[Name of Firm]

Attorneys at Law
[Address]
[City, ST, Zip]

Practice Management System

Request for Proposal

Prepared By:

[Name and Contact Information
for Project Coordinator]

INTRODUCTION

The purpose of this document is to solicit proposals from selected vendors for a computerized Practice Management System for [Name of Firm].

Information contained in this Request for Proposal ("RFP") is confidential among practice management system vendors and the firm. By agreeing to receive this request, the vendor agrees not to disclose any of its contents to parties not involved in the preparation and evaluation of proposals.

This RFP will be sent simultaneously to several practice management system vendors. 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 firm's practice management system needs.

Evaluations of proposals will be performed by the firm. Based on information provided in the proposals, certain vendors will be selected for on site system demonstrations. Upon completion of the demonstration phase, the firm expects to proceed with negotiation of a contract with the selected vendor. If the firm is unable to successfully negotiate with the vendor, the firm reserves the right to begin negotiations with another vendor.

The [Name of Firm] is appreciative of the need to establish a strong and comfortable relationship with the successful practice management system vendor and will make every effort to impartially answer your questions and assist you in providing the firm with the best proposal. The firm requests all questions be directed to [Name and Contact Information for Project Coordinator].

OVERVIEW

[Name of Firm] is an established full service law firm with offices located in [list office locations]. There are [list number of attorneys] attorneys and a total of [list total number of end users] end users working in the firm's office. The firm's commercial section includes [list practice areas in commercial]. Its litigation section performs all phases of litigation for its individual and corporate clients and also represents plaintiffs in personal injury matters.

[Describe current financial management system and case management system software applications].

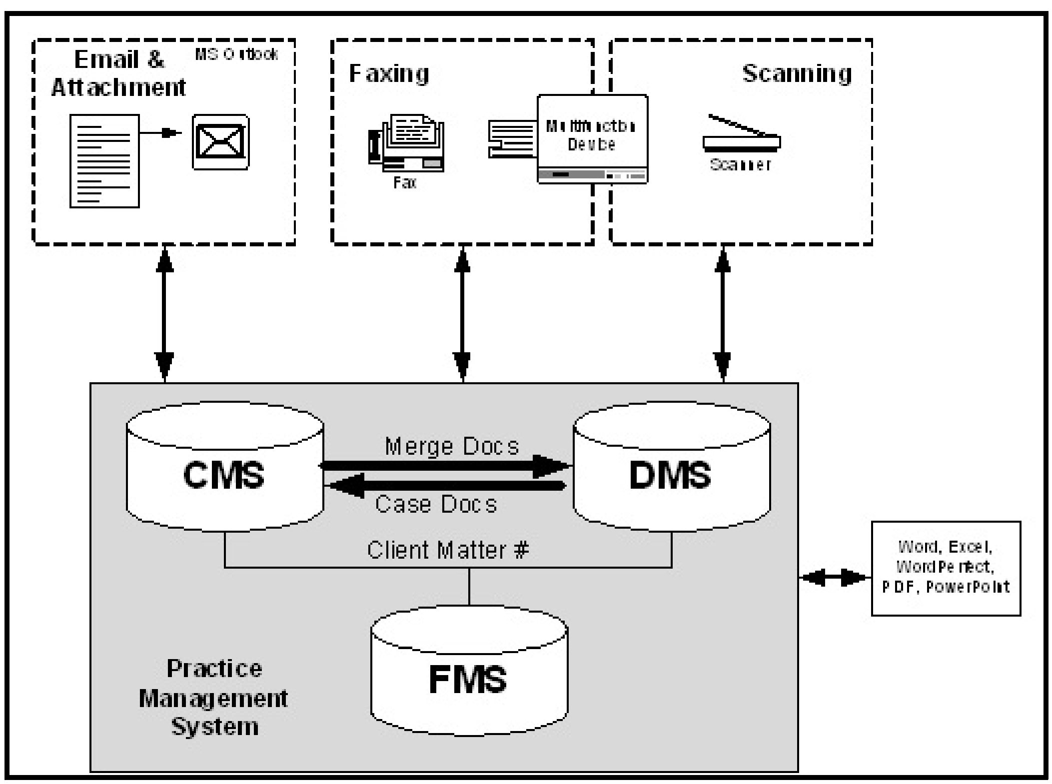
The firm requires a full practice management system that includes financial management, document management, case and matter management, and records management in order to better coordinate the delivery of client services and reduce the amount of redundant information throughout the office. The firm uses Microsoft Office 2007 and Microsoft Vista. The firm is also interested in scanning and imaging technologies to help reduce the amount of paper in the office.

Included in this RFP is a detailed list of practice management system requirements as defined by the firm. Note the firm expects considerable time and effort will be required to customize the system specific to the firm during the implementation phase.

Training will be required for attorneys and staff for the practice management system. The firm will also require annual maintenance and support for the practice management system. The firm's system administrator will also require additional "Practice Management System Administration" training.

The following diagram provides an overview of the recommended practice management system and how documents and information may flow through the office.

- The client/matter number originates in the financial management system ("FMS") and is available to the case/matter management system ("CMS") and the document management system ("DMS").
- Documents created within the CMS are automatically linked in the CMS to the client/matter and stored in the DMS.
- Documents created outside the CMS by Word, Excel, PowerPoint, and PDF are also automatically stored in the DMS by client/matter and accessible through the CMS.
- The system integrates directly with Microsoft Outlook; emails that are case/matter-related are stored in the DMS and linked directly to the case/matter in the CMS, as are attachments.
- Faxes (either by fax server or a multifunction device) will also be stored in the DMS and linked directly to the case/matter.
- Scanned documents are also stored in the DMS and linked to the case/matter in the CMS. Scanning can be done at a network scanner, a personal scanner, or a multifunction device.



CURRENT TECHNOLOGY ENVIRONMENT

[Name of Firm]'s current technology environment is up-to-date with server and network infrastructure technologies. The firm outsources server technical issues to a local systems integrator. In your proposal, please include your recommendations for file server *and* desktop workstation *minimum* and *recommended* hardware requirements.

Current Software Applications

The following list of software applications is provided for reference.

[Note: replace the following list with the firm's current application list]

Microsoft Office 2003 (Word, Excel, PowerPoint). . . . . Office Suite
Microsoft Internet Explorer. . . . . Web Browser
Mozilla Firefox. . . . . Web Browser

Adobe Reader. . . . . PDF Reader
Adobe Acrobat (only several desktops). . . . . PDF Creator
Paperport 10.0.. . . . . OCR Software
OmniPage Pro 14.0 (non-Vista machines). . . . . OCR Software
[name of current time, billing & accounting software]. . . . . Financial Management

Summation. . . . . Litigation Support
CaseMap. . . . . Litigation Support

[Note: if applicable and if available, include a description of the firm's wide area network communications, including a diagram.]

PRACTICE MANAGEMENT SYSTEM REQUIREMENTS

This table will help the firm determine which of their Practice Management System requirements are met by the proposed software system. Please indicate whether your system meets the firm's requirement and provide details as necessary.

CASE/MATTER MANAGEMENT FUNCTIONS		
Overall System Requirements	**Y/N**	**Remarks**
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		
Ability to designate any field as mandatory input		
Bi-synchronization with Microsoft Outlook		
Full text search for financial, case/matter, documents, email		
Custom Report Writer		
Desktop Environment: Microsoft Windows XP, Vista		
Network Operating System: MS Windows 2007		
Security by user down to record or tab		
Client Rolodex/Contact Database	**Y/N**	**Remarks**
Centralized "rolodex" that keeps the latest information on file		
Notes field for each contact entry		
Case/Matter Database	**Y/N**	**Remarks**
Unlimited number of cases/matters		
Matter deletion requires confirmation, auditing		
Pull-down lists for rolodex data		
Case/matter number assignment either automatic or manual		
Case/matter number structure alpha/numeric		
Case/matter lookup table by name, client, number, attorney		
Ability to keep case captions history as case progresses		
Ability to define and keep general case information by practice group		
Ability to track different phases in the life of a case		

CASE/MATTER MANAGEMENT FUNCTIONS		
Ability to document final disposition of the case		
Ability to send reminders, alerts to attorneys of active and closed cases		
Ability to handle cases in multiple jurisdictions		
Ability to handle multiple plaintiffs for single case		
Ability for two levels of matters for same client		
Budgeting		
Cost tracking		
Time tracking		
Document Generation	**Y/N**	**Remarks**
Merge with Microsoft Word 2007 (boilerplate documents, provided by the firm)		
Law firm 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 preset dates		
Auto-merge on preset events		
Calendar/Tickler	**Y/N**	**Remarks**
Calendar appointments		
"Rules-based" calendaring system; law firm will provide rules		
Calendar assignments by one user and/or all in a practice group		
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 case, by client		
Print calendars by attorney, by group, by case, by client		

CASE/MATTER MANAGEMENT FUNCTIONS		
History of calendar appointments rescheduled		
Need audit trail of date entries, modifications		
Print out either appointments, deadlines, tasks or all with select period range		
Ability to produce a trial schedule		
Case/Matter Notes/Diary	**Y/N**	**Remarks**
Automatic time, date, user stamp		
Free form entry with no restrictions		
Automated diary entries for certain events		
Ability to log personal events		
Timekeeping	**Y/N**	**Remarks**
Ability to designate timekeeper roles by case (primary attorney, secondary attorney)		
Ability to designate different timekeeper roles by event		
Ability to transfer cases and events to other timekeepers		
Reports	**Y/N**	**Remarks**
Case/Matter expense tracking & reports		
Time tracking & reports		
Statute of limitation report		
Conflict of interest check		
Case/Matter archive with reporting		
Document generation history report		
Query on any and all fields		
Case/Matter export capabilities		
Integration with Crystal Reports and/or R&R Report Writer		
E-mail Interface	**Y/N**	**Remarks**
Microsoft Outlook - how is email sent & received		
Calendar alerts sent via e-mail		
Ability to drag & drop received documents/attachments directly to matter (explain)		

CASE/MATTER MANAGEMENT FUNCTIONS		
Other Requirements	**Y/N**	**Remarks**
File room records management		
Download info to laptop with synchronization capabilities (explain what info is synchronized)		
PDA integration with Blackberry; bidirectional synchronization capabilities (explain what info is synchronized)		
Web interface (explain)		

DOCUMENT MANAGEMENT SYSTEM REQUIREMENTS		
	Y/N	**Remarks**
Integration with Case/Matter Management System		
Profiling of internally generated documents – auto profile based on defaults		
Ability to profile emails and attachments in native format		
Import electronic documents and directories with drag & drop ease		
Ability to profile scanned documents directly from scanner and/or digital copier/multifunction device		
Ability to make documents read-only		
Ability to link one document to multiple matters		
Ability to relate documents		
Ability to create document types by practice area		
History of document modification (who, what, when)		
Check in / check out documents		
Version control - max number of versions?		
Full-text indexing of documents, including PDF format		
Full-text and meta data search, including Boolean search		
Email search		
OCR search		
Save last search(es)		
Document level / group level security		

DOCUMENT MANAGEMENT SYSTEM REQUIREMENTS		
Document viewer capabilities		
Ability to access documents remotely		
Ability to “briefcase” / organize documents and save to local computer / laptop		
Ability to work off-line with local drive document storage / echo		
Synchronization with voice mail messages		
Synchronization with faxes		
Synchronization with digital dictation		
Report writing capabilities		
Easy to customize profile(s), report(s)		
Native application access		
Collaboration capabilities		
Records management capabilities		
Archiving capabilities		

FINANCIAL MANAGEMENT REQUIREMENTS		
Overall System Requirements	**Y/N**	**Remarks**
New Client/Matter intake form with electronic routing		
Integration with MS Word		
Add custom fields & customize field descriptions		
Annotated & customized help screens		
Inquire on unbilled time & costs		
Inquire on billed time & costs		
Matter details		
Time Keeping & Data Entry	**Y/N**	**Remarks**
Password security		
On-line editing of input data		
Immediate verification of attorney number, client/matter numbers, work/action codes, task-based billing codes		

FINANCIAL MANAGEMENT REQUIREMENTS		
Controls & audit trails		
Alternate billing rates by attorney, by client, by matter with ability to override during time input		
Alphabetic work or action codes allowing an abbreviated narrative entry. Multiple codes for a single entry		
Ability to code the time transaction by category/task per UTBM task-billing parameters. A separate field for this purpose is desirable		
Ability to pop up appropriate task-based codes for the UTBM code set, the client and/or practice area		
Unlimited narrative		
Spell checking on narrative		
Ability to use full word processing techniques during entry of narrative. Examples include word wrap, reverse word wrap, character insert, delete, etc.		
Ability to enter a "No charge" time entry and print "No Charge" on the bill		
Ability to enter the attorney number and date one time for each group of time entries		
Ability to duplicate the previous client & matter number for a new entry		
Ability for corrections prior to posting		
Ability to use a "timer" for individual time entries		
Ability to display detail time entries by matter at any time		
Ability to monitor and report on write ups and write downs		
Option to compare actual hours entered with predetermined time sheet control details		
Ability to split time and costs to multiple clients		
Ability for attorneys and secretaries to view client ledgers		
Billing	**Y/N**	**Remarks**
Password security		

FINANCIAL MANAGEMENT REQUIREMENTS		
Ability to provide a preliminary bill showing all unbilled time and costs, basic management information, accounts receivable balances, trust accounting balances and attorney fee bill allocations. The pre-bill must have space for allocation and other adjustments so that no other document is required for billing instructions		
Ability to bill specific time and cost entries or leave out specific entries		
Ability to have separate cutoff dates for fees and costs		
Ability to print time logs by city/office location		
Ability to display preliminary bill or inquire as to the status of unbilled time and costs and other information		
Ability to print an aged work-in-process (unbilled time and costs)		
Flexible and easy final bill formatting		
Time keeper initials should be able to print with each time entry, if selected through a code in the matter record		
The final bill must allow for three to four lines of matter description		
The final bill should have the ability to show fees and costs to date is selected to do so by a code in the matter record		
The final bill must print an attorney time recap, if selected to do so by code in the matter record		
The final bill must be able to print a category/task summary (defined by the client) if selected to do so by a code in the matter record		
The fees must be optionally sortable by category/task codes		
The final bill must be able to print to a file for optional modification by MS Word		
The software must allow for billing of costs only		
An alternate matter billing address would be desirable		
Bill preparation should be available on demand, by matter, by client, by billing attorney, or by billing cycle		
Error correction procedures should be described. The ability to reverse final bill fee and cost entries would be desirable provided that the general ledger and management reports would be appropriately adjusted		
Ability of the computer to assign bill numbers		

FINANCIAL MANAGEMENT REQUIREMENTS		
Ability to re-bill clients if there are no entries, but balance forward amount		
Ability to re-bill clients with a threshold date and calculate late fees on balances. Only want our hard costs passing to the G/L as client advances		
Manual cash allocation with all expenses being paid first on all outstanding client invoices at time of cash receipt then apply to oldest fee invoice coming forward		
Ability to save detail time and costs by client, matter, big range etc.		
Ability to handle states sales tax for fees and work costs		
Ability to charge interest for delinquent clients		
LEDES capability		
Accounts Receivable	**Y/N**	**Remarks**
Password security		
Ability to print and/or display individual client accounts receivable ledger on demand		
Ability to provide reminder bills for delinquent clients		
Ability to age receivables by bill number, matter number and client in categories of current, 30, 60, 90, 120, and over 120 days with the added capability to produce the same report by attorney. Date of last payment should also be shown		
Ability to provide an accounts receivable billing and payment history audit trail		
Ability to retrieve copy of actual bill sent to client after internal reallocation of time credit		
Cost Recovery	**Y/N**	**Remarks**
Ability to interface with cost recovery devices for postage, fax, mail, copies, federal express, etc. (Which systems?)		
General Ledger	**Y/N**	**Remarks**
Password security		
Ability to handle a cash or modified accrual basis of accounting		
Ability for each of the other modules, where appropriate, to post directly to the general ledger		
Recurring general ledger journal entries		

FINANCIAL MANAGEMENT REQUIREMENTS		
Controls and audit trails appropriate to meeting the requirements of generally accepted accounting procedures and practices		
User-defined financial statement formats		
Ability to produce comparative and/or budget financial statements		
Ability to produce branch office and consolidated financial statements		
Ability to inquire on specific general ledger account numbers and then subsequently printing and/or displaying the detail within the account		
Ability to store detailed debit and credit transactions for up to one-year		
Preparation of financial statements on demand		
Ability to export data to popular spreadsheet software applications		
Accounts Payable	**Y/N**	**Remarks**
Password security		
Controls and audit trails		
Ability to print general expense and trust account/client cost checks		
Incorporation of the payee name and address file		
Ability to post multiple expense accounts on one general expense check		
Ability to post multiple matters on one check		
Integration with a general ledger is mandatory		
Manual check entry capability		
Ability of authorized secretaries to enter check requests through their workstation		
A check reconciliation subsystem		
Aged accounts payable and/or cash requirements reports		
Scanning for accounts payable		
Trust Accounting	**Y/N**	**Remarks**
Password security		
Controls and audit trails		
Integration with a general ledger is mandatory		

FINANCIAL MANAGEMENT REQUIREMENTS		
Must conform with State Bar regulations		
Report Writer	**Y/N**	**Remarks**
Password security		
Ease of operation		
User-defined report titles		
User-defined column or headings		
Automatic page numbering		
Processing statistics by period, records selected, records processed		
Reporting	**Y/N**	**Remarks**
Legal fees collected — shows fees collected for the month and YTD for each matter within client and for each responsible attorney, the branch, and the firm		
The above report by type of law		
Income report showing the distribution of fees by billing and working attorney		
Working Timekeeper reports with Cash allocation and fee percentages		
Master matter listing		
Time and analysis reporting — showing global and non-billable time by attorney and further categorized by type of billable and non-billable time. Overall totals are desired		
Cost comparison report — shows non-cash costs recovered vs. expensed		
Aged work-in-process report (fees and costs)		
Aged WIP by working attorney and by billing attorney with aged WIP and A/R accordingly		
Uncollected funds report showing work in process fees and costs plus the accounts receivable fees and costs and then the overall uncollected funds. Report should be available by attorney client and matter		

TRAINING REQUIREMENTS

Professional training is critical to the success of this project. The firm 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 firm 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.

The Vendor should 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 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 firm will transition into the new system. This transition will cause the firm an initial drop in productivity as attorneys and staff get used to the new system. As the firm progresses 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.

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

Additional Issues to Address

Licenses – Number of Users

For purposes of this RFP, there are [list number of total end users] end users. Vendors must provide licensing costs and describe their licensing agreement. Also, please include licensing costs for additional users. 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 firm will require various levels of user configuration to accommodate the firm's various practice areas. In your proposal, please provide cost ranges for the types of configurations and services your company will perform for the firm.

Data Conversion

As discussed earlier in this RFP, the firm currently uses the [name of current financial management system] financial management system. In your proposal, please state if you have experience in converting [name of current financial management system] systems, the cost structure for data conversion, and the methodology for data conversion.

Upgrade Management

Should the firm 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.

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 firm.

Maintenance and Support

The Vendor must ensure that all deliverables are subjected to reasonable quality assurance tests prior to their delivery to the firm, or if requested by the firm 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 firm's hardware platforms conducted by the firm 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 firm generally operates Monday through Friday 8:30 a.m. to 5:30 p.m. EST. Vendors must provide the firm with 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 firm 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 firm and the firm's IT) 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 firm's intent to have its Administration and IT staff trained and involved in the implementation of the system. The firm prefers a staggered approach to the implementation.

The system will introduce new methods of storing client and matter information. Training for a new system usually takes several days because it is a much more complex system than document management. The rollout for a system is often estimated three to six months, but in reality, the full implementation (including customization) for the firm may take a year before the various practice groups have been customized and all users are on board. In your proposal, please provide detailed recommendations on how the practice management system should be rolled out to the firm.

The plan will be refined with the firm 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 firm resources required to implement the plan. The firm's resources 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.

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 firm. 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 firm'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 firm'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 law firm of [Name of Firm] a computerized practice management system (financial management, case/matter management, document management), including software, installation, integration, data conversion, training, and support and maintenance.

Preparation of Proposal

- All proposals must be submitted in PDF format, 8 ½" x 11".
- No proposal shall be altered, amended, or withdrawn after the specified proposal due date and time.
- Periods of time, stated as number of days, shall be calendar days.
- It is the responsibility of the Vendors to examine the *Request for Proposal* package and seek clarification of any item or requirement that may not be clear and to check all responses for accuracy before submitting a bid.

Withdrawal or Amendment of Proposal

At any time prior to the specified proposal due date and time, a Vendor (or designated representative) may withdraw the proposal. The withdrawal must be requested in writing. Vendors may amend the proposal, but all amendments to proposals must be completed *and* delivered by the specified proposal due date and time.

Tentative Schedule of Events

The RFP will be issued to selected vendors the week of [due date for proposals - give them 3 or 4 weeks]. ***Vendors must provide their written responses by [absolute deadline]***. The firm anticipates selection of a vendor in [month] with the implementation of the system rollout beginning in [month] . The following is a tentative schedule of events for this project:

RFP Mailed to Prospective Vendors. . . . . [dates]
Proposals Due to Firm.. . . . . [dates]
Initial Review of Proposals.. . . . . [dates]
Selected Vendor Presentations.. . . . . [dates]
System Selection, Negotiation. . . . . [dates]
System Implementation Begins. . . . . [dates]

Deadline for Submission

A response will be considered to have met the deadline for submission if the response is actually received on [date to be received], in the firm's office in [location of firm]. It is a requirement that each responding vendor send one complete copy of its response (proposal and any collateral material) directly to the firm's office.

Proposals may be mailed or emailed to:

[Project contact name, street address, phone, email]

Lateness or Noncompliance

In the interest of a timely and demonstrably fair process, late submissions will not be accepted, except in very extraordinary circumstances where lateness is beyond the control of the vendor. Incomplete, qualified or conditional responses will not be accepted. However the firm reserves the right, without prejudice to its right, to reject responses for noncompliance, to request clarification where, in the firm's opinion, the vendor's intent is unclear.

Irrevocable

Responses must be submitted on a fixed price basis and shall remain irrevocable for 90 days following the deadline for submission noted above except in the case of a material decrease in price which shall be passed through to the firm.

Questions

If you have any questions concerning the content of this RFP or wish to clarify any information, please contact [Name, phone, email of Project Coordinator]. Each vendor should, forthwith upon receipt of the RFP, designate a single representative with whom the firm 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 firm. The vendor shall remain fully liable under its contract with the firm regardless of any subcontract and regardless of the firm's approval of any subcontractor.

Return of RFP

If, notwithstanding having expressed an interest in receiving the RFP, a vendor determines that it will not submit a response or for any reason fails to submit a response, such vendor agrees, by its initial acceptance of this document, forthwith to return the RFP and all copies or any portion thereof to the firm.

Limitation of Liability

The firm will not furnish remuneration for preparation of proposals. Receipt of proposals from vendors in no way obligates the firm to the vendor. The firm reserves the right to reject any and all proposals.

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.

PROPOSAL CONTENT

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 Firm] in proposal evaluation, Vendors must provide the following material in their proposals.

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
	Vendor Quotation
	Additional Required Software
	Recommended Hardware, Software, Network, if needed
Section Five -	Terms and Conditions
	Sample Vendor Contracts/Agreements

Company history: please enclose a description of your company, organization, history, qualifications and experience in the legal case/matter management field. Please describe the kinds of service and support provided by your company, all of its certifications, and provide summary resumes of key technical staff personnel, including their relevant certification, who would most likely be responsible for initial and ongoing service and support.

Pricing: Prices on all items and services offered (line item pricing).

Project Schedule: An estimated and detailed timetable for implementation. Include milestones for delivery, installation and setup, conversion from the present system to the proposed system.

Leasing: Purchase alternatives, such as cash, lease, net, etc.

References: At least five (5) references for which you have completed a similar installation that can be contacted. Please include the type of case/matter management system referenced to the type of network, including topology, operating system, number of workstations, and various practice areas. The names, titles, and telephone numbers of contacts for each reference should be given. Unless you specify otherwise, the firm will be free to contact these references.

Warranty: Detailed warranty & maintenance information, including on-site service policies.

Training: Training information and course outlines.

Evaluation Criteria

The firm 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 firm's goals, including immediate needs, long-range plans, and current problems;
- Ability to implement successful installations;
- Amount and quality of on-site installation, system training and maintenance support;
- The number of referenceable, comparable systems installed;
- Financial stability of vendor;
- Responsiveness to ongoing technical support questions;
- Price competitiveness of proposal;
- Qualification of key staff;
- Proposed system matched to RFP requirements.

The selected vendor will be asked to work with the firm’s current Systems Integrator in implementing the practice management system with the following:

- Selected desktop operating system (Microsoft Windows Vista);
- Selected word processing suite (Microsoft Office 2007);
- Selected electronic mail system (Microsoft Outlook 2007);
- Selected network operating system (Microsoft Windows Server).

Oral Presentation By Proposers

In the process of reviewing proposals using the evaluation criteria above, the firm will select several vendors to invite to the firm for an oral presentation of the system and the implementation in the firm. Not all vendors will be invited to participate in this presentation. All vendors will be notified at the same time of the firm’s decision. There shall be no charge to the firm for preparation of the proposal nor for participating in the presentation.