

Questions/Answers – Contract Life Cycle Management System

Hosting Options

1. Would you be open to pricing for the Contract Management system to be hosted by vendor (SaaS/cloud) or deployed on your organization's server (on-premise)? **Yes, Pace is open to pricing for the Contract Management System to be hosted by vendor cloud.**

User Licensing

1. How many total users?
 - How many internal users will require administrative level access? **4**
 - How many internal users will require the ability to add, edit and delete? **8**
 - How many internal users will require request only access? **70**
 - How many internal users will require read-only access? **70**

NOTE: We will need 40 approver levels which does not appear in the categories above. If access is configured separately from the above categories, the numbers will shift. Presently we have 3 levels – Administrators, Approvers and Requestors.

2. How many internal users do you project will require access to the system at any given time concurrently? **40**

Data Import

1. Does your organization require data import services? **Yes, we will need data import services.**
2. If so, please expand upon the data migration / importing requirements for the Contract Management Software System? (Such as record info, employee lists, vendor lists, etc.) **We will need our current data in our current CLMS system moved to the new system.**
3. How many total electronic files (PDF, MS Word, etc.) in current/legacy system into the Contract Management Software System? **We have approximately 2,520 contracts (primarily in ADOBE PDF but some are in MS Word: we have the ability to convert if necessary). Each Vendor in the System also has a profile page/file, and each Contract likely has several supplemental electronic files (email correspondence, copies of vendor insurance & licensing, etc.).**
4. How many total electronic files in current/legacy system? (rows in the exported spreadsheet) **See prior answer, plus we have approximately 45 files representing contracts which were in existence prior to purchasing current system and have been scanned in and saved.**
5. Where are the legacy (historic) electronic contract files currently stored? (shared folders, Sharepoint, document management system, paper, etc.) **Our files are stored with**

Conga through cloud based application. Conga is our first CLMS and all of our legacy files are in the Conga system.

Data Integration

1. Can you please expand upon your preferences to integrate with third-party system(s)? Please provide system details (system name and version, database used, scope of use, home-grown or commercial) if applicable. **PowerBI, DocuSign, Azure. We have current versions of each program.**
2. Are there any additional systems that may require a one-time data import such as a legacy Contract Management system? If so, please provide the system name, version, scope of use, the total number of contract records and files being imported into the system and SOAP/REST API, if available. **No, our current Contract Management System is Conga.**
3. What objects, fields, and tables will your organization be passing in the data integration between the Contract Management Solution and System and specified third-party system(s)? **Contracts to be signed.**
4. Are the other systems installed/deployed on your organization's server(s) or is the vendor hosting the software (cloud/SaaS)? **Cloud Based**
5. Does third-party system(s) have one of the following available for integration and your organization has licensed access: SOAP API, REST API? **Unknown**
6. Can you please provide additional details about your organization's process flows or diagrams as it relates to the integration requirements? **Need additional data from vendor to determine how to answer this question and if applicable.**

Document Templates

1. What documents/contract types would you like to author within the system (number of templates)?
2. Do you require professional services to configure templates? If so, how many would be required for the awarded vendor to configure?

We author our own documents/contract types and we would like training on how to continue to do so in the new CLMS (with the option to use the professional services of the awarded vendor to configure additional templates on an as needed basis).

Below is a short list of a few of our documents/contract types:

- Master Service Agreement – Government (SSD Funds)
- Master Service Agreement – Non-Government
- Fundraiser/Grant Writer
- Memorandums of Understanding (MOUs)
- Internship Agreement
- Construction Contract

- Volunteer Agreement
- Janitorial Services
- Event Venues
- Storage Units

Workflow

1. Do you require professional services to configure workflow processes? If so, how many would be required for the awarded vendor to configure?
2. Can you please provide additional details about your organization's workflow/approval processes? Can you please provide number of steps and examples?

Pace would like training on how to configure/create/modify workflow processes in the new CLMS (with the option to use the professional services of the awarded vendor to configure additional templates on an as needed basis).

Additional details about our organization's workflow/approval processes are provided below:

PRE-AWARD Phase

- Step 1 – Contract Requesters
- Step 2 – Executive Directors/Dept. Managers - Management Approval
- Step 3 – Contracts Admin/Analyst Review
- Step 4 – Finance Approval

AWARD Phase

- Step 5 – Contracts Manager – Pre-Negotiations Review & Approval
- Step 6 – In House Counsel –Legal Review & Approval
- Step 7 – Contracts Specialist –Negotiations & Final Draft
- Step 8 – Final Signatures from Authorized Signers via DocuSign

POST-AWARD Phase

- Step 9 – Performance Monitoring Checklist for Contracts Specialist
- Step 10 – Business Reviews (with Vendors/Contractors/Subcontractors)
- Step 11 – Compliance Audits (with Center Locations)
- Step 12 – Amendments/Renewals/Extension/Modifications/Terminations[®]

Implementation

1. Do you have an established time frame for the implementation of the awarded solution? If so, what are the anticipated kick-off and go-live dates? **Kick Off** – early November; **Go Live** – early December
2. If no specific dates have been established, how many weeks do you plan to dedicate to the implementation process?
Our preference is for:

- Access for a small group (4-5) to a Sandbox/demo training as part of contract negotiation in October
- Role based trainings in Mid-November (prior to implementation)
- Second round of training in December or January (after implementation)

Public Sector Bids

1. Is your organization eligible to purchase off the **GSA Schedule 70**? If yes, would you like GSA pricing in the bid response or retail pricing? **Yes, Pace is eligible to purchase off the GSA Schedule 70 and we would like GSA pricing included in the bid response.**

Additional Questions

1. Does your organization require an electronic signature tool? If so, are you currently utilizing a specific product and which tool are you using? **Yes, our organization currently uses DocuSign.**
2. What is the total number of current contracts? **2,520**

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Reference from ITN	Section	Supplier Question
CLM RFP pdf: “Hosting Platform – High availability platform” – page 3	Technical Requirements	Can Pace define what “High Availability” means in this context? Sufficient redundancy to limit service interruptions & maximize access; also want to ensure maintenance does not impede regular access; want to be sure that multiple users can access system without impacting speed and use of program.
CLM RFP pdf: “Encryption: Ownership, data at rest, and data on the fly” – page 4	Technical Requirements	Does Pace currently have any encryption tool in use? We use encryption for email communication, on our devices and in our data. We use Barracuda Email, MicroSoft 365, One Drive and other programs.
CLM RFP pdf: “Multi-platform accessibility” – page 4	Technical Requirements	Can you please define “platform” in this context? Ability to access System from laptops, phones and apps on other portable devices
CLM RFP pdf: “Contract Requests – ability to design our own custom request forms that anyone with minimal training or limited system access can use to submit requests and/or upload supporting documents” – page 4	Functional Requirements	Can you define the use case for this requirement? We want to ensure that our direct care staff who have busy schedules and are trained in social services and academics can easily use and navigate the system. We do not want a program that is configured such that you have to be an “expert” or a “techie” to understand.
CLM RFP pdf: “All in One Contract File (not separate files) - make process less complex” – page 5	Legal (In-House Counsel) Requirements	Please further define “all in one contract file.” For example, is this a record where the meta-data is stored and organized and the actual files (word docs, PDFs, etc.) are associated with the record? Our current Conga system separates the contract itself from its exhibits, and amendments, and all other documents modifying or constituting the contract and then saves each one as a separate file. We need one file for the complete contract so we do not have to open/access multiple files to obtain the current contract.
CLM RFP pdf: Describe the products, utilities, processes, and services recommended or needed for the conversation and/or upload of Pace’s existing data – page 6	Data Conversion and System Interfaces	Where is Pace’s data currently stored? What system(s)? Data is stored in the Cloud; system is Conga.

<p>CLM RFP pdf: Technical Requirements: “Centralized administration and management” -page 3</p>	<p>Technical</p>	<p>Can Pace please provide examples of contract types/forms/templates they expect to manage via this CMS?</p> <ol style="list-style-type: none"> 1. Master Service Agreement – Government 2. Master Service Agreement – Non-Government 3. Fundraiser/Grant Writer 4. Memorandums of Understanding (MOUs) 5. Internship Agreement 6. Construction Contract 7. Volunteer Agreements 8. Janitorial Services 9. Event Venues 10. Storage Units
<p>CLM RDP pdf: Dates and Timeframes - page 2</p>	<p>Timeline</p>	<p>Is there a required or desired timeframe / date for System Go-Live? If so, please elaborate. Preferred Go-Live is early December 2022</p>
<p>CLM RFP pdf: Scope of Work, “Pace CLMS Users” – page 3</p>	<p>Scope of Work</p>	<p>Do these identified user type groups represent different named individuals or are there any overlapping users between categories? Will any other functional department personas need to view or access any of the data residing in the contract management system? (for example, BD or Capture teams, legal, finance, procurement, HR...) No overlap in our original categories of Administrator, Approver, and Requestor, bus if the user roles are more narrowly defined (e.g. separating requestor from read only or administrators from read, write & edit), the numbers will be different than in our original ITN. See above – “User Licensing” Section on first page.</p>