Supplier Contract Management Agenda

- Background
- Supplier Contract Management
- Benefits
- Contract Life Cycle
- Project Approach, Scope and Timelines
- Pilot Groups
- Project Workgroup
- Questions?
Background

- There is no current Central repository for University related contracts.
- Many departments/schools negotiate, track and manage their own contracts.
- Most areas do understand that the Office of General Counsel should be included in contract review and approval, and that there is an existing policy related to signature authority. However...
- Contract Management was ranked as a top priority by the Finance Advisory Committee as part of the FY 16 prioritization process.
Supplier Contract Management

- Central Repository
- Import Existing and External Contracts (Multiple format types: PDF, Excel, Word)
- Authoring of New Contracts (MS Word)
- Document Library: Sections, Clauses and Document Configurators (Templates)
- Document Versioning
- Collaboration Workflows (Internal and External)
- Automatic Contract Expiration Notifications
- Digital Signatures
- Integration with Procurement Transactions (Requisitions, Purchase Orders)
Benefits

• Central Repository
• Supplier Contract Management will allow designated users to create contracts using pre-defined, Northwestern-specific contract building blocks that will be available in a document library, ensuring consistency based on fully vetted terms.
• Electronic collaboration creates better efficiencies, automatically including all users who need to be involved in the process.
• This system will allow departments to manage contracts more efficiently by eliminating the need to reinvent the wheel with each new contract, since each building block has been pre-approved. Using pre-approved clauses will streamline the contract review process and minimize risk.
• As an added benefit, the Supplier Contract Management module integrates seamlessly with NUFinancials.
Contract Lifecycle

1. Originator and/or Proponent
   Contract need is identified and negotiated outside of system

2. Contract Administrator
   Authors/Imports Contract in the system and
   Routes for Collaboration

3. Internal Collaboration
   Departmental and areas like OGC, RISK, PPS, IT, CPI
   if needed.

4. External Collaboration
   Supplier

5. Collaboration is complete
   Reviewed and Approved contract is routed to
   Contract Administrator

6. Contract Administrator
   Routes for Signing

7. Signing

8. Contract Administrator
   Scans fully executed document (signed by both parties) and
   uploads into NUFinancials and sets PO Contract to Approved

Key
- Department Contract Admin
- Collaboration
- Signature
- Completed Contract

Global Contract Lifecycle
Successful Path
Project Approach, Scope and Timelines

• Phased Approach
  o Phase I (FY 16)
    • Determine business model and process for importing and authoring of new contracts for Northwestern - May 2016
    • Define and build Contract Templates and Contract Terms and Clause Library – June/July 2016
    • Go-Live for Pilot Groups – August 2016
  o Phase II
    • Onboard/ Rollout to other Units and Schools based on readiness – Over the next two years
Pilot Groups

• Procurement and Payment Services
• Office of General Counsel
• CORE Facilities – NUANCE
• Alumni Relations & Development
• WCAS – Marketing and Events
Workgroup Contact Information

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Q&A