

**Request for Quotes: #2017 – 007
Contract Management System**

1. What is the estimated number of registered users?
 - Approximately 15 internal users; access for approximately 80 contractors to sign and review documents; access for an unknown number of bidders to respond to solicitations. EmployIndy issues an average of 10 RFPs and RFQs annually with an average of 15 responses each.
2. What is the estimated number of contracts or documents?
 - EmployIndy currently holds over 100 grants and contracts.
3. What are the specific pain points, deficiencies, or issues with your current contracting process?
 - The current system does not include the solutions sought in this RFQ.
4. What systems/products are currently in place that relate to the contracting process? There was a mention of a “current system”, what is that?
 - EmployIndy is currently using Contract Logix.
5. How many users do you foresee being on the CMS you select?
 - Please see answer to question number 1. We do not anticipate these to be concurrent.
6. Does EmployIndy work off your own contract templates (your paper) or off of counterparty contracts (their paper)? What is the ratio?
 - The majority of our contracts and agreements are EmployIndy templates. A very small percentage of contracts and agreements are counterparty templates.
7. How many total contract templates does EmployIndy use? Are there multiple versions of the same type?
 - We currently have three different contract templates.
8. How many legacy and active contracts does EmployIndy have? Where are they currently located?
 - There are approximately 600 active and expired contracts. They are currently located in our current contract management system.
9. What is the timeframe for vendor down-selection? For final selection? For tentative implementation and then go-live date?
 - It is EmployIndy's goal to have all documents and data migrated by February 2018, and a go live date of March 2018, with guided staff training during that time. It is anticipated that final vendor selection will occur no later than December 2017.
10. Who is involved in the evaluation process of CMS vendors? Is there a final decision-maker?
 - An EmployIndy cross-functional team will review all proposals and provide a final recommendation to the CEO, Finance Committee, and Board of Directors.
11. Has the budget been defined for this project? If so, what is the budget?
 - The budget is not to exceed \$30,000.00
12. Who will be the primary point of contact and/or project manager for the CMS implementation?
 - The primary points of contact and project manager have not been finalized.
13. What is the primary web browser that is used by EmployIndy?
 - EmployIndy uses both Internet Explorer and Google Chrome.
14. What system or platform are you currently using now to manage this process?
 - Please see the answer to question number 5.
15. Are you seeking a custom-built software system or an off-the-shelf product that is configured to your needs?
 - EmployIndy would be open to either option within budget.



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16. Can you supply a sanitized copy of a typical contract now, for us to review as we develop our bid?
 - EmployIndy will supply a template at the time of selection.
17. Can you expand on the requirements for management of solicitations?
 - a. Should the system aid in the creation of solicitations? Yes
 - b. Will the vendor be defining a templated structure of data? Vendor expertise will be solicited.
 - c. Should the system manage any data from respondents other than what is included in a response? Yes, as it relates to resulting contracts.
 - d. Should the system integration with any state-wide procurement systems, and if so, how? Not at this time.
18. Can you supply any sample reports regarding fiscal management and fund reporting now, for us to review as we develop our bid?
 - We do not currently have a system providing a solution for these reports.
19. Does the requirement to “auto extraction of text, clauses, dates, vendor and customer data and auto map to fields” apply to creation of solicitations, responses to solicitations or something else altogether? Can a scenario be provided that describes when and how this is intended to work?
 - It can apply to the creation of solicitations and contract development.
20. Can you expand on the desired integration with salesforce? Can a scenario be provided that describes when and how this is intended to work?
 - Salesforce is EmployIndy’s current customer relationship manager and we desire to understand how your solution integrates with this CRM.
21. Can you expand on the desired integration with Fundware? Can a scenario be provided that describes when and how this is intended to work?
 - Fundware is EmployIndy’s current funds management software and we desire to understand how your solution integrates with our existing produce.
22. Is there any preference of technical approach/technologies to be used for the application? No
23. What aspects of the system, if any, would you expect to be accessed from a smartphone? Please identify if your system is mobile enabled.
24. Do you prefer to purchase the system outright or have an annual subscription service?
 - Please present both options if available.
25. Will Data Migration Services be necessary? If so, how many contracts (and related attachments) will need to be migrated?
 - Yes, data migration will be required. There are approximately 600 active and expired contracts, each with a minimum of three attached documents.
26. Does your team intend to integrate the contract management system with any other software that you are currently using? If so, what systems? Please see answers to questions 21 and 22.