



Request for Proposal (RFP)

Consulting Services for Planning and Design of a Multi-Channel, AI-Driven Intake System

I. Introduction

Legal Services of Eastern Missouri (LSEM) invites qualified consultants or consulting teams to submit proposals to support a 12-month planning and design initiative funded through a Technology Initiative Grant (TIG).

The purpose of this project is to develop a comprehensive, implementation-ready blueprint for a multi-channel, AI-enhanced intake ecosystem grounded in a “no wrong door” approach. The system will increase accessibility, equity, efficiency, and scalability while maintaining rigorous standards of privacy, security, and compliance.

This RFP seeks experienced consultants with demonstrated expertise in legal aid operations, AI governance, business process improvement, technology architecture, LegalServer integration, VoIP modernization, accessibility compliance, performance measurement, and change management.

II. Vision Statement

LSEM seeks to design a client-centered, equitable, and technologically resilient intake ecosystem that meets clients where they are, reduces friction at every point of entry, and responsibly leverages artificial intelligence to expand access to justice while preserving human oversight, transparency, and trust.

III. Organizational Overview

Legal Services of Eastern Missouri (LSEM) is a nonprofit legal aid organization providing free civil legal assistance to low-income individuals and families. LSEM is committed to innovation in service delivery and seeks to modernize and enhance its intake systems to improve accessibility and service quality.

This planning project will produce a detailed blueprint and replication toolkit capable of serving as a national model for Legal Services Corporation (LSC)-funded programs.

IV. Project Overview

LSEM proposes a 12-month planning and design phase to develop a comprehensive AI-enhanced intake system blueprint. This RFP covers planning and design services only. Implementation is not included. Respondents **may** include optional implementation of advisory pricing, clearly separated from core project pricing.

This RFP does not include system configuration, software development, deployment, vendor contracting, or operational rollout activities.

The project will include:

- Current state analysis
- Stakeholder engagement
- AI feasibility and governance planning
- Security and compliance design
- VoIP and telephony maximization planning
- Multi-channel workflow design
- LegalServer integration planning
- Performance measurement framework
- Training and change management planning
- Implementation-ready documentation
- Replication toolkit development

This engagement is focused on planning, analysis, and solution design only. LSEM is seeking grounded, implementation-ready documentation that reflects current technical, regulatory, and organizational realities. Proposals should prioritize practical, achievable recommendations over speculative or emerging technologies.

V. Responsible AI, Data Governance, and Privacy Requirements

Proposals must include a detailed approach to:

- AI transparency and explainability standards
- Bias detection and mitigation methodologies
- Human-in-the-loop review safeguards
- Data minimization practices
- Prohibition on vendor training of AI models using LSEM client data
- Data retention and deletion policies
- Compliance with applicable privacy laws and LSC requirements
- Ethical AI risk assessment framework

Deliverables must include a Responsible AI Governance Framework tailored to LSEM.

LSEM recognizes that not all intake functions are appropriate for AI-assisted decision-making. Respondents are encouraged to clearly identify where AI is not recommended and to propose non-AI or rules-based alternatives where these better support equity, transparency, client trust, or regulatory compliance.

VI. Security and Compliance Requirements

All proposed recommendations must meet or exceed industry-standard security practices. Proposals

must address:

- Encryption at rest and in transit
- Role-based access controls
- SOC 2 or comparable security standards (or equivalent)
- Disaster recovery and business continuity planning
- Incident response protocols
- Secure API integration practices
- Compliance with LSC regulations, including relevant provisions of 45 CFR Part 1630

Experience operating within LSC regulatory environments is strongly preferred.

VII. Scope of Work and Objectives

Objective 1: Current State Assessment

- Document existing intake workflows
- Assess current technology, telephony, and LegalServer configuration
- Identify bottlenecks and service gaps

Objective 2: Stakeholder Engagement

- Facilitate structured engagement with intake staff, attorneys, administrators, clients, and community partners
- Include equity-focused and language access considerations

Objective 3: AI and Technology Evaluation

- Evaluate AI triage tools, conversational AI, voice-enabled intake, multilingual functionality
- Assess integration feasibility with LegalServer
- Produce vendor evaluation matrix
- Provide case studies of comparable AI-enabled intake systems in regulated or public service environments

Clearly distinguish between currently achievable capabilities and aspirational or emerging technologies, including any dependencies on vendor maturity product roadmaps, or future regulatory guidance.

Objective 4: Workflow and System Design

System and workflow designs must be platform-agnostic and suitable for competitive procurement. Designs should not assume the selection of specific vendors or products and must remain adaptable to multiple implementation pathways.

- Design multi-channel intake workflows (web, mobile, phone, in-person)
- Develop specifications for dynamic forms, document upload, scheduling, automated reminders
- Provide procurement-ready technical specifications
- Include phased risk assessment and implementation cost projections

Objective 5: Performance Measurement Framework

- Establish baseline measurement methodology
- Define KPIs tied to access, equity, efficiency, and quality
- Include metrics such as call abandonment rate, intake cycle time, completion rates, and client satisfaction
- Develop dashboard and reporting framework recommendations

Objective 6: Training and Change Management

- Develop phased implementation roadmap
- Design a training framework and enablement approach
- Design an organizational change management strategy

Objective 7: Replication Toolkit

- Produce implementation blueprint
- Draft future implementation RFP language
- Develop adaptation guidance for other LSC-funded programs

VIII. Deliverables

Deliverables must be implementation-ready and include:

- Project management plan
- Current state assessment report
- Gap analysis
- Responsible AI governance framework
- Security and compliance framework
- Vendor evaluation matrix
- System architecture blueprint
- Workflow specifications
- Procurement-ready technical requirements
- Performance measurement framework
- Training and change management strategy
- Phased implementation roadmap with cost estimates
- Sustainability plan
- Replication toolkit
- Final evaluation report

All work products shall become the property of LSEM. Consultants may not retain proprietary restrictions on deliverables. Materials must be fully transferable and suitable for replication.

Deliverables should be sufficiently detailed to support future procurement and implementation by a separate vendor. Materials that rely on proprietary methodologies, closed tools, or consultant-specific frameworks that cannot be independently implemented will not be considered responsive.

IX. Budget and Pricing Requirements

Respondents must provide:

- Not-to-exceed pricing for the full planning engagement

- Detailed breakdown of hours by role and task
- Clear delineation of reimbursable expenses (travel, lodging, materials, etc.)
- Identification of any anticipated subcontractor costs
- Optional pricing for post-planning implementation advisory services (clearly separated from core project pricing)

Estimated Budget Range: \$30,000 - \$40,000

LSEM reserves the right to negotiate final scope and pricing.

X. Consultant Qualifications

Proposals must demonstrate:

- Experience with legal aid or access-to-justice organizations
- Experience designing AI-enabled intake or triage systems
- Familiarity with LegalServer or comparable case management systems
- Expertise in accessibility standards (WCAG 2.1 or later)
- Experience with performance measurement in service delivery environments
- Knowledge of LSC regulatory frameworks
- Experience developing implementation-ready technical specifications

At least one comparable project involving AI-enabled intake in a regulated or public service environment must be described.

XI. Proposal Requirements

Proposals should describe how assumptions will be tested and validated during the planning process. Proposals must include:

- Executive Summary
- Firm Qualifications
- Relevant Experience and Case Studies
- Proposed Methodology
- Detailed Work Plan and Timeline
- Project Team and Roles
- Not-to-Exceed Budget
- Optional Implementation Advisory Pricing
- References (minimum three)
- Sample Deliverables

XII. Evaluation Criteria

Proposals will be evaluated based on:

- Understanding of project objectives
- Responsible AI and governance approach
- Technical sophistication and feasibility
- Relevant experience
- Strength of project team

- Cost-effectiveness
- Demonstrated ability to produce implementation-ready documentation

Demonstrated ability to balance innovation with feasibility, including clear identification of risks, constraints, and tradeoffs.

Shortlisted respondents may be required to participate in interviews, scenario-based discussions, and presentations.

XIII. Project Timeline

Anticipated Project Period: January 1, 2026 through December 31, 2026. ***Work is expected to commence following contract execution.***

RFP Schedule:

- RFP Issued: March 24, 2026
- Questions Due: April 7, 2026 (5:00 PM CT)
- Responses to Questions Issued: April 14, 2026
- Proposal Submission Deadline: April 28, 2026 (5:00 PM CT)
- Finalist Interviews (if applicable): May 5 - 8, 2026
- Anticipated Award Notice: May 12, 2026

Contract Execution: (by) May 26, 2026

XIV. Intellectual Property

All work products, documentation, frameworks, and materials developed under this contract shall become the sole property of LSEM. Deliverables must not include proprietary restrictions that would prevent replication or adaptation by other LSC-funded organizations.

XV. Equity, Accessibility, and Language Access

All planning must incorporate:

- Multilingual functionality recommendations
- Plain language design standards
- Disability accessibility compliance
- Culturally responsive stakeholder engagement
- Equity impact considerations in AI design

XVI. Questions and Submission Instructions

Questions must be submitted in writing to:

Karen Bristow
Legal Services of Eastern Missouri
klbristow@lsem.org

Proposals must be submitted electronically in PDF format with the subject line:

RFP Response – AI-Driven Intake Planning Project

Late submissions may not be considered.

XVII. Reservation of Rights

Legal Services of Eastern Missouri reserves the right to reject any or all proposals, to request additional information, and to modify or cancel this RFP at any time.

XVIII. Glossary of Key Terms

- AI (Artificial Intelligence): Systems capable of performing tasks that typically require human intelligence, including natural language processing and decision support.
- Human-in-the-Loop: A governance model requiring human review or oversight of automated decisions.
- NLP (Natural Language Processing): Technology that enables computers to interpret and respond to human language.
- WCAG: Web Content Accessibility Guidelines, standards for digital accessibility.
- LegalServer: Case management system commonly used by legal aid organizations.
- No Wrong Door: Service design approach ensuring clients can access services through multiple channels without barriers.
- Procurement-Ready Specifications: Technical documentation sufficiently detailed to support competitive vendor selection.

LSEM looks forward to partnering with a consultant capable of helping design a responsible, innovative, and replicable intake system that expands access to justice while safeguarding client trust and data integrity.