

# Cost Proposal

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We propose to provide the State of Iowa with access to three purchasing options, including Thomson Reuters Westlaw Classic, Thomson Reuters Westlaw Edge, Thomson Reuters CLEAR, and Thomson Reuters HighQ. Our offer includes a comprehensive collection of content, features, and services that will meet the needs of Iowa users.

Our proposed pricing for State of Iowa the following options:

## **OPTION 1 – LEGAL RESEARCH WITH WESTLAW**

### **Option 1A – Westlaw**

- National Primary
- State Analytical

### **Option 1B – Westlaw**

- National Primary
- State Analytical
- ALR/AMJUR/CJS
- PeopleMap Premier
- All Briefs

### **Option 1C – Westlaw Edge**

- National Primary with Edge

### **Separately Priced Add-On Libraries**

- State Analytical
- ALR/AMJUR/CJS
- Trial Court Orders
- Criminal Analytical

## **OPTION 2 – INVESTIGATIVE RESEARCH WITH CLEAR**

### **Option 2A – Investigations Basic**

### **Option 2B – Investigations Advanced**

## **OPTION 3 – LEGAL PRACTICE MANAGEMENT WITH HIGHQ**

## **OPTION 4 – PRINT PRODUCTS AND PROGRAMS**

## **OPTION 5 – CUSTOM PACKAGES**

# Option 1—Legal Research with Westlaw

## OPTION 1A

- Content:**
- National Primary
  - State Analytical

**Research Platform:** Thomson Reuters Westlaw

**User Limit:** Pricing provided is monthly per user, per agency location

Number of Users	Base Year 7/1/2022	Option Year 1 7/1/2023	Option Year 2 7/1/2024	Option Year 3 7/1/2025	Option Year 4 7/1/2026	Option Year 5 7/1/2027
1-25	\$108	\$113	\$119	\$125	\$131	\$138
26-50	\$106	\$111	\$117	\$123	\$128	\$135
51-75	\$104	\$109	\$114	\$120	\$126	\$133
76+	\$102	\$106	\$112	\$118	\$123	\$130

## OPTION 1B

- Content:**
- National Primary
  - State Analytical
  - ALR/AMJUR/CJS
  - PeopleMap Premier
  - All Briefs

**Research Platform:** Thomson Reuters Westlaw

**User Limit:** Pricing provided is monthly per user, per agency location

Number of Users	Base Year 7/1/2022	Option Year 1 7/1/2023	Option Year 2 7/1/2024	Option Year 3 7/1/2025	Option Year 4 7/1/2026	Option Year 5 7/1/2027
1-25	\$183	\$192	\$202	\$212	\$223	\$234
26-50	\$179	\$188	\$198	\$208	\$219	\$229
51-75	\$176	\$184	\$194	\$204	\$214	\$225
76+	\$172	\$181	\$190	\$200	\$210	\$220

## OPTION 1C

**Content:** National Primary with Edge

**Research Platform:** Thomson Reuters Westlaw Edge

**User Limit:** Pricing provided is monthly per user, per agency location

Number of Users	Base Year 7/1/2022	Option Year 1 7/1/2023	Option Year 2 7/1/2024	Option Year 3 7/1/2025	Option Year 4 7/1/2026	Option Year 5 7/1/2027
1-25	\$180	\$189	\$198	\$208	\$218	\$229
26-50	\$176	\$185	\$194	\$204	\$214	\$224
51-75	\$173	\$182	\$190	\$200	\$209	\$220
76+	\$169	\$178	\$186	\$196	\$205	\$216

## OPTION 1 ADD-ON LIBRARIES

**Research Platform:** Thomson Reuters Westlaw/Westlaw Edge

**User Limit:** Pricing provided is monthly per user, per agency location

Library	Base Year 7/1/2022	Option Year 1 7/1/2023	Option Year 2 7/1/2024	Option Year 3 7/1/2025	Option Year 4 7/1/2026	Option Year 5 7/1/2027
State Analytical	\$20	\$21	\$22	\$23	\$24	\$26
ALR/AMJUR/CJS	\$23	\$24	\$25	\$27	\$28	\$29
Trial Court Orders	\$20	\$21	\$22	\$23	\$24	\$26
Criminal Analytical	\$14	\$15	\$15	\$16	\$17	\$18

## BLOCKED ACCESS/WARNING SCREENS

Libraries, features, and services on Westlaw that are not included in the proposed content to the agency will be excluded from our offer. For this excluded content, we can offer the agency two options:

- **Total Block**—We can restrict or “block” access to excluded libraries, features, and services for all agency users. Under this option, no additional charges would be incurred because users are prevented from accessing excluded libraries, features, and services. If users attempt to access an excluded library, feature, or service, they will receive a message similar to the following:
  - “Your request to access [library name] cannot be processed because use of this library is not authorized under your subscription agreement.”
- **Warning Screens**—We can provide access to excluded libraries, features, and services to agency users after first presenting users with a warning screen. Before users access a library that is outside of the agency’s subscription agreement, the users will be automatically warned that charges will be incurred for use of that library. They will receive a message similar to the following:
  - **“Notice:** [Library name] is not included in your current plan. If you access [library name], you will incur an additional charge.”

If the agency chooses to allow users to access excluded libraries, features, and services, access to and usage of the excluded libraries, features, and services will be billed separately to the agency at the applicable hourly/transactional rates provided in Schedule A, Plan 2.

# Option 2 – Investigations with CLEAR

## OPTION 2A

**Research Platform:** Thomson Reuters CLEAR Investigations Basic

**User Limit:** Pricing provided is monthly per user, per agency location

Number of Users	Base Year 7/1/2022	Option Year 1 7/1/2023	Option Year 2 7/1/2024	Option Year 3 7/1/2025	Option Year 4 7/1/2026	Option Year 5 7/1/2027
1-25	\$125	\$131	\$138	\$145	\$152	\$160
26-50	\$123	\$129	\$135	\$142	\$149	\$156
51-75	\$120	\$126	\$132	\$139	\$146	\$153
76+	\$118	\$124	\$130	\$136	\$143	\$150

## OPTION 2B

**Research Platform:** Thomson Reuters CLEAR Investigations Advanced

**User Limit:** Pricing provided is monthly per user, per agency location

Number of Users	Base Year 7/1/2022	Option Year 1 7/1/2023	Option Year 2 7/1/2024	Option Year 3 7/1/2025	Option Year 4 7/1/2026	Option Year 5 7/1/2027
1-25	\$194	\$204	\$214	\$225	\$236	\$248
26-50	\$190	\$200	\$210	\$220	\$231	\$243
51-75	\$186	\$196	\$205	\$216	\$226	\$238
76+	\$183	\$192	\$201	\$211	\$222	\$233

# Option 3—Management with HighQ

## OPTION 3

**Management Platform:** Thomson Reuters HighQ

**User Limit:** Pricing provided is monthly per user, per agency location

**One-Time Implementation Fee:** \$4,800 *(Per Agency Location)*

Number of Users	Base Year 7/1/2022	Option Year 1 7/1/2023	Option Year 2 7/1/2024	Option Year 3 7/1/2025	Option Year 4 7/1/2026	Option Year 5 7/1/2027
1-5	\$524	\$540	\$556	\$573	\$590	\$620
100GB of Storage	\$149	\$153	\$158	\$163	\$168	\$176

## Option 4—Print Products and Programs

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This option provides authorized agencies a discount off retail pricing for the purchase of eligible new print titles, existing print purchases, and eligible print programs. Agencies must work with their local West representative at the time of purchase to request the discount.

- Agencies will receive a minimum of a 10% discount off retail rates for the one-time purchase of eligible new print titles. Agencies that purchase eligible new print titles on subscription will receive a 10% discount at the time of the initial purchase, followed by a 20% discount when the titles are updated and new versions are released (i.e., 20% off then-current retail rates).
- Agencies that currently subscribe to eligible print titles on subscription will continue to receive a 20% discount off those titles when new versions are released (i.e., 20% off then-current retail rates).

Certain agencies may be eligible for additional discounting based on a multi-year commitment. These additional discounts/print programs can provide significant savings by locking in lower annual price increases as well as predictable billing for ease in budgeting. Please contact your local West representative for more information.

# Option 5—Custom Packages

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Research needs can vary dramatically from agency to agency, and not all agencies require access to the same content. Custom packages are offered in recognition that some State agencies have diverse and unique needs that cannot be met by the pre-packaged content sets provided by Options 1-3. This option provides agencies with maximum flexibility to purchase custom online legal, contract management, investigative, law enforcement, and other Thomson Reuters/West products and solutions that are specifically tailored to the research needs of individual agencies and end users (including content and features, number of users, and contract length). Offering customized packages allows an agency to enjoy the best value, in terms of both price and content.

**Please note:** A pricing schedule is not available under this option, as the custom agency-specific pricing will be negotiated with the individual agency based on its unique research subscription needs. Agencies will contact their local Thomson Reuters representative for information on these custom packages, and to obtain their discount.

## LEGAL RESEARCH CUSTOM PACKAGES

If an agency's legal research needs differ from or extend beyond the pre-packaged content set offered under Option 1, we can customize a legal research package that is specific to the agency's needs.

In addition to Westlaw, Thomson Reuters offers additional legal products and solutions that may be of interest to State agencies, such as legal know-how/practical legal guidance, legal drafting assistance, continuing legal education (CLE), e-discovery, virtual hearings, digital evidence management, digital identity, public records, patron access, case management, and court management.

## INVESTIGATIVE RESEARCH CUSTOM PACKAGES

When an agency's investigative research and law enforcement needs differ from or extend beyond the pre-packaged content sets offered under Option 3, we can work with individual purchasing agencies to create custom special packages that are specific to an agency's investigative research needs.

**Please Note:** All law enforcement agencies must purchase Investigative Research solutions under a Custom Package.

Under the custom packages option, agencies can enhance their investigative research subscription with premium tools, features, and services. For example, CLEAR offers the following additional resources:

- Real Time Incarceration & Arrests
- Healthcare Licenses/Sanctions
- World Check Risk Intelligence Data
- License Plate Recognition
- Real Property Reports
- Deed and Parcel Maps
- Business Credit Reports
- Vehicle History Data
- Delaware Corporate Gateway
- News
- Adverse Media

- SEC Filings
- Additional data delivery modes including batch processing for high-volume searching
- System-to-system capability (which integrates query and result retrieval directly into internal user applications)

Having numerous search options provides organizations with needed flexibility to meet unique search, retrieval, and integration requirements.

## LEGAL PRACTICE MANAGEMENT CUSTOM PACKAGES

When an agency's data management needs go beyond that of basic document and case management, HighQ has customizable packages to meet the Contract, Matter, Intake, and Agreement Drafting needs of the agency. Whether it's managing Public Records requests to anonymous HR drop boxes, HighQ has the power to meet your needs. Examples of the customizations available with HighQ include the following:

- Document versioning
- Document Automation powered by Contract Express
- Redactions, auto-redact, and bulk redactions
- Bulk Storage needs
- Outside Counsel Litigation Sites
- Document Automation
- Multiple Instances for Multiple Agencies
- Native Integrations
- Social collaboration
- Solution templating
- APIs, Apps, and Add-ins
- Additional internal users and storage

# Pricing Terms and Conditions

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The following terms and conditions apply to any contract between Thomson Reuters (West Publishing Corporation, hereinafter "West") and State of Iowa, (hereinafter, "State") resulting from this proposal (hereinafter "contract").

- **Contract Term**—The proposed contract term is for one year: 7/1/2022 – 6/30/2023.
- **Renewal Option**—Any contract resulting from this proposal may be renewed for five (5) additional one-year periods (Option Years 1–5), subject to available funding.
- **Eligibility**—Available only to authorized state and local agencies as agreed upon by the terms of the Master Service Agreement negotiated between the State and West Publishing Corporation ("West"). The rates set forth hereunder are available only to government personnel accessing West products for government purposes.
- **Agency/Purchasing Entity Locations**—Each agency location must subscribe separately. Access is limited to the agency's personnel at that location. Purchasing agencies/entities with multiple locations may purchase under the Custom Packages.
- **Passwords**—Each Westlaw, CLEAR, or HighQ user must be assigned a separate Westlaw, CLEAR, or HighQ password. Westlaw, CLEAR, or HighQ passwords may only be used by the person to whom the password is issued. Sharing of passwords between or among users is STRICTLY PROHIBITED. West reserves the right to issue additional passwords to the State if West learns that Westlaw, CLEAR, or HighQ has been used by a person other than the person to whom the password has been issued.
- **Password Rates**—The Monthly Charge per User under the Per Password option will NOT be prorated. Requests for passwords by new Subscribers or requests for additional passwords by current Subscribers that are processed by West by the last day of a month will be billed the entire Monthly Charge per User for each password request during such month. The Monthly Charge per User for Subscribers that elect to change from one option to another will be effective on the first day of the month following receipt and approval of the appropriate documentation by West.
- **Included and Excluded Charges (Westlaw)**—The proposed content is included in West's proposed fixed monthly charge. Access to and usage of all other content, features, and services is excluded and will be billed separately as excluded charges. The excluded content, features, and services will be charged at the applicable rates (including applicable transaction, communications, and other associated charges, if any) for each library, feature, or service accessed according to the then-current terms and conditions as set forth in the then-current Schedule A, Plan 2 Westlaw Government Service  
  
West may, at its option, make certain content, features, and services excluded charges if West is contractually bound or otherwise required to do so by a contributor of data to West, or if the content, features, and services are enhanced or released after the effective date of any contract awarded to West pursuant to this proposal.
- **Non-FCRA Use (CLEAR)**—CLEAR is intended for due diligence and investigative purposes, activities not regulated by the Fair Credit Reporting Act (FCRA). Thomson Reuters is not a consumer reporting agency, and customers must not use any of the content, information, or services provided on our sites as a factor in establishing a consumer's eligibility for credit or insurance to be used primarily for personal, family, or household purposes; for employment purposes; in consumer debt-collection decisions, or for any other purpose authorized under section 1681b of the Fair Credit Reporting Act (15 USCA §1681b).

- **New Content, Features, Services, and Platforms**—West reserves the right to charge for any new content, features, services, or platforms released during the term of this contract (whether “third-party” content or not), and such charges may be separate from and in addition to the Fixed Monthly Charge. Such charges (if any) shall not be greater than the charges at which such content, features, services, or platforms are made available to West’s other government subscribers under West’s then-current Government Price Plan.

If, however, any new content, features, services, or platforms released during the term of this contract are made generally available to government subscribers as part of their fixed rate agreement, West will also make these same new content, features, services, or platforms available to the agency at no extra cost.

West may, at its option, make certain content, features, and services excluded charges if West is contractually bound or otherwise required to do so by a contributor of data to West, or if the content, features, and services are enhanced or released after the effective date of any contract awarded to West pursuant to this proposal.

- **Ordering Documents**—All access to and usage of Westlaw, CLEAR, or HighQ is governed by the then-current Thomson Reuters General Terms and Conditions, Product-Specific Terms, and applicable Order Form. These documents will be incorporated by reference into and made part of any contract awarded to West pursuant to this proposal.
- **Signature Requirements**—The applicable Order Form and all related documentation must be signed by an authorized representative.
- **Credentialing Documents**—Access to and usage of CLEAR/PeopleMap requires completion of the then-current Account Validation and Certification (AVC) Form.
- **Contractor Information**—Any contract resulting from this proposal will be with:

<b>Legal Contracting Entity</b>	West Publishing Corporation
<b>Doing Business As (DBA)</b>	West, a Thomson Reuters business
<b>Corporate Address</b>	610 Opperman Drive, Eagan, MN 55123
<b>Remittance Address</b>	P.O. Box 6292, Carol Stream, IL 60197-6292
<b>Federal Tax ID #</b>	41-1426973
<b>DUNS #</b>	14-850-8286
<b>Cage Code</b>	89101
<b>Company Size</b>	Large

- **Order Processing**—Westlaw, CLEAR, or HighQ service will begin 5 -7 days following receipt of a fully executed, clean, and process-able Order Form. To expedite the processing of an order, please ensure that the order references West’s Order Form (i.e., “This order incorporates by reference the attached West Order Form”).
- **Survivability**—At the time of expiration or cancellation of the Master Service Agreement, any existing multi-year agreement between West and a purchasing agency will remain in effect and continue to exist under the terms and conditions of the Master Service Agreement, including payment for services, until the term expires as set forth in the multi-year agreement.
- **Offer Acceptance Period**—The terms of this price proposal are valid for 120 days from the submittal date of this proposal.

The following are among the many editorial enhancements provided by our attorney-editors:

- **Synopses**—Each case synopsis (about 40,000 created annually) summarizes the main holdings of a case and brings into close proximity the legal principles, procedural history, and related facts in the case. At a glance, users can determine whether a case is potentially relevant to their research.
- **Headnotes**—Our attorney editors write headnotes for every distinct point of law in each case, resulting in more than 475,000 headnotes created annually. These headnotes, which are classified to the West Key Number System, help users find more relevant cases faster and include terms describing legal relationships and standard, consistent terminology.
- **Key Numbers**—The West Key Number System, available exclusively on Westlaw, is the master classification system of U.S. law and is widely regarded as the cornerstone of effective legal research. Key numbers are assigned to every point of law in every published case, and these key numbers help users to quickly find other cases that address the exact point of law being researched.
- **Procedural Posture (Westlaw Edge Only – Option 1C)**—Our attorney editors identify the procedural motions, requests, and objections made in a case, along with the appellate posture of the case, so you can filter and see opinions at your desired stage of litigation.
- **Added Search Terms**—Case synopses and headnotes contain terms that may not have been used by the authoring judge. These additional terms include synonyms, acronyms, terms of art, and the popular names of statutes, as well as words that describe the legally significant relationships between the parties (e.g., *landlord* and *tenant*, *husband* and *wife*). As a result, a Westlaw search can retrieve relevant cases that an opinion-only search would miss.

Court's Terms	Terms Added by West Attorney Editors
Smith	Landlord
Defendant	Buyer
Bank	Mortgagee
Plaintiff was injured	Products liability
Firestone	Tire manufacturer
42 U.S.C. § 12111	Americans with Disabilities Act

- **Statute Citations**—The *United States Code Annotated* (USCA) and annotated state statutes on Westlaw give users valuable assistance in applying and interpreting statutes. The annotations include statutory credits, historical and statutory notes, library references, and notes of decision.
- **Parallel Citations**—More than 500,000 parallel citations are added to Westlaw each year to help ensure accurate and convenient research.

## Verification and Correction Process

Our attorney editors provide the most exhaustive verification and correction process in the legal publishing and information industry today, greatly improving the quality of our content. In fact, we are the only legal information provider to engage in these quality control steps to ensure the accuracy and reliability of the data; other legal research services and information providers merely put the raw opinions online and might never correct mistakes.