

REQUEST FOR PROPOSAL

Independent Evaluation of Agentic AI Voice Intake Projects

*A Joint Solicitation of Legal Aid Society of Middle Tennessee and the Cumberland (LASMTC)
and Florida Rural Legal Services, Inc. (FRLS)*

ITEM	DATE/DETAIL
ISSUE DATE	September 29, 2026
QUESTIONS DEADLINE	October 14, 2026
RESPONSE DEADLINE	October 21, 2026
AWARD DECISION	October 28, 2026 (Target Date)
CONTRACT EXECUTION	November 11, 2026 (Target Date)
CONTRACT START	December 1, 2026 (Target Date)
FINAL REPORTS DEADLINE	May 15, 2027 (Target Date)
SUBMISSION SUBJECT LINE	Evaluation of TIG 2026 AI Intake Project
SUBMIT / ALL INQUIRIES	rfp@las.org and Leticia.medina-richman@frls.org

1. INTRODUCTION AND INVITATION

The Legal Aid Society of Middle Tennessee and the Cumberland (LASMTC) and Florida Rural Legal Services, Inc. (FRLS) (together, the "Organizations") jointly invite proposals from qualified consultants to serve a shared, independent evaluator to conduct a **cross-organizational project evaluation** of our agentic AI voice intake projects.

Because both organizations utilize an identical vendor stack, this engagement represents a unique opportunity to establish a **standardized evaluation framework** and **aligned data schema** for the broader legal aid sector.

Project Purpose and Sector Impact: The purpose of this evaluation is twofold. The primary objective of this engagement is to perform a cross-organizational project evaluation of the voice agent intake projects. The evaluator's task is to assess how agentic AI voice intake is working as an integrated part of each organization's intake system including applicant and client experience, staff usability and workflow, downstream case handling, administrative operations, and organizational impact rather than to review the voice agent technology in isolation. The AI voice agent is one component of a larger intake pathway that continues to involve human intake workers, advocates, supervisors, policies, and the LegalServer case management system, and the evaluation should treat it as such.

The evaluative tools and methodologies used for the cross-organizational project evaluation should achieve the second objective of providing a standardized evaluation framework for continued agent improvement and replicability through the legal aid community.

2. ABOUT THE ORGANIZATIONS

Both projects are funded by the Legal Services Corporation (LSC) Technology Initiative Grant (TIG) program, and both use the Safe Haven AI voice agent integrated with LegalServer as the case management system (CMS). Both law firms use the same data reporting tools and a similar API schema for data input from voice agents into their CMS.

Although the Organizations are using a common vendor stack, each has a separate and distinct voice agent configuration, LegalServer instance, service population, and implementation approach.

- 2.1 FRLS is a nonprofit law firm providing free civil legal services to qualified individuals, families, and vulnerable communities across 13 Florida counties and to farm workers statewide. The FRLS client population includes significant rural, migrant, and farm worker populations. FRLS is funded, in part, by the Legal Services Corporation. There are five regional offices with a staff of over 100, including 50 plus attorneys. In 2025, FRLS closed 6,183 cases. Additional information is available at www.frls.org.
- 2.2 LASMTC is the largest nonprofit law firm in Tennessee, providing free, high-quality civil legal services to low-income individuals and families across 48 counties in middle Tennessee. LASMTC is funded, in part, by the Legal Services Corporation. There are eight regional offices including the headquarters in Nashville, Tennessee. LASMTC have a staff of over 100, including 40 plus attorneys. In 2025, LASMTC closed 7,305 cases and served 5,342 unique clients. Additional information is available at www.las.org.

3. SCOPE OF WORK AND PROJECT DELIVERABLES

The purpose of this engagement is to produce a rigorous, independent, and comparative evaluation of the effectiveness, efficiency, equity, and impact of agentic AI voice intake as implemented at LASMTC and at FRLS. This engagement is a project evaluation and not just a technology audit. Findings must be actionable for each Organization; useful for LSC as the funder; and generalizable enough to inform the broader legal aid community's understanding of the benefits, challenges, and scalability of AI voice agents in intake.

The ideal assessment would include a comprehensive socio-technical project evaluation, not a narrow technology audit or software test. While AI agent performance is critical, the evaluation would assess the technology as an integrated component of each firm's holistic intake ecosystem capturing end-to-end workflow integration, measuring impacts across three distinct lenses: the client user experience (UX), staff workflow usability, and a comparative operational assessment measuring the tangible benefits or drawbacks of AI voice intake.

The evaluation will be conducted by an independent consultant to ensure objectivity and credibility. The consultant will work closely with FRLS and LASMTC to carry out a comprehensive and data-informed assessment, guided by the following core responsibilities and deliverables:

- **Collaborative Planning:** Work with the organizations to establish a shared evaluation framework that aligns with the goals of the projects. This includes identifying key focus areas, success indicators, appropriate methodologies, testing rubrics, and custom evaluation metrics.
- **Project Evaluation Plan:** Review and recommend modifications of the Project Evaluation Plan as required by the LSC TIG program to ensure correct methodology, appropriate outcomes, and proposed data sets. See attached.
- **Strategic Data Gathering:** Design and implement an inclusive data collection strategy that captures both quantitative metrics (e.g., system performance, intake volume, efficiency, context awareness and sentiment, conversation flow, response quality, early-termination rate...) and qualitative insights (e.g., client and staff experience, usability, and satisfaction).
 - Assist and/or advise in benchmark data collection of traditional intake metrics for comparative analysis.
- **Cross-organizational project evaluation** of the two (2) agentic AI voice intake projects including:

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- Data analysis and qualitative findings from usability testing
 - Data analysis and qualitative findings from quality assurance testing. Results may also include prompt refinement recommendations as applicable.
 - Summary of feedback received from staff, applicants, and stakeholders applicable.
 - Analysis of the effects/impact of the voice agent integrations into the intake system workflows and the ability for it to serve our client communities effectively and equitably.
 - Evaluate changes in access to legal services, internal workflow, and the applicant experience with agentic voice intake.
- **Standardized evaluation framework/aligned data schema:** Tools and resources that can be used for continued evaluations of the agent, standardized benchmarks, and for the consistency among legal aid law firms.
 - **Two evaluations, two reports.** The selected consultant will deliver two (2) distinct final evaluation reports: one (1) for LASMTC and one (1) for FRLS, supported by shared methodologies, aligned instruments, and a comparative summary suitable for use by LSC and the broader legal aid community.

The evaluation reports will assess the projects' achievements of stated goals and objectives. It will specify the methodologies and data sets used for evaluating the project's progress, challenges, and accomplishments. Further, it should identify any necessary operational adjustments and/or best practices to provide to the greater legal aid community interested in implementing agentic voice technology.

A joint comparative summary (may be a standalone document or a shared chapter appearing in both reports) that speaks to LSC and to the broader legal aid community about the benefits, challenges, and scalability of AI voice agents in intake. Each Organization must receive a draft final report at least sixty (60) days prior to the LSC TIG final-report due date to allow internal review and comment.

For more detailed specifications on the current status of the integrations, project objectives, and available data see the following attachments at the end of this document:

- Appendix 1: Project Narratives and Status
- Appendix 2: Project Evaluation Plan Forms
- Appendix 3: Shared Vendor Stack and Data Sources Overview

4. BUDGET

The two organizations have jointly budgeted a combined maximum of \$40,000 for this evaluation, inclusive of all fees, subcontractor costs, materials, and any incidental expenses. Travel is not expected. Proposals that come in under budget while still delivering high-quality outcomes are encouraged.

Payment will be made in installments tied to deliverables, with the split between LASMTC and FRLS to be finalized in the executed contract(s). The organizations reserve the right to contract with the selected consultant separately or jointly, at their discretion. LSC prior authorization will be obtained where required by TIG grant terms.

5. QUALIFICATIONS

Ideal proposers will bring proven experience conducting program evaluations in nonprofit and/or legal aid environments; expertise in both qualitative and quantitative methods; familiarity with LSC and TIG evaluation expectations; and a demonstrated commitment to equity-centered, accessible evaluation practices. At the same time, the ideal proposer will strike a balance of pairing that program-evaluation foundation with working familiarity with quality metrics for AI voice agents and with legal aid intake processes generally

Proposers do not need to be AI technologists but should be conversant enough with these metrics to evaluate them credibly alongside the human, workflow, and organizational dimensions of the project.

6. TERMS & CONDITIONS

Selection Determination: The organizations reserve the right to accept or reject any or all responses, or any part thereof.

Confidentiality: The selected contractor will sign a confidentiality agreement with both FRLS and LASMTC before the engagement starts. The selected contractor will maintain the organizations PII separately to protect from client information disclosure.

Ownership of Material: All work done for the project and content will be owned by the organizations, its successors and assigns. The organizations, its successors and assigns, will have full access to and have the right to customize all materials provided.

RFP Amendments/Cancellation/Reissue/Reopen: The organizations reserve the right to change the RFP Schedule or issue amendments to this at any time. The organizations also reserve the right to cancel or reissue the RFP.

Minor Administrative Irregularities: The organizations reserve the right to waive minor administrative irregularities contained in any response.

Response Clarification and Additional Vendor Information: The organizations reserve the right to request additional information and /or clarification from any respondent on any or all aspects of its proposal.

Inability to Enter Contract: The organizations reserve the right to eliminate from further consideration any vendor that the organization, because of legal or other considerations, is unable to contract with at the time responses are due.

No Obligation to Enter a Contract: The release of this RFP does not compel the organizations to enter any contract. The organizations reserve the right to refrain from contracting with any vendor that has responded to this RFP whether or not the vendor's response has been evaluated and whether or not the vendor has been determined to be qualified. Exercise of this reserved right does not affect the right to contract with any other vendor.

Non-Endorsement: The selection of a vendor pursuant to this RFP does not constitute an endorsement of the vendor's services.

7. PROPOSAL SELECTION CRITERIA

The Organizations reserve the right to accept the proposal deemed most advantageous in their sole discretion, to reject any or all proposals, to request interviews or clarifications, and to negotiate revised proposals. The lowest-cost proposal will not necessarily be selected.

Proposals will be evaluated jointly by LASMTC and FRLS on the following weighted criteria:

CRITERION	WEIGHT
Demonstrated understanding of the project objectives, scope, and dual-site structure	20%
Evaluation methodology and approach, including AI-specific and equity considerations	25%
Relevant experience including legal aid / nonprofit evaluation, LSC / TIG familiarity, and AI or intake modernization projects	25%
Qualifications of principal staff and key personnel	10%
Cost and cost-effectiveness within the \$40,000 combined cap	15%
Quality of proposal, references, and sample work	5%

8. PROPOSAL AND SUBMISSION REQUIREMENTS

Proposals should be no more than twelve (12) pages (excluding resumes, references, and sample work). All proposals should include the following:

- **Statement of understanding of the services to be performed**, including: (1) the joint/two-report structure and the need for aligned but site-tailored analysis; (2) an understanding of the project objectives; and (3) the standardized evaluation framework and aligned data schema.
- **A description of the approach and methodology** the consultant would employ in the cross-organizational project evaluation
- **A timeline for the proposed work**, including key milestones and deliverables.
- **A budget** outlining the estimated costs of the proposed services.
- **Three references** from past clients. If possible, please provide a sample report for a project of similar size, scope, and type.

All proposals should be submitted electronically to rfp@las.org and leticia.medina-richman@frls.org no later than the submission deadline stated above.

9. Data Security, Confidentiality, and Compliance

The consultant must comply with all applicable federal, state, and funder requirements, including LSC regulations, State Bar rules governing client confidentiality in Tennessee and Florida, and any applicable data protection laws. Access to client data, intake information, case records, and administrative data must be strictly limited to the minimum necessary for the evaluation.

- All access will be logged; secure file-transfer and storage protocols must be used; sensitive data must be encrypted at rest and in transit.

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- No client data or personally identifiable information (PII) may be downloaded, extracted, retained, or used outside the scope of this engagement without written authorization from the affected Organization.
- The consultant will execute a Confidentiality / Data Use Agreement with each Organization prior to receiving any data.
- **Notice of (AI) Artificial Intelligence Use.** Any use of AI tools (including large language models) by the consultant in the course of the evaluation must be disclosed in advance and must comply with each Organization's confidentiality obligations; client data may not be transmitted to third-party AI tools without written authorization.

Contacts, Inquiries, Clarifications and Submission

Please submit proposals, and any questions relating to this RFP, via email to rfp@las.org by the applicable deadlines above. **The subject line should state, "Evaluation of TIG 2026 AI Intake Project."**

The proposals are to be sent in care of:

Vincent Morris | Director of Compliance and Legal Technology
Legal Aid Society of Middle Tennessee and the Cumberland
1321 Murfreesboro Pike, Suite 400, Nashville, TN 37217
Email: rfp@las.org

With copy to FRLS:

Leticia Medina-Richman | Executive Director
Florida Rural Legal Services, Inc.
1321 East Memorial Blvd., Suite 101, Lakeland, FL 33801
Email: Leticia.medina-richman@frls.org

Questions and inquiries should be submitted by email to rfp@las.org no later than the Questions Due date above. Responses to questions will be distributed to all respondents as requested. Neither LAS, FRLS, nor Legal Services Corporation will pay any contractor costs associated with preparing responses or proposals submitted in response to this RFP.

— End of Request for Proposal —