

AGREEMENT WITH ASSEMBLY SOFTWARE LLC FOR A LEGAL CASE MANAGEMENT SYSTEM

City Attorney's Office

City Council

November 19, 2024

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BACKGROUND

- **For over 25 years**, the City Attorney's Office (CAO) has relied on CityLaw as its Legal Case Management System (CMS), to manage all litigation, public safety, and transactional assignments.
- The system has become **obsolete and increasingly problematic**, hindering our ability to manage service requests, documents, calendars, and workflows efficiently.



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ADDITIONAL BACKGROUND

- In January 2024, staff issued Request for Proposals 2238 to identify a comprehensive CMS to meet the CAO's current needs.
- After a thorough evaluation, the panel unanimously selected **JusticeNexus by Aeon Nexus Corporation** as the preferred option. However, despite satisfying all technical requirements, the proposal's **annual cost of \$327,658** significantly exceeded our budget for this project, and negotiations for a lower price were unsuccessful.
- Bearing in mind fiscal responsibility, the decision was made to terminate RFP 2238 due to the remaining proposals' **similarity to our current system**.
- In FY 23/24 Council approved \$100,000 for year 1 implementation costs and \$42,325 for yearly renewals. These funds were unused in FY 23/24 and were returned to the General Fund due to challenges faced with RFP 2238.
- The CAO budgeted **\$42,325** for subscription costs incurred in FY 2024/25 and these funds **will be used to offset the implementation costs** of this proposed system.



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DISCUSSION

- Upon termination of RFP 2238, staff from the City Attorney's Office conducted an extensive search for alternative solutions and found **Neos by Assembly Software LLC**.
- Following thorough software demonstrations and reference checks, Assembly Software LLC offered the **best solution** for the City Attorney's Office, in terms of functionality and cost.




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NEOS BY ASSEMBLY SOFTWARE LLC

- 1 Administrative Tasks**
 - Transactional – Tasks
 - Litigation – Contracts, etc.
 - Attorneys reviewing and approving invoices
- 2 Customization**
 - Case Types
 - Workflows
 - Integrations
- 3 Future Proof Solution**
 - All-in-One Platform
 - Long-term Partnership
 - Regular Feature Improvements
 - Ai



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WHY NEOS?



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Native AI built into workflows
- 

Trusted by 800+ organizations
- 

Generate better case outcomes
- 

100% cloud-based
- 

Do more with less time
- 

Optimize your operations

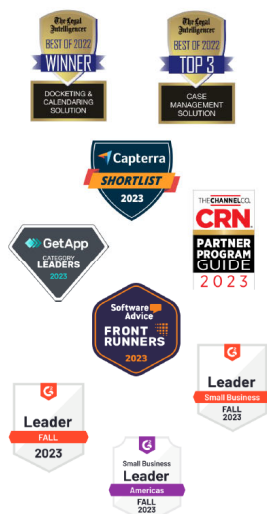
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AWARD-WINNING SOFTWARE SOLUTION



URIARTE LAW P.A.

"Neos is a **10 out of 10**; it is very easy to use and set up. The transition from Needles Desktop to the cloud-based solution was simple — tech support took care of everything and was in constant communication during the process."

DARBY LAW GROUP

"I didn't miss a beat. I was able to follow up on some of the larger cases I had and not have a dip in productivity."

JAMES MORRIS LAW

"My overall experience with Neos has been **simply wonderful**. We have **all the tools necessary** to track and maintain all cases, and it's a great feeling to not wonder about what's going on in a case because you can **find the answer immediately** in the program."



NEOS OVERVIEW

Neos Feature Overview

An end-to-end ecosystem with best-in-class workflows, automation, standardizations & high-value communications tools that just work.

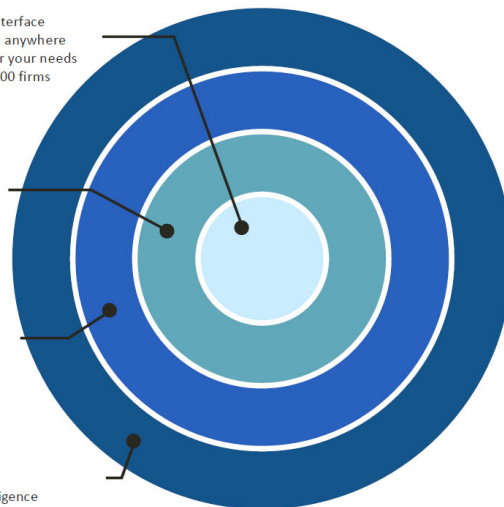
From initial contact to case closed, our goal is to provide the highest value products and services through the entire lifecycle of a case. We do this by enabling firms with the consolidated cloud deployment they need to free up time so they can focus on what they do best.

Neos
Intuitive user interface
Accessible from anywhere
Configurable for your needs
Trusted by +2,300 firms


Integrations
O365/SharePoint
QuickBooks
Cost Recovery
Communications

Automation
Intakes
Referral Agreement
Payments
Workflows

Analytics
Reporting
Dashboards
Business Intelligence
Predictive



TRAINING AND SUPPORT

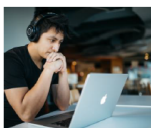


Neos Academy

We're with you every step of the way

Ongoing Training

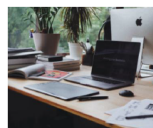
Stay apprised of new features and workflows



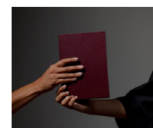
Learning Hub
Video tutorials of the top used features in Neos.



Neos Academy
60 mins monthly free webinar.
Top used features such as Intake, reporting, document management, etc.



New in Neos
Free quarterly webinar showcasing new features released



Neos University
Free Neos certification program



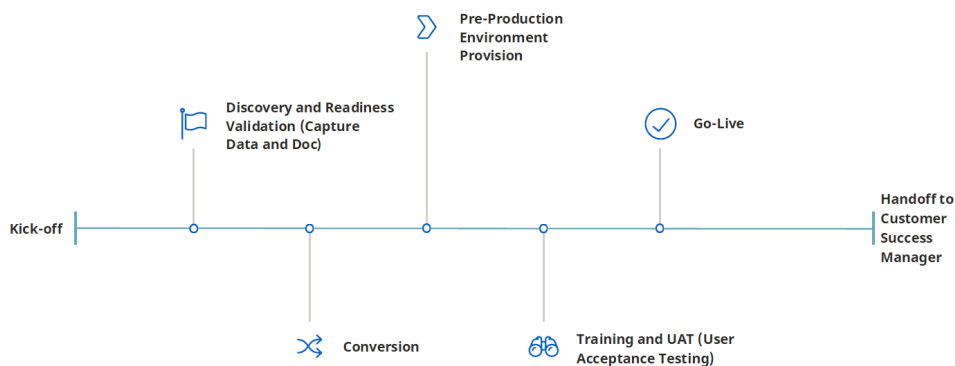
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TRANSITION TO NEOS

Customized Data Migration, User Training, and Platform Configuration



The CAO anticipates a 6-month transition. A breakdown of project deliverables is shown above.



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ANTICIPATED COSTS

	FY 2024/25	FY 2025/26 through FY 2033/34	Total
Implementation	\$59,714.00	-	\$59,714.00
Annual Subscription	\$66,000.00	\$66,000.00 ⁽¹⁾ Annually	\$660,000.00
Total	\$125,714.00	\$66,000.00 ⁽¹⁾ Annually	\$719,714.00

Note: ⁽¹⁾ Subject to not-to-exceed 2% annual increases, for the initial term and extensions. (Industry Standard Annual Increase is 5%)

Cost savings of over \$2.5 Million over the 10-year term, compared to RFP 2238.


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STRATEGIC PLAN ALIGNMENT



City of Riverside Strategic Priority No. 5

— High Performing Government —

Goal 5.2 - Utilize technology, data, and process improvement strategies to increase efficiencies, guide decision making, and ensure services are accessible and distributed equitably throughout all geographic areas of the City.



Community Trust



Equity



Fiscal Responsibility



Innovation



Sustainability & Resiliency


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RECOMMENDATIONS

That the City Council:

1. Approve the Professional Consultant Services Agreement (Technology Services) with Assembly Software LLC, for a Case Management System, for a total amount of \$719,714 over ten (10) fiscal years, with annual subscription renewals thereafter;
2. Approve annual subscription increases not-to-exceed 2% per year for the initial 10-year term;
3. Authorize the City Manager, or his designee, to execute the Professional Consultant Services Agreement (Technology Services) with Assembly Software LLC, including annual subscription renewals and making minor and non-substantive changes; and
4. With at least five affirmative votes, authorize the Chief Financial Officer, or designee, to record a supplemental appropriation in the amount of \$83,389 in the General Fund, City Attorney's Office Software Purchase/Licensing account from available General Fund reserves.



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