

LEGAL ACTION OF WISCONSIN

Providing free legal services to low-income Wisconsin clients since 1968 • Proporcionando servicios legales gratuitos a clientes de bajos ingresos en Wisconsin desde 1968

REQUEST FOR INFORMATION

ISSUED: MAY 21, 2024

Overview: Legal Action of Wisconsin seeks to build an intranet on a Microsoft platform for internal staff use for both legal advocacy and administrative purposes. Legal Action seeks to consult with other groups or experienced individuals to learn more about available solutions, particularly those that apply AI (Artificial Intelligence) tools for efficient searchability.

LAW (Legal Action of Wisconsin) intends to apply Microsoft tools, such as Azure, to establish an Intranet, develop and link SharePoint pages, and explore using AI chatbots for searches. When completed, LAW expects to have different practice area's SharePoint pages integrated into a two-hub system with dashboards for different needs. The two hub system includes: 1) a repository with multiple client facing materials, including but not limited to: Intake manual, Case handling manual, sample pleadings, and brief banks, and 2) a repository with multiple non-client facing materials, including but not limited to: Human resource materials, Staff handbooks and manuals, Union contracts and other union documents, and committee materials, including minutes and recordings

The publication of this Request for Information is to gather information only and will not result in any contracts being awarded. Legal Action seeks to learn from other groups about what has and has not worked for them with the intention of replicating best practices within our organization and learning about options that would best fit our organization's goals and purposes.

Contact and Submission Details: Attorney Jenelle M. Dame is gathering responses to the Request for Information. Written responses can be submitted to jmd@legalaction.org, otherwise, telephone conversations can be scheduled through my [Zoom Scheduler](#).

Timeline:

RFI Released: May 21, 2024

Deadline for questions: May 28, 2024

Deadline for responses: May 31, 2024

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Organization Information: As Wisconsin’s largest non-profit law firm providing free civil legal services, our mission is to deliver exceptional civil legal services and structural change advocacy, free of cost, to those most in need.

Goals and outcome: To create an intranet used as a resource for all staff in 6 different offices to help advocates deliver more efficient legal services.

An internal knowledge management system would reduce silos created among the different offices and lead to decreased duplication of work. It will ensure the highest quality legal work is easily accessible to all staff, and by extension, to the average 7,000 to 10,000 client households served annually. There will be a better understanding of where shared materials are located, and reduce situations where materials get “lost.”

Additionally, information and firmwide updates for staff will be more coordinated. The system will better unify the firm and ensure clients, no matter where they are located throughout our six office and 39 county service area, benefit from the expertise of all the advocates comprising the largest provider of free civil legal services in Wisconsin. Additionally, a more unified firm will improve staff morale, leading to better and more efficient client experiences. Staff working directly with clients can spend time doing what they do best – navigating and assisting low-income clients with civil legal needs to achieve outcomes to benefit their lives. Administrative staffing also will be better equipped to support them.

Once the baseline for the management system is in place, LAW will continue to add documents and pages as well, including but not limited to: Board member information and meeting agendas and minutes; Legal Server integration where each legal server file is an individual share point file for client documents; SharePoint for pro bono attorneys to locate clinic documents; streamlining administrative process through a central repository of documents

Information Requested: We are seeking information related to experience in building an intranet using a Microsoft platform and incorporating AI tools for search functionality.

1) Please provide background information on your organization or company:

- a. Information might include: your history of providing legal services or other services to low-income populations.

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- b. A brief description of your organization's service area, size, and scope to determine any similarities between organizations.
 - c. Any background information on your efforts to create an intranet.
 - d. If you are responding as a tech provider, please briefly describe your experience working with organizations on similar projects.
- 2) Please share feedback on the below items regarding your organization's efforts to implement an intranet:
- a. Recommendations on tools and platforms for building the above referenced intranet. Specifically, did you use Microsoft tools, or another proprietary system, and if so, how did you handle data security?
 - b. Ideas on replication from similar projects.
 - c. What went well, and any pitfalls in your experience.
 - d. Recommendations on incorporating AI tools into the experience.
 - e. Referrals to groups or providers with expertise or knowledge in these areas.
 - f. Did you work with an evaluator, and if so, what measurements did you use to evaluate improved client services on an internal facing project?
 - g. What partners, such as law-librarians, law schools, tech colleges, or pro bono partners, did you collaborate with, and how effective was the collaboration?
 - h. How did you work within the organization to make final decisions in maintaining the intranet, for example, selecting documents to upload, setting deadlines for updates.

Who might be appropriate to respond:

Legal Action is interested in hearing from anyone with experience or subject matter expertise in the above areas. However, we are especially interested in hearing from other non-profit organizations, especially those funded by the Legal Services Corporation; potential tech partners; pro bono partners; law librarians; knowledge managers.