

Shawnee Mission School District  
RFI 23-010 – Contract Management Solution  
March 22, 2023

**Addendum No. 3**

The following responses address a questions submitted by vendors on March 10, 2023, March 14, 2023, March 16, 2023, and March 17, 2023; the response to a question is indicated in **bold**. If you feel that a question has not been addressed, please contact Reed Beebe at [purchasing@smsd.org](mailto:purchasing@smsd.org) as soon as possible.

1. Can the district accept digital submissions?

**No; the RFI currently states on page 5 (“Response Submittal Instructions”), that “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.”**

**The District has concerns that electronic submissions via email or other platforms might be impacted due to such communications being identified by the District’s servers as spam, or possibly quarantined electronically. The District, therefore, at this time prefers physical delivery as instructed in the RFI.**

2. Can you expand on the checklist requirement listed on Desired Features, Bullet 4?

**Bullet 4 under “Desired Features” (page 3 of the RFI) is listed as follows: “The ability to automate needed checklist information that can be communicated to vendors (W-9 paperwork, insurance certificates, bonds, etc.)” The District is interested in a solution that would be able to notify vendors when new or updated documentation might be needed. For example, if a contract requires that an insurance certificate be on file with the District, and the current insurance certificate’s expiration date is inputted into the contract solution, the solution would be able to send an automated communication to the vendor that a new insurance certificate needs to be sent to the District. The District is open to exploring a variety of solutions that address this need to ensure that the District is getting any needed documentation from vendors.**

3. Does BusinessPlus have open APIs? Does the District have BusinessPlus SMEs on staff, or do they utilize an outside party to manage the tool?

**To the District's knowledge, BusinessPlus does not have open APIs; it has targeted APIs that either work with certain modules not currently used by the District, or with specific processes such as emails. These targeted APIs are only installed by vendor PowerSchool if there is a targeted module that will utilize that specific API.**

4. Can you elaborate more about the technical aspects of the system's house built repository? What OS is it built on? Would this tool ultimately be sunset after the implementation of a new tool, and successful migration of legacy agreements?

**The current contract repository uses a Ricoh hot folder from the scan function of a Ricoh copier/scanner; it indexes the document by PeopleSoft, then incorporates the BusinessPlus vendor ID into a file share with MSQI backend. This system has been around for about 14 years, and currently has about 2,000 active files. A custom script may be needed to import all data.**

**The District anticipates that usage of the current house-built repository for current and future contracts would be discontinued after implementation of a new contract management solution. The District would want to have discussions with the selected vendor regarding what data is ultimately migrated to a new solution; for example, some of the older, long-inactive contracts in the house-built platform may not be migrated to the new system, and the District may consider storing these defunct agreements in another District archive, or in the current house-built platform.**

5. What types of contracts does the District plan on handling with the CLM tool? (Professional Services, HR, Real Estate, etc.)

**At this time, the District is interested in managing all types of contract documents – professional services, human resources, vehicle leases, real estate, construction contracts, etc.**

6. How many different templates does the District currently utilize for their contracts?

**The District uses many different templates for contracts. Contracts generally are generated and provided by our third party vendors, as opposed to the District generating the contract. The District contracts with numerous entities throughout each school year, and each entity has a different contract form that they use. The contracts that the District enters into vary greatly with regard to formatting,**

**complexity, and length. Our contracts with architects and construction contractors generally are standard AIA forms.**

**The District's purchasing department has a contract template for service contracts awarded through RFPs. This template is used when the vendor does not provide a contract to the District.**

7. What is the breakdown of contracts executed on Internal Templates and Third-Party Paper?

**See above, in response to question number 6. The majority of the contracts that the District enters into each year are generated and provided by the vendor. Of the District's estimated 300 contracts signed per year, about 150 to 200 of these contracts are standard AIA contracts with language revisions as negotiated by the District.**

8. Aside from legal approvals, are there other approvals that are regularly required during the contract process?

**In addition to review by the District's General Counsel, various District managerial staff are able to review and provide input on contractual documents. Contracts over \$20,000 require approval from the District's Board of Education (BOE) and signature from the BOE president. The District would want to work with the selected vendor to discuss the appropriate workflows for contract reviews of various contract documents.**

9. Can anyone initiate a contract review, or are there approvals (even verbal) prior to that contract initiation process?

**Contract reviews are generally initiated by managerial staff, who contact the District's General Counsel or Purchasing Manager regarding contractual matters, although secretarial, educational, or other staff can also request such reviews. The District would want to work with the selected vendor to discuss the appropriate contract initiation workflow for various contract documents.**

10. What types of KPIs and or Reporting Capabilities are desired?

**The District is interested in solutions that offer a variety of reporting capabilities. Some reporting features of interest include aesthetic, user-friendly dashboards that summarize key data, such as the number of current active contracts; contractual financial amounts; and pending actions (contracts needing to be renewed, or needing new or updated documentation, etc.)**

11. How many people would require access to the CLM System:

- a. Initial Requestors – **the District currently anticipates up to 20 District staff requesters may use the system, although the District would want to work with the selected vendor to confirm this number. This estimate does not include vendors that may be accessing a solution.**
- b. Negotiators – **the District currently anticipates that up to 20 District staff negotiators may use the system, although the District would want to work with the selected vendor to confirm this number. This estimate does not include vendors that may be accessing a solution.**
- c. SME Approvers – **The District’s General Counsel and Purchasing Manager would be subject matter experts (SME) approvers. There may also need to be managerial review, as well as the Board of Education (BOE)’s approval (with signature by the Board president and attestation by the Board secretary) for contracts exceeding \$20,000.**

12. For legacy documents:

- a. How many documents will be required to be moved into the system? **The District’s current intent is to migrate active contract documents into a new platform. The District is currently uncertain about the specific number of documents to be migrated, but would work with the selected vendor to identify the final number of legacy document to be migrated to a new platform.**
- b. How many terms need to be extracted per document? **The District currently would like to have the vendor name, beginning term date, expiration term date, and contract description for legacy documents migrated to the new system, although the District would want to discuss what information could be transferred to the new solution, with the selected vendor.**

13. For Third Party Paper:

- a. Approximately how many contracts on third party paper are submitted annually? **Currently, the District estimates about 100 documents are submitted on third-party paper (that is, a vendor’s contract documents, which can include proposals, purchasing agreements, or subscription agreements that need to be signed by the District.)**

14. How many internal users will be actively using this system?

**Currently, the District estimates that approximately 20 internal users will be actively using the contract management solution, although the District would want to work with the selected vendor to confirm this number.**

15. How many internal users will be in creating workflows?

**Currently, the District estimates that approximately two to three internal users will be authorized to create workflows in the contract management solution, although the District would want to work with the selected vendor to confirm this number.**

16. How many internal users will be initiating workflows?

**Currently, the District estimates that approximately 20 internal users may initiating workflows (that is, submitting documents for review/editing/approval) in the contract management solution, although the District would want to work with the selected vendor to confirm this number.**

17. How many internal users will be approving or need to be notified about workflows?

**Currently, the District estimates that approximately 10 internal users will be approving or need to be notified about workflows, although the District would want to work with the selected vendor to confirm this number.**

18. How many internal users will be creating/initiating contracts?

**Currently, the District estimates that approximately two or three internal users will be creating/initiating contracts, although the District would want to work with the selected vendor to confirm this number.**

19. How many internal users will be approving contracts?

**Currently, the District estimates that approximately 10 internal users may be using the contract management solution to approve contracts, although the District would want to work with the selected vendor to confirm this number.**

20. How many external vendors/users will be interacting with the system?

**The District envisions that all vendors with active contracts may have interaction with the system (to submit contract documents, or contract-related documentation like**

insurance certificates, etc.), so approximately 300 vendors may have access to the system in a given year.

21. What types of integration communications are allowed to BusinessPlus Finance? For example, Rest API, XML , etc. How many different object types need to be integrated between contract solution and BusinessPlus Finance? For example, Vendor, General Ledger, etc. Does Integration with BusinessPlus Finance require an additional license/cost if so does the District already have this?

**The District is not aware of any open API for BusinessPlus Finance that can be set up by outside vendors. There are specific APIs that vendor PowerSchool can install for various modules that the District is currently not using and with specific specifications that PowerSchool has partnered with previously. The District's experience is that having PowerSchool install as specific API written for an application comes at financial expense for the District. However, please note that while the District is interested in a contract management solution that may be able to upload vendor information (addresses, contact information, etc.) from BusinessPlus, and possibly have the ability to help the District track expense information related to contractual amounts, integration with BusinessPlus is not a requirement for the District's consideration of the proposed contract management solution.**

22. Besides DocuSign, what other electronic signatures is the school using currently?

**DocuSign is the primary electronic signature platform that vendors utilize to collect signatures, and the District also uses DocuSign on occasion to collect signatures; any other type of signature platform that a vendor might ask the District to utilize (such as Adobe) is rare.**

23. Are there plans to create a portal that vendors will log into?

**The District envisions that vendors will be able to access the contract management solution to submit contracts and related documents (required insurance certificates, etc.) The District is open to consider various options for how this vendor access would work, including a vendor portal for vendors to log into the solution.**

24. The RFI mentions BusinessPlus. Are your contract documents currently residing in this repository? If so, is there an export tool for this repository?

**The District's current contract repository is not integrated with BusinessPlus; see question number 4 above regarding the current contract repository. Please note that**

**this repository does not have an export tool, and a custom script would need to be written that would extract data from this repository to be placed in a new system.**

25. What is the current contract repository?

**Please see question number 4 above.**

26. How many existing contracts do you have that you'll want in the system?

**Please see question number 12 above.**

27. How many total users will you have accessing the system (Internal [Standard & Review Only]; External; Vendors]

**Please see questions 11, and 14 through 20 above.**

28. What is your preferred eSignature tool?

**Because DocuSign is commonly used by the District's vendors, the District desires a solution able to accommodate usage of DocuSign, although the District is open to considering solutions that offer utilization of other eSignature solutions.**

29. Are there any other business systems that you will want integration with?

**Other than possible integration with BusinessPlus in order to upload vendor information (addresses, contact information, etc.) and possible help track expenses, and the ability to upload select documents from District's current contract repository, and possible integration with eSignature provider(s), the District does not anticipate any additional system integration with current District business systems.**

30. Does BusinessPlus have open APIs?

**Please see question number 3 above.**

31. Can you provide what specific functionality the BusinessPlus system provides?

**BusinessPlus is an ERP (enterprise resource planning) software platform used to track budget, expenditures, procurement, and vendor information.**

32. Are all your contracts in English?

**Yes.**

33. Do you have any DEI or ESG tracking or reporting requirements?

**Currently, the District has no DEI or ESG tracking/reporting requirements.**

34. How many historical contract documents is the District currently managing?

**The District is currently unaware of the number of historical contract documents in its current contract repository.**

35. Does the District have an ERP system that you currently use? If so, do you anticipate the Contract Management System integrating with your ERP?

**The District's ERP is BusinessPlus, a software product offered by vendor PowerSchool. The District would like for the contract management solution to be able to upload vendor information (addresses, contact information, etc.) from BusinessPlus, and possibly have the ability to help the District track expense information related to contractual amounts, but integration with BusinessPlus is not a requirement for the District's consideration of the proposed contract management solution.**

36. Requirement 4 of Exhibit B states, "The ability to automate needed checklist information that can be communicated to vendors." Could the District provide additional detail around what needs to be automated?

**Please see question number 2 above.**

37. Does the District require vendors to respond to the RFI in the Word format shared by the District? Can we leverage our own RFI response format?

**While vendor responses to the RFI do not need to adhere strictly to the RFI format (for example, additional information about the solution can be shared outside the format of the RFI document), for consideration by the District, responses should include the required information listed in the RFI, under "RFI Response Requirements" on page 4 of the RFI, including completion of Exhibits A and B.**



38. Please elaborate on the following desired feature, with a business use case: “The ability to notate/document vendor or contract issues on one platform.”

**For example, if a service provider does not provide a scheduled service, the District would like the ability to notate this service issue and subsequent issues or resolutions on the contract platform, so that this information is easily viewable to internal District users. The intent is to minimize the need to keep separate files or emails regarding service or performance issues that occur during the term of a contract.**

39. We understand the District’s challenges with the current contract management solution includes electronic contract creation, review, signature processing, reporting, etc. Are there any other challenges associated with the current contract management process?

**In addition to the challenges outlined in your question, the District notes that the current process is inefficient, risks loss of contract information, and does not allow for documentation of service issues (poor vendor performance, resolution of service issues, etc.)**

40. Will the District be leveraging its in-house IT team for the implementation of this project or will there be dependency on a District-recommended third party implementation service provider for the project rollout? If the latter, please share the name of the service provider,

**The District currently anticipates that the District’s IT team and other District staff will be working directly with the selected vendor on implementing a solution.**

41. How many users will be using the Contract Management solution?

User Definitions:

- **Power Users:** Users with the ability to create and/or edit and/or view and/or approve and/or co-author and/or search contracts. -

Create, edit, view and export reports based upon user profiles and access rights

- **Business Users:** Users with the ability to view and/or search and/or co-author and/or approve contracts – View and export reports based upon user profiles and access rights

**Please see questions 11, and 14 through 20 above.**

42. Of the 300 annual contracts, how many contracts need to be uploaded in the new solution? Are these electronic or paper contracts? If electronic and paper both, please provide a breakdown of how many in electronic format and how many in paper?

**See question number 12 above regarding the contract migration/upload. The current active contracts in the District's current repository are mostly paper copies that have been scanned and saved electronically. Going forward, the District would like all contracts to be submitted and managed electronically.**

43. For paper contracts, do you have the contracts' meta-data extracted through an OCR solution? Or is the vendor expected to extract meta-data?

**Currently, the District does not utilize an OCR or meta-data solution for contracts generated by the District, and the District is open to considering recommended options for how best to utilize such features.**

44. Do you need integration with DocuSign/EchoSign for eSignature?

**Because DocuSign is commonly used by the District's vendors, the District desires a solution able to accommodate usage of DocuSign, although the District is open to considering solutions that offer utilization of other eSignature solutions.**

45. Does the District have any existing relationship with DocuSign?

**District staff do use DocuSign currently, to collect electronic signatures for parental permission forms. The District's general construction contractors also use DocuSign to issue change orders to existing contracts, but this use of DocuSign is initiated by the general construction contractors, not the District.**

46. We understand the District currently does not leverage a third party solution for eSignature; is our understanding correct? What is your system of preference for eSignatures?

**As noted in question number 45 above, the District occasionally uses DocuSign for some documents, but DocuSign is currently not widely used across the District for collecting electronic signatures. Because DocuSign is commonly used by the District's vendors, the District desires a solution able to accommodate usage of DocuSign, although the District is open to considering solutions that offer utilization of other eSignature solutions.**

47. Please confirm that the District requires vendors to integrate with the following systems: financial software platform BusinessPlus and an existing District-built contract repository platform?

**Please note that the District would like for the contract management solution to be able to upload vendor information (addresses, contact information, etc.) from BusinessPlus, and possibly have the ability to help the District track expense information related to contractual amounts, but integration with BusinessPlus is not a requirement for the District's consideration of the proposed contract management solution. Likewise, the current contract repository will likely require an upload or transfer of active contract documents, but will not require ongoing integration.**

48. Please share the name and number of instance of the source/ERP systems which will require integration with the new solution?

**Please see question number 29 above. Depending on a solution's functionality, the District anticipates that there may need to be some level of ongoing interaction between the contract solution and BusinessPlus (scheduled uploads or data export from BusinessPlus to the contract solution, for example) and an initial data extraction from the current contract repository. The District will work with the selected vendor to outline this process in greater detail.**

49. Please list down all the data point to be integrated between existing source/ERP system(s) and new solution in below: from ERP/Source Systems to New Solution; to ERFP/Source Systems from New Solution?

**Other than possible integration with BusinessPlus in order to upload vendor information (addresses, contact information, etc.) and possible help track expenses (via purchase order information, etc.) , and the ability to upload select documents from District's current contract repository, the District does not anticipate any additional system integration with current District business systems. The District at this time is primarily considering information being uploaded periodically from existing source systems to the new solution, rather than uploading information from the new solution to existing source systems.**

50. Does the District have middleware/SLI for system integration?

**To the District's knowledge, the District does not have middleware/SLI for system integration.**

51. Would you be open to pricing for the Contract Management to be hosted by vendor (SaaS/cloud) or deployed on your organization's server (on-premise)?

**The District is open to considering various pricing options, but the District's decision to use hosting or servers will be contingent on factors such as security and functionality. The District will work the selected vendor to discuss these factors, if applicable.**

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

**Please see questions 11, and 14 through 20 above.**

53. How many internal users will require access to the system at any given time?

**Please see questions 11, and 14 through 20 above.**

54. Does your organization require data import services? If so, please expand upon the data migration / importing requirements for the Contract Management Software? (Such as record info, employee lists, vendor lists, etc.)
- How many total electronic files (PDF, MS Word, etc) in current/legacy system into the Contract Management Software?
  - How many total electronic files in current/legacy system? (rows in the exported spreadsheet)
  - Where are the legacy (historic) electronic contract files currently stored? (shared folders, Sharepoint, document management system, paper, etc)

**Please see question number 12 above.**

55. Can you please expand upon your preferences to integrate with BusinessPlus? Please provide system details (system name and version, database used, scope of use, home-grown or commercial) if applicable.

**Please note that the District would like for the contract management solution to be able to upload vendor information (addresses, contact information, etc.) from BusinessPlus, and possibly have the ability to help the District track expense information related to contractual amounts, but integration with BusinessPlus is not a requirement for the District's consideration of the proposed contract management solution. The District's system and current ERP version is BusinessPlus V22.4.5.0.**

56. 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. What objects, fields, and tables will your organization be passing in the data integration between the Contract Management Solution and BusinessPlus?

**Please see question numbers 4, 12, and 29 above.**

57. Are the other systems installed/deployed on your organization's server(s) or is the vendor hosting the software (cloud/SaaS)?

**BusinessPlus is an on-premise installation. The current contract repository is a hybrid on-premise and SaaS/Cloud based service.**

58. Does BusinessPlus have one of the following available for integration and your organization has licensed access: SOAP API, REST API?

**See question number 3 above.**

59. Can you please provide additional details about your organization's process flows or diagrams as it relates to the integration requirements?

**The District will work with the selected vendor to develop this information as part of a pre-deployment engagement.**

60. What documents/contract types would you like to author within the system (number of templates)?

**See questions number 6 and 7 above.**

61. Do you require professional services to configure templates? If so, how many would be required for the awarded vendor to configure?

**See questions number 6 and 7 above. The District currently anticipates that it will configure templates in-house; if outside professional services are needed, the District will discuss such services with the selected vendor.**

62. Do you require professional services to configure workflow processes? If so, how many would be required for the awarded vendor to configure?

**The District hopes that its staff will be able to configure workflow processes in a proposed solution, but depending on the solution's complexity, professional services may be needed. In that eventuality, the District would work with the selected vendor to discuss and establish the number of needed workflows.**

63. Can you please provide additional details about your organization's workflow/approval processes? Can you please provide number of steps and examples?

**Please see questions 8 and 9 above.**

64. 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?

**The District's understanding is that it is able to purchase off of GSA cooperative contracts. The District also has the ability to purchase off of cooperative contracts offered via the State of Kansas or cooperative organizations (for example, Sourcewell, OMNIA, etc.). Vendors are welcome to note the availability of any cooperative contract pricing for a proposed solution, as a pricing option for the District.**

65. Does your organization require an electronic signature tool? If so, are you currently utilizing a specific product and which tool are you using?

**The District desires a solution that utilizes an eSignature solution. As noted in the responses above, the District and its vendors often utilize DocuSign. Because DocuSign is commonly used by the District's vendors, the District desires a solution able to accommodate usage of DocuSign, although the District is open to considering solutions that offer utilization of other eSignature solutions.**

66. Do you require a testing/staging/DEV environment in addition to production? If so, how many internal users would need access? Please specify the duration in which the testing/staging/DEV environment would need to run for (i.e. ongoing, Year 1 Only, etc.)

**A testing environment is desired by the District, along with a development and production environment, if available. Depending on the solution and any needed testing of solution updates, an initial testing environment during the implementation phase of the solution may be sufficient.**

67. User Licenses: How many users, respectively by type, are you anticipating will use the CLM platform?

- Approximately how many total users would need to launch / request / submit contracts for legal review?
- How many users would need the ability to redline, edit, and approve documents? (This group of users is typically Legal, Finance, and other management.)
- How many users would need the ability to administer the solution, including managing permissions and contract workflows?

**Please see questions 8, 9, 11, and 14 through 20 above.**

68. What systems is the District team hoping to integrate with the chosen CLM platform? Systems to consider: eSignature provider, CRM, cloud storage, procurement platforms, etc.

**Please see question 29 above.**

69. Which departments are involved in the contract process today?

**Please see questions 8 and 9 above.**

70. What contract types does the District process and interact with?

**Please see questions 5 and 6 above.**

71. Does the District want contract analytic dashboarding capabilities built into the platform? Would you like the ability to push out these metrics to a BI tool?

**The District would like contract analytic dashboarding capabilities built into the platform. The District currently does not have a BI tool to which it can push these metrics.**

72. How many legacy contracts is the District wanting to import into the chosen CLM tool? Is there associated metadata with these legacy contracts?

**See questions number 4 and 12 above.**

73. We find that during the evaluation process, leveraging a Sandbox trial gives the team the opportunity to feel the ease of use for Business Users and administration. Would the District like access to a Sandbox environment to test out the platform?

**Please see question number 66 above.**

74. Have you considered any current or future opportunities for online, publicly-facing contracts to streamline the counterparty experience?

**Currently, no, but the District is open to considering such opportunities.**

75. Do you set a negotiation threshold for certain contracts?

**Contracts exceeding \$7,500 require documentation of a competitive bid process or a reason for bid exemption, and may require negotiation of pricing, terms, and conditions. Generally, contract amounts exceeding \$20,000 may require a formal bid document (RFP, RFI, ITB, etc.) which often entails negotiations regarding pricing, terms and conditions, although lesser contract amounts may also be subject to negotiation with vendors**

76. Are there any contracts that don't require negotiation? Could these be accepted with a single click?

**Contracts of less than \$7,500 will generally not require negotiation.**

77. The District currently hosts Terms of Use and Privacy Policy online. How often do you rely on engineering to make updates to these terms? What would it mean for your legal team to have the flexibility to own updates without engineering bottlenecks?

**Per the District's understanding of this question, the District would like its legal team to have the ability to update or upload desired default terms, contractual provisions, or standard documents, and make changes as needed via the contract management solution. The District's understanding is that any needed software updates and maintenance would be provided by the selected service provider.**



78. How important are NPS/CSAT scores in this evaluation?

**The District is currently not requiring vendors to provide NPS/CSAT scoring for its solution, but vendors are welcome to share such information in its response, for the District's consideration.**

79. Do you have adoption rate goals that your team is trying to achieve on your new CLM solution?

**While no specific adoption rate goal has been established by the District for a contract management solution, the District anticipates that, once implemented, the solution will be adopted and used by key users within a few months after full implementation.**

80. How important is the user experience (walk-up usability/modern UI) of the solution when evaluating CLM platforms?

**As noted in the RFI, "The ability to provide an aesthetic, easy-to-use solution for staff and vendors" is a desired feature of a contract management solution, and will be a significant consideration of the District in selecting a contract management solution.**

81. Is it important to your team to have the ability to build, edit, and maintain your own workflows?

**Yes; the ability for the District staff to establish contract workflows is a desired feature of a contract management solution, and will be a significant consideration of the District in selecting a contract management solution.**

82. Have you determined success metrics on what you are trying to achieve from a CLM solution? (adoption, contract turnaround time)

**At this time, the District has not established formal success metrics for a contract management solution, but will likely discuss such metrics with a selected vendor.**

83. Is there interest in leveraging a best-in-class partner to assist in the deployment, or is the expectation that the CLM vendor will handle all implementation in-house?

**The District is open to considering proposals from vendors that utilize partners that would assist in deployment; however, such partnerships should be clearly identified in the proposal for the District's consideration.**

End of Addendum No. 3