



## **Technology/AI Integration for Legal Aid Intake System**

RFP Issue Date: Friday, May 15, 2026

**RFP Submission Deadline: Thursday, June 18, 2026**

**RESERVATION OF RIGHTS:** By submitting a proposal, the respondent understands and agrees to the reservation of rights by Southern Minnesota Regional Legal Services, Inc. as listed in this Request for Proposal. SMRLS reserves the right to amend or cancel this Request for Proposal at any time.

## 1. Project Overview

Southern Minnesota Regional Legal Services (SMRLS), in partnership with Justice North and Legal Services State Support, is seeking a qualified technology partner to design and build an internal-facing intake decision support tool integrated with Minnesota's Legal Organizations Online Network (LOON). This tool should be designed to allow for a thorough evaluation and potential extension to a public-facing tool that assists users in choosing the best organizations to apply to for help.

The project will enhance the statewide Legal Organizations Online Network (LOON) database with AI-powered tools to improve referral accuracy, streamline intake workflows, and expand access to justice. The project will be broken into three phases. This RFP is for Phases 1 and 2, with a possible extension for Phase 3.

- Phase 1: The project will integrate a technical/AI build into LOON to assist intake staff in identifying the most appropriate legal aid organization for referral grounded in the LOON database. The AI-powered tool will enable staff to conversationally interact with LOON's database and dynamically surface the most relevant referral information. This will improve efficiency, reduce misdirected referrals, and ensure clients receive the appropriate legal assistance. The selected vendor should provide alternatives on how to develop an experience that delivers accurate referrals with the existing data.
- Phase 2: The technical/AI model will be refined to prompt intake staff to gather additional applicant details, improving referral precision. Depending on model performance, this phase may also pilot a public-facing tool that directly integrates within LawHelpMN's triage feature (the LawHelpMN Guide) and/or online intake applications, helping applicants understand which organization(s) and resources are mostly likely to help them and whether their legal needs align with available services.
- Phase 3: The project team will explore further technical and/or AI applications to enhance Minnesota's legal aid system. As technology and generative AI evolve, partners will assess emerging capabilities and collaborate with stakeholders to identify high-impact use cases. Potential enhancements include AI-assisted legal research for hotline attorneys and incorporating voice-to-text AI functionality.

This project is focused on building a decision-support tool that operates within existing data, governance, and system constraints. Known limitations in LOON data quality (e.g. outdated listings), taxonomy structure, and program governance are explicitly outside the scope of the vendor's responsibility. The selected vendor will receive a briefing on limitations. However, interested vendors must describe how their solution performs effectively within these constraints.

### Proposed Project Timeline

While estimate this project will progress as described below, we understand that some of these dates may need to be adjusted depending on the selected approach, speed of development work and other variables.

Phase	Task	Start Date	End Date
Discovery	Discovery and RFPs for additional vendors, including AI consultant	Jan 1, 2026	May 15, 2026 (completed)
Discovery	Focus Groups & Workflow Analysis	Jan 15, 2026	May 15, 2026 (completed)
Discovery	Technical/AI Model Research	March 18, 2026	May 15, 2026 (completed)
Phase 1	Vendor's Baseline Evaluation	August 1, 2026	August 31, 2026
Phase 1	Agent Development	September 1, 2026	February 28, 2027
Phase 1	Model Deployment in LOON and other potential connections like Teams and Slack	March 1, 2027	April 30, 2027
Phase 2	Model Refinement & Public-facing Pilot	May 1, 2027	July 31, 2027
Phase 2	Integration with LegalServer & Intake Application Forms	Aug 1, 2027	Dec 31, 2027
Phase 2	Research & Discovery to identify additional high-impact use cases	Oct 1, 2027	Dec 31, 2027
Phase 3 (tentative)	AI-Assisted Legal Research & Voice-to-Text Features	Jan 1, 2028	Dec 31, 2028

## 2. About SMRLS

Founded in 1909, **Southern Minnesota Regional Legal Services (SMRLS)** is a 501(c)(3), not-for-profit charity, and Minnesota's oldest legal aid provider.

With its Administrative Offices based in St. Paul, SMRLS provides free legal services to low-income persons in critical civil matters in the 33 counties located in the east metropolitan area of St. Paul/Minneapolis and Southern Minnesota. SMRLS also serves agricultural workers throughout Minnesota and North Dakota.

SMRLS is an equal opportunity employer. Vendors are encouraged to visit SMRLS online at [www.smrls.org](http://www.smrls.org) to learn more about the organization.

## 3. About SMRLS' Project Partners

**Legal Services State Support** is a project of the Minnesota Legal Services Coalition. State Support manages LOON, which is a structured provider database housed within LawHelpMN.org. The LawHelpMN website is built using the Drupal CMS, and State Support contracts with a Drupal developer for site maintenance and new development projects. LawHelpMN's developers will handle integrations with LOON but will not lead AI development work. Vendors are encouraged to visit State Support online at [www.mnlegalservices.org](http://www.mnlegalservices.org) to learn more about the organization.

**Justice North** is a nonprofit civil law firm that serves Northern Minnesotans by providing representation, limited services, advice, or information to individuals with issues that fall outside of the criminal justice system. Along with SMRLS and one other regional legal services provider, Justice North serves as a "Hub" for Minnesota's coordinated intake system. Intake staff at Hub organizations screen applicants for services at both the Hub and at partner organizations. Justice North, SMRLS, and the other organizations participating in Minnesota's coordinated intake system all use LegalServer as their case management system

## 4. Scope of Work

SMRLS and its partners invite proposals from qualified vendors to design and build an internal-facing intake decision support tool integrated with Minnesota's Legal Organizations Online Network (LOON). This tool should be designed to allow for thorough evaluation and potential extension to a public-facing tool that assists users in choosing the best organizations to apply to for help.

### A. The Current State

LOON is a statewide, Drupal-based referral database used by legal aid intake staff during live client calls when an initial organization cannot serve a caller's legal issue. While LOON contains comprehensive provider and service information, discovery conducted in early 2026 identified persistent challenges that limit its effectiveness during intake. These challenges include seemingly unranked search results that leave staff uncertain about the best referral, difficulty navigating legal topic taxonomies—particularly

for non-attorney staff—and the absence of real-time signals indicating whether organizations are currently able to accept cases.

These limitations contribute to uneven referral quality, missed referrals, and reduced staff confidence, particularly for staff without legal training.

## B. Desired Future State

Through this RFP, SMRLS and its partners seek a vendor to build a decision support application that integrates with LOON and addresses these challenges directly. The ideal tool would guide intake staff through legal topic and filter selection, return ranked referral options with clear, plain language explanations grounded exclusively in LOON data, and clearly distinguish between over-filtered searches and true service gaps.

The tool must:

- Support—not replace—staff judgment. Staff must retain full control over referral decisions, including the ability to opt out of AI-assisted guidance. The tool must preserve the existing LOON search interface and function as an optional, complementary workflow.
- Integrate with LOON and provide guided legal topic selection, ranked referral outputs with explanations grounded in LOON data, including clarity when a search concludes that there are no services available (versus no search results), and optional client-facing summaries.
- Support two guided interaction paths: (1) describing a caller's situation in staff's own words without PII, and (2) assisting staff already working within LOON's filter interface to better navigate the filters or explain unexpected results.
- Meet strict data security and governance requirements: Given the legal aid context and the sensitive nature of client interactions, all proposed solutions must meet strict data security and governance requirements. These include prohibitions on using customer data to train AI models, U.S.-based data storage and processing (required), and enterprise-level security and compliance standards.
- Be built in a way to support robust evaluation of the accuracy of the results grounded in the LOON database. The vendor must create an infrastructure that allows project partners to evaluate the tool's accuracy and effectiveness.
- Allow for potential expansion to a public-facing tool that supports applicants in choosing which legal services organization to apply to and which resources are available. The project partners will determine whether to explore a public-facing tool based on the performance of the internal-facing, Phase 1 model. The

selected vendor should also be ready to migrate or transfer ownership of all deliverables.

- This RFP seeks a vendor with demonstrated experience building grounded, explainable decision-support or AI systems in regulated, public-interest, or similarly constrained environments. Proposals will be evaluated based on technical fit, integration experience, data security posture, pricing transparency, and familiarity with legal aid or comparable service delivery systems.

Vendors should distinguish between problems solvable by technology and those requiring governance, procedure or data improvements.

## **5. Technical Environment**

LOON operates on a mature Drupal 11 platform hosted on Pantheon infrastructure and is maintained by Electric Citizen, State Support's contracted development partner.

The selected vendor will be responsible for building the AI application layer and integrating it with LOON through approved APIs, coordinating closely with Electric Citizen for backend development. Independent deployments to the LOON server environment will not be permitted.

All Drupal-side development, including new endpoints, will be implemented by Electric Citizen. Vendors will build the AI application layer and integrate via approved APIs. Vendors should demonstrate experience integrating with externally managed systems.

The LOON data model includes legal organization, location, and services content types. Referral matching must operate at the services level.

## **6. Technical and Design Requirements**

Proposals must describe how the tool will ground all outputs exclusively in LOON data and prevent hallucinated programs or eligibility.

The solution must work within existing legal topic taxonomies and explain results in plain language with traceable reasoning.

Staff must retain full decision-making authority and be able to opt out of AI assistance at any time.

The solution must be built in a way to allow full evaluation of model accuracy and effectiveness.

Finally, the solution must support extensibility through modular design, API-based architecture, and compatibility with potential future phases.

## **7. Data Security and AI Platform Requirements**

The proposed solution must ensure that no customer data is retained and/or used to train AI models and must comply with SOC 2 Type II standards.

Data must be stored and processed within the United States, and a Business Associate Agreement or equivalent must be available.

Any open-source deployment must include full data isolation and contractual protections.

### **8. Vendor Responsibilities**

The vendor will be responsible for defining an initial evaluation framework, including baseline metrics and benchmarks, to assess the agent's performance upon completion.

The vendor will be responsible for designing and maintaining the AI application layer and coordinating technical requirements with Electric Citizen.

The vendor must support staff testing, feedback cycles, and phased deployment prior to production rollout.

### **9. Proposal Submission Requirements**

Interested candidates should submit:

- A cover letter outlining relevant experience and interest in the project
- Resume or CV
- Proposed approach to consulting on the project, including build approach (custom v. hybrid), architecture, LLM selection and detailed cost modeling
- Three references from similar projects for similarly sized organizations
- Fee structure or hourly rate

### **10. Evaluation Criteria**

Proposals will be evaluated based on:

- Relevant experience and qualifications
- Understanding of project scope and goals
- Architecture and extensibility
- Proposed approach
- Cost-effectiveness (please provide detailed pricing across usage scenarios and any third-party requirements)
- References and past performance

### **11. Proposal Deadlines and Submission**

- Deadline to submit proposals: **June 18, 2026**
- Deadline to submit questions: **June 5, 2026**
- Responses to questions provided: **June 12, 2026**
- Contract Awarded by: **July 10, 2026**
- Please submit your proposal in PDF format as an email attachment to Lara Otsuka, SMRLS Director of Business Administration, at [lara.otsuka@smrls.org](mailto:lara.otsuka@smrls.org)

**SMRLS reserves the right to reject any and all proposals received, and change the dates listed above, as it deems necessary.**

**All costs incurred in responding to this RFP are solely the responsibility of the vendor.**