

**SUBMITTAL TO THE BOARD OF SUPERVISORS
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA**

256



FROM: County Counsel

SUBMITTAL DATE:
June 2, 2015

SUBJECT: Approval of the Agreement with West Publishing Corporation dba Thomson Reuters for the purchase of ProLaw Records Management and Billing Software, without Securing Competitive Bids, for Five Years, All Districts. [up to \$154,600 Aggregate] and Budget Adjustment for FY 2014-2015 for County Counsel; Appropriation for Contingency 100%


RECOMMENDED MOTION: That the Board of Supervisors:

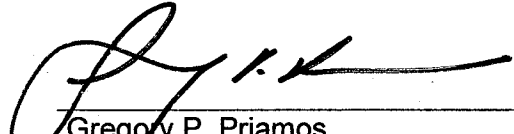
1. Approve and execute the agreement with West Publishing Corporation dba Thomson Reuters for the purchase of ProLaw records management and billing software, up to the aggregate amount of \$154,600, for five years;
2. Authorize the Purchasing Agent, in accordance with Ordinance No. 459, to sign amendments that do not change the substantive terms of the agreement or provide for the renewals and increases not to exceed 5% annually, as approved by County Counsel; and
3. Approve and direct the Auditor-Controller to make budget adjustments to appropriations for County Counsel in the amount of \$98,464 as follows on Schedule A.

BACKGROUND:

Summary

Continued on Page 2


Steve Reneker
Chief Information Officer

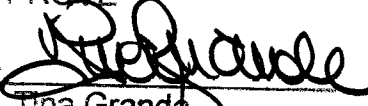

Gregory P. Priamos
County Counsel

FINANCIAL DATA	Current Fiscal Year:	Next Fiscal Year:	Total Cost:	Ongoing Cost:	POLICY/CONSENT (per Exec. Office)
COST	\$ 98,464	\$ 13,025	\$ 154,600	\$ 0	Consent <input type="checkbox"/> Policy <input checked="" type="checkbox"/>
NET COUNTY COST	\$ 98,464	\$ 13,025	\$ 154,600	\$ 0	

SOURCE OF FUNDS: 100% Appropriation for Contingency
Budget Adjustment: Yes
For Fiscal Year: 14/15-19/20

C.E.O. RECOMMENDATION:

APPROVE


BY: 
Tina Grande

County Executive Office Signature

MINUTES OF THE BOARD OF SUPERVISORS

On motion of Supervisor Washington, seconded by Supervisor Benoit and duly carried by unanimous vote, IT WAS ORDERED that the above matter is approved as recommended.


Ayes: Jeffries, Tavaglione, Washington, Benoit and Ashley
Nays: None
Absent: None
Date: June 16, 2015
xc: Co.Co., Purchasing, Auditor

Kecia Harper-Ihem
Clerk of the Board
By: 
Deputy

Prev. Agn. Ref.: | District: All | Agenda Number:

3-19

PURCHASING & FLEET SERVICES: Lisa Brandl, Director

FISCAL PROCEDURES APPROVED
PAUL ANGULO, CPA, AUDITOR-CONTROLLER
BY:  6/4/15
Susana Garcia-Bocanegra
Mental Concurrence

A-30
 Positions Added
 4/5 Vote
 Change Order

SUBMITTAL TO THE BOARD OF SUPERVISORS, COUNTY OF RIVERSIDE, STATE OF CALIFORNIA
FORM 11: Approval of the Agreement with West Publishing Corporation dba Thomson Reuters for the purchase of ProLaw Records Management and Billing Software, without Securing Competitive Bids, for Five Years, All Districts. [up to \$154,600 Aggregate] and Budget Adjustment for FY 2014-2015 for County Counsel; Appropriation for Contingency 100%
DATE: June 2, 2015
PAGE: 2 of 3

BACKGROUND:

Summary (continued)

The Office of County Counsel strives to work more effectively and proficiently, and to provide service to our clients by creating significant efficiencies and enhanced ability to supervise and manage workload by attorney, paralegal and secretary. The ProLaw Records/Time/Billing Management licensed software will provide County Counsel a searchable repository to store and index all of its agreements, contracts, mou's, opinions, case files and related documents.

County Counsel is currently using several different procedures and software programs to research case law, calendar, create legal documents and time management/billing/invoicing. West Publishing Corporation (dba Thomson Reuters) has integrated all our needs into one solution. It will maximize our efficiency and productivity by managing entire matter lifecycles, automating processes, sharing knowledge for reuse, and will eliminate rework, increasing time management savings, accuracy in processing the data and streamlining processes to increase workflow efficiency across the organization

Appropriation adjustments in the amount of \$86,060 to cover the expense of purchasing costs are one-time start-up expenses that will not re-occur in future years. There will be an annual maintenance services charge for the ProLaw licensed software of \$8,062 and an annual subscription fee of \$4,312 for access to Westlaw Legal Calendaring Rules for F/Y 15/16 due and payable with purchase price for a total of \$98,464. Maintenance and subscription costs may increase up to 5% annually but can be terminated with thirty (30) days' notice if no longer needed and pro-rated amount for unused services will be refunded.

Impact on Residents and Businesses

There is no negative impact on the residents and businesses of Riverside County with the purchase and use of this software.

Contract History and Price Reasonableness

Thomson Reuters is providing a discount of 15% off their original quoted price. The proposal includes all professional services necessary to configure and set up the licensed software as well as provide training to Counsel staff on the software and its uses.

ATTACHMENTS:

- A. SCHEDULE A**

SUBMITTAL TO THE BOARD OF SUPERVISORS, COUNTY OF RIVERSIDE, STATE OF CALIFORNIA
FORM 11: Approval of the Agreement with West Publishing Corporation dba Thomson Reuters for the purchase of ProLaw Records Management and Billing Software, without Securing Competitive Bids, for Five Years, All Districts. [up to \$154,600 Aggregate] and Budget Adjustment for FY 2014-2015 for County Counsel; Appropriation for Contingency 100%

DATE: June 2, 2015

PAGE: 3 of 3

SCHEDULE A
FY 14/15

Decrease appropriations:

10000-1109000000-581000	Appropriations for contingency	\$98,464
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Increase appropriations:

10000-1500100000-546280	Capitalized Software	\$98,464
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	Total	\$98,464
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CUSTOMER AGREEMENT**CUSTOMER AGREEMENT**

This Customer Agreement ("Agreement") is entered into this 30th day of June, 2015 (the "Effective Date"), by and between **West Publishing Corporation** doing business as **Thomson Reuters Elite ("Elite")**, with its principal place of business at 800 Corporate Pointe, Suite 150, Culver City, CA 90230 and **County of Riverside - Office of County Counsel ("Customer")**, with its principal place of business at 3960 Orange Street, Suite 500, Riverside CA. 92501.

1. Scope of Agreement.

Except to the extent expressly provided otherwise, this Agreement shall apply to all products and services that are provided by Elite to Customer during the term of this Agreement including software that is owned by Elite or third parties and licensed by Elite to Customer. This Agreement includes the following exhibits and addenda which are attached hereto and incorporated herein:

- Software and Fees Schedule (the "Fees Schedule")
- Maintenance Addendum
- Exhibit A – Notice Contacts

2. Definitions.

2.1 Definitions. As used in this Agreement, the following terms shall have the meanings set forth below:

"Annual Maintenance Charge" shall have the meaning set forth in Section 3.2 of the Maintenance Addendum.

"Competitor" shall mean a third party that is regularly engaged in the business of developing or marketing software that performs the same or similar functions as one or more of the modules of the Elite Software implemented by Customer.

"Customizations" shall mean customizations, configurations or other modifications made in or to the application layer of the Software.

"Documentation" shall mean the documentation (provided in electronic form with the Software) that sets out the operating descriptions for the Software and provides instructions for end users on use of the Software. The Documentation does not include any representation, warranty or condition made by a representative of Elite which is in addition to or inconsistent with the Documentation.

"Excluded Item" shall have the meaning set forth in Section 7.2.

"Fees" shall mean License Fees, Service Fees, Subscription Fees and Annual Maintenance Charges.

"Initial Term" shall have the meaning set forth in Section 10.1.1.

"Installation" shall mean the installation of the unmodified Software by Elite in Customer's environment following Customer's verification that the environment conforms to the PSR and prior to any customization or configuration of the Software.

"License Fees" shall mean the fees for the Software set forth in the Fees Schedule.

"Live Operation" shall mean the first date when Customer commences production use of any of the Elite Software.

"Named User" shall mean an individual employee of Customer authorized by Customer to use the Software, regardless of whether the individual is actively using the Software at any given time. The Fees Schedule will set forth the number of Named Users allowed and each Named User must be registered with Elite and have a unique log-in.

"Production Server" shall mean the server(s) on which the production instance of the Software operates.

"Project Documents" shall mean a project plan, statement of work, change order or addendum executed by the parties that describes services to be performed hereunder. Upon execution, a Project Document becomes part of this Agreement and may not be modified except by written agreement of the parties.

"PSR" shall mean the current Product System Requirements document applicable to the version of the Elite Software in use by Customer.

"Service Fees" shall mean the fees payable to Elite for conversion, implementation, training or other services, other than Maintenance Services, provided under this Agreement.

"Software" shall mean the software listed in the Fees Schedule. The Software consists of software owned by Elite ("Elite Software"). If indicated on the Fees Schedule, the Software also includes software that is owned by third parties that is sublicensed by Elite to Customer pursuant to this Agreement under rights granted by third parties to Elite ("Third Party Software"). Software includes Subscription Software, which Subscription Software may be either Elite Software or Third Party Software as indicated in the Fees Schedule.

"Subscription Fees" shall mean the fees for the Subscription Software set forth in the Fees Schedule.

"Subscription Software" shall mean the software listed under the Subscription Software section of the Fees Schedule.

"Subscription Term" shall be as defined in Section 10.1.1.

"Timekeeper" shall mean any person whose time is entered into the database accessed by the Software and who enters time of at least ten (10) hours per month on an annualised basis.

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A "User" or "Seat" is defined as an active log-in or concurrent active log-in or concurrent user of the Software. References in this Agreement to "User(s)" shall include "Seat(s)".

"Warranty Period" shall mean the ninety (90) day period following Live Operation during which the warranties made by Elite under this Agreement (except the warranties under Section 8 and warranties with respect to Subscription Software) are in effect. The warranties in Section 8, Indemnification, shall be in effect throughout the term of this Agreement. With respect to Subscription Software only, the Warranty Period shall begin on the first day of the Initial Term.

"Written Deliverables" shall mean technical specifications, design documents, and any other documents provided by Elite hereunder.

3. Fees and Payment.

3.1 Fees. The Software and Services are listed in the Fees Schedule attached hereto. Customer agrees to pay Elite the Fees set forth in the Fees Schedule as provided in this Agreement.

3.2 All invoices are due thirty (30) days from date of issuance of invoice. In the event that Customer in good faith disputes all or any portion of any invoice that Elite submits to Customer, Customer may withhold such amount but in such case shall notify Elite in writing of the amount disputed and its reason for disputing such amount within thirty (30) days of receipt of an invoice and shall immediately pay any amount which is undisputed. Elite may withhold and or delay delivery of Software or services if Customer fails to comply with this Section 3.1. Invoices may be delivered by electronic mail or other electronic means to Customer and Customer hereby consents to such delivery. Invoices should be sent to the email address specified on Exhibit A.

3.3 All taxes and duties attributable to this Agreement, including sales, use and any other tax assessed by local, state or federal authorities, except taxes relating to Elite's income, shall be borne by Customer. Customer shall reimburse Elite for any such taxes and duties payable by Elite.

3.4 All reimbursable costs consisting of but not limited to reasonable travel, accommodation and related incidental expenses are the responsibility of Customer and will be invoiced monthly and due thirty (30) days from date of issuance of invoice. Elite will provide copies of receipts for expenses that exceed (USA) \$50.00 upon request of Customer.

4. License.

4.1 Grant of License and Delivery.

4.1.1 Grant of License – Software. In consideration of the License Fees payable hereunder, Elite hereby grants to Customer, and Customer hereby accepts from Elite, subject

to the terms and conditions of this Agreement, a nonexclusive, nontransferable (except as provided in Section 11.7) right and license to use object code copies of the Software (including the Documentation), which Software Elite shall deliver to Customer. For purposes of this Section 4.1.1 only, Software shall not include Subscription Software.

4.1.2 Grant of License – Subscription Software. In consideration of the Subscription Fees payable hereunder, Elite hereby grants to Customer, and Customer hereby accepts from Elite, subject to the terms and conditions of the Agreement, a nonexclusive, nontransferable (except as provided in Section 11.7) right and license to use object code copies of the Subscription Software (including its Documentation) solely during the Subscription Term, which Subscription Software Elite shall deliver to Customer. The foregoing license shall end upon expiration or termination of the Subscription Term.

4.1.3 Customer is entitled solely to a non-exclusive use of the Software under the terms and conditions of this Agreement. Customer acknowledges that there is no transfer of title or ownership of the Software to Customer. Customer hereby acknowledges and agrees that title to the Software and the Documentation and any copies, modifications, alterations or derivative works thereof, and title to any existing or future copyrights, trade secrets, and other proprietary rights embodied therein shall vest and/or remain exclusively with Elite and the third party owners thereof.

4.2 Restrictions on Use.

4.2.1 If a total number of Timekeepers or Users is indicated in the Fees Schedule for the Software, then the Software may not be used by more than such specified number of Timekeepers or Users, as applicable. If the Fees Schedule indicates that the Software is licensed on a Named User basis, then the license granted herein is limited to use by the Named Users. Concurrent usage or sharing of a Named User log-in by multiple users is not permitted and Customer is responsible for ensuring that the Named Users are maintained for the Software and that all actual users are licensed Named Users. However, Customer can transfer a log-in from one Named User to another Named User by notifying Elite of the new Named User.

4.2.2 Customer may not use the Software to provide data management or processing services for third parties nor allow third parties to use the Software. Customer shall not transfer, sublicense or otherwise assign its rights in the Software to any third party except pursuant to an assignment of this Agreement pursuant to Section 11.7. In the event that Customer exports the Software outside of the U.S.A., Customer will be responsible for complying with U.S.A. export law.

4.2.3 Software may not be copied, duplicated or otherwise reproduced, in whole or in part, except that Customer may make copies for back-up purposes as necessary. Customer may reproduce the Documentation for internal use only. Customer shall reproduce and include the copyright notice

CUSTOMER AGREEMENT

indicating Elite's, or the respective third party's, ownership on any copy or portion of the Software or Documentation.

4.2.4 Customer shall not attempt, by decompilation, reverse-engineering, disassembly, or any other method, to create or derive the source programs or any part thereof from the object program or from other information made available under this Agreement.

5. Confidentiality.

5.1 Customer acknowledges and agrees that the Software and the Documentation constitute a valuable proprietary product and trade secret of Elite embodying substantial creative efforts and confidential information, ideas, and expressions. The Software and Documentation, together with the terms of this Agreement and such other information as Elite may designate in writing as confidential, as provided below, shall be referred to as the "Elite Confidential Information". Any information, other than the Software and Documentation designated by Elite as confidential shall not be deemed to be Elite Confidential Information, however, to the extent that such information consists of information that: (a) Customer already possesses without obligation of confidentiality, (b) Customer develops independently, (c) Customer receives without obligation of confidentiality from a third party, or (d) an authorized representative of Elite makes publicly available. Notwithstanding the preceding sentence, nothing in this subsection shall operate to exclude the Elite Software or Documentation from Elite Confidential Information. Customer will take reasonable steps to ensure that the Elite Confidential Information is not used or disclosed except as expressly permitted by this Agreement. Customer will not permit any third party access to, in any manner, the Elite Confidential Information, except as provided in this Agreement. Customer may permit its independent contractors access to the Elite Confidential Information to the extent necessary for such contractor's provision of services to Customer if such contractor executes a confidentiality agreement with Customer or Elite which prohibits the contractor from using or disclosing the Elite Confidential Information; provided, however, that such independent contractors may not include any Competitor. Customer agrees to ensure that Customer's employees are prohibited from taking any action otherwise prohibited to Customer under this Agreement, and to notify Elite promptly and in writing of the circumstances surrounding any possession, use or knowledge of the Elite Information or any part thereof known to Customer that is prohibited hereunder.

5.2 Customer will not alter or remove any copyright or proprietary rights notice or identification which indicates Elite's or the third party's ownership from any part of the Software, it being expressly understood and agreed that the existence of such copyright notice shall not be construed as an admission or presumption that publication of the Software has occurred.

5.3 Elite acknowledges in the course of providing services at Customer's site(s) that Elite may have access to Customer's client list, information of or pertaining to Customer's clients, Customer's billing information and practices and financial

records that constitute Customer's confidential information ("Customer Confidential Information"). Elite will take reasonable steps to ensure that Customer Confidential Information, received by Elite pursuant to this Agreement, is not disclosed or used except as necessary for the performance of this Agreement. Elite agrees to ensure that Elite's employees, agents, independent contractors and guests are prohibited from taking any action otherwise prohibited to Elite under this Agreement, and to notify Customer promptly and in writing of the circumstances surrounding any possession, use or knowledge of Customer Confidential Information or any part thereof which is prohibited hereunder known to Elite. Customer Confidential Information shall not include information which: (a) consists of ideas, concepts, know-how or techniques relating to the installation, configuration, implementation, enhancement, modification or improvement of the Software; (b) Elite already possesses without obligation of confidentiality, (c) Elite develops independently, (d) Elite receives without obligation of confidentiality from a third party, or (e) becomes publicly available without breach of this Agreement.

5.4 Each party acknowledges that should it breach its obligations under this Section 5 the other party may suffer harm which may not be adequately compensated by monetary damages. In such event, the non-breaching party may, in addition to seeking monetary damages, seek equitable relief to enjoin such breach.

6. Services.

6.1 Description of Services. Any services to be provided by Elite to Customer are set forth in the Fees Schedule. A detailed breakdown of those services may be set forth in a separate Project Document. Elite has no obligation to provide services except as specifically set forth in this Agreement or a Project Document.

6.2 Customer Obligations. When Elite performs any services at Customer's facility, Customer shall be responsible for providing a safe and appropriate work space and access to all equipment, materials and related resources that may be reasonably required by Elite for timely performance of its obligations under this Agreement. Customer will make remote access to the Software available, using the current Elite approved remote access method(s), in order to allow Elite to provide services hereunder. Customer shall provide to Elite, in a timely manner, any information, assistance, review, feedback or approvals that are the responsibility of Customer.

6.3 Project Managers. Each party shall inform the other of the individual appointed to serve as its project manager ("Project Manager"). The Project Managers shall serve as the primary contact for the services to be provided hereunder. Each party shall be responsible for ensuring that its Project Manager dedicates sufficient time to fulfill that party's respective obligation under this Agreement. Customer acknowledges that a change of Project Managers by Customer may result in delays in the services.

6.4 Customizations and Written Deliverables shall be deemed incorporated into the Elite Software for the purposes of the provisions of the Agreement regarding license, restrictions on use, confidentiality and infringement indemnification but not for purposes of Maintenance Services.

6.5 Non-solicitation of Employees. Elite and Customer each agree that it will not induce any employee of the other to terminate his or her employment relationship with the other party. In addition, Elite and Customer each agree that it will not knowingly employ or offer employment to any employee of the other who has performed any services related to this Agreement within one year of the provision of such services.

7. Warranties and Remedies.

7.1 Warranty. Elite warrants that during the Warranty Period the Software will substantially conform to the Documentation when operated in the environment specified by Elite in the PSR.

7.1.1 Warranty – Services. Elite warrants that (i) it will provide the services set forth in this Agreement or a Project Document hereunder consistent with industry standards and in accordance with this Agreement or Project Document, and (ii) that any Customizations provided hereunder will conform in all material respects to the specifications for such Customizations contained in this Agreement or a Project Document for a period of ninety (90) days following the first date of production use of such Customizations.

7.2 Exclusions. Elite will not be responsible to the extent that the Software fails to operate as warranted nor for any other breach hereof due to one or more of the following "Excluded Items:" (1) the failure of software not provided by Elite (for example, operating system software) to perform in accordance with its specifications, (2) failure of hardware to perform in accordance with its specifications, (3) Customer's negligence or fault, (4) Customer's failure to follow the instructions set forth in the Documentation (5) Customer's failure to comply with the PSR, (6) material changes in the operating environment not authorized by Elite, (7) modifications to or changes in the Software not made by Elite, including without limitation those made by Customer using tools provided by Elite, or (8) Customer's failure to implement, maintain and validate a proper and adequate backup and recovery system for the Elite database or user files. It is Customer's responsibility to implement, maintain and validate a proper and adequate backup and recovery system. If a reported failure or breach is caused by an Excluded Item, Elite reserves the right to charge Customer for its work in investigating such failure or breach. Customer may thereafter engage Elite at its discretion to assist Customer in resolving such failure or breach on a time and materials basis.

7.3 THE LIMITED WARRANTIES IN SECTIONS 7.1 AND 8.1 ARE EXCLUSIVE AND IN LIEU OF ALL OTHER WARRANTIES. ELITE MAKES NO OTHER WARRANTY, EXPRESS OR IMPLIED. ANY IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, IMPLIED

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WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE EXPRESSLY EXCLUDED.

7.4 Remedies. Customer shall have the following remedies:

7.4.1 Services Remedies. To the extent permitted by law and subject to Section 7.3, Customer's sole remedy for Elite's material breach of its obligations under this Agreement or a Project Document will be to have Elite reperform the defective services and correct the defective Customizations so that they conform to the warranties provided herein. If Elite is unable after a reasonable time to provide conforming services or Customizations, and the services or Customizations relate to the initial implementation of the Software, Customer may terminate the Agreement pursuant to this Section 7.4 if such defective services or Customizations cause the Software to fail to conform to the warranties provided in herein.

7.4.2 Termination for Breach. In the event that Elite materially breaches any of its obligations under this Agreement prior to or during the Warranty Period, including breach of a warranty or warranties provided herein, Customer may terminate this Agreement as provided in this Section 7.4.2. No termination shall occur unless Customer has given written notice in accordance with Section 11.3 hereof to Elite specifying the breach in reasonable detail, and Elite fails to cure the breach, or to submit, to Customer's reasonable satisfaction, a plan for cure, within ninety (90) days of receipt of such notice. Upon such termination, Elite shall provide a refund as provided in Section 7.4.3. This termination right shall extend up to ninety (90) days after the end of the Warranty Period so long as the breach has been reported during the Warranty Period.

7.4.3 Refund Upon Termination. Upon termination by Customer pursuant to this Section 7.4, Elite will refund to Customer all License Fees received by Elite as of the date of termination upon Customer's compliance with Section 10.5.

7.4.4 Refund Upon Termination – Subscription Software. Upon termination by Customer pursuant to this Section 7.4, Customer will receive a refund of the Subscription Fees paid upon Customer's compliance with Section 10.4.

7.5 Exclusive Remedies. The remedies in Sections 5.4, 7.4 and 8.1 (and, if attached hereto, in the Maintenance Addendum) are Customer's exclusive remedies and are in lieu of all other legal or equitable remedies and all liabilities or obligations on the part of Elite for damages (except for bodily injury) arising out of, relating to, or in connection with this Agreement, including, but not limited to, the licensing, delivery, installation, use or performance of the Software or the integration of the Software with other software or hardware.

8. Indemnification.

8.1 Infringement Claims. Elite represents and warrants that it has sufficient right and interest to grant the rights herein. At

CUSTOMER AGREEMENT

its sole expense, Elite shall defend, indemnify and hold Customer harmless from copyright, trade secret and U.S. patent infringement claims based upon the Software in the form delivered by Elite, including paying any judgment, attorney fees, costs and expenses associated with such claim.

8.2 Without limiting its obligations under Section 8.1, in the event a claim of infringement or misappropriation is made against Elite or Customer with respect to the Software, Elite, for the purpose of settling such claim, may, at its option, in respect of such allegedly infringing Software:

- (i) substitute fully equivalent non-infringing software; or
- (ii) modify such Software so that it no longer infringes but remains functionally equivalent.

If, as a result of such claim, Customer or Elite is permanently enjoined from using the Software by a final, non-appealable decree from a court of competent jurisdiction, Elite will take one or both of the actions set forth in (i) and (ii) above or will obtain for Customer at Elite's expense the right to continue to use the Software. If none of these options can be accomplished in a reasonable time or are not commercially reasonable, Elite will refund to Customer the License Fees paid as amortized over a sixty (60) month period from Live Operation upon return of the Software, and, with respect to Subscription Software, Elite will refund the unused prepaid portion of the Subscription Fees, if any, upon return of the Subscription Software.

8.3 Elite's obligation to indemnify Customer pursuant to this Section 8 is contingent upon Elite being given prompt notice and control of, and detailed information with regard to, any such claim, suit or proceeding. Customer shall have the right to participate at its own cost in the defense of any such claim or action through legal counsel of its choosing. Customer shall not settle any such claim or action without Elite's prior written consent.

8.4 This Section 8 contains the entire warranty by Elite and the exclusive remedies of Customer with regard to any claimed infringement arising out of or based upon the Software.

9. Limitation of Liability and Exclusion of Consequential or Incidental Damages.

9.1 Limitation of Liability. Except for liability arising out of or relating to the Maintenance Addendum, in no event shall Elite's, or its officers', employees', suppliers', directors', parent's, or subsidiaries', liability to Customer arising out of or related to this Agreement, or the licensing, delivery, use or performance of the Software or services provided under this Agreement or any breach of this Agreement, whether based on an action or claim in contract or tort, including negligence, strict liability or warranty, except liability for bodily injury, exceed the License Fees paid hereunder; provided, however, that with respect to liability arising out of or relating to an amendment or addendum under this Agreement entered after the Effective Date, such liability shall not exceed the fees paid

pursuant to such amendment or addendum. For the purposes of this Section 9.1 only, "License Fees" shall include any Subscription Fees paid in the one year period preceding the claim.

9.2 Exclusion of Certain Damages. In no event whatsoever shall Elite or its officers, employees or suppliers be liable for consequential, incidental, indirect, or special damages, including, but not limited to, lost profits, lost revenue, lost data, loss of use, failure to realize expected savings, or other commercial or economic loss of any kind or for any claim against Customer by any other party arising out of or in connection with the licensing, delivery, use or performance of the Software provided under this Agreement or the services provided under this Agreement or any breach of this Agreement, even if Elite or its dealer or representative has been advised of the possibility of such damages.

9.3 Allocation of Risks. Customer acknowledges and agrees that the Fees set forth in this Agreement reflect the allocation of risk between the parties, including the exclusion of warranties in Section 7.2 and the limitation and exclusion of damages in this Section 9. Modification of the allocation of risks would affect the fees that Elite charges, and, in consideration thereof, Customer agrees to the stated allocation of risk. The parties agree that the limitation and exclusion of damages in this section should specifically continue to apply in the event a court or arbitrator determines that the sole and exclusive remedies provided in Sections 5.4, 7.4 and 8.1 (and if attached hereto, in the Maintenance Addendum) fail in their essential purpose.

10. Term.

10.1 This Agreement is effective from the Effective Date and continues until June 30, 2020, unless terminated earlier as provided herein. Termination of the Maintenance Addendum and/or a Subscription Term by either party shall not terminate this Agreement.

10.1.1 Subscription Software Term. The initial subscription term for the Subscription Software shall commence on the date specified in the Fees Schedule (and if no date is specified, on the Effective Date) and shall continue for the period indicated in the Fees Schedule (the "Initial Term"). The subscription shall thereafter renew for successive one (1) year terms unless either party gives notice of termination no later than thirty (30) days prior to the end of the then-existing term (the "Renewal Term"), provided, that, unless Elite intends to terminate the subscription, at least sixty (60) days prior to the scheduled renewal date, Elite shall provide Customer with notice in writing of the date on which the subscription is due to renew (it being agreed that an invoice for Subscription Fees may constitute such notice). The Initial Term together with any Renewal Term(s) shall be the "Subscription Term." Elite reserves the right to increase the Subscription Fees for Renewal Terms; provided, that with respect to the Subscription Software set forth in the attached Fee Schedule, for the second and third annual terms hereof after the Initial Term, any increase in the Subscription Fees for such Subscription Software shall not be more than the

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greater of 5% of the previous year's Subscription Fees or the increase in the Consumer Price Index for the prior year..

10.2 Customer may terminate this Agreement for cause only as provided in Section 7 or 10.4. Customer may terminate this Agreement without cause, for convenience, at any time on thirty (30) days notice, provided, however, in such event, to the extent that the License Fees, and the Subscription Fees for the then-current Subscription Term, have not been paid in full, such fees become due in full upon such termination and Customer will also pay for all Services rendered up to the effective date of such termination.

10.3 Elite may terminate this Agreement in the event of Customer's material breach if such breach has not been cured within ninety (90) days following written notice from Elite to Customer.

10.4 The Customer (COUNTY) obligation for payment of this Agreement beyond the current fiscal year end is contingent upon and limited by the availability of COUNTY funding from which payment can be made. No legal liability on the part of the COUNTY shall arise for payment beyond June 30 of each calendar year unless funds are made available for such payment. In the event that such funds are not forthcoming for any reason, COUNTY shall immediately notify Elite in writing; and this Agreement shall be deemed terminated, have no further force, and effect.

10.5 Upon the termination of this Agreement for any reason, Customer's license and right to use the Software or any part thereof shall end immediately unless the applicable License Fees have been paid in full (and are not subject to refund hereunder) and Customer shall return to Elite the Software and any other documents, manuals, data, information or materials furnished by Elite, as well as any copies thereof and shall destroy any embodiments of these materials stored in or on a reusable electronic or similar medium, including but not limited to memory, disk packs, tape, and other peripheral devices, and document in writing such destruction. Upon termination of the Subscription Term, if any, Customer's license and right to use the Subscription Software or any part thereof shall end immediately and Customer shall return to Elite the Subscription Software and any related materials and destroy any embodiments of such materials.

11. General Provisions.

11.1 Waivers and Limitation of Actions. No delay or omission in the exercise of any power or remedy available hereunder shall impair or affect either party's right to the exercise thereof. No action, regardless of form, arising out of the transactions contemplated herein may be brought by either party more than one (1) year after the cause of action has accrued. For the purpose of this Section 11.1, an action by Elite for monies due from Customer shall accrue on the last date of supply of services or products by Elite hereunder.

11.2 Force Majeure. If either party shall be delayed in its performance of any obligation hereunder or be prevented entirely from performing any such obligation due to causes or

events beyond its control, including without limitation any act of God, terrorism, fire, strike or other labor problem, present or future law, government order, rule or regulation, such delay or non-performance shall be excused and the time for performance shall be extended to include the period of such delay or non-performance.

11.3 Notices. All notices shall be made in writing signed by the party making the same and shall be deemed given or made on the date delivered if delivered in person, on the date delivered by an overnight courier service or on the third (3rd) business day after it is mailed to the parties at the addresses indicated above (or at such other addresses as shall be given in writing by either of the parties to the other).

All notices will be routed to the appropriate persons as listed on Exhibit A – Notice Contacts.

11.4 Invalid Provision. In the event that any provision hereof is found invalid or unenforceable, the remainder of this Agreement shall remain valid and enforceable according to its terms.

11.5 Governing Law. This Agreement shall be construed and enforced in accordance with the substantive laws of the State of California. This Agreement shall not be governed by or construed by the United Nations Convention on Contracts for the International Sale of Goods.

11.6 Dispute Resolution. The following procedures will be adhered to in all disputes arising under this Agreement, provided, however, that nothing in this Section 11.6 shall limit either party's right to seek equitable relief for breach by the other party of Sections 4 or 5 hereof:

11.6.1 Informal Resolution Procedure. The aggrieved party shall notify the other party in writing of the nature of the dispute with as much detail as possible about the deficient performance of the other party. The designated representatives of each party ("Designated Representatives") shall meet in person or by telephone within five (5) business days of the date of the written notification to reach an agreement about the nature of the deficiency and the corrective action to be taken by the respective parties. If the Designated Representatives are unable to agree on corrective action, Customer's senior partner or executive and Elite's managing director shall meet in person or by telephone to facilitate an agreement. If the parties cannot resolve the dispute or agree upon a written plan of corrective action to do so within fifteen (15) business days of the initial written notification, or if the agreed-upon completion dates in a written plan of corrective action are exceeded, the parties will submit the matter to arbitration as provided below.

11.6.2 Arbitration. The parties shall submit any dispute arising under or relating to this Agreement, including but not limited to the formation of this Agreement or the breach thereof of the Software or Services provided or to be provided hereunder, that the parties cannot resolve by the procedure set forth in Section 11.6.1 to binding arbitration in accordance with the then prevailing Commercial Arbitration Rules of the

CUSTOMER AGREEMENT

American Arbitration Association. Any arbitration shall take place in Riverside County before one arbitrator who shall be experienced in the subject matter of the dispute. The arbitrator shall have no authority to award punitive damages or to treble or otherwise multiply actual damages. Judgment upon any award made in such an arbitration may be entered and enforced in any court of competent jurisdiction.

11.7 Assignment. This Agreement, and the rights granted to Customer by this Agreement or any duty or obligation of performance hereunder, may not be assigned, sublicensed, or otherwise transferred by Customer, either voluntarily or by operation of law, except upon compliance with all of the following conditions: (a) assignment is made to a single transferee which is a successor to Customer by merger, acquisition or dissolution (the "Transferee"), (b) the License Fee and Service Fees have been fully paid to Elite, (c) Customer transfers all copies of the Software and Documentation to the Transferee or destroys any copies not transferred, including any copies embodying modifications or alterations made by Customer, (d) Transferee agrees in writing with Elite to be bound by the terms and conditions of this Agreement, and (e) Customer gives Elite written notice of such assignment accompanied by a certificate of compliance with clauses (a) and (c) above. Any attempt by Customer to assign, sublicense, or transfer any of the rights duties, or obligations hereunder except as expressly provided by this Agreement is null and void. This Agreement shall be binding upon the respective parties hereto and their successors and permitted assignees.

11.8 Section Headings. The section and subsection headings used herein are for reference and convenience only and shall not enter into the interpretation hereof.

11.9 Entire Agreement. No representations, warranties, covenants, conditions or agreements, oral or written, express or implied, have been made to any party hereto, except as expressly provided herein. This Agreement, and the Addenda hereto, contain the entire agreement between Elite and Customer with respect to the subject matter hereof and supersedes and cancels any and all prior or contemporaneous oral or written understandings, negotiations and agreements between Elite and Customer with respect

hereto. No amendment or modification to this Agreement or to either party's rights or obligations hereunder may be made in any manner (including without limitation by reference to usage of trade or other regular practice or method of dealing either within the computer industry or between the parties hereto) other than in a writing signed by both parties hereto.

11.10 Survival. Sections 2, 3.2, 5, 7.4, 7.5, 8, 9, 10.4 and 11 shall survive any termination of this Agreement.

Elite

Michael Goddard
Name (Print)

Melvin Rosenberg on behalf of Michael Goddard
Signature

VP, Finance
Title

5-29-15
Date

County of Riverside - for Office of County Counsel

Marion Ashley
Name (Print)

Marion Ashley
Signature

Chairman of the Board of Supervisors
Title

JUN 16 2015
Date

FORM APPROVED COUNTY COUNSEL
BY: GREGORY P. PRIAMOS DATE 6/2/15

ATTEST:
KECIA HARRER-IHEM, Clerk
By: DEPUTY

FEES SCHEDULE - Software, License Fees and Service Fees

County of Riverside - Office of County Counsel
 May 27, 2015
 ("Fees Schedule Date") Pricing valid for 90 days from Fees Schedule Date

Licensed Software

	Qty	Rate	Total	Annual Maint.
ProLaw Software				
70 Seat License				
ProLaw Enterprise 2015.1 Front Office	70	578	40,460	8,092
Case Management Contact Management				
DMS Integration ¹ Docketing				
Document Assembly Document Management				
Marketing Records Management				
Task Management Relationship Management				
Time Entry Drag & Drop Customization				
Conflicts Groupware Integration ¹				
ProLaw Reporting				
(powered by Microsoft SQL Reporting Services)				
Licensed Software Total			40,460	8,092

Subscription Software

	Years	Annual Rate	Total
Westlaw Legal Calendaring Rules Subscription Software			
68-100 Seat License Annual Subscription			
Southern California:	1	4,312	4,312
All State and Federal Rules			
142 Rule Sets			
Subscription Software Total			4,312

CUSTOMER AGREEMENT

Services

	Hours	Rate	Total	
Implementation/Training/Consulting - ESTIMATED				
Front Office				
Application Training	60	160.00	9,600	
Additional Billing Training	20	160.00	3,200	
Product Overview (via WebEx) - Fixed Fee			1,600	
Project Scoping and Plan Development	42	160.00	6,720	
Consulting, Configuration and Setup	153	160.00	24,480	
		Services Total	45,600	
	Total T&M Hours: 275.0			
		Grand Total	90,372	USD
		Licensed Software	40,460	
		Subscription	4,312	
		Services	45,600	
		Annual Maintenance Services	8,092	USD
		Licensed Software	8,092	

Endnotes

Pricing does not include applicable taxes.

SOFTWARE

Elite will install and support the Software in configured hardware/software environments, including but not limited to those maintained by Managed Hosting Service Providers ("MHSP"), pursuant to specifications mutually agreed upon by Elite and the Customer. Elite will support functionality within the Software. MHSP responsibilities shall include, but not limited to, its own and any related MHSP hardware and software environment(s), configuration and troubleshooting of MHSP hardware, MHSP performance, MHSP availability and connectivity issues, and any Software issues arising from MHSP and/or applicable MHSP entities.

Microsoft SQL Server database software is required. Elite will not provide any software except as expressly listed herein. Any software required to comply with the PSR that is not listed herein, including SQL Server Database software, is the responsibility of Customer.

Microsoft is a third party beneficiary of this Agreement to the extent it applies to the license of Microsoft software. Microsoft disclaims all warranties and liabilities (whether direct, indirect, incidental or consequential), to the maximum extent allowed by governing law, arising from the use or installation of a Microsoft product provided hereunder.

1 ProLaw application integration information is available at: <http://www.elite.com/prolaw/application-integration/>.

WESTLAW LEGAL CALENDARING RULES

Elite does not warrant the results produced by Westlaw Legal Calendaring Rules. It is Customer's responsibility to check the results of the Westlaw Legal Calendaring Rules date calculations against the actual court rules.

CONVERSION

Conversion services to convert Customer's existing data to the form needed for use with the Software are not included. Elite can provide pricing for such data conversion services on request.

SERVICES

Normal business hours (Monday-Friday, excluding holidays) for services provided are between 8:30am and 5:30pm at the location where the Elite employees providing the services are located at the time of the provision of such services. After hours services are available from Elite for an additional fee.

The Fees listed herein are based upon similar sized Customers and the Software listed in the Fees Schedule. Additional Fees may be required depending upon the final implementation of the Software and any other services not provided for under the Agreement. Services beyond Live Operation may require additional project management services as well as consulting/training services. Additional Fees not listed herein will be mutually agreed in writing by the parties before provision of such services.

The minimum charge for any hourly services performed outside the scope of initial implementation is two (2) hours.

The price listed herein is based on a single implementation. Multiple implementation phases are available for an additional charge.

Unless otherwise stated, the training services proposed are for on-site at Customer's facility, with a maximum of 8 people per class. This can either be "Train-the-Trainer" or "End User" training. Fees listed herein do not include travel and related expenses.

Payment Terms

Licensed Software*

100% of the License Fees will be invoiced upon the Effective Date.

Maintenance Services

Invoiced upon Installation.

Westlaw Legal Calendaring Rules**

100% of the annual Subscription Fee will be invoiced upon the start of the Initial Term. Initial Term starts 90 days from Effective Date or upon Live Operation, whichever is earlier, and continues for the number of years shown on the Fees Schedule. For subsequent years, the annual Subscription Fee shall be invoiced annually in advance.

Fixed Fee Services

50% will be invoiced upon the Effective Date.
50% invoiced upon completion of Services.

Hourly Services

Invoiced monthly as performed.

Agreement ends on June 30, 2020

*License Fees are non-refundable except as expressly provided herein.

**Annual Subscription fees are non-refundable except as expressly provided herein.

All reimbursable costs will be invoiced monthly from Elite.

Service dates that are cancelled by Customer less than ten (10) business days prior to its scheduled date will be invoiced to Customer at 50% of Elite's price. In addition, any non-refundable travel expenses associated with such cancellation will be charged to Customer.

Should Customer delay start of Services one (1) year beyond original project plan, Elite reserves the right to adjust Customer's Service Fees to Elite's then current service rate.

CUSTOMER AGREEMENT**MAINTENANCE ADDENDUM****1. Scope of Addendum.**

1.1 This Maintenance Services Addendum ("Maintenance Addendum") is part of the Customer Agreement between the parties which is incorporated as if fully set forth herein.

2. Definitions.

2.1 Definitions. As used in this Maintenance Addendum, the following terms shall have the meanings set forth below. Capitalized terms not otherwise defined shall have the meanings set forth in the Agreement.

"Business Day" shall mean Monday through Friday of each week, excluding holidays.

"Business Hours" shall mean the hours from 6:00am to 5:30pm, Pacific Time, during a Business Day.

"Critical Problem" shall mean a Problem that causes an adverse and material effect on Customer's ability to utilize the Software according to the Documentation. Critical Problems are handled in accordance with Section 4.3 of this Maintenance Addendum.

"Major Release" shall mean an Update signified by a change in the numeral to the immediate right of the decimal in the version number e.g. v2.6 to v2.7.

"Maintenance Services" shall mean the services provided pursuant to this Maintenance Addendum as described herein.

"Non-Critical Problem" shall mean a Problem that does not meet the definition of a Critical Problem. Non-Critical Problems are handled in accordance with Section 4.4 of this Maintenance Addendum.

"Problem" shall mean any failure of the Software to perform in accordance with the Documentation. Problems are classified as either Critical Problems or Non-Critical Problems depending on the impact of such Problem on Customer's operations.

"Updates" shall mean any periodic software releases and any release notes provided by Elite to correct Critical or Non-Critical Problems in the Software.

3. Term and Fees.

3.1 Term and Renewal. The initial term of this Maintenance Addendum shall commence upon Installation and shall continue for a period of one year. This Maintenance Addendum shall renew for successive one year terms, unless terminated by either party by giving the other party thirty (30) days written notice prior to the end of the existing term; provided, that, unless Elite intends to terminate this Maintenance Addendum, at least sixty (60) days prior to the scheduled renewal date, Elite shall provide Customer with

notice in writing of the date on which this Maintenance Addendum is due to renew (it being agreed that an invoice for Maintenance Fees may constitute such notice). Notwithstanding the foregoing, with respect to Subscription Software, the Maintenance Services are provided only during the Subscription Term.

3.2 Annual Maintenance Charge. The Annual Maintenance Charge for the first term hereof is set forth in the Fees Schedule and is payable as provided therein. Elite reserves the right to withhold delivery of Maintenance Services if Customer fails to pay the Annual Maintenance Charge in accordance with this Agreement. For subsequent terms, the Annual Maintenance Charge shall be payable annually in advance. Elite reserves the right to increase the Annual Maintenance Charge for subsequent terms; provided, that with respect to the Software set forth in the attached Fee Schedule, for the second and third annual terms hereof after the Initial Term, any increase in the Maintenance Fees for such Software shall not be more than the greater of 5% of the previous year's Maintenance Fees or the increase in the Consumer Price Index for the prior year. The Annual Maintenance Charge for Subscription Software is included in the Subscription Fee.

4. Maintenance Services.

While this Maintenance Addendum is in effect Elite will provide the Maintenance Services set forth in this Section 4 to Customer:

4.1 Updates. Elite will provide all Updates for the Software that it releases during the term of this Maintenance Addendum to Customer at no additional charge. Upon delivery to Customer the Update will be deemed part of the Software for which it is provided for purposes of the Agreement; provided, however, that the provision of Updates pursuant to this Maintenance Addendum shall not extend the Warranty Period or create a new Warranty Period. Depending on the complexity of the Update Elite may offer installation services as part of Maintenance Services in which event Elite shall be responsible for installing such Update as part of the Maintenance Services being provided in consideration of the Annual Maintenance Charge. Elite, however, reserves the right to charge separately on a time and materials basis for the installation of any Updates pursuant to request of Customer, pursuant to separate written agreement.

4.2 Remote Support. Elite shall provide remote support during Business Hours for the reporting of Problems and for the handling of Customer questions relating to the operation of the Software. Remote support shall only be provided for the Production Server and one copy of the production instance used for testing purposes. Elite will, if contracted for separately, provide support for other instances of the Software for an additional fee.

4.3 Critical Problems. Elite shall respond to a report of a Critical Problem as follows:

CUSTOMER AGREEMENT

4.3.1 Elite shall respond to Customer's report of a Critical Problem within two (2) Business Hours. Elite will determine whether the Critical Problem is due to a defect in the Software or whether it is due to an Excluded Item. If the Critical Problem is due to a defect, Elite shall use its best efforts to correct the defect, or provide Customer with a way to temporarily work around the defect if able to do so, or notify Customer on a regular basis as to the progress of the corrective efforts until such time as a correction can be made.

4.3.2 If Elite fails to respond to a Critical Problem as provided in Section 4.3.1, Customer may escalate the matter to the attention of the following individuals, in order: (i) Elite's Support Manager; (ii) Elite's Senior Director, Support; (iii) Elite's Managing Director.

4.4 Non-Critical Problems. In response to a report of a Non-Critical Problem, Elite will determine whether the Non-Critical Problem is due to a defect in the Software or whether it is due to an Excluded Item. If the Non-Critical Problem is due to a defect, Elite shall use reasonable efforts on a time available basis to correct such defect, but the correction may await the release of an Update.

4.5 Access. Customer will make remote access to the Software available to Elite via a remote access method approved by Elite in order to allow Elite to review system setups, configuration, software (including version) in use, hardware information, Timekeeper and/or User count and other information as necessary for Elite to provide the Maintenance Services.

4.6 Customer Obligations. Customer shall insure that Elite's personnel are provided with such information under Customer control as is reasonably necessary to enable Elite to comply with its obligations hereunder.

4.7 Third Party Software. Maintenance Services for the Software will include Maintenance Services for Third Party Software for so long as Elite remains an authorized remarketer for such Third Party Software. Should Elite cease to be a remarketer for any of the Third Party Software and thus be unable to fulfill the then current annual maintenance term, Elite will refund the unused portion of the Annual Maintenance Charge for such Third Party Software. In such event Elite will use reasonable efforts to assist Customer in obtaining support for such Third Party Software directly from the owner thereof or another authorized provider.

5. Exclusions.

5.1 Elite's obligations hereunder shall extend only to:

5.1.1 the latest Major Release of the Software made available to Customer by Elite, and

5.1.2 the Production Server and one copy of the production instance used for testing purposes.

5.2 Maintenance Services shall not include investigation or resolution of Problems resulting from Excluded Items. Elite will

make assistance to Customer available for resolution of Problems resulting from Excluded Items on a time and materials basis.

5.3 The Annual Maintenance Charge does not include on-site service calls made at Customer's request (or travel expenses associated with such calls), or the costs of any other services not specifically set forth herein.

6. Remedies and Liability.

6.1 If Elite materially breaches this Maintenance Addendum and fails to correct such breach within thirty (30) days of written notice thereof, Customer may terminate this Maintenance Addendum and receive a pro rata refund of the Annual Maintenance Charge for the then current term.

6.2 The foregoing remedy is exclusive and is in lieu of all liabilities or obligations for damages arising out of or in connection with this Maintenance Addendum. Elite shall have no other liability to Customer whatsoever arising under this Maintenance Addendum.

6.3 In no event shall Elite's, or its officers', employees', suppliers', directors', parent's, or subsidiaries', liability to Customer arising out of or related to this Maintenance Agreement, or the services provided under this Maintenance Agreement or any breach of this Agreement, whether based on an action or claim in contract or tort, including negligence, strict liability or warranty, except liability for bodily injury, exceed the Annual Maintenance Charge paid in the then current year.

7. General Provisions.

7.1 Survival. Sections 2 and 6 of this Maintenance Addendum shall survive any termination of this Maintenance Addendum.

CUSTOMER AGREEMENT

Exhibit A – Notice Contacts

Elite Contact Information:

Attn: Contracts
 Thomson Reuters Elite
 800 Corporate Pointe, Suite 150
 Culver City, CA 90230 USA
 elite.contracts@thomsonreuters.com
 Fax: 323-417-3030

Customer Contact Information:

Project contact and telephone number:

Name:	Donna Bonelli-Filter
Telephone:	951/955-6314
Email:	dbonelli@co.riverside.ca.us

Invoices to be addressed to:

Name:	Riverside County Counsel
Telephone:	951/955-6300
Email:	dbonelli@co.riverside.ca.us

Customer's Securelink Contact:

Name:	
Telephone:	
Email:	

Named Mobile Device Support Contacts (Up to 5):

Name:		Name:	
Telephone:		Telephone:	
Email:		Email:	
Name:		Name:	
Telephone:		Telephone:	
Email:		Email:	
Name:			
Telephone:			
Email:			



RIVERSIDE COUNTY INFORMATION TECHNOLOGY PROCUREMENT FORM
 To be completed for all departmental purchases of IT systems, services or renewals

PR2014-02079

REQUESTED PURCHASE:	Document Mgmt/Case Mgmt/Billing/Timekeeping/Court Calendaring	
DEPARTMENT/AGENCY:	Office of County Counsel	
CONTACT NAME/PHONE:	Nicole Windom-Hurd, Administrative Services Manager (951)-955-0198	
PURCHASE REQUEST:	<input checked="" type="checkbox"/> NEW EQUIPMENT/SERVICES <input type="checkbox"/> UPGRADE <input checked="" type="checkbox"/> REPLACEMENT	
PURCHASE TYPE:	<input type="checkbox"/> PROFESSIONAL SERVICES <input checked="" type="checkbox"/> SOFTWARE <input type="checkbox"/> HARDWARE <input type="checkbox"/> RENEWAL	
DESCRIBE REQUESTED PURCHASE	The Office of County Counsel desires to purchase an integrated law office practice management software system that supports our major office functions to include case, client and matter management, document management, timekeeping and billing/invoicing, court calendaring and reporting functionality.	
BUSINESS NEEDS ADDRESSED	Our office currently does not have a system to track case matter workflow processes and/or electronically manage documents and emails. We rely mainly on paper and manual statistics to provide performance metrics. Our office's increased workload and focus on litigation has now required us to become even more efficient in the way we do business. The requested system will assist the office by allowing for greater technological efficiencies; along with streamlining of work processes to ensure we can give the most time and attention to the clients that we serve. We will be able to more accurately track performance, provide reporting and reduce redundancies in separate timekeeping and court calendaring systems, manual work processes and related costs. While our office does have an older timekeeping/invoicing system and a court calendaring system, this new integrated system will allow us to better capture the work we do and timekeeping on legal work and allow for more accurate cost recovery for invoicing and workflow.	
ARE THERE ANY OTHER COUNTY SYSTEMS THAT PROVIDE THE SAME FUNCTIONALITY?	<input checked="" type="checkbox"/> NO <input type="checkbox"/> YES <input type="checkbox"/> UNKNOWN	
BUSINESS CRITICALITY	BUSINESS IMPACT (SELECT ALL THAT APPLY)	
<input checked="" type="checkbox"/> Run the business Grow <input checked="" type="checkbox"/> the business Transform <input type="checkbox"/> the business	<input checked="" type="checkbox"/> Support current operations <input checked="" type="checkbox"/> Reduce Expenses <input checked="" type="checkbox"/> Improve Customer Service <input checked="" type="checkbox"/> Improve Operational Efficiencies	
BUSINESS RISKS	Financial: Budget estimation and availability/scope expansion Operational: Potential loss of functionality/Resource planning Customer: Potential Loss of productive time during conversion	
ALTERNATIVE SOLUTIONS	1. Continue business as status quo and manually track case work processes and statistics and maintain paper files and storage costs for paper documents required by the retention policy.	

10/30



RIVERSIDE COUNTY INFORMATION TECHNOLOGY PROCUREMENT FORM
 To be completed for all departmental purchases of IT systems, services or renewals

TRANSACTION	<input checked="" type="checkbox"/> Cash Purchase	<input type="checkbox"/> Lease Purchase	Lease Years: _____	
PURCHASE COSTS Hardware:\$0 Software:\$100,000 Labor: \$50,000 TOTAL COST: \$150,000 *Total cost reflects estimates only.	COST BENEFIT ANALYSIS			
		ALTERNATIVE STATUS QUO	ALTERNATIVE	ALTERNATIVE
	Current Annual Cost	\$ 75,210	\$ 0	-
	Ongoing Annual Cost	\$ 77,500	\$ 13,000	-
	Annual Cost Savings	N/A	\$ 64,500	-
	Net Annual Savings	N/A	\$ 62,210	-
	Project Implementation Cost	N/A	\$ 150,000	-
Project Payback Period? yrs	N/A	1.99 Years	-	
Department Head Signature:		Date: 10/30/14		

RCIT RECOMMENDATION – for purchases and renewals under \$100,000

Recommended: Yes No (Non-recommended requests submit to TSOC)

By: Date: 30 Oct 14

Chief Information Officer Signature: _____ Date: _____

RCIT explanation for non-recommended requests:

IMPLEMENTATION SHOULD INCLUDE INTEGRATION WITH COUNTY LASERFICHE-BASED TRUSTED SYSTEM, ~~AND~~ COSTS FOR RFP / TECHNICAL SUPPORT PROJECTS, AND OTHER INTEGRATIONS WITH PEOPLESOFT FOR BILLING / TIMEKEEPING / ETC.

30 Oct 14

TSOC RECOMMENDATION: for purchases and renewals over \$100,000 and RCIT non-recommended purchases or renewals

Recommended: Yes No (In no, provide explanation below)

TSOC Chair Signature: Date: 11.12.14

TSOC explanation for denied requests:

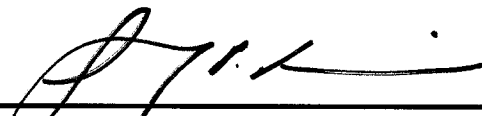
Date: June 2, 2015
From: Gregory P. Priamos, County Counsel
To: Board of Supervisors/Purchasing Agent
Via: Purchasing Agent
Subject: Sole Source Procurement; Request for ProLaw purchase and implementation services.

The below information is provided in support of my Department requesting approval for a sole source. Outside of a duly declared emergency, the time to develop a statement of work or specifications is not in itself justification for a sole source.

1. **Supply/Service being requested:** ProLaw Records/Time/Billing Management and implementation
2. **Supplier being requested:** Thomas Reuters ELITE
3. **Alternative suppliers that can or might be able to provide supply/service:** None. Thomas Reuters ELITE is the sole provider of ProLaw software. County Counsel has been contracting with Thomas Reuters for legal books and other web based access legal programs since 2008.
4. **Extent of market search conducted:** Minimal
5. **Unique features of the supply/service being requested from this supplier, which no alternative supplier can provide:**
ProLaw's Records/Time/Billing Management System will provide County Counsel a searchable repository to store and index all of its agreements, contracts, memoranda of understanding, Board motions, opinions, case files and related documents. Documents are created in ProLaw through standardized templates and clauses resulting in more accurate workflow management. ProLaw is compatible with Microsoft Office and has the ability to create reminders and set future court hearings with Outlook Calendar, and to route documents electronically for review. The system will create significant efficiencies by enhancing our ability to supervise and manage workload by attorney, paralegal and secretary, as well as capturing all time properly billed to departments.
6. **Reasons why my department requires these unique features and what benefit will accrue to the County:**
County Counsel is currently using several different procedures and software programs to research case law, calendar, create legal documents and time management/billing/invoicing. ProLaw has integrated all our needs into one solution. It will maximize our efficiency and productivity by managing entire matter lifecycles, automating processes, sharing knowledge for reuse and will eliminate rework, increasing time management savings, accuracy in processing the data and streamlining processes to increase workflow efficiency across the organization
7. **Price Reasonableness including purchase price and any ongoing maintenance or ancillary costs from the supplier:**
Start up for this project is \$98,464, with annual maintenance fee of \$8,092 and subscription license renewal at the rate of \$4,312. Maintenance and renewal cost may increase up to 5% annually.
8. **Does moving forward on this product or service further obligate the county to future similar contractual arrangements or any ongoing costs affiliated with this sole source? (Maintenance,**

support, or upgrades, if so, please explain). There will be annual maintenance service charges for licensed software.


9. **Period of Performance:** Five years, renewed annually through 6/30/2020.

6/2/15

Department Head Signature **Date**
Gregory P. Priamos, County Counsel

Purchasing Department Comments:

Approve Approve with Condition/s Disapprove
Not to exceed: \$154,600 aggregate Annual Amount through _____

6/3/15 15-557

Purchasing Agent **Date** **Approval Number**
Lisa Brandl (Reference on Purchasing Documents)