New Mexico State Bar Foundation Internet Portal Project
Request for Proposal

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Introduction and Company Overview

The New Mexico State Bar Foundation, a 501(c)(3) non-profit organization, provides public and educational services. The New Mexico State Bar Foundation ("Bar Foundation" or "Foundation") advances the legal community's commitment to serve the legal profession and people of New Mexico. Through donations, fundraising and direct service programs, the Foundation provides and promotes access to legal services to underserved New Mexicans.

In February 2026, the New Mexico Supreme Court (NMSC) issued an order approving the recommendation of the Access to Justice Commission to establish within the New Mexico State Bar Foundation, a New Mexico Legal Assistance Internet Portal to expand access to justice. For the two years prior to the 2026 NMSC order, a 21-member stakeholder working group, almost 50% of whom are non-lawyers, assembled frequently at the request of the NMSC to develop a strategic plan for an access to justice portal designed to address the legal needs of low-income New Mexicans who are not aware that their problem is a legal problem. In February 2026, when the NMSC order placed the portal effort at the Bar Foundation, the NMSC also created a nine-member Portal Advisory Committee. This Request for Proposal is put forth by the New Mexico State Bar Foundation in collaboration with the Portal Advisory Committee.

Our operating hypothesis is that low-income people with a problem seek help from someone in their community. Our broad vision is that we will create a network of people in the community – such as librarians, social workers, faith leaders, educators, healthcare workers, and community elders – and provide them with the portal, which will function as an online tool that will enable them to:

- Identify the existence of a legal issue or issues the patron faces based on a plain language statement of the patron's problem sent to an issue-spotting AI called FETCH and maintained by the Suffolk University Law School Lit Lab in Boston.
- Provide the patron with information about that problem using LawHelpNewMexico.org – a curated compendium of information concerning the most typical legal issues facing low-income New Mexicans
- And if the patron wishes to be referred to a free legal services provider for whose services s/he is eligible, collect personal information from the patron needed to determine eligibility and refer the patron to a provider for whose services s/he is eligible
- If there are no such services, refer the patron to self-help materials provided by the New Mexico court system or, if the patron wishes to pursue the availability of

representation by a practicing attorney, to the New Mexico State Bar Find a Lawyer webpage to find a private lawyer.

The Portal will benefit all New Mexicans, not just low-income New Mexicans. Anyone who learns of the existence of the Portal can use it to identify the existence of a legal problem, to obtain information concerning that problem, to explore the availability of a potential match to a legal services provider (which will only be available to persons with lower incomes), and to be referred to court-based self-help resources or to the New Mexico State Bar to identify potential private attorneys who might be available to represent them at full or reduced rates.

Portal Completion is aimed for late fall 2027.

Project Objectives

The Portal will be accessible online by anyone. Persons who know of its existence or discover it through an online search engine will be able to use it themselves.

But it is to be specially designed for use by "trusted intermediaries[1]" to help persons who do not know that they have a legal problem.

It will also be a valuable resource for legal services providers, who can use it to perform their own intake processes, to seek a potential match for another agency or resource for persons not eligible for their help, to generate information for clients, or to perform quick research on legal issues on which their organization does not maintain expertise.

Scope of Work (SOW):

What follows is a detailed Scope of Work. Proposals must address the components of the Scope of Work. Additionally, the Foundation encourages vendors/offerors to apply their technical expertise and identify if design or features of the RFP Portal description present potential risks, difficulties, or issues and propose alternative or improved approaches that accomplish the Foundation's objectives.

A. Key Portal Features and Functionality for Patrons

The vendor will build a webpage for the Portal that will interact with persons using desktops, laptops, Chromebooks (and the like) and smartphones. It will receive and export

[1] The New Mexico State Bar Foundation will employ a public relations consultant to, among other things, advise on the "branding" of the Portal itself and of such terms as "trusted intermediary."

information in both verbal and text formats and in multiple languages. It will recognize the user's language from her or his voice or text input. It will collect information on the devices (smart phones, iPads, laptops, etc.) used to communicate with it.

The Portal will have a means of identifying that a user is a "trusted intermediary" and her or his identity.

The landing page will immediately introduce the user to the meaning and function of an icon for immediate exit (an "escape button"). The icon will appear on every Portal page. Its purpose is to protect a patron from having her or his Portal activity observed by an inappropriate person, such as an abuser when a domestic violence victim is seeking protection. Because of the short duration of the Portal's interaction with a patron, it will not be necessary for the Portal to save work in progress at the time of an immediate exit. This will be explained to the patron in the introductory language.

Step 1. Legal Problem Identification

The initial inquiry to the Portal will be anonymous.[2] It will display the question "What is Your Problem?" followed with an instruction to state the problem verbally in two to three phrases or type it into the text bar. When it has received a problem statement, it will ask a series of screening questions, such as

> Say or type the name of the New Mexico county in which you live or say or type "I do not live in New Mexico."

If the answer is I do not live in New Mexico, the Portal asks

> Did your problem start when you were in New Mexico?

If the answer to that question is "no" the Portal will inform the user that s/he should seek help from someone in her or his own state.

If the answer is "yes," the Portal will send the problem statement to FETCH (Fast Ensemble Tagging and Classification Helper), a legal-issue classifier developed by the Suffolk University Law School Lit Lab, to help legal aid and referral systems categorize a user's legal problem. FETCH reads the plain language statement of a problem and returns the names of legal topics and the likelihood that the plain language statement implicates each suggested topic. It also presents follow up questions for the patron to clarify the nature of

[2] If the inquiry is initiated by a "trusted intermediary," (TI), the TI will access the site. The TI may leave the patron to enter her or his own information and navigate the site by her or himself (with the exception of entering "TI Remarks)." Or the TI may enter the information on the patron's behalf.

the problem. The Portal will display the results of the FETCH analysis, which include an indication of the likelihood of correct legal problem identification.

In implementing the FETCH application for New Mexico, the Portal developers will choose a taxonomy of legal issues from which FETCH will choose the most appropriate category or categories.

If FETCH does not identify a legal issue, the Portal will report that result to the inquirer, with the suggestion that s/he take the problem to someone in her or his community who might be able to help her or him find help in resolving it. If a Trusted Intermediary is assisting the user, s/he will use whatever information s/he has to help the patron find a non-legal solution to the problem.

If a legal issue has been identified, the Portal will ask:

Are you an enrolled member of a New Mexico tribe or Pueblo? If the answer is "no" it will ask:

Did your problem start when you were on a New Mexico tribal reservation or Pueblo?

If the answers to both are "no" the Portal will proceed to Step 2. If either answer is yes, the Portal will ask the follow up question:

Say or type the name of the tribe or Pueblo

If the tribal name given is one known to the Portal to have a digital legal presence, the Portal will proceed to Step 2 using the tribal law as the source of information about the legal topic. If not, it will inform the inquirer that her/his problem may involve tribal law, but the Portal does not have access to that tribe's laws and will only provide information on New Mexico state law, which "may or may not apply to your problem." Do you want to proceed? If the answer is yes, proceed to Step 2.

<u>Step 2. Delivery of legal information</u>

The Portal will ask, "Do you want to see/hear information about that legal problem?"

If the user says or texts "yes," the Portal will provide a short summary of the relevant information provided by Law Help New Mexico, or the appropriate tribal information database, including available official forms and a short list of actionable steps the patron might take to address the legal problem. It will use a Generative AI retrieval-augmented generation (RAG) to locate and present that information to the patron. The vendor will advise the New Mexico State Bar Foundation on the configuration of Law Help New Mexico necessary for it to function optimally as the RAG resource (i.e., how to divide the content into AI "tokens"). The vendor will also design, test and refine GenAI prompts to eliminate or

minimize the likelihood of Gen AI hallucinations in the preparation of legal information reports and actionable steps for the patron to follow. Finally, the vendor will explore the potential use of Legal Aid Content Intelligence (LACI), which was developed by Lone Star Legal Aid, to help legal aid organizations keep legal information accurate, current and trustworthy (https://www.lonestarlegal.org/laci/). It is envisioned LACI would be used to identify, on a monthly basis, all changes to the references (statutes, regulations, court rules, legal precedents, etc.) on which the information on Law Help New Mexico relies. If LACI is found to be appropriate for this purpose, the vendor will provide an interface with LACI. If LACI is found inappropriate or insufficient for this purpose, the vendor will provide an appropriate and sufficient IT solution that fulfills this need.

After the user has listened to or read the information, the Portal will say or display, "if you would like a text copy of this information, say or enter your smartphone number or your email address." The Portal will send the information to the designated destination as a text message or email.

Step 3. Making a potential match for legal help.

All civil legal services providers funded through contracts with the Civil Legal Services Commission will be expected to participate in the Portal. Other providers – such as the Modest Means Helpline, Enlace Comunitario, Goodwill, Legal Resources for the Elderly Program, and Catholic Charities, will be invited to participate. The Portal Manager will make the decision to include or exclude individual providers.

The Portal will ask the patron whether s/he wishes to find out whether s/he qualifies for free legal services that deal with her/his problem. It will notify the user that s/he will then need to enter personal information to answer eligibility questions. The Portal will then ask the question, "Are we permitted to share your personal information in order to seek potential match for legal help for you?" The patron will be presented with "Yes" and "No" boxes. If the patron chooses the "No" box, the Portal will respond that, without this agreement, it will not be able to seek a potential match for legal help, giving the patron an opportunity to change his or her response to the information sharing question. If the patron does not enter "Yes" the Portal will provide the information on the New Mexico State Bar Find a Lawyer page, and available self-help resources.

If the patron chooses the "Yes" box, the Portal will then proceed to pose questions necessary for determining eligibility for the services of a provider, such as questions about a person's demographic information and whether the person has a disability. For all the questions about determining eligibility for services of a provider, the Gen AI should accept "I don't know" answers.

Each provider will maintain on a designated location on the Portal application a list of the subject matters for which it provides legal services (using the categories in the Portal taxonomy), including the level of service provided for each subject matter (including at least whether representation in court is or is not available) and its eligibility screening criteria for each of them. The provider will have secure access to its screening information and will be expected to maintain its currency. Providers who indicate court representation is a possibility are considered "first-level" providers and will be offered the patron's matter as a potential match before the patron's matter is offered to a provider who does not provide court representation (a "second-level" provider).

For each subject matter, the provider will also show an "O" or a "C" (or some other agreed upon symbol indicating whether the provider is open or closed for new cases within that subject matter). The eligibility criteria will include geographical location (already entered at the start of the session), income, age, veteran status, disability, and any other criterion used by a New Mexico provider. The Portal will not collect information on citizenship; providers who use that criterion will have to obtain the information in the course of making a representation decision.

Based on county of residence and case type, every time the Portal encounters a patron who agrees to share personal information, it will scan all providers for first-level civil legal services provider (CLSP) eligibility using those two criteria. It will then create questions that will gather information bearing on other screening criteria used by the identified providers (e.g., income[3][4], date of birth, disability, veteran status, etc.). It will also ask if the patron has an upcoming court appearance date within the next five days. Based on the patron's answers, it will determine whether there is a "possible" provider or providers for this patron. It will ask the patron if s/he wants to apply to one of these provider(s) for legal assistance. It will not inform the patron of the name(s) of the provider(s). If yes, it will obtain the patron's name, contact info – phone number or email address[5] – and name and DOB (if known) of the person(s) and/or organization(s) with whom the patron is in conflict (with the option of "I am not in conflict with anyone in this matter on which I am seeking help").

The Portal will inform the patron that it will contact the possible CLSP. And that the patron will be notified (by the provider or by the Portal) with the result – using the contact information the patron provided.

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[4] The providers will agree on a common method for capturing income and asset information.
[5] This will not be necessary if it already obtained that information during the Law Help New Mexico step in the process.

The Portal will send potential match messages to legal services providers in whatever format the provider designates. Likewise, it will send messages to patrons in their desired form of communication and language.

The Portal will send to all identified first tier CLSPs (those that may provide in court representation) the name and DOB of the adverse party/ies, and contact info for the patron, but not any other information concerning the nature of the problem or other information gathered during the initial patron interview. The message will be identified as "potential client for conflict check." Matters with fast approaching court appearances will be "red flagged."

Each CLSP will conduct its own conflict check. It will enter "conflict" or "no apparent conflict" into the Portal. When it enters "conflict" that CLSP is eliminated as a potential source for legal help for that patron. The Portal sends the problem statement, the FETCH response, all information provided from Law Help New Mexico and the answers to the screening questions it posed during the initial contact with the patron to the first CLSP to enter "no conflict" into the Portal. The CLSP then makes a representation decision or contacts the patron for more information (including citizenship for DNA People's Legal Services [DNA]and New Mexico Legal Aid [NMLA]). The other first-tier CLSP(s) who were sent a "potential client for conflict check" email will receive a follow-up email identified as "potential client no longer available." If the CLSP does not choose to represent the patron, the Portal will send the "conflict information" to all remaining first tier providers for whose services the patron appears to be eligible, with a statement that the potential client is "once again" available for representation.

When the CLSP makes a decision on case acceptance, its staff enters that fact, and its internal identifier for the matter[6], into the Portal.

If no first tier CLSP accepts the patron for representation, the Portal sends the conflict check information to all second tier providers for whose services the patron appears to qualify. The Portal follows the same procedure for second tier providers as outlined above for the first tier providers until a CLSP has accepted the patron for representation.

If all CLSPs (first-level and second-level) for which a patron is potentially eligible for assistance decline the case, the Portal sends a text or email message to the patron advising that s/he is not eligible for representation by a CLSP, providing information on the New Mexico State Bar's Find A Lawyer page, on a local self-represented litigant court-based support office, and the number of the statewide NM Courts' Help Line.

[6] No such identifier will contain the name of the person represented.

The Portal will also contain special exceptions that override the standard potential match procedures. The providers will jointly agree upon special potential match rules. For instance, if the Center on Law and Poverty identifies specific litigant characteristics it is seeking for class actions or law reform litigation, Portal staff can provide that the Portal will give the Center priority in considering representing patrons with those characteristics. The Offeror will agree to alter the Portal to change these exceptions upon request.

No further action will be taken on seeking a source of help through the Portal. This process will have identified all potential prov

The Foundation's Portal staff will pay close attention to "red flagged" matters, attempting to convince a provider to assist this patron. The Portal staff will monitor CLSP actions on referred matters and follow up if no action has been taken by an eligible provider within two weeks.

Step 4. When a provider accepts a case.

The CLSP provider staff will report to the Portal when a CLSP agrees to provide representation and send its internal identifier for the matter. It will have an opportunity to enter comments regarding the accuracy of FETCH in identifying the legal problem or problems of the referred person, and identification of inappropriate potential matches (and in what way they were inappropriate). Portal staff will send comments concerning FETCH's performance to the Suffolk LitLab. Portal staff will follow up on all reports of inappropriate potential matches and take steps to ensure that any errors are corrected (by correcting the provider's reported eligibility criteria or by correcting the portal's use of correct information).

Upon notification that a patron will be represented or upon provision of alternative sources of help (Find a Lawyer page, a court's self-help center, or New Mexico Courts Help Line), the Portal will capture all data specified in this RFP and then delete all information on the case except for the provider's internal identifier and the patron's contact information for the purpose of seeking feedback on the Portal's performance.

Step 5. When a provider rejects a case.

If a patron ultimately is not accepted for representation after the provider has spoken to the patron, the provider staff will provide to the Portal any feedback concerning the performance of FETCH or of the Trusted Intermediary (TI). A provider will not be required to provide any reason for rejecting a case. However, the Portal will provide optional feedback/data collection entries for the provider to complete at the time of rejection. They will include:

- conflict of interest

    - patron did not meet our income/assets standards

    - issue(s) outside of our program priorities

    - legal issue misidentified

    - provider lacks the resources to be able to help this client

- other

Step 6. When no free legal services are a match.

Whether the inquiry has been initiated by a person through an internet search or by a TI on behalf of a patron, if it does not result in a match to a legal services provider, the Portal will provide the user or patron with contact information for the New Mexico State Bar Find a Lawyer Page, for the nearest court-based self-help center or, if there is no nearby self-help center, to the statewide NM Courts Help Line.[7]

Step 7. Other Trusted Intermediary (TI) information.

The Portal will also enable a TI to indicate that s/he was able to refer the patron to a non-legal source of help with the patron's immediate problem, such as a source of short term assistance with food, housing, utilities, or medical needs.

Step 8. "Before exiting" information.

Whenever a Portal user ends a session before seeking or securing a potential match for legal services, the Portal will display a request for feedback. This request will give the user the opportunity to provide demographic information (race/ethnicity, gender, preferred language, age, and disability) and user feedback to help evaluate the effectiveness of the Portal in identifying legal issues, providing information and identifying an available potential match for legal services.

B. Key Portal Features and Functionality for Trusted Intermediaries

The Portal will maintain a section accessible only by TIs. It will include a directory of TIs including their year of commencement of TI status, contact information, and any special skills (such as speaking another language).

[7] The courts' self-help centers can serve as TIs and engage the Portal on behalf of one of their patrons for the purpose of providing curated information from Law Help New Mexico.

TIs will be able to use the directory to identify another TI who may be able to help with a patron interaction, or, using videoconferencing, to enable another TI to take over a patron interaction. TIs will have an "urgent" code to accompany a text message asking for immediate help with a patron whose problem is beyond the capacity of the TI encountering it. These messages will be sent to a designated Portal staff member as well. The expectation is that TIs will have access to expert support throughout normal business hours.

This section will also maintain training materials and a user guide to the Portal. (The vendor will not be responsible for preparing these materials.)

C. Evaluation Data Produced by the Portal

The Portal will include two mechanisms for obtaining feedback on the operation of the Portal and the performance of trusted intermediaries.

- The first will be used whenever a Portal session, whether initiated by a user directly from the internet or through a trusted intermediary, ends without resulting in a potential match for legal help. The patron will be asked to provide demographic information and feedback on the performance of the Portal and (if a trusted intermediary is involved) on the performance of the TI.
- If a potential match is accepted by a provider, the Portal will send an email or text message to the patron (whether s/he accessed to Portal directly from the internet or through the assistance of a trusted intermediary), two weeks after the date of the provider's acceptance of a potential match. The feedback request will be sent to the preferred address of the patron. TIs will be trained to give patrons the option of entering feedback/information themselves or providing information for the TI to enter on their behalf. The questionnaire will ask the patron to enter demographic information and seek information on:
    - The patron's satisfaction with the Portal's ease of use,
    - Her or his rating of the helpfulness of the information provided,
    - The helpfulness of the trusted intermediary and support persons, and
    - The steps the patron took to follow up on the information obtained from the Portal.
- Upon sending this request for feedback, the Portal will delete information on a patron's name, address, cell phone number and email address from the Portal, retaining the provider's case number or other unique identifier.

The application will enable Portal administrators to supplement and change the questions posed by the feedback instruments.

The Portal will compute monthly reports of

- Number of TIs and support personnel

  Geographical location of TIs and supports

  Counties with no TIs

- Use of the Portal

  Number of TIs who used the Portal to serve a patron in the past month and year to date

  Number of non-TIs who accessed and used the Portal in the past month and year to date

  Total number of patrons served by the Portal in the past month and year to date

- Number of problem statements submitted to the Portal
- Number of legal issues identified by FETCH

  Frequency of FETCH identification of every case type in its taxonomy statewide and by county, including whether this was the primary or a secondary case type

  Number and percentage of legal issues identified that are reported as incorrect or incomplete by legal services providers

  Number of information/forms downloads by the medium of communication – paper printout, text message, e-mail, other

- Number of potential matches for legal help completed

  To a legal services provider, by provider

  To a court-based self-help center

  To the NM Courts Help Line

  To the New Mexico State Bar Find a Lawyer page

  To a non-legal source of assistance

- Number of potential matches accepted, statewide, by county, and by each provider
- Number of potential matches rejected by a provider by reason recorded

- Number of patrons for which no potential match was identified by these categories:

    No provider offering legal services for this legal question, listing each question on the taxonomy and the number of times help was sought

    Patron exceeded income or assets criteria

    Patron did not live in a county served by a provider

    Patron did not meet another provider criterion, such as age, veteran status or other criterion

    Note: NMLA and DNA will provide data on number of potential matches rejected because of citizenship

- Number of potential matches for which a provider did not respond within two weeks, by provider
- Feedback received through the feedback instrument

    From TIs

    From patrons

    From persons accessing the Portal directly

D. Technical Requirements

The Portal application will comply with these criteria.

1. Maximum use of Generative AI – The vendor will use Generative AI technology to the extent possible. It will generate legal information summaries using a RAG approach limiting the AI's information source to LawHelpNewMexico.org, forms and guides developed by the New Mexico Supreme Court, and included by URL or reproduction of the material in LawHelpNewMexico.org. The RAG prompts will minimize the likelihood of hallucinations.

2. Accessibility – The vendor will comply with all applicable and recommended techniques to ensure that users of the Portal will not encounter barriers associated with use of a language other than English, with the use of legal jargon, with disabilities related to hearing, eyesight, or other physical attribute (understanding that our approach will make the help of a TI as universally available as possible). The current IT standard for accessibility is WCAG 2.1 Level AA. It will be required by the Americans with Disability Act as of April 26, 2027. The IT contractor will be required to comply with that standard.

3. Security – The Portal will be as fully secure as current technology allows and will comply with recognized frameworks, such as the National Institute of Standards and Technology (NIST) Cybersecurity Framework (CSF) along with applicable web application security standards. The vendor will explain how they will address authentication, multifactor authentication, role-based access controls, encryption, security monitoring, incident response, and disaster recovery. The vendor will provide independent security testing before Portal launch, a plan for ongoing vulnerability management and security updates, and provide evidence demonstrating that appropriate security safeguards have been implemented.

4. Location of Data Storage – Any data stored by this system will be within the continental United States.

5. Protection of personally identifiable information – all personal information will be protected so that it does not become known to the Generative AI application (or applications) used. The Portal will not retain the names, addresses, telephone numbers, or email addresses of Portal users. This information will be collected, as described above, and sent from the Portal to a provider as part of a potential match for legal services, but then deleted from the Portal. Legal services providers will be responsible for safekeeping of personal information provided to them. The provider's case number will be retained in the Portal for purposes of obtaining additional information from providers on case outcomes.

6. Maintainability – the application will be constructed in such a way that local Portal staff are able to make changes to at least these aspects of its operation:
    a. The screening questions included at the beginning of a Portal interaction, and the pathways created by different responses (for instance, we anticipate starting Portal operations incorporating a few of New Mexico's 23 recognized tribal entities but adding more in the future),
    b. Modifying the contents of the feedback questionnaire and the monthly and annual reports generated by the Portal information tracking and feedback mechanisms.

7. Given the breadth and complexity of the Portal's proposed functionality, vendors are required to propose a **phased implementation approach** that clearly identifies required launch capabilities, potential future enhancements, technical dependencies, associated costs, and measurable milestones. Vendors should also identify significant assumptions or exclusions, proposed acceptance criteria for deliverables, and a process for managing changes in scope.

8. Vendors are required to propose a hosting and ongoing support model, including responsibility for technical operations, service-level expectations, estimated annual operating costs, a projected five-year total cost of ownership, including the assumptions underlying recurring expenses, and provisions for transitioning to another provider if necessary.

9. The vendor will specify how the vendor will provide support for the portal long-term including the terms and conditions for providing these ongoing services.

10. The selected vendor will be required to provide an early project deliverable documenting the proposed system architecture, data flows, third-party integrations and processors, technical dependencies, data retention practices, and security and privacy risks.

OPTIONAL BUT STRONGLY PREFERRED:

11. Among those involved at a national level with access to justice for marginalized populations, there is a great deal of interest in the reuse of access to justice software rather than starting from scratch every time a court or state wants to build an access to justice portal or other similar resource. If possible, the Foundation would like the software developed for our portal to be available for reuse by access to justice programs in other states. The vendor will identify: 1) if it is possible to create our portal so it can be easily replicable, 2) the Creative Commons (or alternative) license that you would propose to use for this purpose and explain its terms of use, and 3) identify in the budget parameters section if there would be any additional cost to create our portal so it can be easily and inexpensively replicable in this fashion.

E. Support for Civil Legal Services Providers in the Use of Generative AI

The NM Supreme Court Access to Justice Commission Stakeholder Working Group recommended that the Portal entity serve as the support organization for NM civil legal services organizations in the use of Generative AI to enhance their own internal organizations. GenAI has now been widely adopted within the legal community. Civil legal services providers generally lack the resources to build GenAI-based applications to streamline their internal processes. We hope that the Portal will be bringing additional clients to NM providers. To serve them, NM CLSPs will have to become more efficient.

The budget approved by the Supreme Court includes funding to train NM CLSPs in the use of Gen AI and to begin developing process improvement tools that they identify as most likely to improve their ability to serve clients. Having these capabilities will make the providers more attractive to recent law graduates who are expecting to learn how to use these tools in their law practices.

Offerors responding to this RFP will specify whether they offer to perform these services and, if so, the specific terms under which they are willing to perform them, including the additional cost required to perform these services.

No offeror will be penalized for not offering these AI support services as part of their proposal.

Sequence of Events

This tentative schedule is provided for the convenience of Offerors but may be subject to change at any time by the Foundation. Any such changes will be stated in an addendum to this RFP or otherwise communicated to Offerors.

Action	Responsibility	Date
1. RFP issued	NM State Bar Fndn	11/23/26
2. Acknowledgment of Receipt	Offerors	12/4/2026, 5pm MDT
3. Deadline to Submit Written Questions to kasey.daniel@sbnm.org	Offerors	12/09/2026, 5pm MDT
4. Response to Written Questions and RFP Amendments	NM State Bar Fndn	12/17/2026, 3pm MDT
5. Submission of Proposal Response Deadline	**Offeror**	**1/15/27, 3pm MDT**
6. Optional Virtual Interviews/Discussions with Select Finalists	NM State Bar Fndn/Offeror	Between 1/19 and 1/28*
7. Notification of Award	NM State Bar Fndn	2/22/2027*
8. Finalize/Award Contract	NM State Bar Fndn/Offeror	2/26/2027*

*Dates tentative based on Foundation timeline

Foundation contact:
Kasey Daniel
Kasey.daniel@sbnm.org, 505-797-6023

Proposal Submission Instructions:

Acknowledgment of Receipt: Potential offerors shall email the "Acknowledgement of Receipt form" (APPENDIX A) in order to be placed on the Foundation RFP distribution list. The form should be signed by an authorized representative of the organization, dated, and emailed to Kasey Daniel (kasey.daniel@sbnm.org) on or before 12/04/2026, 5pm MDT.

The Foundation distribution list will be used for the distribution of written responses to potential offeror questions. All potential offerors who submit an Acknowledgement of Receipt form shall receive an email addressing potential offerors' questions and the Foundation's answers to questions. Failure to return the Acknowledgement of Receipt form will result in the potential offeror's organization name not appearing on the distribution list and not receiving written responses to offeror questions.

If it becomes necessary to revise any part of the RFP or if additional information is needed to clarify any provision of the RFP, the revision and/or additional information shall be provided to all persons who have submitted an Acknowledgment of Receipt by the deadline in the sequence of events chart. The Foundation shall not issue a revision or supplement to the RFP less than seven working days before the deadline set for the receipt of proposals, unless the Foundation extends the deadline.

Offeror Submission of Written Questions about the RFP 12/09/2026, 5pm MDT.

Responses will be provided only to questions submitted in writing and only to clarify information already included in the RFP. Written questions must be emailed to Kasey Daniel at kasey.daniel@sbnm.org and must be received by 12/09/2026, 5pm MDT.

Response to Written Questions 12/17/2026, 3PM MDT

The Foundation will provide written responses to written questions via email to all potential offerors who submitted an Acknowledgment of Receipt form by the form deadline.

Submission Response Deadline 1/15/2027, 3:00 PM MDT

Proposals must be received on or before the above deadline and submitted by email to Kasey Daniel (kasey.daniel@sbnm.org) with the subject "Portal Project Proposal – [Organization Name]." Requests for extensions of this deadline shall not be granted. Proposals received after the above date and time will not be accepted.

Only electronic submittals in PDF format will be accepted.

If the proposal is too large to be emailed, please contact the Portal Manager for upload instructions.

Portal Manager:
Kasey Daniel
kasey.daniel@sbnm.org
505-797-6023

Evaluation of Proposals

Proposals shall be evaluated by Bar Foundation staff and members of the Portal Advisory Committee. As deemed necessary, virtual interviews/discussions with Offeror finalists may be conducted, but the final award may be made without any interviews/discussions.

Proposal/Response Format

Proposals must include the following sections, to be submitted in this order:

1. Administrative Information – 1 page
    a. Provide administrative information, and include at a minimum: name, mailing address, phone number, and email of designated point of contact.
2. Confirmation of acceptance of RFP Terms and Conditions – 1 page.
    a. A statement confirming the acceptance of RFP terms and conditions and a statement(s) raising any concerns and/or proposing any term amendments.
3. Organization description, qualifications and past experience.
    a. Provide an overview of your organization. Include overall organizational structure, number of employees, legal structure, and ownership.
    b. Describe resources and organizational structure with respect to this RFP.
    c. Provide full resumes of key staff who will be working on the Foundation Portal project.
    d. Provide an overview of your qualifications and previous experience on at least two similar or related projects. Include descriptions, costs, timeline, and client reference contact information. Provide website URLs that the Foundation can visit to see the projects.
    e. Please describe your specific experience or engagement in the legal services industry and/or in New Mexico. Include the type of engagement, with whom, for what purpose, and for how long.
4. Proposed solution and approach to meeting the project objectives – address in detail each section of the Scope of Work.
    a. Propose a phased implementation approach that clearly identifies required launch capabilities, potential future enhancements, technical dependencies, associated costs, and measurable milestones. Vendors should also identify significant assumptions or exclusions,

proposed acceptance criteria for deliverables, and a process for managing changes in scope.

b. Provide a detailed overview of the tasks, deliverables, technical specifications, and project boundaries. Describe how you will meet the tasks outlined in the Scope of Work.
c. Describe integration requirements or options. Please indicate any other providers (solution, technology service, data) that you currently work with that your solution is integrated with. Please describe the level of integration.
d. Detail your proposed plan for sequenced steps in product development and testing.
e. Describe a strategy for gathering user feedback.
f. Describe any reporting or tracking tools provided.
g. Suggest any innovations, additions, or modifications to the Scope of Work provided in the RFP.
h. If the offeror is also including, as part of the proposal, the provision of support services for civil legal services providers in the use of Gen AI, the offeror should include a separately delineated section about the provision of these services.

5. Proposed work plan and timeline/schedule
    a. Present a well-conceived phased work plan. Indicate which sections and key topics the phased work plan covers. Include a full description of each task.
    b. Illustrate how the work plan would proceed in phases and what the key milestones or benchmarks would be, along with required levels of Foundation staff engagement.
    c. Estimated timeline for portal project completion.
6. Cost proposal
    a. Include all costs such as set-up fees, license fees, etc.; and direct labor rates and estimated hours for named project resources if applicable.
    b. Estimate other direct costs and reimbursable expenses, if any, and associated mark-up percentages, if any.
    c. Detail specifically any additional cost associated with creating the portal so it can be easily and inexpensively replicable for reuse by other access to justice programs in other states.
    d. If the offeror is also including, as part of the proposal, the provision of support services for civil legal services providers in the use of Gen AI, the offeror should include a separately delineated section of the cost proposal regarding the costs associated in the provision of these services.

Terms and Conditions

Offerors shall indicate agreement with these terms, or in the alternative, indicate specific concerns you have with a term and / or proposed amendments to any terms. These are key terms and conditions; full details will be addressed at the point of contracting.

1. Only electronic response submittals in PDF format will be accepted. If the proposal is too large to be emailed, please contact the Portal Manager for upload instructions.

Portal Manager:
Kasey Daniel
Kasey.daniel@sbnm.org
505-797-6023

2. No Obligation. This RFP in no manner obligates the Foundation to the service offered until a valid written contract is approved by the Foundation.

3. Basis for Proposal. Only information supplied by the Foundation in writing from the Foundation or in this RFP should be used as the basis for the preparation of offeror proposals.

4. Proposal validity. Proposals, including pricing, remain firm for [120] days after the submission deadline.

5. Amended Proposals. Any offeror may submit an amended proposal before the deadline for receipt of proposals. Such amended proposals must be complete replacements for a previously submitted proposal and must be clearly identified as such in the transmittal correspondence. The personnel of the Foundation will not merge, collate, or assemble proposal materials.

6. Proposal costs. Offerors bear all costs of preparing and presenting proposals, including interviews and demonstrations.

7. Right to Waive. The Foundation reserves the right to waive minor irregularities. The Foundation also reserves the right to waive mandatory requirements, provided that all of the otherwise responsive proposals failed to meet the same mandatory requirements, and the failure to do so does not otherwise materially affect the portal project. The right to waive minor irregularities and mandatory requirements is at the sole discretion of the Foundation.

8. Reservation of rights. The Foundation may reject any or all proposals, negotiate with one or more offerors, award all or part of the work, cancel this RFP, or issue addenda, at its sole discretion.

9. Property of the Foundation. Proposals become Foundation property and will not be returned.

10. Prime Contractor Responsibility. Any contract that may result from this RFP shall specify that the prime contractor is solely responsible for fulfillment of the contract with the Foundation. The Foundation will make contract payments to only the prime contractor.

11. Subcontractors. Any contract that may result from this RFP shall specify that the prime contractor shall not subcontract any portion of the services to be performed under said contract without the written approval of the Foundation. If subcontractors are permitted, all contract obligations flow down to subcontractors, and the contractor remains liable for the subcontractor's performance.

12. Communications. From issuance until award, offerors shall communicate about this RFP only with the Portal Manager named above.

13. Conflicts of interest. Offerors shall disclose any financial, employment, or contractual relationship with the Foundation, the New Mexico State Bar, any Board or Portal Advisory Committee member, or any participating legal services provider. Any person or entity that helped prepare this RFP is ineligible to submit a proposal.

14. Confidential information. Offerors shall mark any trade-secret or proprietary content. The Foundation will make reasonable efforts to protect marked content, but it may disclose proposals to its Board, the Portal Advisory Committee, and the New Mexico Supreme Court, and as otherwise required by law.

15. Ownership of work product. All software, source code, documentation, prompts, configurations, test data, evaluation sets, and any model fine-tuned for the Portal ("Work Product") are works made for hire to the extent permitted by law. Otherwise they are assigned to the Foundation. The contractor retains its pre-existing intellectual property. Where any of it is embedded in the Work Product, the contractor grants the Foundation a perpetual, irrevocable, royalty-free, transferable license, sublicensable to the Foundation's licensees, to use, modify, and distribute it as part of the Portal.

16. Open-source release. The Foundation may release the Work Product under a license of its choosing. The contractor shall not incorporate third-party code under a license that would restrict that release without the Foundation's prior written approval. At each milestone the contractor shall deliver a software bill of materials,

including a list of every third-party component and its license.

17. Source code. A duplicate of source code and documentation shall be kept in a repository the Foundation controls throughout the term and updated at least at each milestone.

18. Data ownership and use**.** The Foundation owns all Portal data. The contractor shall use Portal data only to perform the contract, and shall not sell it, use it for any secondary purpose, or use it to train or improve any AI model. The contractor shall impose the same restrictions on its subcontractors and AI model providers.

19. Indemnification. The contractor shall defend and indemnify the Foundation, its directors, officers, employees, and volunteers against third-party claims arising from:
    a) infringement of intellectual property rights
    b) security incidents attributable to the contractor
    c) bodily injury or property damage
    d) the contractor's violation of law
    e) the contractor's gross negligence or willful misconduct

APPENDIX A: ACKNOWLEDGMENT OF RECEIPT FORM

RFP TITLE: New Mexico State Bar Foundation Internet Portal Project Request for Proposal

In acknowledgment of receipt of this Request for Proposal, the undersigned agrees that s/he/they has received a complete copy, beginning with the title page and table of contents, and ending with this Attachment A.

The acknowledgment of receipt should be signed and emailed to Kasey Daniel (kasey.daniel@sbnm.org) no later than 5:00pm MDT on 12/04/2026. Potential Offerors who elect to return this form, which has been completed with the indicated intention of submitting a proposal, will receive copies of Offeror written questions and the NM State Bar Foundation's written responses to those questions, as well as any RFP amendments that may be issued.

ORGANIZATION: _____

REPRESENTED BY: _____

TITLE: _____

PHONE NUMBER: _____

ADDRESS: _____

CITY: _____ **STATE:** _____ **ZIP:** _____

E-MAIL: _____

SIGNATURE: _____ **DATE:** _____

This name and address will be used for all correspondence related to the Request for Proposal.

Your organization does/does not (circle one) intend to respond to this Request for Proposal.

Send Acknowledgment to:

Kasey Daniel
New Mexico State Bar Foundation
Email: **kasey.daniel@sbnm.org**