access to SharePoint as an option for the Platform but is open to considering other potential solutions.
- The Platform is expected to link together the current fractured system of SharePoint sites already existing for various purposes, such as accounting, volunteer engagement, training materials, litigation guides, and project specific SharePoint sites.
- Educate project partners about available technology tools that will contribute to the overall success of the project, i.e. tools that will make searching for information more efficient and accurate.
- Implement chosen technology tools into the design and build of the platform.

- The Platform must be searchable and Legal Action would prefer a search tool that uses natural language.
- Integrating and refining the Platform with the launch of pilot subjects for each hub, conducting user testing, and integrating feedback from the external evaluator.
- Building out each hub using lessons learned during the pilot process and integrating feedback from user testing and the external evaluator.
- Explore and integrate document automation where possible.
- Train staff on the use and maintenance of the knowledge management platform.

The Director of Knowledge Management and Steering Committee have completed a knowledge audit to determine the structure of the hubs and what materials should be transferred from network drives to the intranet. Legal Action already has an operational Employee Toolkit SharePoint site that is well used, and we anticipate using this SharePoint as a central starting point for the administrative and client services hubs. However, as stated above, we are also open to considering other tools that may meet our needs and are within our budget constraints.

**Summary of Services Requested:**

The entire project’s timeline is two years, with the grant period beginning in January 2025 and ending in December 2026. The selected applicant should expect to participate in the project from approximately late May 2025 – November 2026.

Legal Action proposes the following milestones for success and is open to adjustments:

- Late May – June 2025- contract signed and initial meeting with the project team for information gathering, including the review of results of knowledge audit and proposed Platform structure and existing SharePoint pages.
- July 2025 – explore potential tech solutions for searchability and structure for the hubs. Determine a pilot subject area for the client services hub and start building the hub.
- Late September 2025 – Conduct a training for project ambassadors, launch pilot of the client services hub and conduct first user training session.
- October 2025– January 2026 – evaluate pilot, conduct user testing, prepare to launch full client services hub.

- December 2025 – hear any recommendations from evaluators and implement any revisions identified during user testing.
- February 2026 – launch full client services hub
- March 2026 – conduct user testing of full client services hub and implement any improvements.
- March – April 2026 – identify pilot of administrative hub
- April 2026 – launch pilot administrative hub
- May 2026 - conduct user testing of administrative hub to identify any glitches, prepare for launching full admin hub
- June 2026 – Implement revisions to admin hub, prepare to launch full administrative hub.
- July 2026 – launch full administrative hub
- August 2026 – September 2026 – make any final revisions to Platform and search tool based on feedback from external evaluators and user feedback
- September 2026 – conduct second user training on both hubs.
- September – October 2026 – any document automation projects
- October – November 2026 – set up for building out the knowledge management platform for engaging students and volunteers.
- November 30, 2026 – contract concludes.

**Oversight and Project Management:**

Legal Action will oversee the vendor’s performance by signing a milestone-driven service agreement and payment schedule as well as by ongoing communication regarding project status and coordination issues.

The vendor will work closely with Legal Action’s Director of Knowledge Management. The vendor will be expected to meet with the project team monthly to check status and determine the next steps to move forward the above milestones. Legal Action expects that there will be work conducted independently by both the vendor and Legal Action in between the monthly meetings. Legal Action expects to receive regular progress updates from the vendor and to be notified immediately of any concerns or delays that may arise during the engagement.

## **Proposal Submission Requirements:**

All proposals must be 15 pages or less (not including resumes and samples of comparable work), concise, well-organized, and demonstrate how your proposed services, approach and methodology, qualifications, experience, and terms meet or exceed Legal Action’s requirements. The proposal must be sent electronically via email to the RFP Coordinator, whose information appears below. The email subject should be clearly marked “Knowledge Management Platform Tech Contractor Proposal” and received no later than April 30, 2025. Late proposals will not be accepted and may be disqualified from further consideration.

All proposals must also contain the following:

### **I. Applicant Information**

- Your full name, address, telephone number, email, and website
- Firm overview, including a brief history, mission, number of employees, and number of years in operation.
- Your RFP point-person. Please include title, phone number, and email address.

### **II. Firm and Key Personnel Qualifications**

Describe your familiarity with implementing a searchable knowledge management platform integrating Artificial Intelligence and/or Automation. Provide resumes for the project manager and each of the key personnel identified, describing each individual’s qualifications and experience which make him or her particularly suited for this project. Include relevant education, training and work experience, and certifications.

### **III. Statement and Methodology**

Describe your understanding of the overall project goals, and the objectives and deliverables of the project. Include a clear description of the work to be performed, the anticipated methodology used to complete the work and the objectives to be reached and/or product to be delivered for each phase of the project. Include a description of the work product to be produced by you at each stage in the process. Describe what resources you will need from outside of your organization to accomplish the project deliverables. Please include a timeline for project completion in the time designated for these deliverables.

**IV. Management:**

Provide a work plan for carrying out the project. Clearly identify the proposed project manager and key personnel responsible for each part of the work plan. The Proposal must include the hours anticipated to complete the project and must demonstrate your ability and willingness to meet the proposed project schedule.

**V. Cost:**

Identify the estimated cost and the proposed cost basis for you to complete the project, including direct and indirect costs and expenses, any plans for utilizing students and interns for research to maximize the scope of the work that can be accomplished. Specify a maximum, all-inclusive cost for the project. Rates, whether fixed or hourly, must include all overhead costs and profit. Legal Action is a 501(c)(3) tax exempt organization and is eligible for GSA Schedule pricing. The available budget for contracted tech services is \$50,000 - \$67,000.

**VI. Alternatives:**

The Proposal may include discussion of alternative tasks or areas of work the submitter believes will better enable Legal Action to reach its objectives for this project. If the Proposal contains any such alternatives, the Proposal must clearly identify the ways in which the proposal would modify the scope of work as presented in this RFP and be clearly identified in the proposed work plan.

**VII. References:**

Provide two (2) recent references concerning your firm's performance on comparable projects. Indicate the project name, a brief description of the project and the name, title, telephone number and email address of a reference who is knowledgeable about the project and who may be contacted by proposal evaluators.

**RFP Evaluation:** Legal Action of Wisconsin Evaluation Team (Team) of at least two (2) persons 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. In awarding a contract for tech services, Legal Action will examine factors including:

1. The extent to which the tech provider's response addresses the project's overall goals, objectives, and purposes;
2. The specific plan to be used to perform the services requested;

3. Qualifications and experience in performing comprehensive project evaluation services; and
4. Total cost for providing services.

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.

**Notification of Selection of Apparently Successful Vendor:** Vendors whose responses have not been selected for further negotiations or award will be notified via email.

**Contract Award/General Terms and Conditions:** Vendors selected to provide tech services will be expected to enter a contract with Legal Action of Wisconsin.

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

Jenelle M. Dame  
Legal Action of Wisconsin, Inc.  
633 W. Wisconsin Ave., Suite 2000  
Milwaukee, WI 53203  
(414) 274-3062  
[jmd@legalaction.org](mailto:jmd@legalaction.org)

**RFP Schedule:**

RFP released – April 1, 2025  
Responses due not later than 5:00pm CST – Wednesday, April 30, 2025  
Successful vendor announced – May 16, 2025  
Contract signed and work commences – May 23, 2025

**RFP Questions:** Applicants may contact the RFP Coordinator at the address and/or numbers listed above with any questions concerning this RFP. All questions must be received prior to the response due date and time listed above. Written questions are preferred and should be submitted by email to ensure receipt and timely response.