

## Exhibit B

Each year, Poudre School District processes approximately 900-1200 contracts. Currently, the District manages contracts through a manual process of retaining base agreements and updates for each vendor on network drives. Clauses are kept in a folder and inserted using the copy and paste process. Vendors are currently tracked with an excel spreadsheet for long-term agreements and through our ticketing system for short-term agreements. No single system exists for tracking and reporting on agreements.

We are looking for a contract management solution that creates efficiencies throughout the full life-cycle of agreements, which includes but may not be limited to creation, tracking, notices and vendor compliance.

Contract management solutions should have a workflow automation to ensure proper approvals are given by various departments prior to execution of agreements.

Systems should have the ability to retain all vendor agreements in one location by project or request, with specific details for each agreement. The District would like to automate our manual systems to allow for consistency, transparency, and accuracy in documents and communication. Currently, we have very limited reporting and search abilities for finding information by agreement type. Internal schools and departments do not currently have the ability to search for agreements, but we are interested in a solution that has this capability.

### 1. Scoring

a. System Functionality Minimum Requirements	20%
b. Additional System Functionality	35%
• Contract Performance	
• Technical Components	
• Useability	
• User Support	
c. Written Proposal	20%
d. References	5%
e. Cost	20%

### 2. System Functionality Minimum Requirements

- Centralized vendor information
- Centralized all agreements, amendments, documents and projects with vendors
- Tracking of contract start dates, end dates, or amendment dates by agreement and vendor
- Calculation of total contract value, including all amendments
- Creation of contract numbers

- Searchability of data items in contract solution, including notes
- Ability to create and add custom data fields to meet specific district needs
- Ability to identify department and internal end users by agreement
- Ability to send notifications to external and internal customers
- Ability for multiple users to access the system.

### 3. Contract Performance

- 3.1. Have you created systems for other Educational Institutions? If yes, please describe your previous work and size of institution.
- 3.2. Explain how your system provides monitoring of vendor compliance or tracking of issues with a vendor.
- 3.3. Explain how your system allows for auditing of vendor performance.
- 3.4. How does your system manage contract close-out, including final performance, notices, and any financial tracking of spends?
- 3.5. Does your system have the ability to compare contractual pricing and actual spends?
- 3.6. Can your system keep contract template for use? Does the system have merge and injection capabilities? Can created agreements be sent to internal customers for review and revision prior to sending to vendors?
- 3.7. Is versioning available for agreements or other created documents?
- 3.8. How are vendor agreements managed in the system? Can these be uploaded to and then modified within the system and processed through workflow?

### 4. Technical Components

- 4.1. Is this an out-of-box system? If so, can there be any development to meet specific District needs?
- 4.2. Explain your process for implementation, including supports.
- 4.3. If full development is needed, what is the process and which method do you use?
- 4.4. What are the limits of your repository? Are data and documents stored on your servers or ours?
- 4.5. Does your system have the ability to receive and send data to other systems? Please explain how your system integrates with third-party systems; through API, flat file, or other systems?
- 4.6. Does your system use SSO? How is this set up? What data can be transferred over? For example, a system should be able to bring over name, department, contact information, and other details.
- 4.7. Can the system allow for workflow capability, including approval workflow? Please explain and identify how the system works, including branching, dual approval, triggers, and any other specifics.
- 4.8. Provide a description and details of your warranty.
- 4.9. Describe your user roles and the levels of access.

## 5. Useability

- 5.1. Do you have an end-user friendly dashboard for non-system users to search and create reports?
- 5.2. What reporting capabilities does your system have available? What are your canned reports and what capabilities are there for writing new reports? Are reports real time?
- 5.3. Does your system have the ability to send emails to end-users and vendors? How do these emails process? Are they canned or can they be modified based on need? Can users view system-generated emails that were sent?
- 5.4. Explain how notices to internal and external customers are sent through your system, along with any tracking of auto-notices.

## 6. User Support

- 6.1. If changes to forms, process, or additional development is needed, what are the costs?
- 6.2. What training is provided, both for initial use and ongoing?
- 6.3. Explain your customer support and ongoing service. Provide a copy of your service level agreement.