REQUEST FOR PROPOSALS:
Housing Law AI Research Assistant

1. <u>**Purpose**</u>

The Legal Aid Society of Cleveland ("Cleveland Legal Aid") seeks an experienced developer to design and implement a Housing Law AI Research Assistant ("AI Assistant") to support the legal work of staff and volunteer attorneys. This AI Assistant is to be a tool that integrates Cleveland Legal Aid's varied sources of institutional expertise in housing law, allowing advocates to make use of them more easily. By streamlining legal research and document drafting, the AI Assistant will increase the quality and efficiency of services provided to clients. It will be capable of quickly delivering relevant legal information, identifying potential case strategies, and assisting in the creation of memoranda, pleadings, motions, briefs, and correspondence related to landlord-tenant and other housing law matters. The tool will combine generative AI algorithms with conditional logic in a user-friendly interface that requires minimal training to use. It will also incorporate strong encryption and security protocols to protect the underlying data, which will not be used for external training or shared outside of approved contexts. Ultimately, this project aims to significantly reduce the time attorneys spend on manual research and drafting, enabling us to serve more clients and improve outcomes in housing-related cases.

2. <u>**About the Legal Aid Society of Cleveland**</u>

Founded in 1905 as only the fifth legal aid in the country, Cleveland Legal Aid is a nonprofit law firm that provides high quality legal assistance to people with low income in civil matters in five counties in Northeast Ohio. Legal Aid's mission is to "secure justice, equity, and access to opportunity for and with people who have low incomes through passionate legal representation and advocacy for systemic change." Through the years, Cleveland Legal Aid has handled hundreds of thousands of civil legal cases and contributed to many broad-based policy changes. Today, Cleveland Legal Aid continues to use the power of the law to improve safety and health, promote education and economic security, secure stable and decent housing, and improve accountability and accessibility of government and justice systems.

Cleveland Legal Aid's Housing Practice Group works to help low-income tenants secure and retain safe, decent, and affordable housing. While the group's primary focus is defending tenants in eviction cases, it also engages in a wide range of litigation to preserve and expand housing rights. This includes enforcing Fair Housing protections, safeguarding the rights of tenants under the Violence Against Women Act, and challenging unlawful housing practices that disproportionately impact vulnerable communities. The group also works to preserve and increase the supply of affordable housing in the region and regularly participates in advocacy efforts at the local, state, and

national levels. In support of this work, Cleveland Legal Aid publishes <u>Ohio Eviction and Landlord-Tenant Law,</u> an 886-page treatise most recently updated in 2022, which provides a comprehensive analysis of all aspects of landlord-tenant law in Ohio. Cleveland Legal Aid, through its Volunteer Lawyers Program (VLP), engages over 500 attorneys each year to provide *pro bono* assistance to clients, including renters facing issues such as evictions, unhabitable conditions, and utility shut offs.

3. <u>Project Description</u>

Cleveland Legal Aid has received funding from the Legal Services Corporation's Technology Initiative Grant Program to develop and implement a secure, integrated AI platform that fulfills the goals outlined in the Purpose section. This platform will enhance the capacity of staff and volunteer attorneys by streamlining legal research, drafting, and access to institutional knowledge. The budgeted amount for all work performed on this project is $60,000; however, proposals exceeding this amount will be considered if they clearly demonstrate added value.

A. The Development Process

The selected developer will work closely with Cleveland Legal Aid's Housing Practice Group to build and refine the AI Assistant using curated legal content, document templates, and established internal workflows. In addition, the developer will assist in creating user training materials and will participate in initial training sessions for staff and volunteer attorneys.

To ensure the tool aligns with real-world use, Cleveland Legal Aid will engage justice community partners throughout the design, pilot, and implementation phases. This will include local private law firms, Ohio legal aid organizations, and national partners. At least one local firm involved in our Volunteer Lawyers Program will contribute feedback to shape features relevant to pro bono advocates.

Data security and ethical use are foundational to this project. The developer will be required to ensure that no data used to develop or train the AI Assistant is reused, repurposed, or shared with any third party (including LLM providers) without Cleveland Legal Aid's explicit approval.

To promote responsible AI use, Cleveland Legal Aid has developed an internal policy governing AI tools. This policy will be reviewed and revised as necessary during implementation, and standard operating procedures will be created to ensure consistent and appropriate use. All outputs generated by the AI Assistant will require attorney review prior to application in any legal matter.

B. The Platform

The core functionality of the platform will be powered by one or more large language models (LLMs) trained on authoritative housing law materials, including the Ohio Eviction and Landlord-Tenant Law treatise and thousands of internal pleadings, templates, and sample documents developed by Legal Aid attorneys. The Housing Practice Group will oversee updates to the training content, ensuring the platform reflects ongoing developments in Ohio case law and best practices through a user-friendly interface that allows seamless incorporation of new material.

The AI Assistant will support a range of use cases, including the ability to:

- Locate relevant case law, sample documents, and templates;
- Summarize discrete areas of housing law;
- Generate legal memoranda;
- Generate draft of client correspondence; and
- Generate draft pleadings, motions, and briefs.

All generated content will include citations to underlying legal authorities, with clickable links that allow users to verify and review sources quickly.

The platform will integrate with Legal Aid's existing tools—specifically LegalServer (case management) and SharePoint (document management)—to enable seamless data sharing and documentation. All data will be processed in a secure, isolated environment accessible only to authorized users. Strong encryption, access controls, and clear data-handling protocols will be required to safeguard client confidentiality, protect attorney work product, and maintain compliance with ethical and organizational standards.

Finally, the AI Assistant will include features to support automated tracking and evaluation. We plan to log AI usage within LegalServer through an automated process facilitated by the AI Assistant, that will document how the tool is applied across cases. If successful, this initiative will serve as a replicable model for expanding AI-assisted legal tools into other areas of practice.

4. **Qualifications**

The ideal developer will demonstrate strong technical expertise, an understanding of the scope and requirements of the project, a clear understanding of the non-profit legal services sector, the ability to deliver projects on time and within budget, experience using resources effectively and efficiently, and a commitment to responsible, human-centered AI implementation. Competitive applicants will also meet the following qualifications:

- **Proven Experience with AI/LLM Development**: Demonstrated experience designing and deploying applications using large language models (LLMs), preferably in a legal, nonprofit, or similarly sensitive context. Applicants should have experience fine-tuning AI models using specialized legal content or other domain-specific datasets.
- **User-Centered Design Expertise**: Ability to develop intuitive, low-friction user interfaces tailored to non-technical professionals. Applicants should show a commitment to designing tools that are accessible to a range of users and that require minimal training.
- **Experience with Legal or Document-Centric Workflows**: Familiarity with document automation, legal research tools, and drafting tools is strongly preferred. Applicants should understand the sensitivity and complexity of legal content.
- **Commitment to Data Security and Privacy**: Demonstrated understanding of secure architecture design, including data encryption, access control, and ethical data use. Applicants must be prepared to work within protocols that ensure confidential data is isolated, non-pooled, and compliant with Cleveland Legal Aid's data handling policies.
- **Integration Capabilities**: Experience with integrating custom tools into case management systems (such as LegalServer) and document management platforms (such as SharePoint) is highly desirable.

- **Training and Support Capabilities**: Ability to create comprehensive documentation, user guides, and training materials. Willingness to lead or co-lead initial training sessions for Cleveland Legal Aid staff and volunteers.
- **Collaborative, Values-Aligned Approach**: Willingness to engage with Cleveland Legal Aid attorneys and staff in an iterative, collaborative development process. Familiarity with the legal aid mission or similar service-oriented contexts is a plus.
- **Monitoring and Evaluation Planning**: Capability to implement tracking mechanisms and usage reporting features aligned with Cleveland Legal Aid's evaluation goals.

5. <u>Deliverables</u>

The selected developer will be expected to complete the following deliverables aligned with project goals in close collaboration with Cleveland Legal Aid staff:

- **Project Plan**
  - A detailed project plan outlining technical development phases, stakeholder engagement, training timelines, and system integration milestones.
- **AI Assistant Platform**
  - Development and deployment of the AI Assistant with core functionalities including:
    - Search and retrieval of relevant housing law case law, templates, and sample documents.
    - Summarization of specific legal issues.
    - Drafting of memoranda, client correspondence, and court documents.
    - In-text citations with clickable links to legal authorities.
  - Custom interface designed for use by staff and volunteer attorneys with minimal training required.
- **Integration with Internal Systems**
  - Seamless integration with LegalServer (case management system) and SharePoint (document repository).
  - Enable logging of AI Assistant usage in LegalServer to support evaluation and documentation.
- **Content Configuration and Fine-Tuning**
  - Incorporate training data, including <u>Ohio Eviction and Landlord-Tenant Law</u> and internal templates, pleadings, and sample documents.
  - Implement a structured process that Cleveland Legal Aid staff can follow both for updating training data with new information (e.g., new case law, user feedback on existing resources) and for removing training data that is no longer appropriate to use.
- **Security and Data Handling Protocols**
  - Design system architecture to ensure encryption, access control, and protection of privileged information.
  - Ensure all data is processed in an isolated environment and is not pooled into external datasets.
- **Documentation and Training**
  - Create user manuals, help documentation, and onboarding materials for Legal Aid staff and volunteers.
  - Lead or co-lead at least two initial training sessions.

- **Standard Operating Procedures and Policy Alignment**
  - Assist in the revision of Cleveland Legal Aid's AI Policy based on system capabilities and risks.
  - Develop standard operating procedures for staff use of the AI Assistant, aligned with internal compliance protocols.
- **Monitoring and Evaluation Tools**
  - Implement usage tracking and reporting mechanisms.
  - Deliver a summary report with usage metrics and feedback recommendations for future improvements or expansion.

6. Estimated Project Timeline

RFP released: February 17, 2026
Questions due: February 27, 2026
Proposals due: March 12, 2026, 8:00pm EST
Evaluation Period (possible interviews with selected respondents): March 12, 2026 to March 27, 2026
Successful vendor notified: March 27, 2026
Execute Contract: April 10, 2026
Work Begins: April 13, 2026

7. Response Requirements

- Describe your firm's capabilities. Specifically, include your experience working with nonprofits, legal aid organizations, or legal entities, as well as your ability to provide each of the above identified Deliverables.
- Project outline and timeline.
- A detailed budget proposing either a flat fee (with a breakdown of included services) or an hourly rate with estimated hours and related costs. Please include information about what expenses will be covered and any variable expenses (e.g. travel reimbursement).
- List all members of the team who will work directly on each component of this project as well as their qualifications.
- Provide a client list.
- Provide three references from past clients.
- Include whether your firm is considered a small business enterprise (SBE), minority-owned business enterprise (MBE), woman-owned business enterprise (WBE), and whether your firm is local to Northeast Ohio.
- Include any additional information you deem pertinent to consultant selection.

8. How to Apply

Please send RFP responses and inquiries to rquarto@lasclev.org with the subject line "Cleveland Legal Aid Housing Law AI Research Assistant" by March 12, 2026, at 8:00pm EST.