



London Breed, Mayor

Department of Human Services
 Department of Aging and Adult Services
 Office of Early Care and Education

Trent Rhorer, Executive Director

MEMORANDUM

TO: ADULT & AGING SERVICES COMMISSION

THROUGH: SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

FROM: JILL NIELSEN, DEPUTY DIRECTOR
 JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *JNT*

DATE: AUGUST 7, 2019

SUBJECT: NEW CONTRACT: THOMSON REUTERS TO PROVIDE FIRM CENTRAL CASE MANAGEMENT AND WESTLAW ONLINE LEGAL RESEARCH TOOLS

CONTRACT TERM: 9/1/19-6/30/22

CONTRACT AMOUNT:	<u>New</u>	<u>Contingency</u>	<u>Total</u>
	\$100,495	\$10,049	\$110,544

ANNUAL AMOUNT	FY 19/20	FY 20/21	FY 21/22
	\$31,878	\$33,472	\$35,145

Funding Source	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING:	\$100,495			\$10,049	\$110,544
PERCENTAGE:	100%			100%	

The Department of Adult and Aging Services (DAAS) requests authorization to enter into a new contract with Thomson Reuters for the period of September 1, 2019 through June 30, 2022, in the amount of \$100,495 plus a 10% contingency for a total amount not to exceed \$110,544. The purpose of the contract is to provide Firm Central case management and Westlaw online legal research tools to the Public Administrator/Public Guardian’s office.

Background

The Public Guardian and Public Administrator are represented by in house counsel who are employed by DAAS. The legal division requires access to legal resources in order to perform

legal research and analysis in performance of its representation of the Public Guardian and Public Administrator. In addition, the office is moving toward centralizing case management information, billing, and calendaring.

West Publishing Corporation, a Thomson Reuters business, provides integrated information solutions to the U.S. legal market and has been providing research materials to the legal and professional community for more than 145 years. Utilizing online legal tools is considered a best practice and is more affordable than the alternative of maintaining a stand-alone library of the resources available via Westlaw, including statutes, cases, and secondary sources. Online research is also more efficient and practical than utilizing offsite law libraries, which was the division's practice prior to acquiring Westlaw. Westlaw provides legal researchers with access to exclusive resources, proprietary tools, and technology that is currently being utilized by the Legal Division of the Office of the Public Administrator/Public Guardian.

In addition to offering online research with its Westlaw product, Thomson Reuters also offers a legal case management and calendaring system, Firm Central which integrates with Westlaw. Firm Central provides a centralized resource for legal case management and legal calendaring in an all-in-one secure cloud platform. The Legal Division handles an ongoing caseload of 450 – 500 cases at a time. Having a centralized online platform to track legal work performed on each case, to systemize billing, and to calendar deadlines and hearing dates is critical to the ability to meet court requirements and provide continuity in the face of staff changes, whether short or long term.

For the past year, the Public Guardian and Public Administrator's office has used Firm Central. Typically, most non-service IT procurements are handled through purchasing and /or the City's Technology Marketplace and do not come through Commission. However, updates in the City's procurement policy now mandate that procurements involving Protected Personal Information (PPI) must include a Business Associate Agreement (BAA), which in turn necessitates use of a contract. A BAA is an appendix to a contract that includes conditions and contractor responsibilities to protect client data. Since the Firm Central service involve the storage of some Protected Personal Information (PPI), this purchase will now be facilitated through a departmental contract.

Services to be Provided

Contractor will provide access licenses and use of the following Thomson Reuters products:

- A. Westlaw for Government is an online legal research service for lawyers and legal professionals. It provides proprietary database services. Information resources on Westlaw include more than 40,000 databases of case law, state and federal statutes, administrative codes, newspaper and magazine articles. The following key features are included in Westlaw:
 - National Primary Core
 - Litigation Analysis
 - KeyCite Overruling Risk
 - WestSearch Plus
 - All-State Analytical

B. Firm Central is a task, billing, and calendar management software for attorneys. It streamlines business operations and legal practice workflows onto one platform. The following features are included in Firm Central:

- Time & expense tracking
- Matter Management – Manage tasks, deadlines, client files, and documents from desktop, laptop, or smartphone. Allows you to access everything you need in a single, centralized, secure interface
- Westlaw Integration – Leverages the technology of Westlaw and works seamlessly with the legal research platform to build efficiency into daily matter work
- Multiple billing rates and fee types
- One-click invoicing
- Rules-based legal calculation and Advanced customization capabilities with Deadline Assistant
- Automatic alerts and updates to court rules
- Create custom events and rules sets

Selection

Thomson Reuters is the sole source provider of Westlaw and Firm Central online legal research tools.

Funding

These contracts will be funded County General Funds.

ATTACHMENTS

Appendix A-Scope of Services

Appendix B-Calculation of Charges

Appendix A – Services to be Provided

Thomson Reuters

Westlaw and Firm Central Online Legal Research

September 1, 2019 – June 30, 2022

I. Purpose of Contract

The Office of the Public Administrator/Public Guardian (PA/PG) within the Department of Aging and Adult Services (DAAS) of the San Francisco Human Services Agency (SFHSA) will contract with Thomson Reuters for online legal research and client management tools known as Westlaw and Firm Central for the benefit of the in house legal division that represents the programs.

II. Definitions

Contractor	Thomson Reuters
DAAS	Department of Aging and Adult Services
Firm Central	Cloud-based legal client and practice management software that fully integrates with Thomson Reuters Westlaw
HSA	Human Services Agency of City and County of San Francisco
PA/PG	Office of the Public Administrator/Public Guardian
Westlaw	An online legal research service for legal professionals. It provides proprietary database services. Information resources on Westlaw include more than 40,000 databases of case law, state and federal statutes, administrative codes, newspaper and magazine articles, public records, law journals, law reviews, treatises, legal forms and other information resources

III. Description of Services

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IV. Location and Time of Services

Westlaw and Firm Central Online Legal Research Services are available as a secure internet-based web portal to any authorized user with access over the internet, accessible twenty four (24) hours per day, seven (7) days per week.

Appendix B – Calculation of Charges

Thomson Reuters

Westlaw and Firm Central Online Legal Research

September 1, 2019 – June 30, 2022

HSA will reimburse the contractor for services provided based on the following schedule of rates. Contractor will invoice the City and County on a monthly basis for actual services provided.

3-Year Pricing

LICENSES	Firm Central <u>15 Users</u>	Westlaw <u>5 Attorney + 5 Staff</u>	Total
<u>FY 19/20</u>			
<i>Month</i>	\$1,654	\$1,003	\$2,656
<i>Annually</i>	\$19,844	\$12,033	\$31,878
<u>FY 20/21</u>			
<i>Month</i>	\$1,736	\$1,053	\$2,789
<i>Annually</i>	\$20,837	\$12,635	\$33,472
<u>FY 20/22</u>			
<i>Month</i>	\$1,823	\$1,106	\$2,929
<i>Annually</i>	\$21,878	\$13,267	\$35,145
3Y Term TOTAL			\$100,495

The budgeted contract amount is **\$100,495** plus 10% contingency for a contract total not to exceed of \$110,544 for the period **September 1, 2019 to June 30, 2022**.