



**SHAWNEE MISSION
SCHOOL DISTRICT**

Contact information:

Shawnee Mission School District
Purchasing Department
8200 W. 71st Street
Shawnee Mission, Kansas 66204

ATTN: Reed Beebe

**Please note that vendors may request a copy of
this RFI in Word format by emailing
purchasing@smsd.org.**

DATE: February 27, 2023 RFI NO. 23-010

RFI TITLE: **Contract Management Solution**

Responses will be accepted until:

Date: **March 29, 2023**

Day: **Wednesday**

Time: **11:00 a.m. CST**

**Terms, conditions, and specifications under which
responses are requested are included. Please review
thoroughly.**

Introduction:

The Shawnee Mission School District (“the District”) requests a written response to this Request for Information (“RFI”) for the purpose of obtaining information from qualified vendors interested in providing a contract management solution capable of meeting the District’s needs in managing various types of contracts.

This is a request for information only; this RFI is issued by the District solely for its information and planning purposes, and the RFI does not commit the District to contract for any supplies or services whatsoever. The District, at this time, is not seeking detailed proposals that outline specific pricing and terms and conditions, but the District intends to follow-up with selected vendor(s) that offer products and services that are of interest to the District, with possible subsequent negotiation of a multi-year contract with the desired vendor(s).

All RFI responses shall be delivered, and shall adhere to the format, as further indicated herein. The District shall have the right to ask additional questions of – or request additional information from – responding vendors. The responses may, upon review by District staff, result in a qualified list of vendors for the products and services requested in this RFI; should this occur, finalists will be notified, and formal proposals will be requested that include specific pricing and other terms and conditions for the District’s consideration.

This RFI includes an overview of the District’s current practices regarding the management of its contracts.

Overview:

The Shawnee Mission School District is located in suburban northeast Johnson County, Kansas, ten miles from downtown Kansas City, Missouri. The District is the third largest school district in the state of Kansas and is dedicated to guiding students to success.

The District uses BusinessPlus, a product provided by vendor PowerSchool, as its financial software platform. While BusinessPlus does offer a contract management module, the District currently does not use this module, and the District would like to consider available products that provide the desired contract management solution features identified in this RFI.

The District manages approximately 300 contracts per year. The majority of these (approximately 150 to 200) are American Institute of Architects (AIA) contracts with construction contractors. Other contracts include annual or multi-year service, lease, or licensing agreements with various renewal schedules and requirements.

Contracts are generally signed by managerial District staff (managers, directors, etc.) Contracts exceeding \$20,000 are signed by the District's Board of Education (BOE) president.

Executed contractual agreements are saved on a District-built software platform that serves as a central repository for District contracts. This platform notifies select staff of renewal dates, but currently does not provide additional reminder notifications (for example, reminders for insurance certificates or renewal notice deadlines). Input access to this platform is currently limited to less than ten District staff; most staff are unable to directly upload contracts to the platform for storage. This platform does not have robust reporting capabilities.

The District currently does not have a platform or solution that allows for electronic contractual creation, review, editing, or signature collection. Most contract signatures are gathered via handwritten signatures on printed contractual documents, and contract edits are managed via PDF, Word, Google Docs, email communications, or other software platforms among District staff and vendors. Some vendors send the District contractual documents via DocuSign or other platforms for signature, but these electronic documents are often printed, signed physically, and then scanned.

Desired Features:

The District currently desires a contract management solution with the following features:

- The ability to review and edit created or uploaded contract documents
- The ability to allow for electronic signatures
- The ability to set up a contract review workflow (so that staff can determine the status of a contract, who is currently reviewing the contract, who needs to sign the contract, etc.)

- The ability to automate needed checklist information that can be communicated to vendors (W-9 paperwork, insurance certificates, bonds, etc.)
- The ability to serve as an electronic storage repository for executed contracts
- The ability to notate/document vendor or contract issues on one platform
- The ability to automate notifications (expiring contract term, expiring insurance certificates, need to rebid, etc.)
- The ability to upload information (vendor address, vendor contact information, etc.) from the District's current financial software BusinessPlus, and the District's current contract repository
- The ability of the vendor to provide a smooth implementation and training resources for staff
- The ability to provide an aesthetic, easy-to-use solution for staff and vendors
- The ability to track contract amounts/changes to contract amounts (spend, change orders, addenda, etc.)
- The ability to set different levels of access (administrative, staff only, vendor access, etc.)
- The ability to set/change contract management workflow for different types of contracts
- The ability to have easy searchability using such search criteria as vendor name, contract description, entry date, expiration date, key terms, etc.
- The ability to edit (add, remove, or modify) notification fields for automated reminders
- The ability to facilitate vendor usability of the system, particularly if the vendor uses another electronic signature program for its contract management

Software Requirements:

A wholly Web based platform would be most desirable to the District, but if additional client software is required, that software must not be limited to a single operating system and the software must have function and feature parity across all supported operating systems. At minimum, any additional required software must be fully functional on macOS 12 or later and Windows 10/11. Please note that if additional client software is required, and this software does not meet the requirements identified in this section, the District may disqualify the listed contract management solution from further consideration.

Desired Budget and Implementation Timeframe:

The District currently has established no budget for a contract management solution, but anticipates that annual costs (excluding any applicable implementation costs) will range between \$25,000 and \$75,000. However, at this time the District is interested in gauging

general features and cost ranges. Currently, the District would be interested in implementing a contract management solution in the summer months (June-July-August 2023), although the District's schedule is flexible and subject to discussion with the selected vendor(s).

RFI Response Requirements:

Submitted responses should be limited to the sections and items identified below. The capacity of the respondent to make a complete and responsive presentation will be favorably considered.

Submittals should contain the following items:

- A. **Letter of Interest:** Provide a brief letter expressing the respondent's interest and appropriate qualifications. The letter of interest should include the following information:
 - Title of this RFI ("**RFI 23-010: Contract Management Solution**");
 - Name and mailing address of respondent (including physical location, if mailing address is a P.O. Box);
 - Contact person, telephone number, and email.
- B. **Completion of Exhibit A Questionnaire:** Respond to the questions listed in **Exhibit A**. Please note that a Word copy of this RFI, including Exhibit A, can be requested by emailing purchasing@smsd.org.
- C. **Completion of Exhibit B Checklist:** Please check "Yes" or "No" regarding your firm's ability to provide the desired contract management software solution features listed in the provided checklist. You may also use this checklist to clarify or provide additional information regarding your firm's ability to provide a contract management solution that addresses the District's desired features. Please note that a Word copy of this RFI, including Exhibit B, can be requested by emailing purchasing@smsd.org.
- D. **References:** Provide three (3) references for similar products/services provided within the last five (5) years, to institutions of similar size and needs to the District. Provide a brief description of the products and services provided. If a vendor is selected for subsequent negotiations, the vendor will be asked to provide specific reference contact names, addresses, and telephone numbers that can provide feedback on the proposed products and services.

Response Submittal Instructions:

Responses shall be submitted no later than the time and date indicated herein. Responses submitted to a location or individual other than that listed below will not be considered duly delivered or timely. The District shall not be responsible for re-routing responses delivered to a person or location other than that specified below. Late response submittals shall not be accepted or considered. All responses, whether accepted or rejected, shall become the property of the District and will not be returned. The District

reserves the right to waive minor defects and/or irregularities in response submittals and shall be the sole judge of the materiality of any such defect or irregularity. The District reserves the right to seek additional responses if the received responses are deemed unsatisfactory. All costs associated with response preparation shall be borne by the respondent.

Responses may be submitted in hardcopy format (one physical copy, along with a thumb drive containing a digital copy of the proposal) to the **“Official Contact”** address listed in this RFI, and shall be received by delivery in person or via service (US Mail, UPS, FedEx, etc.) in a sealed envelope or box. Electronic delivery (i.e., email) will not be accepted.

All responses must be received no later than **11:00 a.m. CST, Wednesday, March 29, 2023**, and should be clearly marked **“RFI 23-010 – Contract Management Solution.”**

Please note that vendors may request a copy of this RFI in Word format by emailing purchasing@smsd.org.

Official Contact/Deadline for Questions:

Additional feedback or questions may be addressed by the official contact below:

Reed Beebe
Shawnee Mission School District
8200 W. 71st Street
Shawnee Mission, KS 66204
913-993-6475
purchasing@smsd.org

All questions concerning this RFI must be received no later than **Friday, March 17, 2023 by 4:00 p.m. CST**. The District will address questions via addenda (see **“Addenda/Cancellation”** below); it is currently anticipated that any applicable addenda will be issued by **Wednesday, March 22, 2023 by 4:00 p.m. CST**.

Response and Response Evaluation Availability:

To the extent allowed by the laws of the State of Kansas, including the Kansas Open Records Act (K.S.A. 45-215 *et seq.*), responses received by the District will not be open to public review, nor disclosed to unauthorized persons, prior to award of a contract (or a decision by the District not to award a contract) for the products and services listed in the RFI. Likewise, the District’s evaluation documentation of the received responses will not be open to public review nor disclosed to unauthorized persons, prior to award of a contract/decision not to award. Thereafter, all proposals and related evaluation documentation shall be open to public inspection.

Addenda/Cancellation:

The District may modify or cancel this RFI at any time prior to the RFI due date by issuance of an Addendum or Cancellation. Such Addenda and/or Cancellations will be

posted on the District's website, currently: smsd.org (Go to [About](#); [Department Teams](#); [Purchasing & Bidding](#); [Bids & Bid Summaries View Page](#)).

Selection Criteria:

After the District's initial review of submitted responses, the District intends to choose one (1) to three (3) highly qualified vendors considered best qualified and capable of providing/performing the desired products/services outlined in this RFI and, if desired, request product demonstrations of the proposed solution(s); the District may attempt further negotiation with the goal of executing a final contract with the selected vendor(s). However, the District reserves the right not to make a contract award, to make a partial contract award, or to make a multiple vendor contract award, at its sole discretion, through this RFI process.

The following criteria will be used by the District to evaluate the RFI responses:

- The response's adequacy in providing the desired information outlined in this RFI (5 points);
- The desirability to the District of the contract management features identified in the response (50 points);
- The desirability to the District of the general cost ranges/cost model(s) in relation to the District's needs (15 points);
- The respondent's experience and qualifications in providing the products and services desired by the District (10 points).
- The respondent's ability to provide adequate implementation services (10 points)
- The respondent's ability to provide ongoing customer support and training (10 points).

Confidentiality of Respondent Information:

The District is a state agency, and information submitted to the District in response to District solicitations for product or service information is generally a public record. Accordingly, no response shall restrict the District's ability to produce the solicitation response and/or any corresponding documents in response to a lawful request or from otherwise complying with the Kansas Open Records Act (K.S.A. 45-215 *et seq.*)

Confidentiality of District Information:

Respondent acknowledges that any information provided by or obtained from the District in connection with this RFI is the sole property of the District and must be treated as confidential, and that this confidential information is not to be used for any purpose other than replying to this RFI, and that this confidential information must not be disclosed without the prior written authorization of the District, and, if applicable, that this confidential information must be returned to the District immediately upon the request of the District.

Pricing/Cost Model Information for General Information Purposes**Only:**

Any pricing/cost model information provided by respondents is for general information purposes and is not intended to be binding on respondents. Any legally binding pricing or purchasing commitments will be established only when specified by the express terms of a subsequent bid or negotiation process, or where established through the execution of a written agreement.

The District understands that specific pricing will be determined by the products and services selected by the District, and at this time the District is interested in information regarding general pricing structure options and general cost ranges, not a finalized price quote.

Information in RFI Only an Estimate:

The District and its representatives make no representations, warranty, or guarantee as to the accuracy of the information contained in the RFI or issued via addenda. Any quantities or data contained in this RFI or related addenda are good-faith estimates provided only as general background information.

Governing Law:

It is understood and agreed that the construction and interpretation of this RFI and related addenda shall be governed by the laws of the State of Kansas.

EXHIBIT A: QUESTIONNAIRE

Please respond to the questions below; a Word copy of the RFI, including Exhibit A, can be requested by emailing purchasing@smsd.org. In addition to completing this questionnaire, please provide a letter of interest and references, along with completing Exhibit B, as outlined on page 4 of this RFI.

1. Please discuss your firm's experience and qualifications with providing contract management solutions and services. Please include information regarding your firm's years of operation and service to institutions of similar size and needs to the District, as well as general information about your staffing size.
2. Discuss how your firm would work with the District to implement a contract management solution. What is a typical implementation timeframe for clients with similar needs to the District? What information or resources (staff contacts, software or network access, etc.) do you anticipate your firm will need from the District in order to implement a solution?
3. Please discuss training and implementation resources that will be available to District staff for your contract management solution. Also, what resources are available for sustained training of new District staff?
4. Please discuss what general reporting features (dashboards, report generation, etc.) are available with your firm's contract management solution.
5. Describe your firm's typical process for transferring existing data (vendor information, contract expiration dates, PDF copies of contracts, etc.) from existing client platforms to your solution?
6. Please discuss your firm's customer support services (hours of operation, services offered, chat, service ticket, or other communication options, etc.)
7. Please discuss the customization capabilities of your contract management solution, in terms of allowing District staff to establish data fields and workflows.
8. How would the District's vendors be able to utilize the contract management solution (for example, submit contracts, make edits to contract documents, receive notifications, upload documents, etc.)? Would the vendor need to be established as an account user in the proposed solution?
9. If a District vendor has a preferred contract signature solution (for example, submitting documents for signature via DocuSign or other software), would your firm's contract management solution be able to accommodate existing vendor signature processes?

10. The District outlines its software requirements on page 3 of the RFI (“Software Requirements”); please discuss whether your firm’s contract management solution is able to meet these requirements, if applicable.
11. Please discuss your solution’s pricing structure. For example, are ongoing costs based on the number of user licenses, a flat annual subscription fee, etc.? Is discounted multi-year pricing available? How are implementation costs, if applicable, billed (deposit, progress payments, etc.)? If pricing is based on user licenses, how is the term “user” defined (for example, staff who upload contracts, vendors who access the solution to upload documentation or respond to automated notifications, etc.)?
12. The District understands that final costs for a contract management solution are contingent upon final products and services selected by the District, and the District is not seeking a formal or binding quote at this time. However, based on the District’s needs, what is a typical annual cost range for your firm’s contract management solution? What is a typical implementation cost range, if applicable?
13. Is there any additional information about the capabilities of your firm’s contract management solution in meeting the needs of the District, not addressed in the questions above or in the District’s checklist of desired features, that you would like to share? You are welcome to submit any additional information materials (brochures, online links, etc.) that you think may be of interest to the District.

EXHIBIT B: DESIRED FEATURES CHECKLIST

Please check “Yes” or “No” regarding your firm’s ability to provide the desired contract management software solution features listed below; a Word copy of the RFI, including Exhibit B, can be requested by emailing purchasing@smsd.org. In addition to completing this questionnaire, please provide a letter of interest and references, along with completing Exhibit A, as outlined on page 4 of this RFI. **NOTE: The District understands that proposed contract management solutions may not be able to provide all of the desired features listed below, and the inability of a solution to provide all desired features is not disqualifying for consideration.** The checklist below is meant to help District staff gauge which desired features may be available from a proposed solution.

| Desired Features | Yes | No |
|--|-----|----|
| The ability to review and edit created or uploaded contract documents | | |
| The ability to allow for electronic signatures | | |
| The ability to set up a contract review workflow (so that staff can determine the status of a contract, who is currently reviewing the contract, who needs to sign the contract, etc.) | | |
| The ability to automate needed checklist information that can be communicated to vendors (W-9 paperwork, insurance certificates, bonds, etc.) | | |
| The ability to serve as an electronic storage repository for executed contracts | | |
| The ability to notate/document vendor or contract issues on one platform | | |
| The ability to automate notifications (expiring contract term, expiring insurance certificates, need to rebid, etc.) | | |
| The ability to upload information from the District’s current financial software BusinessPlus, and the District’s current contract repository | | |
| The ability of the vendor to provide a smooth implementation and training resources for staff | | |
| The ability to provide an aesthetic, easy-to-use solution for staff and vendors | | |
| The ability to track contract amounts/changes to contract amounts (spend, change orders, addenda, etc.) | | |
| The ability to set different levels of access (administrative, staff only, vendor access, etc.) | | |
| The ability to set/change contract management workflow for different types of contracts | | |

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| The ability to have easy searchability using such search criteria as vendor name, contract description, entry date, expiration date, key terms, etc. | | |
| The ability to edit (add, remove, or modify) notification fields for automated reminders | | |
| The ability to facilitate vendor usability of the system, particularly if the vendor uses another electronic signature program for its contract management | | |

CLARIFICATIONS -- If you would like to clarify or provide additional information regarding your firm's ability to provide a contract management solution that addresses the District's desired features (for example, if your solution offers a different but equivalent feature, or alternative or additional features that may be of interest to the District), you may do so below: