

# Request for Proposal: Training on Copilot Agents

## Request for Proposal (RFP)

### **Microsoft Copilot Agents**

**Issued by:** Legal Aid Chicago on August 18, 2026

**Contact:** Vivian R. Hessel, Chief Information Officer

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**Subject Line:** Proposal – Copilot Agent Development Training Services

**Proposals Due:** September 18, 2026

## 1. Project Overview

Legal Aid Chicago is the largest provider of free civil legal services in Chicago and suburban Cook County. Our mission is to provide high-quality civil legal assistance to people living in poverty and to promote access to justice through advocacy, innovation, and collaboration. Over the past two years, Legal Aid Chicago has implemented Microsoft Copilot, developed AI governance policies, established data sensitivity classifications, conducted staff training, identified and evaluated AI use cases across the organization, and completed a pilot program involving approximately 25 staff members from a broad range of roles.

Legal Aid Chicago is now entering the next phase of AI adoption. Staff members have gained practical experience using Microsoft Copilot for drafting documents, summarizing information, researching topics, and doing other tasks. Legal Aid Chicago now wants to explore and learn how to use prebuilt Copilot Agents (including Researcher, Analyst, Learning Coach, Prompt Coach, SharePoint Agents, and other out-of-the-box agents), and, where feasible, custom Copilot Agents. Should time and resources permit, Legal Aid Chicago also wants to learn about Copilot Cowork to automate tasks and workflows.

## 2. Project Objective

Legal Aid Chicago seeks proposals from qualified consultants or training organizations to provide advanced training, mentoring, and hands-on workshops that enable a small cohort of staff to design, build, test, govern, and deploy Microsoft Copilot Agents to support organizational objectives. The selected vendor will help staff move beyond using Copilot and toward creating AI-powered solutions that automate repetitive work, improve knowledge management, increase efficiency, and enhance client service delivery. This effort will also help Legal Aid Chicago build internal expertise and develop a sustainable model for future agent development.

### 3. Desired Outcomes

The selected consultant will help Legal Aid Chicago achieve the following objectives, which build upon Legal Aid Chicago's previous Copilot implementation, governance, and training efforts:

- Build internal expertise in Copilot Agent design and development.
- Train a cohort of approximately 10-20 staff members to create, modify, and maintain Copilot Agents.
- Identify and prioritize high-value agent use cases.
- Develop practical agent prototypes that can be used within Legal Aid Chicago.
- Establish governance, security, and quality review processes for internally developed agents.
- Create reusable training materials and documentation.
- Provide mentoring and coaching as participants build their first agents.
- Develop metrics to evaluate adoption, effectiveness, and organizational impact.

### 4. Scope of Services

The selected consultant should propose a training and mentoring approach that includes some or all of the following activities:

- Reviewing existing Copilot use cases and training materials.
- Instructor-led workshops to identify automation opportunities, that are recorded for reference and repeated viewing.
- Helping staff prioritize high-value agent scenarios through hands-on learning, coaching, and/or office hours.
- Recommending agent opportunities that align with organizational goals.

Potential use cases may include:

- Knowledge retrieval from SharePoint and internal resources.
- Grant reporting and compliance assistance.
- Document review and summarization.
- Meeting preparation and follow-up.
- Project management support.
- Staff onboarding and training assistance.
- Policy and procedure guidance.
- Legal and administrative workflow support.

Training should emphasize practical application and hands-on exercises rather than lecture-only instruction. The consultant will work directly with participants to:

- Design agent solutions.
- Build functional agent prototypes.
- Troubleshoot implementation issues.
- Test agent performance.
- Improve prompts, instructions, and grounding data.
- Review governance and security concerns.

The consultant will provide:

- Administrator guidance and documentation.
- End-user guidance and documentation.
- Agent development standards.
- Governance recommendations.
- Training recordings.
- Sample agent designs and configurations.
- Sample success measures.
- Adoption metrics.
- Recommendations for future expansion.

The expectation is that participants will complete at least one functioning agent by the end of the engagement.

## **5. Budget Range and Timeline**

The budget range is \$12,000 to \$20,000. We plan to begin this training project by October 1, 2026 and complete the project by November 20, 2026.

## **6. Vendor Qualifications**

Preference may be given to vendors with demonstrated experience implementing AI solutions in environments that handle sensitive or confidential information. Vendors should demonstrate:

- Significant experience with Microsoft Copilot and Microsoft 365.
- Experience building, configuring, or supporting Copilot Agents.
- Experience delivering technical training and workshops.
- Experience with AI governance, security, and responsible AI practices.
- Experience supporting nonprofit, legal services, government, or similarly regulated organizations.
- Knowledge of Microsoft 365 security, SharePoint Online, Teams, and related services.

## 7. Proposal Requirements

Proposals should include:

**Executive Summary:** The Executive Summary shall not exceed one paragraph and describe the vendor's ability to meet the requirements of this RFP, proposed approach, and qualifications.

**Company Profile:** The company profile must include the legal company name, headquarters location, years in business, number of employees, ownership information, and relevant certifications.

**Relevant Experience:** A description of up to two comparable projects that include client type (nonprofit, for-profit, legal, non-legal), project scope, deliverables, results achieved, and reference information for each project.

**Project Approach and Staffing Plan:** A description of the training methodology to be used, the workshop structure, expected participant commitment, knowledge transfer strategy, project lead, instructors, and subject matter experts. If the vendor is planning to use a subcontractor, include information on subcontracting staff being used and their specific roles.

**Timeline:** We plan to start this project on or about October 1, 2026, and complete this project by November 20, 2026. Provide a proposed schedule that meets this timeline.

**Pricing:** Provide all costs, including fixed-price components, hourly rates (if applicable), assumptions, and/or optional services within the anticipated budget range of \$12,000 to \$20,000.

**References:** Provide at least two references for similar engagements if not already provided in response to the "Relevant Experience" Section above.

**Sample Agreements:** Vendors shall provide sample contractual agreements in this part of the vendor's response for all services proposed.

**Additional Materials:** The vendor may include any additional materials or brochures regarding the proposed services.

## 8. Evaluation Criteria

Proposals may be evaluated using the following criteria:

- Understanding of Project Objectives: 25%
- Experience with Copilot Agents: 25%
- Training and Mentoring Approach: 20%
- Qualifications of Proposed Team: 15%
- Cost Effectiveness: 10%
- Experience with Nonprofit or Legal Entities: 5%

Legal Aid Chicago reserves the right to interview finalists before making a selection.

## 9. Submission Instructions and Terms and Conditions

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Legal Aid Chicago reserves the right to reject any or all proposals. Legal Aid Chicago may negotiate project scope and pricing with selected vendors. Submission of a proposal does not guarantee award. Costs associated with proposal preparation are solely the responsibility of the vendor.

Legal Aid Chicago may request additional information or interviews as part of the evaluation process. 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. Legal Aid Chicago also reserves 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.

Legal Aid Chicago will evaluate each proposal based on the evaluation criteria mentioned above and will make the final decision on the selection of the vendor.