

Toolkit

The Vendor-Free IT Community.



PROCUREMENT

These NOREX Member-contributed documents include contracts & agreements, SLA, non-disclosure agreement, SOW, RFI, RFQ, RFP, vendor management, vendor comparison, vendor scorecards & requirements, pricing, leasing, merger & acquisition, and discussions. | TK012

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The NOREX Document Library is continually updated for the benefit of our Members. Please consider contributing documents from your organization. Thank you!

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Contracts & Agreements

SOFTWARE SUPPORT AGREEMENT. This agreement describes the terms of software maintenance and technical support services. 4 Pages (20-1053)

MASTER IT ACQUISITION PLAN. This spreadsheet contains IT Purchase Plans and lists approved, hold, withdrawn, or denied status. 10 Pages (20-1004)

CLOUD PROVISIONS. General and special provisions for Cloud computing are provided in this detailed contract. 22 Pages (20-1003)

CLOUD CONTRACT CHECKLIST. The following checklist contains key points, when fully developed, the Statement of Work (SOW) can then be drafted. Definition of terms is located at the conclusion of this checklist. 9 Pages (20-1002)

CLOUD CONTRACT TEMPLATE. This template provides a basis for contracting a Cloud computing service for SaaS, PaaS, or IaaS services. 4 Pages (20-1001)

DATA RECOVERY LANGUAGE. This language is used for data recovery when an agreement is terminated with a vendor. 1 Page (20-1000)

CONSULTING AGREEMENT. This is an example of an agreement between an organization and a company being hired to perform a service. It also includes a Statement of Work. 10 Pages (20-773)

SOFTWARE CONTRACT CLAUSES. These pages provide examples of software contract clauses regarding financial services & source code escrow for licensed products. 2 Pages (20-663)

IT CONTRACT LANGUAGE. The following are language & wording suggestions for IT contracts for Institutions of Public Higher Education (IPHE). 3 Pages (20-661)

SAAS SUBSCRIPTION AGREEMENT. This agreement sets forth the terms and conditions on which a vendor provides the functionality made available via Internet software. 8 Pages (20-629)

INSURANCE REQUIREMENTS. Following are examples of insurance requirements when two or more organizations are engaged in contracted services. 5 Pages (20-541)

MEMO OF UNDERSTANDING TEMPLATE. This template can be personalized for any business agreement between two or more parties. 4 Pages (20-536)

MASTER SERVICES AGREEMENT. This serves as a template for an agreement between an organization and a service provider, determining statement of work, fees, time and materials, and other details. 14 Pages (20-535)

SECURITY CONTRACT LANGUAGE. The following document describes language frequently used in the development of security contracts. Topics include encryption, authentication, compliance, auditing, personal data, and requirements. 4 Pages (20-508)

VENDOR AGREEMENT STANDARDS. Following are basic vendor agreement standards concerning indemnity protection, limitations of liability, consequential damages exclusions, warranties, and more. 2 Pages (20-495)

ACCEPTABLE USE ANNUAL CONTRACT. This agreement is about the acceptable use and confidentiality of company Information Technology assets, computers, networks, systems, and data. 2 Pages (20-318)

SaaS CONTRACT REVIEWS. A presentation delivered during a NOREX WebForum shows SaaS volume, deal breakers, must-haves, and more. 6 Pages (20-259)

COPIER/PRINTER LEASE AGREEMENT. The following are components of a service agreement for leased copier and/or printer equipment. 5 Pages (20-146)

DATA SHARING AGREEMENT. The following data sharing agreement template is HIPAA compliant. 3 Pages (20-086)

HIPAA BUSINESS ASSOCIATE AGREEMENT. This agreement template is between an organization and a HIPAA compliant organization. 7 Pages (20-085)

SAMPLE PENSION ANALYSIS CONTRACT. This contract identifies, decomposes and re-designs selected current and future business processes to create efficiencies using technology. 27 Pages (20-011)

COMPANY APP TERMS OF USE. All content, information, and services provided on and through the organization's app may be used only under the following terms and conditions. 11 Pages (50-263)

LIMITATION OF LIABILITY. These are samples of what one organization has used for wording a Limitation of Liability clause for technology contracts. 1 Page (50-255)

Discussions & Polls

VENDOR MANAGEMENT TRANSCRIPT. NOREX Members discussed flexible pricing strategies, holding vendors accountable for service delivery, strategies for maintenance / support agreements, handling vendors and items to document, implementing an IT VMO, tools for vendor management and vendor scoring, and assessing the maturity of your VMO and strategic vendor relationships. 17 Pages (NV2390)

SD-WAN TRANSCRIPT. NOREX Members discussed drivers to SD-WAN, reliability of their solution, negative experiences when implementing SD-WAN, recommendations for design and deployment, solutions evaluated for SD-WAN, utilizing providers with their own backbone vs. providers like CATO and Velo, access to all internet / Cloud services routed through NGFWaaS, and use of a managed service provider for SD-WAN. 22 Pages (NV2389)

FOOD & BEVERAGE MANUFACTURING: IT SECURITY TRANSCRIPT. NOREX Members discussed recommended IT Security initiatives, cybersecurity insurance and renewals, segregation of the IT network, communication to the outside world from the OT network, solutions used for 2FA on VPN connections, Artic Wolf, Red Canary, and documented recovery and response plans. 15 Pages (NV2386)

POST-COVID HYBRID WORK STRATEGIES TRANSCRIPT. NOREX Members discussed how best to manage a hybrid work environment, provisions for home offices, hardware support and budget, internet connectivity issues, cash allowances and potential legal concerns, achieving equity amongst in-office and at-home staff, best tools for building out conference rooms, and security. 30 Pages (NV2385)

POWER BI TRANSCRIPT. NOREX Members discussed getting started with Power BI, experiences with building and executing, visualization services, mining capabilities, dashboard viewing, licensing agreements, backup and recovery strategies, deliverables, and alternative products. 15 Pages (NV2383)

RANSOMWARE TRANSCRIPT. NOREX Members discussed Ransomware attacks and what to do once infected, restoring LAN shares and rebuilding workstations, warnings against paying ransom, counter measures and mitigation, backups and patching, cybercriminal activity detection, MDR vs. MSSP, endpoint protection, and the use of an MDM application. 30 Pages (NV2381)

IT ASSET MANAGEMENT TRANSCRIPT. NOREX Members discussed tracking assets and industry standard metrics, foundation pieces needed before ITAM is useful, assets tracked, software being used for asset management, IT asset management tools, and Block 64. 25 Pages (NV2380)

[**SECURITY FRAMEWORKS TRANSCRIPT.**](#) NOREX Members discussed the hierarchy of security frameworks; most commonly used frameworks; categorization of control, platform, and risk frameworks; and active threat hunting. 14 Pages (NV2374)

[**VIRTUAL COLLABORATION & BUILDING CULTURE: WORK-FROM-HOME BEST PRACTICES TRANSCRIPT.**](#) NOREX Members discussed reconciling and standardizing a hybrid workforce, combating organization culture loss, maintaining productivity, security, connectivity issues, equipment reimbursement, and scheduling and hoteling solutions. 22 Pages (NV2373)

[**GLOBAL IT ISSUES TRANSCRIPT.**](#) NOREX Members discussed the biggest issues they and their organizations are facing with a global footprint in today's business climate. The expectations with employees able to return to the office, IT talent recruiting and hiring internationally, standardization of processes, cybersecurity, procuring equipment globally, keyboard sourcing, and in-country IT support were challenges shared by all Member participants. 17 Pages (NV2371)

[**MICROSOFT TEAMS BEST PRACTICES TRANSCRIPT.**](#) NOREX Members discussed the implementation of Microsoft Teams within an organization, Teams' members as part of the infrastructure or collaboration teams, the use of the exploratory license program, promoting adoption and usage of the platform, and VoIP integrations. 49 Pages (NV2369)

[**CLOUD-BASED STORAGE TRANSCRIPT.**](#) NOREX Members discussed the lessons learned, and difficulties experienced, when transitioning from on-prem storage to Cloud. The discussion covered the pros and cons of various Cloud platforms, security, policy and practices, and the dangers of accessibility. 17 Pages (NV2368)

[**HYPERCONVERGED INFRASTRUCTURE TRANSCRIPT.**](#) NOREX members share experiences adopting a Hyperconverged Infrastructure including performance expectations, vendor options, and back-up strategies during this April 2021 WebForum. 16 Pages (NV2365)

[**TELECOM / VOIP / TEAMS PHONE SYSTEMS TRANSCRIPT.**](#) A great March, 2021 discussion on telecom trends. Strategies and experiences moving to Teams (and others) for voice; softphones comparison; VoIP enhancements; and more. This transcript includes several polls and a lively chat session. 32 Pages (NV2361)

[**RISK MANAGEMENT TRANSCRIPT.**](#) NOREX members share strategies for identifying, managing and reporting risks during this February 2021 session. 21 Pages (NV2358)

[**SECURITY INITIATIVES FOR 2021 TRANSCRIPT.**](#) NOREX members share 2021 IT security plans including budgets, initiatives and tools during this January 2021 session. 34 Pages (NV2354)

[**PLANNING FOR 2021 TRANSCRIPT.**](#) NOREX members share their expectations for IT budgets, staffing levels, security initiatives, user support trends and other 2021 issues during this December 2020 session. 19 Pages (NV2351)

[**LICENSING / CONTRACT NEGOTIATIONS TRANSCRIPT.**](#) Great contracts between vendors and IT are the key to assuring accountability on the part of vendors though it can be challenging to track all the tools that get purchased within an organization. In this NOREX WebForum, members discuss key experiences that taught their organization stronger negotiating opportunities, key wording to assure makes it into your agreements and how to tackle the challenges of tracking licensing and certifications. 19 Pages (NV2347)

[**AZURE / AWS / GOOGLE ENTERPRISE CLOUD USAGE TRANSCRIPT.**](#) NOREX Members discuss the usage of Microsoft, Amazon and Google cloud services during this June 2020 WebForum. 20 Pages (NV2325)

[**ASSET MANAGEMENT / PROCUREMENT FOLLOWING COVID-19 TRANSCRIPT.**](#) NOREX Members discuss ITAM strategies and tools in light of the COVID-19 Pandemic during this May 2020 WebForum. 20 Pages (NV2323)

[COVID-19: BRINGING WORKFORCE BACK TRANSCRIPT.](#) Organizations are currently working on how and when to move staff back to the office after the COVID-19 pandemic shutdown. Among the decisions to be made are whether to return the full or partial staff to the office. During this WebForum, NOREX Members and guests discussed options, resources, and lessons learned regarding equipment returns, social distancing in the office, government requirements and guidelines, stipends for employees, work prioritization, remote work tools, sanitizing, restrictions, and temperature scanning in the workplace. This transcript includes discussion about keeping the workforce safe after returning to the office, as well as a robust chat log conversation. 53 Pages (NV2321)

[VENDOR MANAGEMENT OFFICE \(VMO\) TRANSCRIPT.](#) NOREX Members and guests share their experience, questions, and ideas on Vendor Management Office (VMO). This WebForum explored issues including vendor risk assessment, pricing flexibility, hardware & maintenance, performance review, security compliance, and creating a sense of urgency with vendors. 19 Page (NV2320)

[COVID-19 PANDEMIC: RESPONSE, LESSONS LEARNED, WHAT'S NEXT? TRANSCRIPT.](#) Members discuss how the organization has responded to the impact to the pandemic crisis. Lessons learned on supporting WFH from a technical, hardware, security and team engagement / collaboration, and what is next perspective are shared. Polls, links, and a lively chat section are included in this April, 2020 transcript. 28 Pages (NV2315)

[EMPLOYEE ONBOARD / OFFBOARD IT ISSUES TRANSCRIPT.](#) What is the corporate lead time to setup new accounts? Who is responsible for opening onboarding tickets; training; off boarding best practices and the solutions / tools to assist with automation are included in this discussion. Polls, a lively chat and BYOD / MDM best practices are included in this March 2020 transcript. 30 Pages (NV2309)

[VDI TRANSCRIPT.](#) NOREX Members discuss the selection, implementation and operation of various Virtual Desktop Infrastructure platforms during this February 2020 WebForum. 16 Pages (NV2306)

[ENTERPRISE STORAGE SOLUTIONS TRANSCRIPT.](#) NOREX members discuss current storage trends including usage of flash, cloud options, modern data protection, automation and artificial intelligence during this September 2019 WebForum. 10 Pages (NV2289)

[DOCUMENT MANAGEMENT TRANSCRIPT.](#) NOREX members share experiences selecting, implementing and managing Document Management systems during this September 2019 WebForum. 18 Pages (NV2286)

[IT BUDGET PLANNING/ BEST PRACTICES TRANSCRIPT.](#) NOREX members discuss budget planning processes, best practices, categories and helpful tools during this July 2019 session. 14 Pages (NV2280)

[PRIVILEGED ACCESS MANAGEMENT TRANSCRIPT.](#) NOREX members discuss the implementation and of Privileged Access Management procedures and tools during this July 2019 WebForum. 14 Pages (NV2278)

[LICENSING/ CONTRACT NEGOTIATIONS TRANSCRIPT.](#) NOREX members discuss the strategies for managing contracts and negotiating licenses during this April 2019 session. 17 Pages (NV2266)

[DISASTER RECOVERY TRANSCRIPT.](#) Topics of this March 2019 session include recovery approaches such as on- prem vs. DR-as-a-Service, backup and recovery tools, testing strategies and Business Continuity considerations. 20 Pages (NV2264)

[GLOBAL IT ISSUES TRANSCRIPT.](#) NOREX members share strategies and solutions used to support technologies globally during this February 2019 WebForum. 13 Pages (NV2260)

[CLOUD-BASED STORAGE TRANSCRIPT.](#) NOREX members discuss the pros and cons of moving from on-prem to cloud-based storage during this January 2019 session. 16 Pages (NV2254)

[MEMBER VENDOR RATINGS: MULTI-FACTOR AUTHENTICATION.](#) This Multi-Factor Authentication Tools and Solutions poll resulted in 30 products being rated. 6 Pages (NR009)

[**MEMBER VENDOR RATINGS: ENDPOINT SECURITY.**](#) This Endpoint Security Tools and Solutions poll resulted in 50 products being rated. 5 Pages (NR008)

[**MEMBER VENDOR RATINGS: NETWORK SECURITY.**](#) This Network Security Tools and Solutions poll resulted in 65 products being rated. 5 Pages (NR007)

[**MEMBER VENDOR RATINGS: PROJECT MANAGEMENT.**](#) This Project Management Tools and Solutions poll resulted in 32 products being rated. One hundred and thirty members responded. 4 Pages (NR006)

[**MEMBER VENDOR RATINGS: CUSTOMER RELATIONSHIP MANAGEMENT.**](#) This Customer Relationship Management Tools and Solutions poll resulted in 26 products being rated. One hundred and thirty members responded. 3 Pages (NR005)

[**MEMBER VENDOR RATINGS: BACKUP/ STORAGE.**](#) This Backup and Storage Tools and Solutions poll resulted in 51 products being rated. One hundred and thirty members responded. 6 Pages (NR004)

[**MEMBER VENDOR RATINGS: PATCH MANAGEMENT.**](#) This Patch Management Tools and Solutions poll resulted in 24 products being rated. One hundred and thirty members responded. 2 Pages (NR003)

[**MEMBER VENDOR RATINGS: PASSWORD MANAGEMENT.**](#) This Password Management Tools and Solutions poll resulted in 31 products being rated. One hundred and thirty members responded. 3 Pages (NR002)

[**MEMBER VENDOR RATINGS: HELP DESK.**](#) This Help Desk Tools and Solutions poll resulted in 56 products being rated. One hundred and thirty members responded. 8 Pages (NR001)

[**GOVERNMENT: MS365 ADOPTION TRANSCRIPT.**](#) NOREX Members from Government agencies share strategies on the adoption of Microsoft's M365 licensing program during this October 2020 WebForum. 19 Pages (GSP100)

[**CIO: ROLE / JOB DESCRIPTION OF THE CIO TRANSCRIPT.**](#) Senior IT leaders discuss the evolution of the Chief Information Officer role during this October 2020 session. 17 Pages (CV076)

Merger & Acquisition

[**MERGER & ACQUISITION QUESTIONNAIRE.**](#) This worksheet provides an example of the questionnaire used for a particular merger / acquisition size. 11 Pages (20-729)

[**MERGER PROJECT PLAN.**](#) Discovery and planning phases of a project are outlined in this merger plan. 1 Page (20-455)

Non-Disclosure & Confidentiality Agreements

[**CONFIDENTIALITY AGREEMENT.**](#) Confidential information is defined, and terms, restrictions, and exceptions to confidentiality are expressed in this agreement. 3 Pages (20-772)

[**GRAMM LEACH BLILEY ACT SECURITY PROGRAM.**](#) This describes safeguards implemented to protect covered data and information in compliance with the FTC's Safeguards Rule of the Gramm Leach Bliley Act (GLBA). 4 Pages (20-764)

[**THIRD PARTY LIMITED ACCESS AGREEMENT.**](#) This Agreement outlines specific responsibilities that relate to vendor access to any company data that may be stored within software or on the server. 5 Pages (20-760)

GRAMM-LEACH-BLILEY AGREEMENT ADDENDUM. The Gramm-Leach-Bliley Act, or Financial Modernization Act, requires that financial institutions must explain how they share & protect customers' private information. This addendum provides further information on carrying out this requirement. 2 Pages (20-662)

PROVIDER CONFIDENTIALITY & SECURITY AGREEMENT. This agreement applies to any provider party who is on site or who requires access to the company network. 2 Pages (20-539)

DATA CLASSIFICATION WORKSHEET. Information class, type, systems, availability, integrity, and confidentiality level are examples of these data classification tools. 4 Pages (20-530)

PRIVILEGED ACCESS AGREEMENT. This agreement includes acknowledgement of responsibilities, necessary clearances, and authorization for privileged access to systems. A non-disclosure certificate is also included. 3 Pages (20-362)

NON-DISCLOSURE AGREEMENT. A non-disclosure agreement template that can be modified for your use. 3 Pages (20-094)

CONTRACTOR DATA INTEGRITY / CONFIDENTIALITY. This is an agreement template between an organization and services contractor. 1 Page (20-087)

CONFIDENTIALITY AGREEMENT. This agreement template outlines the intent of both parties in regard to the protection of information. 2 Pages (20-084)

ACCEPTABLE USE / CONFIDENTIALITY. This agreement describes the standard policy of the use of company Information Technology resources and data contained therein. 5 Pages (20-043)

Pricing

VITAL RECORDS PRICING. This document is an example of how to record cost & pricing for various vital records systems and filing. 1 Page (20-607)

COST PROPOSAL WORKSHEET. Pricing in this cost proposal reflects the requirements for a claims management software RFP. 4 Pages (20-223)

COST PROPOSAL EVALUATION. These worksheets provide a way to record and compare scores from cost proposal evaluations. 4 Pages (20-128)

RFI

VENDOR PROGRAM QUESTIONNAIRE. This template questions vendors on their interoperability standards, performance guarantee, implementation, support, and training. 19 Pages (50-351)

RFI: INFORMATION SECURITY RISK ASSESSMENT. Requested here is a privacy and security risk assessment pursuant to the Health Insurance and Portability Accountability Act (HIPAA). 18 Pages (20-573)

RFI: PRODUCER INFORMATION MANAGEMENT. This document is to request information on a product information management / product master data management solution. 11 Pages (20-387)

RFI: CUSTOMER SERVICE MANAGEMENT. This Request for Information is to solicit suggestions, ideas, or potential Information Services Customer Service Management (ISCSM) approaches on a non-competitive and non-binding basis. 19 Pages (20-314)

RFI: RECORDS MANAGEMENT SYSTEM. A department is seeking information from vendors that can provide an operationally proven web-based Commercial Off-The-Shelf (COTS) software law enforcement application framework to replace, among other functions, internally developed Records Management System. 32 Pages (20-163)

RFI: EVENT MANAGEMENT SOFTWARE SOLUTION. This Request for Information is for those in the process of identifying Event Management Software vendors for an upcoming requirement. 5 Pages (20-095)

RFI: WEBSITE REDESIGN. A company is soliciting capabilities information and cost parameters from solution providers regarding the design, development, implementation and hosting of the company website. 6 Pages (20-056)

RFP

RFP: REMOTE TIER 1 HELP DESK. This RFP is for outsourcing of a provider of support services to users of corporate PCs, laptops, and other devices. 7 Pages (20-1047)

IT RFP. This Request for Proposal is for design and development services for tools with a password vault for all staff within the organization. 2 Pages (20-1005)

RFP: CLOUD COMPUTING PROVISIONING SERVICES. This document solicits proposals for a cloud-based solution for optimal architecture, security, performance, and strategic vision. 17 Pages (20-881)

RFP: TALENT MANAGEMENT SYSTEM. An organization is looking for a system focused on performance management, professional development, and succession planning for team growth. 27 Pages (20-869)

RFP: INTERNET SERVICES. This RFP will assist in selecting a qualified service provider for one or more internet services at one or multiple locations. 16 Pages (20-854)

RFP: MULTIFUNCTIONAL DEVICES. An organization seeks proposals for multifunctional devices for use in the copy center. Outlined are desired capabilities as well as supplier requirements. 25 Pages (20-743)

RFP: VOICE SYSTEM SOLUTION. An organization seeks proposals to provide a replacement of their current PBX phone system and centralized voice mail system. 40 Pages (20-734)

RFP: ERP SYSTEM. An organization is looking to replace its current system with an integrated enterprise system that will improve the efficiency and effectiveness of business processes. 28 Pages (20-733)

RFP: ERP SYSTEM. In this example RFP, a city organization seeks qualified proposers to meet current & future Enterprise Resource Planning system needs. 49 Pages (20-702)

RFP: ERP NEEDS ASSESSMENT SERVICES. This example RFP is for the acquisition of a new Citywide Business Enterprise software system. 8 Pages (20-701)

RFP: DATA CENTER STRATEGY. An organization is seeking recommendations and best practices from other facilities about revisions & realignment of technology as well as infrastructure of the data center. 12 Pages (20-645)

RFP: RECORDING, INDEXING, & IMAGING SYSTEM. This office is seeking the latest technological advances and hardware, including recording/cashiering with integrated scanning and indexing capabilities, e-recording, verification, bookkeeping/treasury functionality, hardware, implementation services, annual maintenance, production support, and microfilm creation/storage. 10 Pages (20-610)

RFP: INSTRUCTIONAL DEVICE PROCUREMENT. Proposals are solicited for vendors to provide instructional devices and related services for school districts and the education industry. 43 Pages (20-464)

RFP: COMPUTER HARDWARE, SOFTWARE & SERVICE. An organization seeks a single vendor solution for computer hardware (computers, servers, and related hardware), software, and Microsoft Volume License Purchase Program and related services. 30 Pages (20-463)

RFP: COMPUTERS & PERIPHERALS. This RFP is seeking computers and/or related computer peripherals or components with the best price/performance ratio and the ability to provide service and support for said equipment. 16 Pages (20-462)

RFP: COMPUTER LEASE / PURCHASE. This RFP is mainly focused on the service aspects of hardware deployment and technology leasing for a university setting. 8 Pages (20-461)

RFP: CAD/RECORDS MANAGEMENT. Following is a proposal request for a Computer Aided Dispatch (CAD) and Records Management System as well as its implementation and maintenance. 122 Pages (20-446)

RFP: CUSTOMER LOYALTY STRATEGY. An organization requests proposals for a customer loyalty plan to develop strategy for customer recognition, engagement, and loyalty. 12 Pages (20-445)

RFP: ERP / CRM SOFTWARE REPLACEMENT. This RFP was written in order to replace a current aging ERP software technology and potentially replace a newer internally developed stand-alone CRM system with an integrated cost effective solution. 16 Pages (20-438)

ERP / CRM RFP REQUIREMENTS. Vendor responses to an ERP/CRM Software Replacement RFP can be logged according to criterion of your choosing, with rating definitions described in the document. 10 Pages (20-437)

ERP / CRM SYSTEM RESPONSE SUMMARY. The following matrix shows how to compare vendor responses to an ERP/CRM software system RFP. 1 Page (20-436)

RFP: MSSP. For the purpose of engaging into a partnership with a professional Managed Security Service Provider (MSSP) for security monitoring and other network & computing asset security services, this informal RFP has been issued. 9 Pages (20-412)

RFP: WIRELESS ACCESS POINT. Proposals are requested for installation of new wireless access point equipment such as Xirrus Wi-Fi or equivalent. 6 Pages (20-380)

RFP: NETWORK FIREWALL & SECURITY APPLIANCE. A larger-scale network firewall & security appliance is needed to meet specific connection speeds, protection, filtering, and Ethernet interfaces. 5 Pages (20-379)

RFP: MOBILE WIRELESS SERVICES. To meet current and future communication needs, the company is requesting proposals from qualified mobile communications firms to provide nationwide mobile voice & data services and equipment for a period of two years with two additional one-year options. 8 Pages (20-258)

RFP: CLAIMS MANAGEMENT SOFTWARE SYSTEM. A hosted and managed software system is solicited. 36 Pages (20-227)

RFP: INMATE VIDEO VISITATION SYSTEM. A company is seeking proposals from qualified vendors who provide a Video Visitation System (VVS) for inmates of specified locations. 25 Pages (20-215)

RFP: RECORDS MANAGEMENT SYSTEM. This requests proposals for qualified contractors to provide a Records Management System to replace several existing systems. 217 Pages (20-164)

RFP: ENVIRONMENTAL HEALTH PERMIT & INSPECTION MANAGEMENT SYSTEM (EHPIMS). This is a request for qualified organization who can provide a commercial, web-accessible, off-the-shelf Environmental Health Permit and Inspection Management System software solution to transition the company from paper-based processes to electronically-based processes. 45 Pages (20-122)

RFP: ITSM. The goal of this RFP is to identify and select the correct system for replacement for the current Information Technology Service Management (ITSM). 50 Pages (20-118)

RFP: CASE MANAGEMENT SYSTEM. This proposal was designed for an adult services case management system and includes a detailed description of requirements. 49 Pages (20-112)

RFP: MULTIFUNCTION PRINTERS. The company is requesting fresh bids for MFP systems in order to maintain industry standards and to increase efficiency whenever possible. 10 Pages (20-110)

RFP: CLOUD-BASED IP PBX. A request for a provider of an IP PBX (Internet Protocol Private Branch Exchange), employing converged data and voice networks. 11 Pages (20-093)

POS HARDWARE RFP RESPONSE. Following is a response matrix to an RFP for Point of Sale hardware. 3 Pages (20-092)

RFP: POS HARDWARE & DEPLOYMENT. This RFP is for a Point of Sale (POS) system's hardware and deployment system, with the indicated details. 9 Pages (20-091)

RFP: WEB DEVELOPMENT & SUPPORT. The eCommerce and IT department are seeking a business partner with design and technical resources available to assist with the continuous development and support of its transactional website operating on the Demandware platform. 9 Pages (20-090)

RFP: NETWORK CABLING. This is a Request for Proposal and Scope of Work (SOW) for a network cabling job. 1 Page (20-089)

RFP: MANAGED PRINT SERVICES. This outlines the scope for Managed Print Services (MPS) including printers, software, repairs, maintenance, etc. 32 Pages (20-078)

RFP: INTERNET SERVICES. This request solicits proposals from qualified firms for telecommunications / data communications to provide Internet connectivity. 12 Pages (20-077)

RFP: FRAUD, WASTE, ABUSE. This requests proposals for a third-party contractor to design, implement, and administer a confidential fraud, waste, and abuse hotline for employees. 6 Pages (20-076)

RFP: MANAGED HOSTING SERVICES. This request is for a vendor to serve as the provider of the hosting of applications. 16 Pages (20-065)

RFP: INTERNET SERVICES. A company wishes to contract with an e-rate eligible vendor to provide dedicated broadband Internet services. 16 Pages (20-055)

RFP: GENERAL TELECOM SERVICES. This is a Request for Proposal for telecom system and services. 16 Pages (20-054)

RFP: DOCUMENT MANAGEMENT SYSTEM. This comprehensive Request for Proposal is for integration of several departmental document management, imaging, and workflow requirements. 88 Pages (20-035)

RFP: TECHNOLOGY ASSESSMENT. This is a Request for Proposals looking for a consulting firm to provide an Information Technology Assessment. 21 Pages (20-034)

RFP: WEBSITE REDESIGN. Sample this Request for Proposal for a developer to build, implement, and host a company's new website. 56 Pages (20-030)

RFP: EXTERNAL WEBSITE DESIGN. This proposal seeks bids for a provider of external website design, development, and hosting services. 30 Pages (20-027)

RFP: CLOUD BASED CALL CENTER. In order to create an integrated contact center solution, responses to this RFP will be used to evaluate the functional & technical fit of vendor packages based on requirements, the vendor's overall capabilities, and value. 58 Pages (50-251)

RFP: ENTERPRISE REQUIREMENTS PLANNING SYSTEM. A company is looking for an Enterprise Requirements Planning system (ERP) to replace the existing proprietary legacy business support systems. 85 Pages (50-242)

RFP: DATA & TELECOM. This Request for Proposal is for a company looking to partner with a primary services provider for all-inclusive communications services. 22 Pages (50-220)

RFQ

RFQ: IT INFRASTRUCTURE ASSESSMENT. An IT Senior Leadership team is requesting quotes for an overall IT Infrastructure Assessment with a focus on operational excellence and high availability of Tier 1 systems. 3 Pages (20-644)

RFQ: HOSTED CONTACT CENTER. The Hosted Contact Center (HCC) contracts are multiple-award Master Services Agreements (MSA) with prequalified HCC contractors for hosted contact center services under fixed-priced, multi-year terms. 14 Pages (20-413)

RFQ: COTS. Quotations are requested for the non-exclusive supply of a Commercial Off-the-Shelf (COTS), cloud-based, Constituency Management System. 71 Pages (20-239)

RFQ: CASE MANAGEMENT SYSTEM. The objective of this RFQ is to procure a cloud-based case management system. 26 Pages (20-111)

RFQ: INFRASTRUCTURE PLAN DEVELOPMENT. This RFQ asks for a review of the current infrastructure's technical requirements, improvement recommendations, timing and costs. 16 Pages (20-107)

RFQQ: ENTERPRISE KNOWLEDGE MANAGEMENT. A company wishes to begin an Enterprise Knowledge Management system to gather and build a library of pertinent information to improve service delivery and resolve customer problems more quickly. 23 Pages (20-012)

Q & A AMENDMENT FOR ENTERPRISE KNOWLEDGE RFQQ. What follows is a Q&A amendment to an Enterprise Knowledge Management RFQQ. 4 Pages (20-010)

SOLICITATION AMENDMENT & BIDDER QUESTIONNAIRE. This amendment answers questions raised by potential bidders of the RFQQ for Pension Modernization gap analysis. Following is a questionnaire for potential bidders to complete. 12 Pages (20-009)

RFQQ: PENSION MODERNIZATION GAP ANALYSIS. This is a Request for Quotation & Qualifications to conduct a gap analysis for the company's pension unit, going from the current manual process to an automated one. 12 Pages (20-008)

Service Level Agreements

IT SUPPORT SLA. This document represents a service description and Service Level Agreement (SLA) between the end users and the IT Department in order to provide support from the Help Desk. 2 Pages (20-746)

INSURANCE REQUIREMENTS. Following are examples of insurance requirements when two or more organizations are engaged in contracted services. 5 Pages (20-541)

INFORMATION SECURITY REQUIREMENTS AGREEMENT. This ISR is an exhibit to the Master Services Agreement effective under which provider may be engaged from time to time to provide services. 5 Pages (20-538)

SERVICE AGREEMENT THIRD PARTY POLICY. This addendum to a Master Service Agreement provides policy on the use of third party software (freeware, open source) as well as third party deliverables. 3 Pages (20-537)

SERVICE LEVEL REQUIREMENTS TEMPLATE. Customize this document to include any appropriate service level requirements for your department and IT system requirements. 4 Pages (20-450)

MANAGED HOSTING SLA. This Service Level Agreement describes the use and availability of network resources to those who have purchased Managed Hosting Services. 5 Pages (20-417)

HOSTED EXCHANGE SERVICES AGREEMENT. The following is an agreement for hosting exchange services and spam filtering. 8 Pages (20-416)

WEB HELP DESK SLA. Following is a Service Level Agreement for web help desk service requests and incidents, prioritized based on impact and urgency. 2 Pages (20-386)

MASTER MANAGED SERVICES AGREEMENT. This is an agreement template which outlines in detail the necessary components of a two-party service agreement. 34 Pages (20-226)

Statement of Work

SOW TEMPLATE. A member shares a template from which you can create your own Statement of Work. 3 Pages (20-628)

RECORDING, INDEXING, & IMAGING SOW. A company is looking for a complete turnkey solution to include all software, hosting, equipment, archival microfilm creation, and support. 25 Pages (20-611)

VIDEO SURVEILLANCE SYSTEM SOW. The purpose is to procure a high quality, reliable and effective mobile surveillance system that will monitor and record interior and exterior events. 8 Pages (20-564)

DECLARATION OF FOURTH PARTY PERFORMANCE. This template serves as a statement of a relationship between a corporation and a fourth party. 2 Pages (20-540)

PM SERVICES SOW. Following is a Statement of Work for Project Management services, which can be used as a template for other purposes. 4 Pages (20-427)

PROJECT MANAGEMENT SOW. The following Statement of Work template contains requirements for quality control, methodologies, and open source software. 5 Pages (20-265)

SOW: VULNERABILITY & PENETRATION TESTING. Vulnerability identification and analysis, physical security, authenticated and unauthenticated testing are examined in this SOW. 11 Pages (20-143)

SOW: ENVIRONMENTAL HEALTH PERMIT & INSPECTION MANAGEMENT SYSTEM. This Statement of Work describes the three-phased implementation of the system software. 57 Pages (20-133)

SOW: WEBSITE REDESIGN/IMPLEMENTATION. This Statement of Work is seeking a vendor to redesign the website and implement a new official website. 3 Pages (20-016)

Vendor Management

SaaS BUYER RESPONSIBILITIES. This document outlines product buyer responsibilities in a question-and-answer format. 3 Pages (50-366)

IT VENDOR RISK MANAGEMENT PROCEDURE. This procedure specifies security requirements for acquisition of IT products and services in which data is stored, processed, or transmitted by an entity not under direct control. 4 Pages (20-1092)

THIRD-PARTY ACCESS POLICY. This policy establishes the rules governing access to information systems, information, and computer or server room by parties such as vendors, contractors, consultants, security, etc. 5 Pages (20-924)

VENDOR SECURITY QUESTIONNAIRE. Issues such as compliance, risk assessment, incident management, and requirements are itemized in this vendor survey. 3 Pages (20-887)

CLOUD COMPUTING FUNCTIONAL REQUIREMENTS. This spreadsheet provides technical, security, solution, portability, and SLA requirements of cloud computing, along with performance metrics. 13 Pages (20-880)

PROCUREMENT SECURITY REQUIREMENTS. Security requirements for on- and off-premise systems, data use, login, and application use are described in this document. 3 Pages (20-722)

VENDOR SECURITY ASSESSMENT. This questionnaire is about secure coding, incident response, confidentiality, and other aspects of vendor security. 2 Pages (20-683)

PURCHASE ORDER TEST SCRIPT. This sample test process module provides informative descriptions of purchase order processing scenarios & data requirements. 19 Pages (20-660)

CERTIFICATE OF SALE TEMPLATE. The following is an example of a certificate of sale. 1 Page (20-545)

CERTIFICATE OF DONATION TEMPLATE. This domain template can be tailored to fit your own certificate needs. 1 Page (20-544)

PROCUREMENT WORKFLOW GUIDE. The following guide outlines a schedule of sequential, primary activities of a competitive process such as RFP, RFQQ, Work Request, etc. 1 Page (20-503)

COMPUTER EQUIPMENT BILL OF SALE. This is a template which can serve as a bill of sale between two parties buying and/or selling computer equipment. 1 Page (20-419)

VENDOR PERFORMANCE EVALUATION. This form is used to record vendor evaluations for later comparison. 2 Pages (20-041)

FREWARE APPLICATION & APPROVAL FORM. This form provides a format for requesting non-standard software or freeware for installation on company equipment. 1 Page (50-319)

IT PURCHASING CHART. The following is an example of an ITAM approvals flowchart. 1 Page (50-316)

THIRD PARTY RISK ASSESSMENT. This security questionnaire helps to diagnose possible risks with potential or current vendors. 2 Pages (50-314)

VENDOR TRAVEL POLICY. This policy applies to all vendors, consultants, and contractors traveling on behalf of the company or its subsidiaries. Vendors are required to comply with this policy when requesting incurred reimbursable travel expenses as permitted by a contract. 1 Page (50-269)

VENDOR SECURITY ASSESSMENT. This Application Security Review (ASR) questionnaire enables organizations to assess security compliance and serves as a prerequisite before approval of purchase or use of applications. 17 Pages (50-264)

OUTCOME ORIENTED IT SOURCING. The following slide deck explores an example of outcome based sourcing evolution, pricing construct, and best practices. 11 Pages (50-262)

LIMITATION OF LIABILITY. These are samples of what one organization has used for wording a Limitation of Liability clause for technology contracts. 1 Page (50-255)

VENDOR MANAGEMENT OFFICE. The IT VMO helps to ensure the reliability and cost effectiveness of outside supplies. 3 Pages (50-235)

IT VMO. Job description. 9 Pages (50-234)

Vendor Scorecards & Evaluations

PASSWORD VAULT SCORING MATRIX. Several password vault solutions are compared using features such as quality, ease of use, automated sync, security, and integration. 1 Page (20-1096)

PATCHING TOOL VENDOR MATRIX. This weighted scoring template compares several patching tool vendors by service and performance. 2 Pages (20-1056)

HRMS EVALUATION TEMPLATE. This template is used for the evaluation of Human Resources Management Software vendors. 1 Page (20-1051)

ELECTRONIC TIME CAPTURE REQUIREMENTS. This list of requirements is for a crew-based time collection system which can integrate with an existing ERP. 3 Pages (20-1045)

EMAIL SECURITY PRODUCT SCORESHEET. This chart provides a weighted comparison of several prominent email security products. 3 Pages (20-1044)

EMERGING TECHNOLOGY SCREENING MAP. This tool helps assess the overall impact of emerging technologies by scoring on a set of business, risk, and cost criteria. 12 Pages (50-350)

VENDOR EVALUATION MATRIX. This template is for product evaluation teams to build a vendor questionnaire and to distribute and evaluate responses and vendor ratings. 23 Pages (50-349)

VENDOR SCORING MATRIX. This spreadsheet scores vendors on a weighted scale. 2 Pages (20-1006)

ITS PROCUREMENT POLICY. This policy outlines ownership considerations for the ITS end user hardware assets procured to enable employees to perform their job duties efficiently and effectively. 7 Pages (20-991)

THIRD PARTY VENDOR SECURITY POLICY. This policy addresses the high-level requirements for system acquisition, development, and maintenance for third-party vendor-provided information systems. 7 Pages (20-990)

GENERIC SOFTWARE EVALUATION SCORECARD. This form records requirements, weights, and ratings for software comparisons. 2 Pages (20-952)

PROJECT MANAGEMENT TOOL COMPARISON. This spreadsheet contains specifications about several PM tools, including Planview, MS Project, CA Project, Daptive, Smartsheet, Wrike, Asana, ClickUp, Monday.com, Bamboo, and SP Project Tracker. 24 Pages (20-932)

VENDOR SCORING MATRIX. This Excel template provides a format for evaluating potential vendors and recording weighted scoring. 3 Pages (20-927)

VENDOR SCORECARD QUESTIONS. Initial questions and electronic requirements are covered in this vendor scorecard for HR & Payroll solutions. 13 Pages (20-716)

VENDOR REQUIREMENTS & RATING. A requirements example and ratings log for vendors is given here along with sample questions. 4 Pages (20-715)

SYSTEM SCORECARD & COMPARISON. This worksheet shows a way to compare and score financial tech systems. 5 Pages (20-677)

VENDOR PERFORMANCE REVIEW. Use the following template to organize your evaluations of vendor performance in areas of customer service, finance, responsiveness, and planning. 2 Pages (20-627)

VENDOR SERVICES QUESTIONNAIRE. These questions were designed to determine whether a vendor can provide the expected type and level of services. 2 Pages (20-577)

ROI TEMPLATE. This spreadsheet contains an example of an ROI method, logging call deflection, incremental cash flow, and risk aversion. 6 Pages (20-458)

VENDOR MATRIX. This software vendor scorecard matrix is a template that could be modified to suit your comparison needs. 4 Pages (20-415)

VENDOR SEARCH TEMPLATE. This workflow shows the process of researching/evaluating a vendor. 2 Pages (20-533)

VENDOR DATA & RISK ASSESSMENT. This worksheet provides data on vendors as well as a risk assessment & security questionnaire. 19 Pages (20-225)

TELEPHONE SCORECARD TEMPLATE. This scorecard rates everything from consoles, voice mail, and calendaring to conference calling and IVR recording. 21 Pages (20-151)

DOCUMENTATION & INDIVIDUAL SECURITY EVALUATION. The Evaluator will rate how well the Proposer's solution overall satisfies the company's requirements, as well as its overall suitability for the company. 34 Pages (20-129)

REFERENCE VERIFICATION & EVALUATION. Protocol for an SME (Subject Matter Expert) to check references includes phone scripts and question lists, and the evaluation worksheet follows. 24 Pages (20-126)

TECHNICAL REQUIREMENTS WORKSHEET. Following is an evaluation sheet for third-party, subcontractor, and local software. 14 Pages (20-125)

BUSINESS PROPOSAL FORMAT CHECKLIST. This proposal checklist accompanies a proposal for an Environmental Health Permit & Inspection Management System (EHPIMS). 3 Pages (20-124)

EVENTS MANAGEMENT SUITE. This suite is a scorecard and pricing matrix for events management vendors. 2 Pages (20-096)

VENDOR SCORECARD. Here is an example of a vendor scorecard, weighing services, quality, cost, etc. 4 Pages (20-040)

VENDOR SCORECARD. This spreadsheet is a supplier performance management scorecard rating responsiveness, quality, financials, and more. 1 Page (10-1748)

CLOUD VENDOR QUESTIONS. This series of questions explores information helpful when making decisions related to cloud hosting service adoption. 3 Pages (50-294)

DEMO SCRIPT SCORING TEMPLATES. These templates provide guidance for developing vendor and script scoring techniques. 16 Pages (50-241)

SUMMARY SCORES WORKSHEET. Overall scoring, pricing, functional essay, and matrix summaries are demonstrated in this template. 9 Pages (50-240)

ESB ASSESSMENT MATRIX. This matrix helps assess and score various Electronic Service Bus (ESB) vendors based on technical & functional capabilities. 21 Pages (50-239)

EVALUATION MATRIX TEMPLATE: LARGE. This template is used by product evaluation teams to build vendor questionnaires, distribute and evaluate the vendor responses and provide response ratings. 22 Pages (50-238)

EVALUATION MATRIX TEMPLATE: MEDIUM. This template is used by product evaluation teams to build vendor questionnaires, distribute and evaluate the vendor responses and provide response ratings. 4 Pages (50-237)

EVALUATION PUNCH LIST. These questions are provided to initiate the evaluation process and make sure procedures are followed. 1 Page (50-236)