

[Name of Agency]

Law Department

[Address]

[City, ST, Zip]

Matter Management System

Request for Proposal

Prepared By:

[Name and Contact Information
for Project Coordinator]

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Introduction

The [Name of Agency] law department has prepared this Request for Proposal (“RFP”) to acquire a computerized matter management system. This RFP will be sent simultaneously to several matter management system developers. We realize that different vendors offer different configurations and we wish to use your expertise in the overall system configuration. We have provided detailed recommendations and requirements that will meet the law department’s specific matter management system needs. If you have questions or concerns about this RFP, please bring them to our attention immediately.

Evaluations of proposals will be performed by the [Name of Agency] and the [Name of Agency] IT Staff. Based on information provided in the proposals, certain vendors will be selected for on-site system presentations. Upon completion of the demonstration phase, the law department expects to proceed with negotiation of a contract with the selected vendor. If the law department is unable to successfully negotiate with the vendor, it reserves the right to begin negotiations with another vendor.

The [Name of Agency] and the law department are appreciative of the need to establish a strong and comfortable relationship with the successful matter management system vendor and will make every effort to impartially answer your questions and assist you in providing the organization with the best proposal. However, the law department requests all questions be directed to [Name and Contact Information for Project Coordinator].

Law Department Overview

The [Name of Agency] is located in [city, state]. The legal department has [number of divisions] main divisions: [list divisions]. The following is a general description of the functions and responsibilities within each division:

[Describe the various functions and responsibilities of each division, an example follows]

Civil Program - General Counsel - [describe the office functions, responsibilities, clients, and the number of attorneys, paralegals, and legal assistants].

Criminal Program - Prosecution - [describe the office functions, responsibilities, clients, and the number of attorneys, paralegals, and legal assistants].

For purposes of this RFP, assume there are a total of [total number of attorneys and staff] in the [Name of Agency] law department.

Current Matter Management Environment

[Describe the current matter management environment and whether or not the office uses a software application. Describe how cases are currently tracked by attorneys and staff. Describe the number of records you currently handle and the expected growth of these records over the next five years].

Current Software Applications

The following applications are used within the [Name of Agency] law department. The office has valid licenses and is entitled to support from the [Name of Agency] IT department for the following applications:

- [List the applications supported by the IT department]
- [List other applications used by the law department, but not supported by the IT department]

RFP Technical Environment

Technical fit is evaluated for all hardware and software purchased for the [Name of Agency].

Current Security Standards: The [Name of Agency] complies with [Name of State] Department of Public Safety (DPS) Data and Network Security standards.

Network infrastructure: [describe the network infrastructure].

File and Application Servers: [describe the file and application servers].

Network Addressable Storage and Storage Area Network: [describe the SAN environment].

Databases: [describe any databases].

Web (Internet/Intranet) Servers: [describe the Internet and Intranet environment].

E-mail: [describe the e-mail environment].

Application systems (general): [describe any other applications].

Electronic Document Management: [describe the document management environment].

Reporting tools: [describe any reporting tools].

Workstations: [describe the general desktop systems].

Printers: [describe the printer environment].

Scanners: [describe the scanner environment].

Remote access: [describe remote access technologies and procedures].

RFP Technical Environment Section

Technical Questionnaire

Please provide a technical overview of the system being proposed, including answers to the following questions. Failure to do so will result in loss of points for technical fit. Vendors who are selected as finalists will be required to complete a more detailed technical questionnaire.

1.	Servers
1.1	What is the recommended hardware platform?
1.2	What is the server operating system?
1.3	How many servers are required for the production and test environment, including servers needed for optional modules such as web services?
1.4	What is the recommended amount of disk storage space?
1.5	For servers that must be accessible to the Internet, please describe the DMS firewall requirements to access servers on the internal network.
1.6	Do you include a separate license (without additional license fees) for a test environment?

2.	Database
2.1	What is the database platform?
2.2	How is connectivity made to the database (i.e., ODBC, individual user SQL login)?
2.3	If we sign a non-disclosure agreement, will you provide your ERD and/or data model?
2.4	Assuming that at various times you will need access to our data for technical support, please provide your methods for obtaining this remote access.
2.5	As previously stated, our DBMS standard is [describe the DBMS server environment]. Does your application support our standard?

3.	Application
3.1	How is the application licensed?
3.2	What components are installed and run on the server?
3.3	Please estimate the amount of workload placed on the server and the amount of workload placed on the client.

3.4	What reporting tools are included or can be used with the application? Does the application come with standard reports?
3.5	How often are patches and major upgrades released? How are they installed on the server?
3.6	Does the application include an archive utility?
3.7	How is security managed?

4.	Security
4.1	Are transmissions (outside the server/system) encrypted, including authentication and data transfer? If so, by what method?
4.2	How is the data stored on the system (user accounts database, configuration files, customer data, etc.) secured and/or encrypted?
4.3	By default, System or User accounts do not have Domain Admin permissions. Is this a foreseeable issue for the application's integration or functionality?
4.4	Does the SQL logon IDs use Windows Security, SQL Security, or a Mixed Security model?
4.5	Does the application require a specific System account, or does it use the Local System account?
4.6	What permissions does the administrator of the application require on the server itself?
4.7	Does application support Microsoft Windows updates set to automatically download/install the latest critical patches?
4.8	Does the application provide integration with Microsoft Windows' Event Viewer, or its own logging/auditing mechanism?
4.9	Does the application provide any Performance Monitor counters (to integrate w/Microsoft PerfMon utility)?

5.	Workstations
5.1	What desktop operating systems are supported?
5.2	How are client upgrades installed?
5.3	Are any additional hardware peripherals required?

6.	Integration
6.1	Does the application integrate with Microsoft Office and Outlook?

6.2	Does the application integrate with [describe current document imaging or document management software]? If not, what other document imaging or document management software does your application integrate with?
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7.	Additional modules
7.1	What additional modules are available, such as web services or remote accesses?
7.2	What additional hardware or software is required to support those modules?

Matter Management System Requirements

The [Name of Agency] law department is seeking to implement a matter management system in order to better coordinate the delivery of client services and reduce the amount of redundant information throughout the office. Detailed *Matter Management System requirements* are provided as part of this RFP.

It is essential that the matter management system be supported by a company that is itself robust, meaning that it has the resources and national client base to support ongoing product development and adjustments to a predictably fluid software and hardware environment, including changes to the operating system platform and the Internet, and the development of new hardware like handheld PCs and tablet PCs. The costs for researching and implementing these changes should be spread over many users. Also, the vendor should have a demonstrated commitment to support matter management in a government office environment.

Matter Management System Requirements – Functional Questionnaire

The following matter management system requirements are based on the needs of the [Name of Agency] law department. In your proposal, please indicate if your solution meets these requirements. Use the “Additional Notes” to provide specific details and explain the detailed functionality.

Function Description	Y/N	Additional Notes
Client Rolodex/Contact Database		
Unlimited number of clients and interested parties		
One time entry for clients and interested parties		
Ability to add, delete or modify data fields in all screens by authorized users		
Centralized "rolodex" that keeps the latest information on file		
Ability to designate any fields as mandatory input		
Search entire rolodex with wildcard characters		
Notes field for each contact entry		
Matter Database		
Unlimited number of matters		
Ability to add, delete or modify data fields in all screens by authorized users		
Matter deletion requires confirmation, auditing		
Deleted matters can be restored		
Pull-down lists for rolodex data		
Matter number assignment either automatic or manual		
Matter number structure alpha/numeric		
Matter lookup table by name, client, number, attorney		
Ability to designate any fields as mandatory input		
Ability to keep matter captions history as matter progresses		
Ability to define and keep general matter information by division		
Ability to track different phases in the life of a matter		
Ability to document final disposition of the matter		

Function Description	Y/N	Additional Notes
Ability to send reminders, alerts to attorneys & staff of active and closed matters		
Budgeting		
Cost tracking		
Time tracking		
Document Generation		
Merge with Microsoft Word (boilerplate documents); office will provide master forms for merging		
Add, delete, or modify data fields within the merge document by authorized users		
Merge several documents simultaneously		
Merge must allow users to enter information in document during merge if information not available in data field.		
Auto-merge on pre-set dates		
Auto-merge on pre-set events		
Calendar/Tickler		
Calendar appointments		
"Rules-based" calendaring system; office will provide rules		
Calendar assignments by single user and/or all in a division		
Standard description for categorized appointment type		
Task list assignment with reporting		
Ability for secretaries to schedule events for different attorneys which show up in the attorneys' calendars		
Calendar view on screen by attorney, by group, by matter, by client		
Print calendars by attorney, by group, by matter, by client		
History of calendar appointments rescheduled		
Audit trail of date entries, modifications		
Print out either appointments, deadlines, tasks or all with select period range		
Ability to produce a trial schedule		
Search on events		

Function Description	Y/N	Additional Notes
Transfer events & tasks from one user to another		
Calendar and reminder alerts popups and sent via email		
Integration with Microsoft Outlook – full bidirectional synchronization		
Matter Notes/Diary		
Automatic time, date, user stamp		
Free form entry with no restrictions		
Automated diary entries for certain events		
Full text search		
Ability to log personal events		
Timekeeping		
Ability to designate timekeeper roles by matter		
Ability to designate different timekeeper roles by event		
Ability to transfer matters and events to other timekeepers		
Reports		
Matter expense tracking & reports		
Time tracking & reports		
Statute of limitation report		
Conflict of interest check		
Matter archive with reporting		
Document generation history report		
Custom report writer		
Query on any and all fields		
Matter export capabilities		
Email Interface		
Microsoft Outlook		
Ability to drag & drop received documents/attachments directly to matter		

Function Description	Y/N	Additional Notes
Other Requirements		
Security by user down to record or tab		
File room records management		
Supports Governmental Regulatory and Accounting Reporting Standards		
Download info to laptop with synchronization capabilities		
PDA integration; bi-directional synchronization capabilities		
Web interface		

Matter Management System User Configuration

All off-the-shelf matter management systems provide some level of user configuration, typically done internally at the customer site either by the Administrator or the developer. The law department has several different divisions and will need to configure the system for these groups. The program needs to have the capability of *easily* creating data fields and reports. User configuration should be available in the following areas:

Matter Intake Form – The system should provide capabilities for configuring the matter intake form. This allows the law department to begin with a basic intake form (the same basic initial information for all matters), then customize a sub form (or on the same form) with additional required information based on the type of matter or other triggers. The configuration should allow for creating data fields and the ability to “drag and drop” where that data field will be located on the intake form.

Document Generation – The system should integrate directly with Microsoft Word. The purpose is to allow the end user to generate standard documents or forms with a simple “merge.” The law department will determine a standard set of these boilerplate documents, then build in the required data fields into the document.

Calendar – The system should provide a “rules-based” calendar system, allowing the law department to create a number of rules based on the type of matter, the jurisdiction or court, or any number of criteria. These can be actual dates and deadlines or tasks associated with the individual matter. Once the rule has been applied, it should appear in the calendar system *and* in Microsoft Outlook.

Reporting – The ability to create customized reports is of paramount importance to the law department. If the data is in the system, it should be *easily* extracted in any format designed by the law department. Typically, reports are created, based on selection criteria as well as format. Once the report is created and saved, the user only needs select and run the report.

In your proposal, please address the various levels of configuration in detail available as described above. Include who would do the configuration (your company or the law department) and the steps required to configure the system. The law department is also interested in your company’s pricing schedule for such configuration.

Training Requirements

Professional training is critical to the success of this project. The [Name of Agency] law department is committed to having all attorneys and staff receive the best possible training within a reasonable time period. In this case, the system training must be integrated with additional training by the implementation of changes in the business processes, new policies, and directives that will be implemented in support of the new system. Therefore, the Vendor will need to work with the law department to incorporate needed training with the design of operational change training. As such, the Vendor is requested to describe their approach and methodology with regards to:

- Preparation of a training plan;
- Delivery of system training as provided to other clients;
- Training collateral such as participants' guides, workbooks and training aides;
- Technology enhanced training such as computer-based or video-based training; and
- Online training support,

and explain how their training approach will best fit with their implementation plan of the proposed systems. In your proposal, please indicate the types of training available, amount of training recommended per position (attorney, legal assistant, administration staff), and provide a training outline and/or training manual (if available). Suggested training includes:

Initial training – Initial training of the matter management system should be *mandatory* for all attorneys and staff and should include an overview of the system. Initial training is typically handled by the vendor during the initial installation and implementation. In your proposal, indicate the recommended amount of time for initial training.

On-going and Follow-up training – After the initial training, the law department will transition into the new system. This transition will most likely cause the law department an initial drop in productivity as attorneys and staff get used to the new system(s). As the users progress with the new system, follow up training will help to increase and optimize productivity for all users. In your proposal, indicate the recommended amount of time for floor support following initial training.

Administrator training – The law department will require additional training for the Matter Management System Administrator. This training should include, at a minimum, all customization capabilities, document generation and management, rules-based customization, and report writing. In your proposal, indicate the recommended amount of time for administrative and technical training.

Data Conversion & Migration Requirements

Database Conversion

The [Name of Agency] law department does not currently utilize any in-house systems for matter management. Therefore, for the purposes of this RFP, there will be no database conversion.

[Note: If the [Name of Agency] law department does utilize an in-house system for matter management, the description of the system and the data should be included here.]

Additional Issues to Address

Licenses – Number of Users

For purposes of this RFP, there are [number of end users] end users. Vendors must provide licensing costs and describe their licensing agreement. For example, is the proposed solution on a per-seat, per-server, or per-site basis? If per site, what is the maximum number of users that the site is licensed for? Vendors must also include costs for *all* licenses required by their solution, such as database licenses and licenses for reporting tools.

User Configuration

As discussed earlier in this RFP, the [Name of Agency] law department will require various levels of user configuration to accommodate practice areas. In your proposal, please provide cost ranges for the types of configurations and services your company will perform for the law department.

Upgrade Management

Should the [Name of Agency] law department request that the application be customized, details shall also be given on how the Vendor would handle customized sections of their proposed solutions as it relates to the product upgrades. Details of which parties will be responsible for different aspects in the upgrades shall be described. This shall take into account the amount of customization versus configuration of the proposed solution.

Vendors shall provide details on the release(s) of their current product(s) and on their scheduled next release(s). Vendors shall also provide details on their typical schedule of releases (e.g., minor release every six months, major release every 18 months), and the amount of effort required to carry out the upgrades by the law department.

Maintenance and Support

The Vendor must ensure that all deliverables are subjected to reasonable quality assurance tests prior to their delivery to the [Name of Agency] law department, or if requested by the law department upon installation, in advance of the commencement of the warranties, maintenance and support obligations. The Vendor shall be responsible for preparing and running all such tests.

Once the software has undergone preliminary tests on the [Name of Agency]'s hardware platforms conducted by the [Name of Agency] IT department with the Vendor's participation during the initial stage of the implementation, the Vendor shall be responsible for the warranties, maintenance and support of the software from the time of installation to the final acceptance of the entire system. If the Vendor is unable to meet this requirement, then Vendor is to describe in detail a reasonable alternative solution.

Vendors shall provide the following warranties for all proposed software (including any development or customized software) provided as part of the solution:

- The software and any developed applications (either stand alone or customization of the base solution) must be covered by a warranty for at least one year from the acceptance date of the system(s), during which period maintenance and support will be provided at no additional cost.
- Any software which is not covered by a warranty must be clearly indicated and the reason for the exclusion must be explained.

The [Name of Agency] law department generally operates Monday through Friday 8:30 a.m. to 5:30 p.m. [time zone: ET, CT, MT, PT]. Vendors must provide description and costs for their various service levels, including their standard service levels and any and all options for upgrade from the standard service level.

If the Vendor service level includes a response time for critical issues/problems that is different from that of a non-critical issue/problem, Vendors must identify what constitutes a critical issue.

The Vendor shall be required to offer such support services for a minimum of three years after the acceptance date of the proposed solution and the Vendor shall specify a cap on any annual increase to the maintenance and support agreement. The law department shall have the option to automatically renew annually the agreement on the same terms.

Project Implementation Approach

Vendors shall describe and demonstrate how their methodology and approach to manage a project of this scope will be applied to this project. Describe how you would involve the stakeholders (representatives of the [Name of Agency] law department and the IT Department) in the design process. Also describe the project scheduling, monitoring, and controlling mechanism that will be utilized. Describe your recommended process for change control, including process for recommending changes, participating in the decision process, and for documenting and implementing the approved changes.

The Vendor must provide an implementation approach and plan to demonstrate how the design, development, delivery, installation, configuration, test, and integration of the proposed solution will be approached. The Vendor must take into account the law department's intent to have its Administration and IT staff trained and involved in the implementation of the system. The law department prefers a staggered approach to the implementation.

In your proposal, please provide detailed recommendations on how the matter management system should be rolled out to the law department. The following tables may provide a guideline to assist you.

The plan will be refined with the [Name of Agency] law department during negotiations of the contract. It must identify and describe tasks, deliverables, resources, roles and responsibilities and schedules required to successfully implement the solution. It should be based on the Vendor's prior experience with similar implementations.

The implementation plan must include expectations or assumptions as to the number and type of law department resources required to implement the plan, which must be identified for each phase of the plan. The Vendor's staffing estimates should also be demonstrated. The Vendor must provide adequately trained staff on site during the implementation to deal with any difficulties which may arise.

Suggested Matter Management System Implementation Plan

Task Description	Start Date	Responsibility
Initial Needs Assessment Phase		
Needs Assessment	Week 1	Law Department & Vendor
Establish Implementation Plan, Training Environment	Week 1	Law Department & Vendor
User Documentation Requirements	Week 2	Law Department & Vendor
Software Customization Phase		
Determine Customization Needs	Week 3	Law Department & Vendor
Begin Customization	Week 4	Vendor
Deliver, Test Customization	Week 6	Law Department & Vendor
Customization Adjustments	Week 8	Vendor
Deliver, Test Customization	Week 10	Law Department & Vendor
Data Conversion & Testing Phase		
Deliver Data Layout to Vendor	Week 2	Law Department
Data Mapping Report Conversions	Week 3	Vendor
Initial Data Conversion Test	Week 4	Vendor
Data Conversion Review	Week 6	Law Department
Data Conversion Adjustments	Week 8	Vendor
Data Conversion 2nd Review	Week 9	Law Department
Final Data Conversion Adjustments and Review	Week 10	Law Department & Vendor
Roll Out Phase		
Install Software	Week 4	Law Department & Vendor
Implementation Assistance	Week 6	Law Department & Vendor
Deliver Data to Vendor for Final Data Conversion	Week 10	Law Department
Final Data Conversion	Week 12	Vendor
Training Phase		
Administrator Training	Week 3	Vendor
End User Training	Week 12	Vendor
One on One Training & Floor Support	Week 14	Vendor
Final Acceptance by [Name of Agency]	Week 22	Law Department

Quality Assurance and Testing Approach

The Vendor must provide a QA and testing approach to demonstrate how high quality goods and services will be delivered to the [Name of Agency] law department. This approach must cover all deliverables and services proposed by the Vendor. Vendors should identify all resources required for testing, including all hardware and software required.

Testing of the new system shall be performed to identify and expose all issues and associated risks, communicate all known issues to the project team, and ensure that all issues are addressed in an appropriate manner before release. This requires careful and methodical testing of the software to first ensure all areas are scrutinized and, consequently, all issues (bugs) found are dealt with appropriately.

Testing the systems thoroughly will assure that the system meets the full requirements of the law department's user community, maintain the quality of the product, and remain within the budget range established. At the end of the project, the user should find that the project has met or exceeded all of their expectations. The testing processes should accomplish the following:

- Assure high quality of all deliverables;
- Design, assemble and execute complete testing practices for the project;
- Confirm the full functional capabilities of the final product;
- Confirm stability and performance (response time, etc.) of the final product;
- Confirm deliverables meet the law department's expectations and requirements; and
- Report, document and verify code and design defects.

As part of the final Agreement, the Vendor shall submit a plan, which will detail how they will accomplish testing of all delivered software. This approach shall recommend an approval process for all testing elements as well as sign-off procedures for pass/fail items.

Proposal Considerations

Purpose

The purpose of this document is to solicit proposals for providing the [Name of Agency] law department an off-the-shelf computerized matter management system that will be utilized throughout the law department office. The proposals should include software, installation, integration, configuration, data conversion, training, maintenance and support.

Proposal Format

Proposals shall be submitted in one (1) original and [number of required copies] copies in the format described in the Proposal. Proposals shall be on 8 1/2" & 11" paper with the text on one side only. All submittal information must contain data for only the local office(s) which will be performing the work. To assist the [Name of Agency] law department in proposal evaluation, Vendors must provide the following material in their proposals. *[Note: Agency should modify this proposal format as desired. Any other required material should be so indicated.]*

Letter of Transmittal
Table of Contents
Table of Illustrations
Executive Summary

Section One - Vendor Information
Section Two - Matter Management System Requirements
Vendor Alternatives/Exceptions to Requirements
Section Three - Implementation and Training
Section Four - Pricing Information
Completed [Name of Agency] Price Forms [if provided in RFP]
Vendor Quotation
Additional Required Software
Recommended Hardware, Software, Network, if needed
Section Five - Terms and Conditions
Sample Vendor Contracts/Agreements
References

Submission

It is a requirement that each responding vendor send its response directly to the [Name of Agency] Materials Management office.

Proposals shall be mailed/delivered to:

[Name and Contact Information for Project Coordinator]

Questions

If you have any questions concerning the content of this RFP or wish to clarify any information, please contact [Name and Contact Information for Project Coordinator]. Each vendor should, forthwith upon receipt of the RFP, designate a single representative with whom the [Name of Agency] may communicate regarding this RFP and the vendor's response.

Subcontracting

The response should indicate whether the vendor proposes to use subcontractors for any aspect of the work and must identify the proposed subcontractor in sufficient detail. No subcontracting shall be permitted without the prior approval of the [Name of Agency]. The vendor shall remain fully liable under its contract with the [Name of Agency] regardless of any subcontract and regardless of the [Name of Agency]'s approval of any subcontractor.

Additional Information

Throughout the proposal, vendors should provide additional information regarding all capabilities that will be present in the proposed system, even where no specific information has been requested. All functions and applications available on the proposed system should be included.

Evaluation Criteria

The [Name of Agency] law department intends to establish a long-standing relationship with the selected vendor, and will select a vendor based on the following qualifications:

- Demonstrated understanding of the law department's goals, including immediate needs, long-range plans, and current problems;
- Ability to implement successful matter management system installations;
- Compliance with the [Name of Agency] IT standards;
- The number of referenceable, comparable matter management system installations;
- Price competitiveness of proposal;
- Qualification of key staff; and
- Proposed system matched to RFP requirements.

The selected vendor will be asked to work with the [Name of Agency] in implementing the matter management system with the [Name of Agency] law department's existing environment as described earlier in this RFP.

Rights of the [Name of Agency]

In addition to any other express rights set out in this RFP or any other rights that may be implied in the circumstances, the [Name of Agency] reserves the right to:

- a. Make public the names of any or all Vendors;
- b. Request written clarification or the submission of supplementary written information from any Vendor;
- c. Waive formalities and accept proposals which substantially comply with the requirements of this RFP;

- d. Verify with any Vendor or with a third party any information set out in a proposal;
- e. Check references other than those provided by any Vendor;
- f. Disqualify any Vendor whose proposal contains misinterpretations or any other inaccurate or misleading information;
- g. Disqualify any Vendor or the proposal of any Vendor who has engaged in conduct prohibited by this RFP;
- h. Make changes, including substantial changes, to this RFP provided that those changes are issued by way of Addenda;
- i. Accept or reject any proposal if only one proposal is submitted;
- j. Select any Vendor other than the Vendor whose proposal reflects the lowest cost to the [Name of Agency];
- k. Cancel this RFP process at any stage;
- l. Cancel this RFP process at any stage and issue a new RFP for the same or similar goods or services to any of the goods and services to be provided to meet the requirements described in this RFP;
- m. Accept any proposal in whole or in part;
- n. Discuss with any Vendor different or additional terms to those contemplated in this RFP or in any Vendor's proposal;
- o. Reject any or all proposals in its absolute discretion,

and the [Name of Agency] shall not be liable for any expenses, costs, losses or any direct or indirect damages incurred or suffered by a Vendor or any third party resulting from the [Name of Agency] exercising any of its express rights under this RFP or exercising any rights which may be implied in the circumstances.