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*Roberts, Louis & Stevenson, LLP
Sample RFP Report for Imaging and Coding
May 22, 2001*

Presented by:

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May 22, 2001

Mr. Stevenson:

This report outlines our efforts to assist you in managing your recent Request for Proposal (RFP). It supplements the information you have received electronically and on-line. In this report you will find an overview of the proposals received (this letter), an outline of the individual quotes broken down, totaled, and grouped in different ways, and even an estimate of your shipping costs. In the appendix you will find a listing of all the providers who received your RFP along with the actual proposals and marketing material for those who responded.

I am pleased with the responses you received. In less than 48 hours we were able to provide you with eight proposals. I have listed a few comments about specific proposals below.

MNO Partners: We have awarded projects to them in the past. Overall rankings by their clients are good (below), and I know from speaking with the most recent client that they were very happy. MNO Partners is a ten year old operation in San Francisco, and their rates are competitive.

Professionalism: 8
Quality of Work: 8
Cost Accuracy: 10
Time Accuracy: 8
Likelihood of Hiring Again: 8-9

GHI, Inc.: (commentary on their proposal and our experience with them, similar to above...)

JKL Group: (commentary on their proposal and our experience with them, similar to above...)

VWXYZ LTD: (commentary on their proposal and our experience with them, similar to above...)

The electronic files you received are all formatted for printing and easy viewing. The Totals & Scenarios sheet will give you the opportunity to modify your case assumptions to see how it affects each provider's quote. This is a handy tool for dynamic cases where the volume of documents you're working with, and other document characteristics, could change.

This concludes the provider identification, RFP distribution, and proposal summarization portion of our service. We will now follow up with you to discuss the proposals, and are prepared to further manage Q&A sessions for any clarifications you may need from your final list of providers. We will also check references if you would like.

We have enjoyed working with you so far, and look forward to the successful completion of your RFP process!

Best regards,

John Doe
Client Manager

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Roberts, Louis & Stevenson, RFP # 859

RFP Number: 000859
Open For Quotes: No
Allow Partial Bids: No
Project Title: Imaging and Coding Project
Bid Close Date: 5/21/01
Work Start Date: 6/1/01
Work End Date: 7/1/01
Pref Location: within U.S.
Contact Method: Through PageBid

Project Summary:

We are a large New York based law firm which has a case with 250,000 pages to be imaged, coded, and OCR'd for loading into Summation. This project cannot be sent offshore. Case parties and matter will be discussed before start for conflict checks. All proposals must be received by 5 p.m. Pacific Standard Time on 5/21. Thank you for your interest.

Requested Services:

Coding/Indexing

Coding pricing should be per document. I need a Summation ready load file and the OCR text file attached to the Summation database. FIELDS TO BE CODED: BatesStart, BatesEnd, Attach Start, Attach End, Date, Estimated Date Qualifier, Document Type, Title, Subject or RE line, author/organizations, recipients/organizations, copyees/organizations, and doc characteristics.

Number of pages	250,000
Average number of pages per document	5
Condition of pages	B: Good
Media of source pages	hard copy
File format of source pages, if images	single page tiff
Location where service is to be performed	within U.S.
Objective fields to be coded (list all fields)	see above description
Subjective fields to be coded (list all fields)	none

Imaging

Documents are to be broken up by physical unitization. Pages are already Bates labeled. CD directory structure will be discussed before start.

Number of pages	250,000
Condition of pages	B: Good
Disassembly/prep required	Yes
Reassembly required	Yes
Location where service is to be performed	within U.S.
Media of source pages	hard copy
Image format	single page tiff
Barcoding/Bates labeling	None
Optical Character Recognition conversion	Yes
Required DPI	300
Color scanning	No

CD duplicating/mastering

Estimate 20 master CDs. Provide one master set and one duplicate set.

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-Provider Questions-

Question

1) How many "doc type" possibilities will there be? More than 10 or less than 10? 2) How many "document characteristics" will there be? Can you please provide all of those.3) What will determine whether a document is "attached"? Is it the physical binding (paper clip, staple) that we use to determine a document is attached or something else? 4) Is it likely that many of the documents will contain more than 20 names per field? For example, would it be likely that there would be more than 20 names cc'd in a document? 5) If one vendor is awarded the whole project is the deadline still 4 weeks to complete the scanning and coding?

Answer

1) Probably 10 - 15 2) Privileged, Redacted, Marginalia, Draft, Handwritten, Illegible. 3) I may have someone here at the firm determine attachment ranges. 4) I do not have the documents in front of me, so I am not certain. It is possible, but not likely. 5) Yes, still 6 - 8 weeks.

Question

1. I am assuming that you would like the image number to match the existing bates number on the hard copy. Is this a correct assumption? And if so are the page numbers more or less contiguous? Will there be more than one bates number on a page? 2. Names fields (author, recip, cc) -- I understand that you require both personal and organizational names to be captured. Are these to be captured as separate entries, or must the name of the person be linked with the name of the organization? For instance, if a letter is addressed to John Doe and Jane Roe of CBS Corp, would the entry in the Recipient field look something like this: Doe, John; Roe, Jane; CBS Corp or more like this: Doe, John – CBS Corp; Roe, Jane – CBS Corp?

Answer

1. Yes the numbers should match, and yes the pages are more or less contiguous. I'm not certain if there will be more than one Bates number on a page, but if there are, you will be instructed as to which one to capture. 2. I would prefer that names and organizations be in two separate tables that link together. Otherwise: Doe John, CBS Corp

Attachments:

None



Totals & Scenarios Sheet

Roberts, Louis & Stevenson Case, 5/22/01

Description	Units
Normal Pages	250000
Pages per Document	5
Documents	50000
CD Masters	20
CD Dupes	20
Dis/Re-assembly Minutes per Document	0.28
Hours to Prep	233
Estimated Boxes	100

←-----

In Excel, plug new assumptions into the highlighted units on the left to see the effect on the quote totals.

Providers	Services						Total
	Imaging	Coding	OCR	CDs	Misc.		
ABC, Inc. (New York)	\$ 57,500.00	\$ 74,000.00	\$ 25,000.00	\$ 2,400.00	\$ 1,320.00		\$ 160,220.00
DEF Corp (Phoenix)	\$ 20,833.33	\$ 105,000.00	\$ 5,000.00	\$ 300.00	\$ 100.00		\$ 131,233.33
GHI, Inc. (San Diego)	\$ 43,166.67	\$ 100,000.00	\$ 7,500.00	\$ 400.00	\$ 849.50		\$ 151,916.17
JKL Group (Miami)	\$ 27,166.67	\$ 42,500.00	\$ 12,250.00	\$ 1,800.00	\$ -		\$ 83,716.67
MNO Partners (San Francisco)	\$ 37,500.00	\$ 89,000.00	\$ 12,500.00	\$ 500.00	\$ 1,875.00		\$ 141,375.00
PQR Corp. (Denver)	\$ 25,250.00	\$ 85,000.00	\$ 12,500.00	\$ 500.00	\$ -		\$ 123,250.00
STU, Inc. (Houston)	\$ 47,500.00	\$ 72,500.00	\$ 12,500.00	\$ 500.00	\$ -		\$ 133,000.00
VWXYZ LTD (Boston)	\$ 31,000.00	\$ 72,500.00	\$ 12,500.00	\$ 1,900.00	\$ -		\$ 117,900.00



Totals & Scenarios Sheet

	Notes
ABC, Inc. (New York)	
DEF Corp (Phoenix)	Plus shipping.
GHI, Inc. (San Diego)	Plus shipping.
JKL Group (Miami)	Plus shipping. Estimated 120 hours of prep, which for consistency is shown in proposal, but not here.
MNO Partners (San Francisco)	Plus shipping.
PQR Corp. (Denver)	Plus shipping (NTE \$800).
STU, Inc. (Houston)	Plus shipping.
VWXYZ LTD (Boston)	Plus shipping.

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Detail Sheet

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Providers	Services									
	Imaging	Doc Prep	Units	Coding	Units	OCR	CD Master	CD Dupe	Other	
ABC, Inc. (New York)	\$ 0.180	\$ 0.05	per page	\$ 1.48	per doc	\$ 0.100	\$ 75.00	\$ 45.00	\$ 1,320.00	
DEF Corp (Phoenix)	\$ 0.060	\$ 25.00	per hour	\$ 2.10	per doc	\$ 0.020	included	\$ 15.00	\$ 100.00	
GHI, Inc. (San Diego)	\$ 0.140	\$ 35.00	per hour	\$ 2.00	per doc	\$ 0.030	included	\$ 20.00	\$ 849.50	
JKL Group (Miami)	\$ 0.090	\$ 20.00	per hour	\$ 0.85	per doc	\$ 0.049	\$ 65.00	\$ 25.00		
MNO Partners (San Francisco)	\$ 0.100	\$ 0.05	per page	\$ 1.78	per doc	\$ 0.050	included	\$ 25.00	\$ 1,875.00	
PQR Corp. (Denver)	\$ 0.101	included		\$ 1.70	per doc	\$ 0.050	\$ 95.00	\$ 25.00		
STU, Inc. (Houston)	\$ 0.130	\$ 0.06	per page	\$ 1.45	per doc	\$ 0.050	\$ 65.00	\$ 25.00		
VWXYZ LTD (Boston)	\$ 0.124	\$ 0.14	per page	\$ 1.45	per doc	\$ 0.050	\$ 60.00	\$ 35.00		

Notes

- | | |
|------------------------------|--|
| ABC, Inc. (New York) | Project meeting and database loading charge. |
| DEF Corp (Phoenix) | Data conversion fee for Summation. |
| GHI, Inc. (San Diego) | Estimated hourly fees for set up, management, and technical support. |
| JKL Group (Miami) | |
| MNO Partners (San Francisco) | Set up fee. |
| PQR Corp. (Denver) | Shipping at actual cost but NTE \$800. |
| STU, Inc. (Houston) | |
| VWXYZ LTD (Boston) | |

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Shipping Sheet

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Shipping Estimates

	<u>FedEx**</u>	<u>UPS</u>	<u>Box Brothers (Air Freight)</u>
Overnight (NY-Chicago*)	\$7,498.98	\$8,606.00	\$5,400.00
2nd day (NY-Chicago)	\$5,824.00	N/A	\$4,900.00
Ground (NY-Chicago)	N/A	\$2,117.00	N/A
Overnight (NY- San Diego*)	\$7,498.98	\$9,644.00	\$5,500.00
2nd day (NY- San Diego)	\$5,824.00	N/A	\$5,000.00
Ground (NY- San Diego)	N/A	\$2,217.00	N/A

Assumptions: Estimates are based on 100 boxes (10x12x16) weighing 35 pounds, pick-up and delivery to destination.

* Chicago and San Diego are hypothetical shipping destinations used for purposes of this estimate.

**The FedEx estimates may be reduced further through volume discounts FedEx offers customers with existing accounts.

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Appendix

Recipient List Individual Proposals

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Provider Pool Sheet

Roberts, Louis & Stevenson Case, 5/22/01

RFP Recipients

ABC, Inc.
Bogus Partners
DEF Corp.
Example Co.
Galt Inc.
GHI, Inc.
JKL Group
John Doe Imaging
MNO Partners
PQR Corp.
Sample Corp.
STU, Inc.
VWXYZ LTD

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ABC, Inc.

Proposal for
Scanning and Coding
RFP #859

ABC, Inc.
1234 Local Avenue
New York, NY 10021
XXX.345.6789

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ABC, Inc. Estimated Bid

Request For Proposal Number 000859

ABC, Inc. ("ABC") presents this estimate for document processing to PageBid("PageBid") to address the litigation support needs relating to a litigation matter for a large New York law firm.

ABC is also a certified reseller of major legal software packages including Summation®, Concordance®, LiveNote®, Access® and Trial Director®. Our expertise using these technologies makes ABC uniquely qualified to provide recommendations for handling your litigation quickly and efficiently.

ABC has provided Web solutions, standard product solutions and custom solutions for over twenty years to support the needs of our clients in managing litigation. ABC is currently hosting millions of pages of documents on our Web server for commercial and federal clients.

Assumptions:

- You have approximately 250,000 pages of documents to be prepped, scanned, OCR'd, reassembled and coded. These documents are assumed to be of "good" quality. ABC interprets the "good" quality as:
 - Primarily 8.5" x 11" or 8.5" x 14", no more than 20% odd-sized paper; Good quality originals, no more than 10% colored paper; Primarily single-sided documents, no more than 10% double-sided; Paper generally in good condition.
- Scanning should be done at 300 dpi.
- Documents should be scanned to single page tiff format.
- The documents are already physically bates labeled.
- Standard document coding is priced on a per document basis (instead of per page), and we will use the average of 5 pages per document (i.e., 50,000 documents for 250,000 pages) provided in the RFP.
- The following fields are to be coded:
 - Bates Start
 - Bates End
 - Attach Start
 - Attach End
 - Date
 - Estimated Date Qualifier
 - Document Type
 - Title
 - Subject or Re line
 - Author/Org
 - Recipient/Org
 - CC/Org
 - Document characteristics
 - Estimated date to begin work is 6/1/01. Estimated date for completion is 7/1/01
- ABC must review the document collection before committing to performing the project.
- ABC assumes that this project will be coding from images.

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Cost estimate for coding, scanning and OCR:

Coding:

Volume of documents	Price	Cost estimate
50,000	\$1.48 per document	\$74,000

Scanning:

Description	Quantity/Price	Cost estimate
Initial meeting with client	8 hours @ \$100 per hour	\$800
Prep and reassembly	250,000 pages @ 5 ¢ per page	\$12,500
Image capture/enhancement/QA at 300 dpi	250,000 pages @ 18 ¢ per page	\$45,000
Image capture/enhancement/QA at 200 dpi	250,000 pages @ 14 ¢ per page	\$35,000
Prep for loading into Summation	8 hours @ \$65 per hour	\$520
CD Mastering	1 Master set of 20 CD's @ \$75 per CD	\$1500
CD Duplicates	1 duplicate set of 20 CD's @ \$45 per CD	\$900

OCR:

Description	Quantity/Price	Cost estimate
OCR	250,000 pages @ 10 ¢ per page	\$25,000
Total estimate for Coding and Scanning at 300 dpi and OCR:		\$160,220
Total Cost estimate for Coding, Scanning at 200 dpi and OCR:		\$150,220

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Attachment A

ABC REFERENCES

Dewey & Howe, L.L.P.

Project Summary

On-line hosting implementation for an ongoing case. ABC has provided the following assistance to Dewey & Howe for this project and continues to support them today:

- Document processing, including document preparation and reassembly, imaging, OCR and objective coding of fielded information.
- Design and setup of database for use by personnel at Dewey and co-counsel
- Loading of all processed images, text and coded data into the database

Santa & Claus, PC

Project Summary

ABC provided document processing and litigation support services from June 1999 to present for a class action suit at the North Pole.

Document Processing & Management

ABC was responsible for the processing, management, security and control of a collection containing 140,000 documents with over 800,000 total pages. ABC created, installed and maintained a document control system that addressed security requirements and provided a folder/box level inventory which preserved the chain of custody during the shipment of the documents. All documents were prepared, scanned and reassembled to ensure that the integrity of each document was maintained. All images were quality checked to ensure that the best possible image was captured. The images were converted to full-text through the Optical Character Recognition process (OCR) and exported into single page TIFF Group IV files. Each image was assigned a unique number electronically as to not alter the original document. A relational image-enabled database was developed for the management of case documents. The database was customized for the client and incorporated full-text dirty OCR and coded field information for document searching, viewing and printing. Images and text files were delivered on CD-ROM. ABC technical support involved providing PC workstation support, software installation, upgrades and maintenance. The customized database was installed on stand-alone workstations and all images were made available to users on hard drives.

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*This would normally be followed by all
of the remaining proposals and
supporting material for providers who
responded to the RFP.*