



**INTERFOLIO, INC.**  
1400 K Street NW  
11th Floor  
WASHINGTON, DC 20005

2/7/2019

**INTERFOLIO**

Jeff von Rosenberg  
1400 K Street, NW 11th Floor  
Washington, District of Columbia 20005  
United States  
jeff.vonrosenberg@interfolio.com

**CUSTOMER**

N.K. Anand  
Executive Associate Dean of Engineering  
Texas A & M University-College Station  
805 Rudder Tower  
College Station, TX 77843-1244  
United States  
nkanand@tamu.edu

Thank you for considering Interfolio for your hiring, promotion, and/or faculty activity reporting needs. The pricing in this Order Form is void if not executed by Customer by 04/04/2019. Capitalized terms used but not defined on this Order Form shall have the meaning given such terms in the Agreement.

**Product Descriptions**

**Faculty Activity Reporting**

Annual subscription license includes access to the Interfolio Faculty180 software application, which includes Faculty Activity Reporting and Analytics Dashboards.

**FAR Implementation, Training & Support**

Standard implementation package includes needs assessment, initial setup, and administrator training. Additional fees may apply to implementation work beyond the standard scope of work. See Statement of Work for additional details.

**Annual Account & Project Management Service**

Includes Project Management, Quarterly Utilization Reports, Product Release Management, Advisory Support and Faculty Adoption Consultation, Integration Consultations, and Ongoing Support.

**Data Integration Package**

Service includes initial data consultation, mapping, and loading of data from .

**Review, Promotion and Tenure**

Annual subscription license includes all review, promotion, and tenure cases at Texas A & M University-College Station.

**RPT Implementation, Training & Support**

Standard implementation package includes needs assessment, initial setup, and administrator training. Additional fees may apply to implementation work beyond the standard scope of work.

**On-site Training**

Dedicated on-site training sessions for system administrators and users. Expenses for flight & accommodations invoiced separately. Quantity/Days: 2

Product Name		Year 1	Year 2	Year 3	Year 4	Year 5
Faculty Activity Reporting	List Price	\$34,160.00	\$35,526.40	\$36,948.31	\$38,425.73	\$39,962.93
	Net Price	\$25,406.50	\$27,977.04	\$29,100.05	\$30,261.49	\$31,469.90
FAR Implementation, Training & Support	List Price	\$54,442.50	\$0.00	\$0.00	\$0.00	\$0.00
	Net Price	\$19,054.87	\$0.00	\$0.00	\$0.00	\$0.00
Annual Account & Project Management Service	List Price	\$0.00	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00

Product Name		Year 1	Year 2	Year 3	Year 4	Year 5
	Net Price	\$0.00	\$4,000.00	\$4,000.00	\$4,000.00	\$4,000.00
Data Integration Package	List Price	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00
	Net Price	\$2,000.00	\$0.00	\$0.00	\$0.00	\$0.00
Review, Promotion and Tenure	List Price	\$29,890.00	\$31,085.60	\$32,328.17	\$33,621.98	\$34,967.03
	Net Price	\$21,183.47	\$23,327.01	\$24,262.14	\$25,231.43	\$26,239.15
RPT Implementation, Training & Support	List Price	\$7,472.50	\$0.00	\$0.00	\$0.00	\$0.00
	Net Price	\$5,295.87	\$0.00	\$0.00	\$0.00	\$0.00
On-site Training	List Price	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00
	Net Price	\$4,000.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>LIST PRICE:</b>		\$139,965.00	\$70,612.00	\$73,276.48	\$76,047.71	\$78,929.96
<b>DISCOUNT:</b>		\$63,024.29	\$15,307.95	\$15,914.29	\$16,554.79	\$17,220.91
<b>TOTAL:</b>		\$76,940.71	\$55,304.05	\$57,362.19	\$59,492.92	\$61,709.05

**Term:**

- The term begins upon execution of this Order Form ("**Effective Date**") and extends for five consecutive one-year periods.
- This agreement will continue to apply as long as the Term under the Order Form remains in effect, unless earlier terminated by either Customer or Interfolio as set forth herein (the "Term").

**The Service Includes:**

- A designated Interfolio Project Manager during implementation.
- Customer support for your users, applicants, and candidates via Scholar Services team.
- Unlimited Users.

**Notes:**

- The first invoice will be sent upon full execution of this agreement. Subsequent invoices will be sent on the first day of the following term years.
- The license granted herein provides access for Customer's College of Engineering only. Remote campuses, specialty schools (such as medical, law, graduate schools, etc.), international campuses, and continuing education units are not included in this license and may require additional fees for access.

Interfolio is provided as a software-as-a-service. The parties signing below hereby enter into this Order Form as of the date of the later signature below ("**Effective Date**"). This Order Form is governed by the terms of the existing agreement between the parties dated December 20, 2018 including any amendments to the terms as noted above. By signing below, you are acknowledging that you have been given the opportunity to review and agree to such terms, which are hereby incorporated herein by reference.

Interfolio, Inc.

Texas A & M University-College of Engineering

PO #:

BY: Andrew Rosen (Apr 4, 2019)

**Authorized Signing Authority**

Andrew Rosen CEO

**Printed Name/Title**

Apr 4, 2019

**Date**

BY:

**Authorized Signing Authority**  
**ROBERT C. BOUNDS**  
**DIRECTOR, PROCUREMENT SERVICES**

**Printed Name/Title**

4 APR 2019 Date

**Exhibit B**  
**INTERFOLIO PROFESSIONAL SERVICES - STATEMENT OF WORK**  
**Texas A&M University – College of Engineering**

This Work Statement is a preliminary expectation of both Interfolio and Texas A&M University – College of Engineering ("Customer") of the services that shall be performed. This SOW is an exhibit to the Order Form between Interfolio and Customer which is hereby referenced and incorporated into this SOW and will control the delivery of services. It may be modified by a writing approved by the designated representatives of each Interfolio and Customer. Any services beyond the scope outlined herein, shall be the subject of an additional SOW.

**Objective**

We are proud to propose to Customer an Interfolio Professional Services effort to support the implementation of Review, Promotion & Tenure and Faculty Activity Reporting.

The intended outcomes of this effort are to:

- Deploy the selected Interfolio solution and ensure implementation and rollout for the Customer organization.
- Provide knowledge transfer, solution expertise and train Customer project team as the key administrative users who will be critical to the successful implementation and support of the solution.

**Professional Services Overview**

The Interfolio Professional Services team provides expertise and guidance throughout the implementation process. These services vary in scope and effort based on our review of the Customer requirements. The team is planning to deliver implementation and annual project management services, based on the objectives stated above.

Below you will find a description of the proposed effort to ensure a successful deployment of the Interfolio solution.

**Implementation Services**

1. **Plan** - The Interfolio Project Manager will schedule the kickoff discussion with the Customer project manager and his/her defined team. During this meeting, the team will define the key objectives of the deployment and develop the overarching project plan with the timeline and schedule. They will also define the communications tools (i.e., Customer dashboard), file transfer method and meeting cadences to ensure that the team is meeting regularly to discuss progress, timeline and potential risks around the implementation.

As part of the Faculty Activity Reporting planning phase, the Customer will need to provide sample files for the data sources that they are planning to input into the system for their implementation. This list of files needs to be well defined at the onset and the details of the effort for the integrations should be outlined in the addendum. Should additional data sources be needed post this initial scoping effort, then a separate change order could be required and additional fees may apply.

2. **Inform** – For Faculty Activity Reporting, The Interfolio Project Manager will begin this phase by preparing the basic setup of the system which includes working with the Customer Project team to configure the system and load the base data set as defined in the Addendum. The data that is typically included in this activity are exports from existing institutional sources (SIS, ERP, etc.) As part of this effort, the data can be uploaded directly via the product interface, via API, SFTP, virtual shared drive. As another key milestone, the combined team will define and configure system inputs including institution hierarchy, user's roles and permissions. This setup is defined as one of the key milestones of the implementation and will drive the remainder of the activities.

Once all data sources are identified, the Interfolio Project Manager will verify for relevancy, accuracy and ensure that the data is mapped to the right areas(s) of the system. They will also setup any vita templates.

For Review, Promotion & Tenure, Customer and Interfolio Project Manager will work together to define and configure the various system inputs including: institution hierarchy, custom forms, user's roles and permissions and the overarching template workflows. We will also ensure that the functionality for administrators, committee managers and committee members is well defined and understood by the Customer project team. The Interfolio Project Manager will also ensure there is a clear understanding by the project team regarding the reporting functionality of the module.

At this point in the implementation, the Customer will have a solid understanding of the solutions and will review the set-up workflows to move into the next phase. At this point, the team will deliver administrative training where the focus will be to demonstrate the functionality and then train the Customer Project Manager/Administrator to fully understand the functional areas of the solution.

3. **Train** – The project team will schedule the training sessions to be delivered to the various teams across the institution. This training will be delivered as agreed upon between Customer and Interfolio Project Manager. The Interfolio project manager will work with the Customer project manager to ensure that schedules align and that the necessary technology is in place to support the training sessions.
4. **Deploy** – Upon completion of the training the solution is ready to be deployed to the end users and the searching efforts will commence based on the Institutions timeline. The Interfolio Project Manager will also perform a debrief on the implementation and close out the project plan.

### Annual Project Management Service

This service is an additional service that is applicable in year two and each year beyond the first-year license period. It ensures a premium level of project management and overall support to your Institution governance team and ensure smooth operations. The service provides the following:

1. **Project Management** - Direct access to your Interfolio Project Manager for the full term of your license to provide seamless service and 2<sup>nd</sup> level advisory support. This includes one onsite annual retraining for new institutional users as well as continuing support of the current configuration with additional units and set up as applicable. Support will also be provided for configuring existing integration services and management of recurring data transfers and/or product integrations.
2. **Quarterly Utilization Reports** – The Interfolio project manager will schedule and deliver a report at the end of each quarter highlighting usage, activity and overall utilization. The project manager will also address any anomalies in the reports and perform process reviews and updates when applicable.
3. **Product Release Management** – This activity will include more in-depth communication and training around new features and product updates occurring during the term of the license. The Interfolio Project Manager will ensure all communications are being reviewed, analyzed and acknowledged by the Customer team.
4. **Advisory Support and Faculty Adoption Consultation** – Should Customer require additional training and consultation to help with adoption, the Interfolio Project Manager can support this effort. The Project Manager will provide materials and online resources, and hold regular sessions for training, consultation and support.
5. **Integration Consultations and Ongoing Support**– As the usage of the product continues to grow, so does the need to review and consider additional data sources outside the scope of an initial implementation. As part of this service, the Interfolio Project Manager can work with the Customer to review those sources, analyze relevant touch points and discern whether additional automatic data loads can be utilized in the system. The Interfolio Project Manager will lead these discussions and help the Customer team to decide whether additional integrations are necessary.

### Interfolio Implementation and Support Team

Implementation begins by identifying the members of our staff who will serve as your primary contacts for the project. These primary roles are as follows:

1. **Project Manager:** As the primary point of contact for your core team, the Interfolio Project Manager is responsible for the planning and implementation of Interfolio's products. Serving as an expert in Interfolio's products, functionality, and applications, the Project Manager will work closely with your core team to construct a project plan, schedule alignment meetings and trainings, and coordinate with all relevant parties through project closeout.
2. **Scholar Services Support:** Interfolio's Scholar Services team will act as the primary contact for product and technical support for your institution's administrators, faculty, and staff. In addition to curating an online Help Center, our Scholar Services team are available for live support via phone and email from 9:00am – 6:00pm Eastern Time, Monday through Friday.

### Customer Responsibilities

To support initial implementation and ongoing support of Interfolio, the Customer also agrees to provide a day-to-day point of contact throughout the life of the project. This person can either be a system administrator or project manager who is ultimately responsible for the success of the effort. This resource will act as the team lead on the Customer core team. His or her responsibilities include:

1. Attend project team meetings and training sessions designed to prepare the core team to perform and manage all administrative processes.
2. Providing access to resources and executives as necessary for this project;
3. Following-up on questions and circulating materials as appropriate;
4. Facilitating scheduling, inviting and confirming participants for online presentations and working sessions if appropriate;
5. Ensuring access to data sources and any other relevant inputs to the process
6. Coordinate with sub-level unit administrators in performing modifications to system configuration.

Customer also agrees to include executive-level leadership and support for the project. This typically consists of representation from any combination of: the office of the Provost, faculty, Information Technology, Institutional Research, and/or Faculty Affairs. Duties of the core team include:

1. Primary stakeholders for the project and validate the direction and ongoing uses for how Interfolio will be used at the institution.
2. Participation in quarterly checkpoints or regularly scheduled discussions during year one of the implementation

- Determine key roles & responsibilities for the deployment including management of digital records, technical system support, or data integration with other campus systems.

#### Closeout Process

As part of our methodology, the Interfolio Project Manager will consolidate relevant information and will formally close out the project once the above tasks and activities are completed. This will include incorporating feedback, identifying key insights and scheduling a debrief session with the Customer team and executive sponsors to review these findings.

#### Change Management

Once the Customer has agreed upon the activities included in this proposal along with a project schedule with the list of deliverables (in the Plan phase), then the combined project team (Interfolio and Customer) will utilize change control if a change occurs that would impact the agreed upon delivery. Any request for any change in service must be in writing: this includes requests for changes in project plans, scope, schedule, requirements and design specifications, or any other aspects of the project. Services related to changes will be performed only after the Customer and Interfolio agree in writing to the proposed changes.

#### Fees

The proposed services are priced as indicated in the Order Form.

The parties signing below hereby enter into this Statement of Work as of the date of the later signature below ("Effective Date").

INTERFOLIO, INC.

CUSTOMER: TEXAS A&M UNIVERSITY – COLLEGE OF  
ENGINEERING

BY: Andrew Rosen (Apr 4, 2019)  
Authorized Signing Authority/ Date

Andrew Rosen CEO  
Printed Name/Title

BY: 4 Apr 2017  
Authorized Signing Authority/ Date  
**ROBERT C. BOUNDS**  
**DIRECTOR, PROCUREMENT SERVICES**  
[Signature]  
Printed Name/Title



## ADDENDUM

### Confirmation of Single Sign-On Method:

Single Sign-On (SSO) is a widely employed means to simplify access for your faculty and staff increasing security and institutional control. Users benefit by only needing 1 set of credentials (username/password).

Interfolio be configured to support SSO via:

- Shibboleth
- SAML
- ADFS (via SAML)
- CAS
- LDAP

### Interfolio Faculty Activity Reporting Data Transfers included in Implementation Fee:

Base Data Sets:

- Units
- Faculty
- Current Position
- Secondary Unit Assignment
- Faculty Classifications
- Courses Data
  - Prefixes
  - Courses
  - Courses taught
- Committees

### Data Transfer/Migration Process

Legacy data is faculty activity data that is stored in an institutional repository or existing activity reporting system. Examples of legacy data include teaching, research, service, and professional development activities stored in an electronic format. For an extra fee, Interfolio can facilitate a one-time transfer of legacy data to a configured Faculty Activity Reporting database.

Interfolio will provide the service of an initial data consultation, mapping, and loading of data from agreed upon data sources of Workday, Banner, and homegrown grants and course evaluation systems.

### Process Outline

Sample File

- Customer will provide CSV export of data tables from agreed upon data source(s) in an agreed upon format
- Customer will transfer sample files to Interfolio. Methods of file transfer can include SFTP, email, or accessible folder via cloud service provider.

Data Handling and Delivery, Interfolio will:

- Review the test file and validate fields and data formatting
- Check the data file against the system configuration to verify setup
- Map all data fields into the Faculty Activity Reporting system
- Perform testing of data in the Faculty Activity Reporting transfer database
- Provide Customer with access to a transfer database for review

Review and Approval

- Customer will review all loaded data and report back any findings
- Customer will commence data review process as individual file types are loaded.
- Interfolio will include one round of revisions to data fields, structure, and formatting.
- Once approved, Interfolio will copy the data from transfer to customer production database

### Other Data Transfers:

Any additional requests for data transfers and/or system modifications, to include reports, that are not already available, will be considered a change request. All requests will be reviewed to determine the scope of work and associated costs.