



Request for Proposals (RFP)

AI-Powered Intake & Referral Assistant

Legal Aid Society of Mid-New York, Inc.

Date Issued: May 14, 2026

Submission Deadline: June 30, 2026

Overview

The Legal Aid Society of Mid-New York (LASMNY) is soliciting proposals from qualified vendors to design and implement a secure, internally facing AI-powered Intake & Referral Assistant (IRA) to support intake staff. IRA will serve as a decision-support and knowledge-access tool that centralizes complex organizational rules related to financial eligibility, grant and funding criteria, and geographic case routing into a single conversational interface. IRA will be used exclusively by LASMNY staff and will not interface directly with clients.

Organizational Background

Established in 1952, LASMNY's mission is to provide free legal assistance to low-income people facing civil legal problems that impact the basic needs of life. We serve thirteen counties in central New York with six offices and a telephone HelpLine. We also operate a statewide program serving agricultural workers and their families. Through legal advice, emergency legal services, extended legal representation, and community legal education, we help low-income people stabilize their finances, protect themselves from domestic violence, and avoid homelessness.

Project Objectives

1. Improve consistency and reliability of intake determinations.
2. Strengthen adherence to LSC and grant-specific compliance requirements.
3. Reduce cognitive load and training time for intake staff.
4. Provide clear, explainable guidance while preserving human decision-making authority.

Scope of Work

Discovery & Scoping

Inventory and assessment of relevant PDFs, spreadsheets, and policy manuals; identification of high-risk eligibility and compliance areas; stakeholder interviews; taxonomy mapping; current-state process mapping, including review of LASMNY's recent intake evaluation; LegalServer integration scoping; User Acceptance Testing criteria; and a knowledge base governance model should all be addressed during discovery.

Functional & Technical Requirements

1. **Financial Eligibility Logic.** IRA must apply Federal Poverty Level (FPL), HUD Area Median Income (AMI), asset tests, and income disregards. Eligibility determinations must reflect program-specific variations across LASMNY's funding sources (e.g., LSC, OTDA, OCA, IOLA, county DSS).
2. **Grant Triage and Case Routing.** IRA must recommend the appropriate funding stream and LASMNY office for each case based on legal issue, problem code, applicant characteristics (income, household composition, county of residence, and special populations), program capacity, and funding-source geographic restrictions. The system must map cases to the correct office within LASMNY's 13-county service area and flag when multiple funding sources apply, when no funded program covers the matter, or when a specialized practice unit is needed.
3. **Retrieval-Augmented Generation with Mandatory Citations.** IRA must use a Retrieval-Augmented Generation (RAG) architecture that prioritizes LASMNY-provided source documents over external sources. Every response must include inline citations identifying the specific document, section, or policy supporting each element of the answer.
4. **Consistent Guidance Across User Experience Levels.** IRA must provide reliable, accurate responses through a conversational interface, regardless of the user's familiarity with intake procedures. The system should serve as a just-in-time reference for staff who do not perform intake daily and ensure that eligibility, funding, and routing decisions remain consistent across users.
5. **First-Tier Decision-Support with Documented Escalation Pathways.** IRA must be the initial resource for routine intake questions, such as eligibility checks for specific grants or funding-source coverage in specific counties. Built-in escalation criteria must route users to human supervisors when questions exceed the system's training scope.
6. **Preservation and Codification of Organizational Rules.** IRA must support structured ingestion of LASMNY's eligibility frameworks, grant compliance requirements, geographic routing logic, workflow procedures, and partner referral protocols. The system should draw from authoritative source materials and staff knowledge to ensure organizational expertise is preserved as a maintained asset, rather than dispersed across documents and individual memory.
7. **Consistent Answers Across All Six LASMNY Offices.** IRA must deliver uniform responses across all six offices, while supporting explicit encoding of office-specific variations.
8. **Coverage of Community Resources Beyond the Legal Aid Network.** IRA's knowledge base must include community referral resources such as food banks, shelters, 211, county Departments of Social Services, county Offices for the Aging, and mental health crisis services. This ensures appropriate referrals are available when a matter is outside LASMNY's legal scope or eligibility criteria.
9. **Built-In Logging, Analytics, and Continuous Improvement.** IRA must capture staff queries, identify gaps in the knowledge base, flag inaccurate or outdated answers, and support

quarterly review and update cycles by designated LASMNY administrators.

10. Governance, Accuracy Guardrails, and Confidentiality Controls. IRA must include documented guardrails distinguishing internal decision-support from legal advice (the system must not provide legal research or case-specific legal advice and must function exclusively as an internal staff tool); must exclude client personally identifiable information from training data; must comply with LASMNY's data security and confidentiality requirements; and must document prompts, training data sources, and decision logic to support funder transparency and audit requirements.

Project Timeline

The project must be completed by mid-November 2026. Vendors should propose a detailed work plan covering discovery, configuration, pilot development, testing, and rollout by November 2026.

Milestone	Date
RFP Issued	May 14, 2026
Vendor Questions Due	June 10, 2026
Proposal Submission Deadline	June 30, 2026
Vendor Selection	July 20, 2026
Project Kickoff	August 3, 2026
Discovery Period	August 3 – August 21, 2026
Prototype Build	August 24 – October 9, 2026
User Testing	October 12 – October 23, 2026
Pilot Deployment & Staff Training	October 26 – November 6, 2026
Final Readiness Review	November 9 – 12, 2026
Full Production Launch	November 13, 2026
Post-Launch Support & Issue Resolution	November 13 – December 18, 2026

Budget Parameters

Proposals shall include a comprehensive cost breakdown covering:

- Implementation costs, itemized by project phase (discovery, build, testing, training,

launch), with personnel costs broken out by role.

- Recurring costs for Years 1, 2, and 3, including licensing model (per-seat, organizational, or usage-based), hosting and infrastructure, LLM/API usage, and ongoing maintenance and support.
- Hourly rates by role for out-of-scope or additional services.
- Cost assumptions underlying the proposed pricing (e.g., LASMNY effort, source-material volume, query volume, user count) and how costs would change if assumptions vary significantly.
- Proposed payment schedule tied to project milestones.

Proposal Submission Requirements

A complete proposal must include:

1. Cover Letter. Signed by an authorized representative of the vendor, identifying the primary point of contact, the vendor's legal name and address, and federal employer identification number.
2. Vendor Qualifications and Experience. Organizational history, areas of expertise, and prior experience implementing comparable systems, with emphasis on RAG or LLM-based knowledge systems, implementations for legal services organizations or nonprofits, and projects of similar scope.
3. Proposed Solution and Technical Approach. Description of the proposed system architecture, including LLM and infrastructure choices, RAG approach, citation framework, integration with LegalServer, security and confidentiality controls, and how the proposal addresses each project objective in this RFP.
4. Project Plan and Timeline. A detailed work plan covering discovery, configuration, pilot development, testing, training, and rollout, with phase-level milestones and deliverables consistent with the project timeline.
5. Project Team and Staffing. Key personnel proposed for the engagement, including role, relevant experience, biographical summaries, and estimated time commitment. Any proposed subcontractors shall be disclosed with the same information.
6. Cost Proposal. A comprehensive cost breakdown structured per the Budget Parameters section of this RFP.
7. References. At least two references from comparable engagements completed within the last three years, including organization name, contact name and title, email, phone, project description, dollar value, and dates of engagement.

Questions and Additional Information

Please email questions or requests for additional information to rfp@lasmny.org by 5:00 p.m. on June 10, 2026.

Submission Instructions

Please email your proposal in Portable Document Format (PDF) to rfp@lasmny.org by 5:00 p.m. EST on June 30, 2026. Include “LASMNY Intake & Referral Assistant (IRA) Proposal – [Your Organization Name]” in the subject line. Proposals shall remain valid for 90 days from the submission deadline.

Selection Criteria

Proposals will be scored on a 100-point scale using the following criteria:

- Vendor qualifications and prior experience with comparable RAG or knowledge-system implementations — 20 points
- Technical approach, system architecture, and responsiveness to the project objectives — 25 points
- Project plan and credibility of the proposed timeline — 15 points
- References and past performance — 10 points
- Security, compliance, and governance — 5 points
- Cost reasonableness and overall value — 25 points

Additional Terms

LASMNY reserves the right to request clarifications, invite shortlisted vendors to provide demonstrations, and negotiate with one or more vendors prior to selection. This RFP does not commit LASMNY to award a contract or pay any costs incurred in proposal preparation.