



## INVITATION TO NEGOTIATE (ITN) Contract Lifecycle Management System (CLMS)

**Pace ITN Release Date: Thursday, August 18, 2022**

**Introduction:** The purpose of this document is to invite vendors to participate in the Pace Center for Girls, Inc. (Pace) Invitation to Negotiate (ITN) procurement process for acquiring a new Contract Lifecycle Management System (CLMS). The goal is to solicit responses for products and services that **1.)** address our company’s contract lifecycle management system needs, **2.)** integrate into electronic signature system(s), and **3.)** provide professional and data migration services to assist in the implementation process for the CLMS.

### Pace Center for Girls Leadership



### Our Vision

Pace envisions a world where girls and young women have power in a just and equitable society.

### Our Mission

Pace provides girls and young women an opportunity for a better future through education, counseling, training, and advocacy.

**Pace's Day Program:** Pace’s team of counselors, and educators provides free year-round middle and high school academic services, counseling, life-skills training, career preparation and more, developing individualized approaches based on each girl’s unique strengths, life experiences and needs.

**Pace's Reach Program Services:** Pace’s team of therapists and counselors offers social, emotional, behavioral health and support services for girls ages 11-17 and their families. Reach therapists provide services in our centers as well as in girls’ homes, schools, and communities.

**Pace Locations:** Pace, one of the only multi-state, gender-responsive, trauma-informed, and strength-based models for girls, is a non-profit organization with a National Office in Jacksonville, Florida. We provide services in **28 different counties** across **3 states**:

<b>FLORIDA</b>	Alachua Broward Citrus Clay Collier (Immokalee) Naples (Reach only)	Escambia-Santa Rosa Hernando Hillsborough Jacksonville (Duval) Lee Leon	Manatee Marion Miami-Dade Orange Palm Beach Pasco	Pinellas Polk Treasure Coast (St. Lucie) Volusia-Flagler
<b>SOUTH CAROLINA (Reach Programs)</b>	Darlington, Florence			
<b>GEORGIA (Reach Programs)</b>	Macon-Bibb, Peach			

## PACE’S ITN PROCUREMENT PROCESS

Pace selected the ITN process as the best way to obtain the required combination of *best value pricing*, *top-tier technology*, and *excellent services* from vendors with a proven track record.

**Step One:** Vendors will be invited to submit responses to this ITN. Systems *must, at a minimum*, meet Pace’s mandatory requirements as listed in the “**Critical Criteria for Proposed Software**” section of this ITN.

**Step Two:** The Procurement, IT/IS, and Contract Management Teams will evaluate vendor responses with respect to Pace’s needs and critical criteria, as presented in this ITN. Qualified vendors will be invited to continue in the procurement process.

**Step Three:** Selected vendors will then be asked to perform *live and/or virtual* product demonstrations. Such demonstrations will be based upon Pace’s specific functional needs, requirements, and ease of use.

**Step Four:** Pace may ask selected vendors to refine their proposals for various products and services.

**Step Five:** Pace will select a vendor to proceed with contract negotiations.

### **Procurement Agent**

The Procurement Agent is Paul Tappe. Email: [Paul.Tappe@pacecenter.org](mailto:Paul.Tappe@pacecenter.org).

### **No Contact or Lobbying**

Vendors shall not contact, directly or indirectly, any Pace employee, officer, representative, or member of its Board of Trustees or local Boards of Directors, for the purposes of influencing or attempting to influence an award or other final decision. A vendor may, as an exception to this prohibition, contact the named Procurement Agent. The provisions of this section shall begin on the release date of this ITN and continue until Pace renders an award for this ITN. Any contact prohibited by this section will disqualify a vendor from further consideration.

### **ITN Submittal Information**

**\*\*\*Vendor ITN Submission Deadline: Wednesday, September 7, 2022, at 6:00pm Eastern Time**

Responses must be sent via email to **Paul Tappe, Procurement Analyst**, at [paul.tappe@pacecenter.org](mailto:paul.tappe@pacecenter.org) up to the indicated date and time. Late proposals will not be accepted. **Responses shall be binding upon the provider for 180 calendar days following the award recommendation date.** All terms and specifications included in or appended to this ITN apply to any subsequent award.

### **\*Dates and Timeframes\***

<b>Pre-Award - Release of Pace ITN</b>	<b>August 18, 2022</b>
<b>Vendor questions due</b>	<b>August 26, 2022</b>
<b>Pace responses to vendor questions due</b>	<b>August 31, 2022</b>
<b>Deadline for vendor submissions of ITN</b>	<b>September 7, 2022</b>
<b>Vendor invitations for demonstrations/RSVPs</b>	<b>September 12, 2022</b>
<b>Vendor demonstrations and presentations</b>	<b>September 15 – September 27, September 30, 2022, and October 3, 2022</b>
<b>Award – Vendor Selection/Contract Negotiations</b>	<b>October 17, 2022</b>
<b>Approve &amp; Sign finalized contractual agreement</b>	<b>October 25, 2022</b>
<b>Begin Implementation Process of New CLMS</b>	<b>November 10, 2022</b>
<b>Post-Award – Compliance/Performance Monitoring</b>	<b>TBD</b>

### **Changes to the ITN**

If Pace determines, at its sole discretion, that it is necessary to change any information in this ITN, including changes to the dates and times above, an addendum will be posted at [www.pacecenter.org/rfps-itns](http://www.pacecenter.org/rfps-itns). It is the Vendors’ responsibility to monitor Pace’s website for any changes.

**\*\*\*NOTE:** The Pace ITN procurement process for a new Contract Lifecycle Management System (CLMS) **is not** legally binding and should not be considered as a promise to deliver or pay for goods and services until a vendor is selected and awarded a fully executed contractual agreement. Issuance of this ITN does not require Pace to award a contract. If contract negotiations fail with the Vendor first chosen as the award winner, Pace may rescind the award and negotiate with another finalist.

## SCOPE OF WORK

**Examples of Application Software Supported at Pace.** Conga, Salesforce, DocuSign, Microsoft 365, Multiview

**Pace CLMS Users:**

<b>Number of Administrators</b>	<b>10</b>
<b>Number of Approvers</b>	<b>50</b>
<b>Number of Requesters</b>	<b>50</b>

Pace requires that for all tasks, the Vendor assign a **dedicated representative** to work with Pace IT and its Contracts Management Team through all phases of review, setup, data migration, planning, and training.

**Review of Pace Business Model.** The planning phase will include a vendor review, in consultation with Pace’s IT, and Compliance & Risk Management Teams, of Pace’s current contracts business processes and make recommendations to Pace as to modifications to its processes based on best practices and software functionality. The goal is to ensure there are no gaps in our contracts management process and transfer of data.

**Initial System Setup.** In consultation with Pace's IT and Contracts Management Team, the Vendor will work with Pace to complete the initial setup of the system.

**Planning/Implementation.** Pace expects that implementation will consist of two *in person* pilots, three *remote* pilots and a subsequent phased rollout of the system throughout Pace’s National Office and Pace Center Locations in consultation/collaboration with Pace’s IT and Contracts Management Team. Pace expects that the Vendor will provide a dedicated representative to work directly with Pace during the pilot and initial implementation. The pilot implementation will include an additional review of the system setup should it be necessary to fine-tune the initial setup as described in “**Initial System Setup**” above. Vendor should provide timeline and suggestions on rollout process.

**Training.** The implementation phase will include Vendor-provided training for contract management system administrators and pilot program participants. The Vendor will also propose an additional training strategy including either face-to-face training or Web-based training for additional users during the first phase of Pace-wide rollout. Online training webinars and/or a **dedicated representative** are needed for ongoing training.

### CRITICAL CRITERIA FOR PROPOSED SOFTWARE Mandatory Requirements

Pace wishes to update its contract management tools and procedures to provide greater efficiency, tracking, and ease of use. As such, please confirm if your system meets the following *minimum* mandatory requirements:

Technical Requirements	Yes	No	Vendor Comments (If applicable)
<b>Cloud Based</b> - cloud storage and hosted solution			
<b>Hosting Platform</b> -High availability platform			
<b>Up to Date Browser</b> (current, latest release of Edge or Chrome)			
<b>Roles &amp; Permissions</b> -The ability for role-based access			
<b>Disaster Recovery</b>			
<b>Backup Recovery</b> – backup and data retention			
<b>Robust App Capabilities</b> (demonstrate in real time)			
<b>Multi-Factor Authentication</b> (MFA) capability. Azure AD Multi-Factor Authentication			

compatibility is strongly preferred.			
<b>Single Sign-on (SSO) capability.</b> Azure AD SSO compatibility is strongly preferred.			
<b>Encryption:</b> ownership, data at rest, and data on the fly			
Centralized administration and management			
Strong preference for an integrated, secure e-signature component.			
Multi-platform accessibility.			
Ability to audit and track users and data			
<b>Integration</b> with Outlook, Microsoft 365 Office Suite Application, Microsoft Teams (e.g., approval workflow, expiring contracts etc.)			
<b>Graphic capabilities</b> for reports and integration with Microsoft PowerBI			
<b>Functional Requirements</b>	<b>Yes</b>	<b>No</b>	<b>Vendor Comments (If applicable)</b>
<b>Centralized Electronic Repository</b> – so that contracts are easy to track, manage, and secure.			
<b>Contract Requests</b> – 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.			
<b>Automated Alerts/Notifications</b> - tasks and calendar reminders that align with each contractual agreement.			
<b>Clause &amp; Template Libraries</b> – the ability to create these libraries with pre-approved legal language (terms & conditions), and document formats to assemble contracts faster and eliminate deviations.			
<b>Redlining</b> - a system that tracks changes by user and allows them to simultaneously review and revise documents directly in the system.			
<b>Auditing</b> - complete audit trail data and auditing capabilities that align with each agreement; capture and store full contract history data such as tracked edits, updates, logins, and user permissions.			
<b>Automated Workflows</b> - clearly defined workflows for the entire contract lifecycle (Pre-Award, Award & Post Award)			
<b>Digital e-Signatures</b>			

DocuSign (or CLMS)			
<b>Post Award Checklist – Contract Performance/Monitoring; Compliance Review Tools</b>			
<b>Legal (In-House Counsel) Requirements</b>	<b>Yes</b>	<b>No</b>	<b>Vendor Comments (If applicable)</b>
Legal Review/Approval in Workflow			
Flags, fields and/or categories for key data (exp. dates, choice of law, unusual provisions etc.)			
<b>All in One Contract File</b> (not separate files) –make process less complex			
<b>Risky Clauses</b> – define, readily identify, and report against			
<b>Ability to track MBEs &amp; WBEs</b> (Minority & Women Owned Businesses)			
Searchable PDFs			
Ability to generate <b>Summary Sheets</b> (basic contract summary, abstract or key info)			
<b>Data Security</b> - Vendor’s agreement to comply with FERPA, HIPAA and security protocols regarding data (including entering into a Business Associate Agreement)			
<b>Data Analytics &amp; Reporting Requirements</b>	<b>Yes</b>	<b>No</b>	<b>Vendor Comments (If applicable)</b>
A master tool that can be used for generating reports and running analytics to meet Pace’s objectives			
Separate ability for authorized users to generate limited reports			
Complies with security and privacy requirements by allowing access only to authorized users			
Create data visualizations (charts & graphs) from a variety of sources			
Customizable dashboards			
Real-time reporting			
Scheduled reporting			
Ability to drill down into reports			
Ability to report on workflow step turnaround times			
Online tutorials & training materials (for the data analytics & reporting)			
<b>Customer &amp; Account Services Requirements</b>	<b>Yes</b>	<b>No</b>	<b>Vendor Comments (If applicable)</b>
Dedicated Representative(s)			
Online tutorials & training materials (for the CLMS)			
24/7 support. Knowledge base, phone support availability, live chat support.			
<b>Insurance Requirements</b>	<b>Yes</b>	<b>No</b>	<b>Vendor Comments</b>

(If applicable)			
Cyber Liability, minimum \$1 million per occurrence/\$2 million aggregate and additional insured endorsement			
Professional Liability (E&O), minimum \$1 million per occurrence/\$2 million aggregate			

**REQUIRED FORMAT FOR ITN RESPONSE**  
**New Contract Management Lifecycle System (CLMS)**

**Section 1: Executive Summary**

- ❖ Summarize your company’s submission in response to the ITN.

**Section 2: Vendor Profile**

- (a) Vendor’s business name, mailing address, phone number, and website address
- (b) Vendor’s primary contact person and their contact information
- (c) Brief overview of the vendor’s company, products, and services
- (d) Identify proposed staff and provide professional background details
- (e) Are you a certified or non-certified Minority Business Enterprise (MBE or WBE)?

**Section 3: Critical Criteria for Proposed Software (Mandatory Requirements)**

- ❖ Respond to each of the items in the section above.

**Section 4: Proposed Software Products**

- ❖ Identify all application software that is proposed or required.

**Section 5: Proposed Training and Implementation Services**

- (a) Describe the training and implementation support required, recommended, available or provided for each proposed software product, including the database management system.
- (b) Provide a suggested implementation schedule, including major milestones.
- (c) Estimate the number of hours of vendor-provided professional services and frequency.
- (d) Describe all additional services (e.g., remote technical support) required, recommended, and available or provided for each proposed product.

**Section 6: Data Conversion and System Interfaces**

- ❖ Describe the products, utilities, processes, and services recommended or needed for the conversion and/or upload of Pace’s existing data.

**Section 7: Software Maintenance and Enhancements**

- (a) Describe the benefits, impacts, and schedules of new releases and modules. State the circumstances under which such releases are mandatory or optional.
- (b) Describe, both during and after the warranty period, the procedures for obtaining product support.
- (c) Explain how custom modifications can be made by the vendor and/or Pace. In addition, describe the alternative mechanisms for maintaining such modifications over time.

**Section 8: Vendor’s Corporate Strength**

- ❖ Describe the vendor’s corporate history, market segment(s), client base, employee base, research and development programs and financial well-being.

**Section 9: Optional Products and Services**

- ❖ Describe, in detail, all optional products and services. Pace may want to procure an optional item but might not be able to do so if it is not formally declared in this section. Optional products might include query tools, workflow systems, documentation, training materials, data warehouses, database technologies, and security mechanisms.

**Section 10: Additional Information**

- ❖ Provide any additional information that Pace should consider in its evaluation of your response. This would include marketing brochures or generic information that meets your *specific solution(s)* to this ITN and a list of whether your company is currently involved in litigation with any of your clients.

**Section 11: User Types (License Levels)**

- ❖ List each user type and provide comprehensive details on capabilities, roles, and permission levels.

**Section 12: Pricing Sheet**

- ❖ Include a detailed pricing sheet, including but not limited to license costs per user type (individual and bulk), number of users, proposed length of term, add-on modules, professional services, data migration services, support and maintenance, and non-profit discounts.

Version Update: 1. Calendar of Events Update-Vendor Demonstrations  
2. Calendar of Events Update-Award Notification  
3. Leadership Team update