Consensus for Purpose- 'CFP' CMS Checklist Review

Date: 06 May 2024

Status: Final

Contents

1.   Executive Summary

This checklist outlines key considerations for centres who are considering selecting Consensus for Purpose ('CFP') as their CMS tool, including problem definition, functionality, integration, costs, and vendor capacity.

When considering any CMS tool to be used as the primary system for business and case management in their centre, a centre must consider their different priorities and requirements.

Key questions for centres include:

•   What is your overall vision for the CMS tool?

•   What are your business objectives?

•   What key outcomes does your chosen CMS tool need to achieve?

When centres carefully consider the answers to these questions, the CMS tool is likely to meet the centre's required business functionality.

This checklist should be read in conjunction with PowerPoint slide deck and webinar recordings delivered to Queensland centres on 8 May 2024. Links will be provided after this presentation.

For a live demonstration recording, please click on the below link and download and watch the recording.

Consensus for Purpose - Demonstration-20240325_143359-Meeting Recording.mp4

2.   Overall System Functionality

Feature	CFP	Rating	Roadmap
User Management	**Yes**	√√√√	**Live**
User Experience	Yes	√√√√	Live
Security	Yes	√√√√	Live
Search	Yes	√√√√	Live
Integration with Office 365	Yes	√√√√	Live

3.   Case Management Functionality

3.1.   Client Management

Feature	CFP	Rating	Roadmap
Client Details – at a Glance	**Yes**	√√√√	**Live**
Alerts/Notifications e.g. high risk clients	Yes	√√√√	Live
Other Parties	Yes	√√√√	Live
Search	Yes	√√√√	Live
Update Client details easily	Yes	√√√√	Live
Merge duplicates	Yes	√√√	Live
View all Services at a glance	Yes	√√√√	Live
Conflict Checking	Yes	N/A	In test. June 2024
Client Portal	Yes	N/A	TBD in later phase

3.2.   Service/Matter Management

Feature	CFP	Rating	Roadmap
Service Details – at a Glance (all details of a matter)	**Yes**	√√√√	**Live**
Reminders/Alerts/Notifications e.g. key dates	Yes	√√√√	Live
File Notes	Yes	√√√√	Live
Tasks	Yes	√√√√	Live
Key dates including limitation dates	Yes	√√√√	Live
Matter and task assignment	Yes	√√√√	Live
Supervision, risk management review	Yes	√√√√	Live
Capture outcomes	Yes	√√√√	Live
Matter & Task assignment	Yes	√√√√	Live
Time Tracking	Yes	√√	Live. Future customisation anticipated.
Supervision/ Risk Management File Review	Yes	√√√√	Live
Capture outcomes	Yes	√√√√	Live
Matter closure / archive	Yes	√√√√	Live

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3.3.   Referral Management

Feature	CFP	Rating	Roadmap
Referral to	Yes	√√√√	Live
Referral from	Yes	√√√√	Live
Track referrals	Yes	√√√√	Live
Internal referrals	Yes	√√√√	Live

3.4.   Appointment Management

Feature	CFP	Rating	Roadmap
Create & view appointments	Yes	√√√√	Live
View calendar (personal and shared)	Yes	√√√√	Live
Send reminders and follow-ups	Yes	√√√√	Live
Integrated to Outlook for calendar and emails	Yes	√√√√	Live
Calendar synchronised with Office 365	Yes	√√√√	Live
List views of all assigned appointments (individual and shared)	Yes	√√√√	Live
Appointments linked to matter/client and can be seen on general user and supervisors' dashboard as well as in Outlook	Yes	√√√√	Live
SMS Reminders • Send SMS from CMS • Track SMS	Yes	N/A	Will be integrated in later phase

3.5.   Document Management

Feature	CFP	Rating	Roadmap
Documents uploaded into integrated SharePoint Online instance	Yes	√√√√	Live
Drag & Drop documents to save	Yes	√√√√	Live
Easy to manage documents across a remote and part-time workforce	Yes	√√√√	Live
Create subfolders	Yes	√√√√	Live
Document tagging	Yes	√√√√	Live
Emails kept within related matter	Yes	√√√√	Live
Version control	Yes	√√√√	Live
Limited/Controlled Access (Information Barriers)	Yes	√√√	Live

3.6.   Template Management

Feature	CFP	Rating	Roadmap
Create or import own templates from other sources	Yes	√√√√	OOTB Feature release July 2024

Feature	CFP	Rating	Roadmap
Auto-generation – defined fields will populate automatically	Yes	√√√√	OOTB
Templates can be Outlook, Word or Excel	Yes	√√√√	OOTB
Easy for power users to define, populate, update and assign templates so general users can generate documents	Yes	√√√√	OOTB

4.   Integration

Feature	CFP	Rating	Comment
Integration with MS Office • Emails • Calendar • Reminders • Tasks • SharePoint Online • Word • Excel	Yes	√√√√	Live
Integration to CLASS	No	XXXX	No system will integrate to CLASS. There is no plan by CLCA to integrate data back into CLASS since the Data Import Tool Project has failed. When CLCA has completed the build of the new National Data Repository, Consensus Data will be able to be transferred to the new National Data Repository via the CLCA approved Data Ingestion methods.
Integration to DEX1	Yes	N/A	Yes – in later phases, via centre-specific customisations. Further information will be need to gathered around this business requirement prior to implementation.
Compatibility with NLADS2	Yes	N/A	Very easy, as Consensus has been customised specifically to meet the NLADS requirements.

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[1] DEX is the tool that some centres are required to use for reporting on DSS funding for social security services and matters.

[2] NLADS is the acronym for Na onal Legal Assistance Data Standards.

5.   Vendor Capacity

Vendor presence in Australia	Yes
How large is the vendor team?	50 in Australia 150 + overseas support staff
How long has the vendor been operating for?	11+ years
Vendor involvement with community legal sector	Heavily involved with community sector. Barhead has an entire NFP sector, servicing NFPs and NGOs, domestically and internationally
Hosting	Solution is hosted in Australia
Deployment support	All data source and other deployment and migration requirements will be discovered when discussing deployment support. CFP can handle as many data sources as required on a case-by-case basis. **Is there integration and migration support?** Yes. **Are documents going to be migrated too, or just clients/matters?** Everything will be migrated.
Ongoing maintenance	Sliding scale. See costs sheet.
Training	**How much training is offered?** Agreed during discovery and agreement phase. Barhead and the consortium will work with each centre to provide training and support to ensure each migration is a success.
Support	Barhead, via email.
Contract considerations	Defined by centres and Barhead by mutual agreement.

6.   Other Considerations

Customisation	**How much customisation to the product is required?** Minimal, if any. All DSM values and processes are implicit within CFP. Centre-specific customisations may be required. This relates mainly in operational process areas or specific field customisations. **How easy is the product to customise?** Very easy. Proper training provided to power users will ensure that simple configuration customisations, such as adding fields and values, changing views, creating specific dashboards, creating templates, can all be handled in-house.

Regional and remote (offline operation)	Is there a need to use the solution offline? E.g., at courts Basic solution can be used offline e.g. looking up a contact, recording a filenote etc. More advanced functionality require an internet connection.
Software requirements	What software does your centre need to run the system, e.g., what version of Windows is required? Does it run on a Mac? Not dependent on a particular version of windows. Can be run on any modern device, PC or Mac.
Community legal education and law reform	Does the system allow for collection of data on other key activities such as CLE and law reform? Yes.

7.   Cost Comparison

Costs*		LEAP		Consensus		Actionstep		Cabenet	
Cost per user (standard)	$3,468	$104,040	$450	$13,500	$708	$21,240	$480	$14,400
Cost per user (volunteer)	$3,468	$693,600	$0	$0	$252	$50,400	$480	$96,000
Total licence cost all users per annum		**$797,640**	**$13,500**	**$0**		**$71,640**		**$110,400**
Additional ongoing costs:								
Support*				$12,000		$15,000		
Other apps – Microsoft app user**				$8,280				
Kontekta CLASS Sync						$2,500		
One-off costs:								
Implementation***				$5,000		$25,000		$11,880
Total outlay year 1		$797,640		$38,780		$114,140		$122,280
Total year 2		$797,640		$33,780		$89,140		$110,400
Total year 3^		$797,640		$33,780		$89,140		$110,400
Total year 4		$797,640		$33,780		$89,140		$110,400
Total year 5		$797,640		$33,780		$89,140		$110,400
TOTAL		**$3,988,200**		**$173,900**		**$470,700**		**$563,880**

*All costs based on 30 standard users
and 200 volunteers

**Based on 100 Microsoft licences

***Implementation is a range - depends on complexity - agreed with Barhead.Can range between $5,000 to $40,000 depending on number of data sources.

^CLASS is decomissioned