



# Request for Proposal to Implement Microsoft Copilot and Train Users to Use Copilot Effectively

**ISSUE DATE: January 24, 2025**  
**PROPOSALS DUE: February 25, 2025**



## **Section 1. Project Overview**

### **Description of Legal Aid Chicago**

Legal Aid Chicago is the largest civil legal aid provider in Chicago. We provide free civil legal services to residents of Chicago and Chicago suburbs in Cook County, Illinois. Our staff of over 225 includes approximately 100 full-time attorneys and paralegals who are experts in poverty law. Our holistic legal services allow our clients to get help with multiple legal problems in one place. Since its inception in 1966, Legal Aid Chicago has changed the lives of hundreds of thousands of Cook County's most vulnerable residents, including people who are seniors, disabled, veterans, immigrants, and survivors of domestic violence. Our work is not just a band-aid solution; access to our services can begin the move out of poverty for many of our clients.

### **Project Summary and Objectives**

Legal Aid Chicago is seeking proposals from qualified vendors to collaborate with us to integrate Copilot into our Microsoft environment. We are currently migrating Legal Aid Chicago's on-premise SharePoint 2013 infrastructure to SharePoint Online (Microsoft 365) and anticipate completing this migration by June 30, 2025.

For this Request for Proposals, the objectives of our project are: 1) implement Microsoft Copilot across relevant Microsoft 365 applications; 2) ensure the integration aligns with our organizational processes, security protocols, and goals; 3) provide training to staff on effectively using Microsoft Copilot; 4) work with Legal Aid Chicago to establish key performance indicators to measure the effectiveness of using Copilot; and 5) contribute to the governance and best practices for the responsible use of AI tools.

### **Necessary Experience, Proposal Requirements**

The selected vendor must have or provide: 1) a minimum of two (2) years of experience in implementing and training others to use AI tools; 2) experience working with civil legal aid organizations or nonprofit organizations; and 3) references from at least three customers for similar projects.

In addition, by responding to this RFP, a vendor is representing they can provide all aspects of the services requested by Legal Aid Chicago in this RFP; they can complete the work by the due dates; and they can present a strong financial position. Proposals must include all information solicited by the RFP and any additional data that a vendor deems pertinent to the understanding and evaluation of its proposal.



## Selection Schedule

The selection schedule dates may change at the discretion of Legal Aid Chicago. All dates shown below end as of the of the end of the business day, 5:00 p.m., Central Time, unless otherwise noted. Any changes to these dates will be communicated by email. Legal Aid Chicago reserves the right to reject all proposals received, or to change the dates listed below, as it deems necessary.

Milestones	Anticipated Timeline
Request For Proposal Date	January 24, 2025
Responses Due	February 25, 2025
Q & A Period	January 24, 2025 – February 25, 2025
Finalists Determined	March 4, 2025

## Budget

The available budget for this project is \$26,000.

## Evaluation Criteria

- **Meeting Legal Aid Chicago’s Requirements** - (maximum of 35 points; 35%) How completely do the proposed services meet Legal Aid Chicago’s requirements, as stated in this RFP.
- **Reference’s Satisfaction** - (maximum of 15 points; 15%) How satisfactory are the references.
- **Vendor Qualifications and Experience** - (maximum of 10 points; 10%) How strong are the vendor’s qualifications and experience.
- **Minority Owned Businesses** - (5 points, 5%) Points for this section will be awarded if the vendor, or vendor’s partner/subcontractor(s), are a female or minority owned business.

Vendors are required to prepare their proposals in accordance with the instructions outlined in this RFP. Failure to follow these instructions may result in rejection. RFP submissions must be written and submitted to Legal Aid Chicago at [copilotprojectrfp@legalaidchicago.org](mailto:copilotprojectrfp@legalaidchicago.org) no later than 5:00 p.m. Central Standard Time on February 25, 2025.

## Section 2. Project Description and Requirements

Our Microsoft Copilot Development Project aims to revolutionize legal service delivery at Legal Aid Chicago through the implementation of Microsoft Copilot, Microsoft’s Artificial Intelligence



(AI) tool. This innovative technology will empower our staff by streamlining the writing process and enhancing overall productivity.

The consultant will collaborate with us to integrate Copilot into our Microsoft environment. The consultant will review our environment, make recommendations, and work with us to set up the security and permissions to use Copilot safely and effectively. We will follow IT best practices such as multi-factor authentication (MFA), the principle of least privilege, and other information security protocols.

Legal Aid Chicago has recruited 25 people (approximately 10% of our staff) from various job categories, including attorneys, paralegals, grant managers, finance staff, human resources staff, information technology staff, intake staff, and others. This is our group of Copilot Testers. The consultant will work with us to obtain baseline measures for specific tasks which we will use to compare to the time it takes to complete the same or similar tasks using Copilot.

We are using the tools and resources available on the AI for Social Progress (AI4SP) website (<https://ai4sp.org/>) to help us evaluate the readiness and suitability of our Copilot Testers to integrate AI into their work. During the first phase of our project, we want the consultant to help us use the workshops and resources available on the AI4SP website, as well as other resources the consultant identifies, to help our staff understand AI tools and prepare to use Copilot effectively. We plan to complete the migration of our existing SharePoint system to SharePoint Online during this period so that we can optimize the use of Copilot when we implement it.

### **Section 3. Deliverables and Timeline**

The selected consultant will provide the services outlined below. The work will begin in February or March 2025 and must be completed by June 30, 2026.

- Assessment and Planning
  - Set up a kickoff meeting with project overview summary.
  - Conduct a readiness assessment of our Microsoft 365 environment.
  - Work with Legal Aid Chicago to create an implementation and rollout plan.
  - Provide detailed project plans outlining timelines, milestones, and responsibilities.
  - Work with Legal Aid Chicago to obtain baseline measures for specific tasks so we can compare these baselines to the time it takes to complete the same or similar tasks using Copilot. These tasks will include, but are not limited to:
    - drafting specific documents;
    - completing intake interviews;
    - reviewing discovery;
    - summarizing meetings;



- crafting presentations;
  - writing grant narratives; and
  - creating training materials.
- Configuration and Deployment
  - Collaborate with our IT team to ensure seamless integration.
  - Configure Microsoft Copilot features within our Microsoft 365 environment.
  - Set up security protocols and permissions necessary to safeguard data privacy and ensure compliance with IT best practices.
  - Provide detailed documentation identifying maintenance and updating procedures.
- Training
  - Develop a training/communication plan.
  - Develop training materials for IT staff on managing Copilot.
  - Develop training materials for end users on using Copilot effectively in their daily workflows.
  - Deliver initial training sessions for Copilot Testers on how to use Copilot effectively in their respective roles.
  - Provide ongoing support and resources, including training materials, user guides, and help desk support, to assist Copilot Testers in using Copilot effectively.
  - Deliver refresher training sessions and advanced workshops to ensure Copilot Testers are proficient and to address any emerging challenges or questions.
- Analytics
  - Define key performance indicators to measure progress and success in achieving the project objectives.
  - Implement data collection mechanisms to track key performance indicators, including surveys, interviews, performance metrics, and reports to track usage and compliance with Legal Aid Chicago policies.
  - Provide a test plan outlining the testing procedures conducted to validate the functionality and effectiveness of Copilot, along with test reports documenting the results.
- Governance and Best Practices
  - Work with Legal Aid Chicago to establish governance and best practices for using Copilot and/or other AI tools, including but not limited to developing guidelines for the ethical and effective use of these tools.
  - Work with Legal Aid Chicago to establish monitoring and reporting mechanisms to track usage and impact of Copilot and/or other AI tools.



## Section 4. Proposal Requirements

Effective immediately upon release of this Request for Proposals (RFP) and until notice of contract award, proposals in response to this RFP shall be directed to [copilotprojectrfp@legalaidchicago.org](mailto:copilotprojectrfp@legalaidchicago.org). All official changes, modifications, responses to questions, or notices relating to the requirements of this RFP will originate from this email address. Proposals must address all the questions and information being requested in this RFP, affirm that the services required can be provided by your firm, and include the information described below.

- **Executive Summary.** The Executive Summary shall not exceed one (1) page and shall describe the vendor's ability to meet the requirements of this RFP. Vendors must provide information about their company so that Legal Aid Chicago may evaluate the vendor's stability and ability to support this project.
- **Description of Services.** The Description of Services to be performed must include a detailed approach for implementing Microsoft Copilot, with a description of how you will ensure a smooth transition with minimal disruption to our users.
- **Costs.** All one-time and ongoing/recurring costs and a total cost must be specified. In the event services are provided at no additional cost, the item should be noted as, "no charge." Do not use "To Be Determined" or similar annotations, as Legal Aid Chicago is asking vendors to provide pricing for all desired outcomes with the understanding that they may have to make assumptions. Such assumptions should be stated in this section. Vendors may submit multiple versions of pricing forms to reflect multiple proposal options, if offering multiple options. The pricing forms should be clearly named to distinguish each option.
- **Staffing Plan.** The Staffing Plan must detail the qualifications of staff who are proposed to provide services. If the vendor is using a subcontractor, please include information on subcontracting staff being used and their specific role(s).
- **Timeline.** In this section, the vendor must outline the timeline for this project and must describe their ability to adhere to the anticipated project schedule using the proposed staff.
- **Project Plan.** The Project Plan must include timelines, milestones, and responsibilities, including how you will ensure timely delivery and quality control.
- **Company Profile.** The Company Profile must include:
  - Legal Name
  - Name of Owner(s)
  - Legal Address



- Federal taxpayer ID (companies based in the United States are preferred)
  - Number of Employees
  - Years in Business
  - Approximate Annual Revenue
  - Total Number of Clients
  - Number of Not-For-Profit Clients
  - Number of law firm/legal aid clients
- **References.** Include at least three customers for similar projects, including contact information for at least one individual at each who can speak to your work.
  - **Sample Agreements.** Vendors shall provide sample contractual agreements in this part of the vendor's response for all services proposed. In addition, the final agreement between vendor and Legal Aid Chicago shall include the following language:

**Indemnity.** [Vendor] agrees to release, defend, indemnify and hold harmless Legal Aid Chicago, its governing board, officers, employees, and agents from and against any and all claims, costs, losses, damages, liabilities, expenses, demands, and judgments, including litigation expenses and attorneys' fees, which may arise from [Vendor's] performance under this agreement or negligent acts or omissions of its subcontractors, agents, or employees, including but not limited to, any penalties, claims or damages arising from or pertaining to a breach of this agreement. Such indemnification shall include but shall not be limited to the full cost of any notice to impacted individuals, including the costs to retain an outside consulting firm, vendor, or outside attorneys to undertake the effort.

**Insurance.** [Vendor] shall carry Professional/Errors & Omissions Liability in the amount of \$1,000,000 to protect Legal Aid Chicago from liability acts of [Vendor]. Upon execution of this Agreement, [Vendor] shall provide a copy of the certificate of liability insurance evidencing the coverage described above. The policy specified above shall name Legal Aid Chicago as additional insured. [Vendor] agrees to give at least thirty (30) days' notice to Legal Aid Chicago prior to the cancellation, non-renewal or material modification of any such policy.

- **Exceptions and Deviations:** If the vendor finds it impossible or impractical to adhere to any portion of these specifications, the vendor shall so state in this section.
- **Additional Materials:** The vendor may include any additional materials or brochures regarding the proposed services in this section.



All costs incurred in responding to this RFP are solely the responsibility of the vendor. Please submit proposals in a single PDF file as an email attachment to this email address: [copilotprojectrfp@legalaidchicago.org](mailto:copilotprojectrfp@legalaidchicago.org).

## **Section 5. Evaluation of Proposals**

Legal Aid Chicago reserves the right to reject any proposals received after the submission deadline, or that are missing any proposal requirements, or that are not adequate for Legal Aid Chicago to reach a judgment about the proposal meeting the needs of Legal Aid Chicago.

At its discretion, Legal Aid Chicago may choose to contact or request to meet with a vendor for an interview, to clarify their response, or to negotiate the contract terms submitted with their proposal.

Legal Aid Chicago reserves the right to make an award without further discussion of the proposals submitted. Therefore, agreements should be submitted on the most favorable terms the vendor can propose.

Legal Aid Chicago reserves the right to accept or reject any proposal or part thereof without assigning any reasons thereof. We also reserve the right to modify any part of the project or the RFP, as well as to negotiate the terms and conditions of the project with the selected vendor.

### **Selection Process:**

Legal Aid Chicago will evaluate each proposal based on the evaluation criteria mentioned above. Shortlisted vendors may be invited for an interview to clarify their proposal and provide additional information if necessary. Legal Aid Chicago will make the final decision on the selection of the vendor.

