Agentic AI Technology Innovation Project

Request for Proposals

Project Overview

Legal Services of Greater Miami invites proposals from qualified vendors to design, develop, implement, and support agentic artificial intelligence (AI) workflows to automate administrative functions within its Finance and Development departments.

This project supports Legal Services' goal of increasing organizational capacity and efficiency by integrating agentive AI into administrative workflows, enabling the organization to redirect staff time and limited resources toward frontline legal services without increasing administrative overhead.

Project Term: April 1, 2026 – September 30, 2027 (18 months)

This RFP aligns with the approved project goal, objectives, and milestones as reflected in the TIG application and performance documentation.

Project Goal. To increase organizational capacity and efficiency to deliver legal services by integrating agentive AI into administrative workflows in the Finance and Development departments.

Project Objectives

1. **Workflow Development and Integration**. Develop agentive AI workflows that automate high-priority administrative functions and integrate with LSGMI's existing systems.
   a. **Deliverables**:
      i. Develop at least four fully functioning agentive workflows (minimum two per department)
      ii. Develop system interoperability enabling AI agents to retrieve, update, and process data across platforms
2. **Training and Adoption**. Train Finance and Development staff on the use, oversight, and refinement of AI workflows.
   a. **Deliverables**:

i. Complete training sessions for all impacted staff and develop functional user guides
3. **Ongoing Monitoring and Refinement**. Establish a structured process for ongoing monitoring, support, and refinement.
    a. **Deliverables**:
        i. Institute quarterly workflow performance evaluations and track refinement requests
4. **Documentation and Replication**. Document outcomes and produce replicable materials for the legal services community.
    a. **Deliverables**:
        i. Develop a report, toolkit and/or guides, and conference or recorded webinar presentation

Scope of Work & Timeline

Months 1-2: Workflow Mapping and Design

- Conduct workflow mapping sessions with Finance and Development teams
- Define workflow logic, triggers, KPIs, and exception handling
- Identify systems requiring integration
- Establish security and access requirements
- Finalize technical architecture and implementation roadmap

Months 3-7: Development and Integration

- Develop at least four production-ready agentive workflows (two per department)
- Build secure interoperability across relevant platforms
- Conduct iterative testing and refinement
- Complete user acceptance testing
- Resolve compatibility and reporting issues
- Prepare for production deployment

Months 8-10: Deployment and Training

- Deploy validated workflows into production
- Conduct hands-on training sessions for all impacted staff
- Develop and distribute role-specific user guides
- Administer post-training surveys
- Confirm adoption benchmarks

Months 11-18: Refinement, Evaluation, & Documentation

- Institute quarterly workflow performance evaluations
- Track refinement requests
- Monitor dashboards, logs, and KPI performance
- Conduct evaluation reviews
- Tune agent performance and refine workflows as compliance or operational needs evolve
- Draft technical implementation summary
- Develop replication toolkit and/or guides
- Prepare conference presentation or recorded webinar
- Finalize sustainability plan and transition to maintenance model

Proposal Requirements

Proposals must include:

- Executive summary
- Technical approach and methodology
- Detailed 18-month work plan aligned with timeline phases
- Security and compliance framework
- Staffing plan and assigned roles
- Relevant experience with agentic AI automation
- Project schedule with milestones
- Detailed budget (development, integration, training, monitoring, and support)
- Two references

Evaluation Criteria

Proposals will be evaluated based on:

- Demonstrated experience with agentic AI workflow automation
- Technical soundness and security architecture
- Integration capabilities across enterprise systems
- Feasibility within the 18-month timeline
- Cost-effectiveness and sustainability
- Understanding of nonprofit and grant compliance environments
- Commitment to documentation and replicability

Submission Information

Proposals must be submitted electronically in PDF format to isanchezbyson@legalservicesmiami.org by **March 20, 2026**.

Questions regarding this RFP must be submitted in writing to:

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Chief Program & Innovation Officer
Legal Services of Greater Miami
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