AI for the Modern Legal Aid Organization

A Guide on What to Consider When Implementing AI in Your Legal Aid Organization

What is AI?

Artificial intelligence is technology, like computer software or programs, that enables machines to simulate human intelligence and complete tasks usually done by humans. Usually, you will engage with three types of AI.
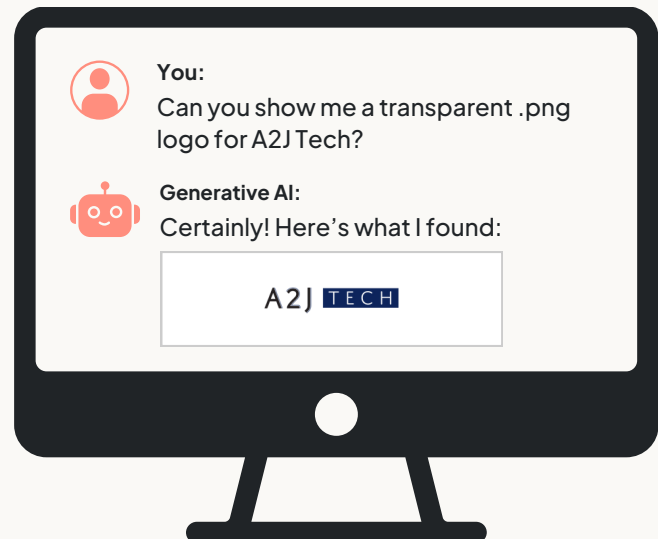
1. Machine Learning

Machine learning, a type of AI, involves training machines to learn from data. Instead of just mimicking human tasks, it identifies patterns in data to make conclusions. Once a machine learns to make accurate conclusions, it can apply them to new data.

2. Generative AI

Generative AI creates original content by recognizing patterns in data it has learned from.

AI Models like GPT (Generative Pre-trained Transformer) can produce human-like text, draft documents, write stories, or even generate artwork based on a given input.

You:
Can you show me a transparent .png logo for A2J Tech?

Generative AI:
Certainly! Here's what I found:

A2J TECH

3. Natural Language Processing

Natural language processing (NLP) is a branch of AI that uses machine learning to enable computers to understand, process, and generate human language. NLP can be applied to written text and speech and can analyze the intent or sentiment of a message.

Initial Considerations

DISCLAIMER: The use cases in this guide are based on publicly reported information about legal services projects. They do not cover all possible uses of AI in legal aid. A list of common large language models is included at the end of the guide.

ABA Standard 4.10

The American Bar Association has commented on the expansion of AI into the legal field, including some considerations for legal aids in implementing AI as part of Standard 4.10 in their Standards for the Provision of Civil Legal Aid. The ABA encourages legal services organizations (LSOs) to get involved in the expansion of AI in the legal field, stating that "AI brings great opportunities for efficiency and expanded services to legal aids." It emphasizes that legal services organizations develop strong internal standards to ensure they are responsibly integrating new technology. Check out our blog post on creating a technology strategy for your organization if you need help getting started!
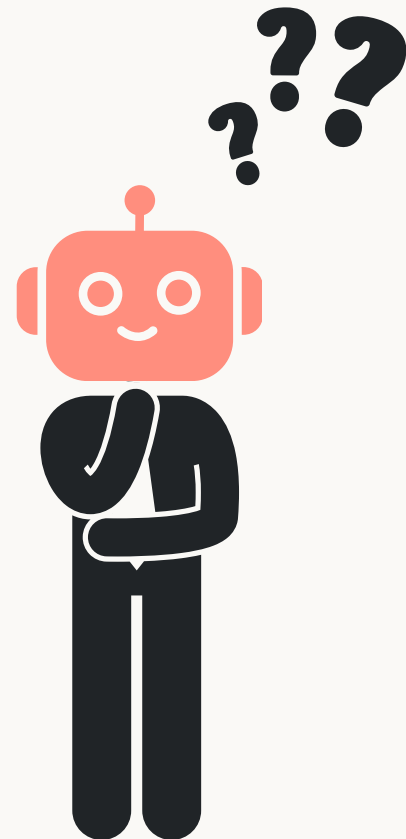
Legal Services Corporation Technology Baselines

If you are an organization funded by the Legal Services Corporation, you have probably heard of their Technology Baselines. These exist to encourage the consideration of using technology that could increase the efficiency of providing legal services and expanding access to justice in your community. In your future technology projects for your organization, consider how AI could help you achieve these baselines.

Use Cases
Document Automation

AI can greatly enhance your team's efficiency in conducting time-consuming administrative work.

Legal services organizations provide valuable legal assistance. Often, LSOs are overwhelmed with work and clients, which can lead to high stress and compromises in various areas to focus on demanding administrative work. By automating monotonous tasks, LSOs can free up time for their staff to focus on important elements of their legal work, like building a strong rapport with their clients.
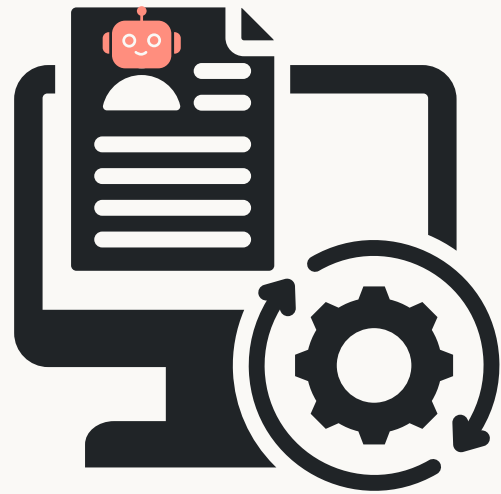
The Legal Aid Society of Middle Tennessee and the Cumberlands

At the <u>Legal Aid Society (LAS) of Middle Tennessee and the Cumberlands</u>, staff provided expungement services to eligible Tennesseans. However, these expungement petitions were often done manually, sometimes even by hand, which was time-consuming and monotonous.

To address this issue and improve the efficiency of the team, LAS used the popular AI tool ChatGPT. The team at LAS taught the model how to read criminal records and determine what charges were eligible for expungement. The model was then prompted to push the information it collected onto a document automation software that automatically generated a petition. This saved valuable attorney time, freeing them up to focus on developing a deeper client relationship and understanding of the case. This also contributed to an incredibly successful expungement clinic, <u>expunging 384 charges for 98 people in a single day.</u> This is one way AI can be used to automate administrative tasks. There are countless ways LSOs can tailor AI to assist them in the important work they do.

Use Cases
Intake Triage

At A2J Tech, our business process improvement team helps LSOs improve their intake systems every day. Many LSOs have a list of case priorities or legal problems the organization can take on. These are usually dependent on a specific grant and can close or open based on the grant's status.

Through our experience with various LSO's intake systems, we have seen that there can be a double-sided issue: frustrated clients waiting on a phone queue for a legal problem the LSO does not or cannot currently handle and intake staff at LSOs spending time filtering out clients who don't qualify. This wastes both party's time and causes undue stress and frustration. For one legal aid, AI offered a helpful solution.
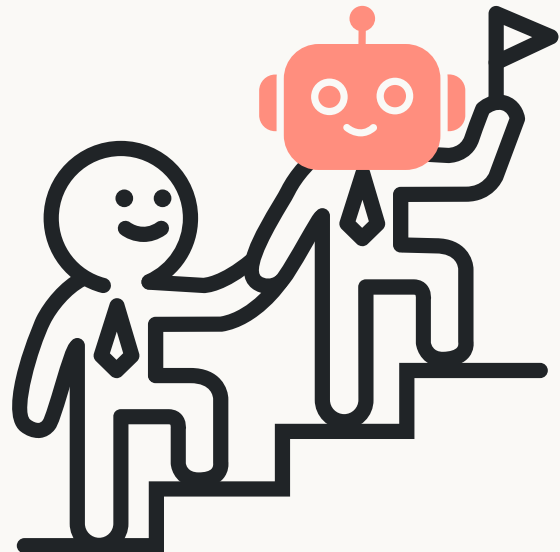
Legal Services of Eastern Missouri – Missouri Tenant Help

Like many legal aid organizations, the Legal Services of Eastern Missouri was looking for a better way to filter out clients who didn't qualify for their services. Through the use of Docassemble forms and OpenAI, LSEM created Missouri Tenant Help, an online intake screener that takes into account eligibility rules uploaded into OpenAI to give clients an accurate plan of action. The tool automatically considers the changing eligibility rules and gives the appropriate outcome for each client. While only focused on housing needs currently, LSEM and the three other legal aids in Missouri who use this platform hope to expand the tool to cover all possible legal issues and integrate it with LegalServer.

Use Cases
Virtual Legal Assistant

Improving access to justice is a core tenet of the mission of any legal aid. LSOs provide services for thousands of individuals per year. But what happens to those who don't qualify for services? How do you expand access to justice when your resources are limited? Many applicants reach out for help to understand how to navigate a legal issue. Two legal aids saw the opportunity to continue to serve their community even when their services could not be offered.
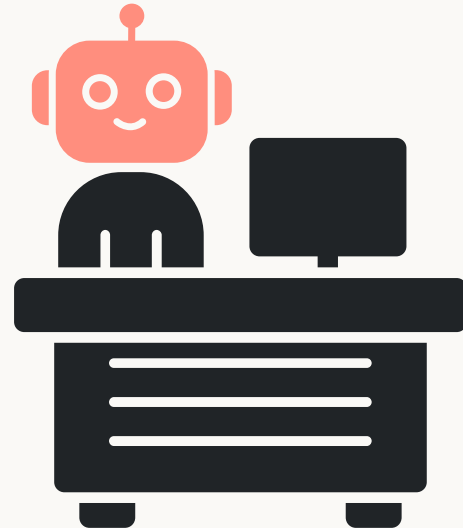
Legal Aid of North Carolina and Legal Aid of Western Virginia

For both organizations, much of their population was situated in rural areas where it is difficult to access an attorney or make it to a legal aid office. For these folks, both Legal Aid of North Carolina and Legal Aid of West Virginia saw a need for an easily accessible legal help resource within their communities.

Using AI, both LSOs created virtual legal assistants that offered users legal information on their current problems in plain language for easy comprehension. Users could ask questions on specific aspects of their case and receive comprehensive answers with suggestions on what steps they could take next, whether submitting a particular form or contacting legal aid for services. This tool saved time on both ends: users didn't have to sit for hours on the phone to reach someone who might not be able to help and intake staff at LSOs had more bandwidth to engage with qualified clients. By training AI on the specific legal information that applies to their state, the LSOs were able to ensure with a degree of confidence that their tool was giving accurate information. While not a replacement for official legal advice, the tools have already assisted hundreds of users.

Other Use Cases

Uses for AI in legal aid are not limited to the examples shown here. There are many other tools that could be created or enhanced with the integration of AI. For example:
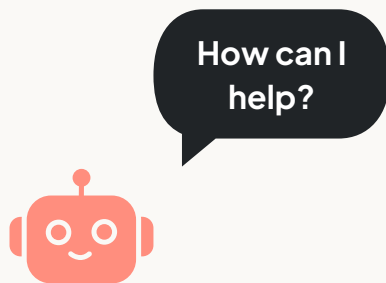
Chatbots

Chatbots use natural language processing to understand user questions and deliver tailored responses. For example, you can direct users to self-help resources, answer frequently asked questions, or guide them through an online intake application.
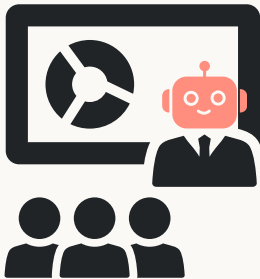
Case Summaries

LSOs can use AI to create case summaries, which can be useful for managing high volumes of cases, identifying trends, and even supporting research by quickly flagging relevant precedents. For a busy LSO, this can save time and energy.

Phone Systems

Integrating AI agents can enhance your phone intake process. These systems can automatically register and analyze call data, assist in client intake by collecting basic information before a human operator takes over, and recognize the topic to prioritize urgent matters.

Reporting

Legal aids can use AI to automate data collection, aggregate case information, and generate insights. AI can help streamline the process of gathering data from various sources, such as case management systems and client interactions.

Approach Considerations

There are many things to consider when deciding to incorporate AI into your practice. It's important to have a holistic understanding of what you're adopting.
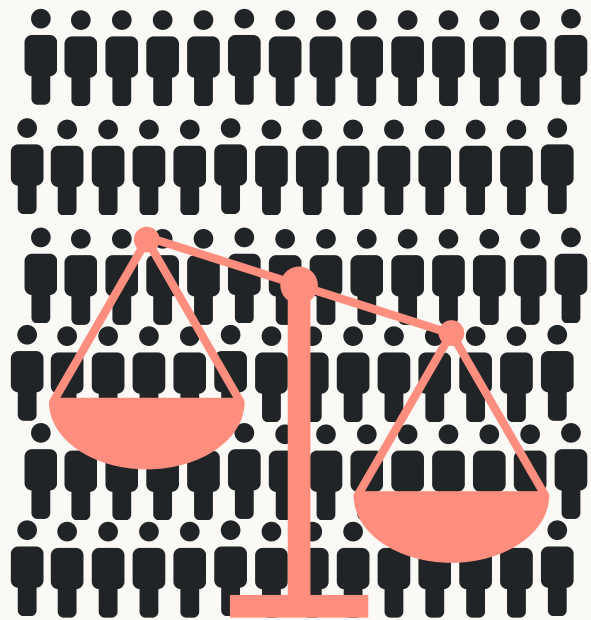
Determine Organization Needs

According to LSC's 2022 Justice Gap report, LSC-funded legal aid organizations receive 1.9 million requests for legal aid a year. Due to lack of resources and time, these organizations typically turn away 49% of these requests.

The need for support among legal organizations is significant. While it's impossible to help every person that comes to your doors, it's possible to expand your capacity to help as many as you can.

LSOs receive 1.9 million requests for legal aid a year.

To determine where your organization needs the most support, we recommend:

- Gather staff feedback
- Track your pain points
- Analyze your current technology limitations
- Talk to clients

Engage your team, analyze your data, and create a list of priorities. Looking for an AI solution can be overwhelming, but going in with a clear purpose will make things simpler.

Approach Considerations

Consider Cybersecurity

Cybersecurity is a hot topic in technology, and for good reason. In an ever-evolving digital landscape, organizations need to stay ahead to stay safe.

In the first half of 2024, 1 billion people fell victim to a data breach. Data breaches expose victims to the possibility of identity theft and fraud. Legal aid organizations handle the sensitive personal information of hundreds of vulnerable people a year- that level of exposure can severely damage a client's case. When incorporating an AI tool, it's important to do your due diligence on a solution's cybersecurity policies.

29%

of legal organizations have experienced a security breach

Source: ABA

We recommend establishing a vetting process for all potential AI solutions, taking the following criteria into consideration:

- Has the tool experienced any recent data breaches/cybersecurity scares?

- How does the program store data?

- Does the program share user data with third parties?

- How prepared is your IT team to manage your clients' data through the new AI tool?

Approach Considerations

Consider Cost

If you are a legal aid organization that relies on outside funding, where you decide to invest your money matters. Grant programs like LSC's Technology Initiative Grant can help offset the cost of implementing AI into your organization. In 2025, LSC awarded over $5.6 million in funding to 19 legal aid organizations. Seven of these organizations are conducting projects that leverage AI.

Organizations are always trying to figure out how to balance high efficiency and low overhead costs. Investing in the right tech solutions can be the key to achieving this perfect harmony.

TIG awards can help fund AI projects for your organization

Before investing time and resources into researching different AI solutions, it's a good idea to establish a budget ahead of time. Work with your accounting and IT departments to develop a realistic technology budget.

When creating your budget, we recommend doing the following:

- Analyze how much you are already spending on legal technology software.

- Understand the return of your investment.

- Analyze how much time you are spending on administrative activities.

- Explore discounts and special offers available to legal services organizations.

- Consider training and hardware upgrade costs.

The ABA Journal recommends spending at least 4-7% of your overall budget on legal technology.

Approach Considerations

Consider Accessibility

A key and often overlooked aspect of integrating AI into your organization is ensuring accessibility. At A2J Tech, we consider accessibility a core part of our work, assuring clients that our deliverables are easily accessible by all current and future end-users.

AI Chatbots have recently taken the legal field by storm, offering an easy to use and simple to implement tool that addresses the complex legal needs of the public. But the need for accessibility doesn't stop at public-facing tools. Integrating AI into your internal practices also requires a focus on accessibility for current staff or future hires who will be interacting with the tools.

Consider the following and check out our blog post and accessibility tools for more information:

- Ensure compatibility with screen readers and assistive technologies.
- Use clear labels, proper color contrast, and avoid overuse of emojis.
- AI training data should be audited for biases, including those against people with disabilities.
- Responses should use plain language, with summaries for complex content.
- Implement text-to-speech and voice command functionalities.
- Offer multilingual support to assist non-English speakers.
- Provide multiple contact options beyond phone numbers (e.g., email, online forms).
- Invest time and resources to ensure that all chatbot-generated content is reviewed by legal professionals to maintain accuracy and relevance. Relying solely on AI without human oversight can lead to misinformation.

Ethical Considerations

Using AI in your legal organization raises important ethical considerations, such as ensuring client confidentiality, avoiding bias, and maintaining accountability.

Think About…

The use of AI in your legal services organization raises important ethical considerations. Lawyers have a duty to maintain client confidentiality, ensure competence, and avoid conflicts of interest. For example, many AI systems rely on data inputs to function, and sharing sensitive client information with these tools may risk privacy breaches or non-compliance with professional regulations.

Additionally, accountability becomes critical. While AI can assist in decision-making, legal professionals must take full responsibility for the advice and actions informed by these tools.

When considering AI solutions, it's important to dive deep into categories we've discussed throughout the guide:

- Cybersecurity/Data Use
- Type of AI
- Needs of the Legal Aid Organization

Large Language Models

Our chart is not inclusive of all the tools out there.
Consider other reputable options for you and your team to explore!

Gemini AI

Gemini AI, developed by Google DeepMind, is an artificial intelligence system designed to handle tasks involving both text and images.

Claude AI

Claude AI, created by Anthropic, is an AI model focused on conversational capabilities and decision-making support. It emphasizes ethical AI usage, with safety measures integrated into its design to ensure responsible and reliable interactions.

Llama (Meta AI)

Meta AI, part of Meta's research initiatives, develops a range of artificial intelligence tools and models, including advancements in natural language processing and generative AI. It focuses on enhancing user experiences and contributing to broader AI innovation.

Chat GPT

Developed by OpenAI, ChatGPT is a generative AI tool used to streamline workflows and conduct research. While not a legal-centered product, it's helpful resource for any law firm.

Large Language Models

The chart below was filled using information gathered off the vendors' websites. This information is accurate as of February 2025. Features are subject to change.

Features	Gemini AI	Claude	Llama (Meta)	Chat GPT
Type of AI	GenAI	GenAI	GenAI	GenAI
Price	$14/month	$25/month	Open Source	$20/month
Data Usage	Zero-Storage Policy	Uses Data to Train Models	Case-by-Case	Data Control for User
Document Drafting	YES	YES	YES	YES
Research	YES	YES*	YES	YES
Integrable with Other Platforms	YES	NO	YES	NO
Customizable Features	YES	YES*	YES*	YES*

*This feature is available with a paid license.

Next Steps

Now that you've seen what's possible and what's available, what now? We've laid out a couple of ways you can begin to implement AI in your organization!
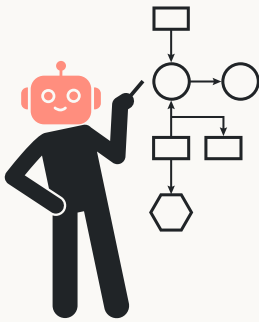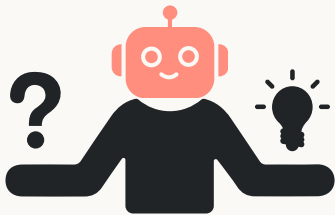
Develop a Technology Plan

Analyze your current technology use and capacity. New technology is always great, but figure out what your organization can realistically manage and sustain. Find where your IT team could use more support.

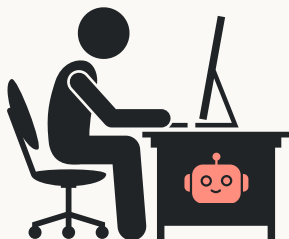## Consider Your Needs

There are many ways to implement AI:

- AI Chatbots
- Document Automation
- AI Agents
- Intake Triage

What does your organization need? Where can support be allocated? Spend time discussing with your stakeholders to get a better sense of where you can begin.

Research, Research, Research

After you've developed a list of support-areas for your team, research what tools are available to address these needs, including tools that help you create your own solutions. For example, maybe your organization needs intake support. Researching AI software that can help you develop a curated intake triage tool is a great starting point.