



Dedicated IT Contract Reviewer

To scale rigorous reviews of distributed technology purchasing, higher education IT groups are elevating contract assessment to a full time, dedicated role. These individuals oversee and sign off all technology contracts, applying common procurement standards (enterprise licensing, duplication red flagging) as well as specialized IT reviews (data security, business continuity and disaster recovery, infrastructure and network requirements).

IT groups who have consolidated IT procurement assessments into the role of a single FTE report multiple, mutually reinforcing benefits:

- Faster contract review cycles advantaged by economies of intellect
- Reduced spend on license duplication
- Prevention of non-compliant data sharing and storage
- Increased partnership with IT early in the procurement process

Included in this Intensive





This practice implementation intensive provides a template to help IT Forum members accelerate adoption of more sophisticated and repeatable processes, including:

- » **Pro-Forma Job Roles and Volumetrics:** Detailed description of reviewer advantages
- » **Sample Job Description:** Summarized roles and responsibilities to fill the position
- » **Technical Contract Identifiers:** Multi-channel approaches for surfacing IT purchases
- » **Fast-Turnaround Review Protocol:** Escalation steps and risk factors for contract review
- » **Dedicated IT Contract Review Value Scorecard:** Success and self evaluation metrics for IT professional elevated to full-time contract review

Outsized Benefits to Contract Evaluation Specialization

FTE Combining IT and Procurement Expertise Improves Speed and Rigor

With distributed purchasing increasing IT risk on campus, CIOs are facing a growing need for—and an inability to provide—high caliber technology contract review in line with campus timeline expectations. The best are implementing fast-cycle evaluations by elevating a dual expert to a full-time contract review role.

	Typical IT Contract Review	Dedicated IT Contract Review
 <p>FOCUS Portion of reviewer’s attention allocated to technology contract review</p>	<p>✘ <i>Unit-level technology purchases—when reviewed—are assessed as a side-of-desk role by professionals working in other IT domains and services</i></p>	<p>✔ <i>Full time employee engaged by IT devotes 100% of their time to technology contract review and vendor negotiations for unit-level purchases</i></p>
 <p>EXPERTISE Breadth of specialized competency applied during contract review processes</p>	<p>✘ <i>Contracts undergo procurement’s checks with limited technology expertise applied to understanding repercussions of the terms and conditions</i></p>	<p>✔ <i>The dedicated IT contract reviewer applies procurement and technological expertise simultaneously in contract evaluations</i></p>
 <p>SYSTEMATIZATION Repeatability and routinization of technology contract review processes</p>	<p>✘ <i>Contracts are reviewed ad-hoc, as-discovered by procurement analysts, and receive review by whoever is available from IT</i></p>	<p>✔ <i>A senior-level IT professional committed to fast-cycle initial reviews oversees contracts, with established escalation steps for follow through</i></p>
 <p>SCALE Percentage of incoming and renewable technology-related contracts assessed</p>	<p>✘ <i>Limited visibility into campus-wide IT contracting, with many tech-related unit-level purchases evading IT oversight</i></p>	<p>✔ <i>85%+ of campus IT contracts are channeled through the review specialist, using a dedicated, multi-channel approach for contract discovery</i></p>

Pro Forma Job Description and Volumetrics

Consolidating Legal and Technical Expertise to Combat Cloud-Era Risk Factors

While procurement offices have historically managed campus purchasing to drive economies of scale and synthesize campus-wide purchasing, IT has amassed specialized expertise and terrain knowledge of the costs and risks associated with technology acquisition. Neither, however, is an expert in the other's field. Uniting this previously siloed expertise has become urgent, with significant risk mitigation and cost savings for institutions uniting these capabilities in one individual.

Contract Review Specialist Attributes

An effective IT procurement coordinator has the ability to move smoothly between technology and contracting language to help end users find solutions to meet their needs, while driving cost savings and comprehensive security in vendor negotiations.



Director-Level IT Experience

10+ years in IT services combined with senior position in IT organization supports institutional gravitas in decision making



Legal and Technical Proficiency

Expertise in compliance, contracting, and technical IT jargon to address both technology and procurement risk factors



100% Dedication to IT Contract Review

Full-time concentration on IT contracts builds human library of terms and speeds turnover times versus side-of-desk attempts

Target Volumetrics

85%+

Distributed Contracts Vetted

Dedicated partnership for distributed technology purchases scales IT expertise across higher percentage of yearly contracts

200+

Contracts Reviewed and Authorized Annually

With full-time focus on contract review, an FTE can turn over 5-6 contracts per week, or over 200 distinct contracts annually

60%+

Contracts Turned Over Within 3 Days

Aggressive SLAs for first stage evaluation ensures that end users aren't left bewildered by bureaucratic delays, and simple solutions are fast tracked



We're not the biggest IT shop, but it became apparent that so many purchases have an IT component these days that we could keep an FTE fully engaged, and that the expertise they'd accumulate would save us so much money and effort on the back end by avoiding mistakes on the front end."

Christopher Waters, CIO
Elon University

Source: EAB interviews and analysis.

Sample Job Description

Sample Job Advertisement (Derived from Multiple University Artifacts)

Assistant Director: IT Contract and Vendor Review

Position Summary

Fast-paced role in a high-pressure environment, working to satisfy customer needs among diverse campus constituents. The Assistant Director: IT Contract and Vendor Review must work diligently under minimal supervision to organize and prioritize incoming and renewable contracts for efficient and thorough review against legal and regulatory requirements. The position holder will possess a high standard of customer service and relationship management skills, and will develop sustainable partnerships across campus units.

Role Responsibilities

Negotiation

- Address issues of privacy, compliance, data sovereignty, disaster recovery, information security, risk management, and identity integration, and develop best practices to incorporate these concerns into licensing and procurement processes
- Proactively manage and implement cost-effective licensing for IT and broader technology purchasing arrangements
- Own complex IT problems and solution evaluation, involving in-depth negotiations with third-party IT solution providers

Communication

- Analyze constituent needs and recommend appropriate solutions for faculty and staff in the process of acquiring new technologies
- Actively promote central IT standards in distributed purchasing agreements
- Communicate and promote current services available through enterprise licensing to faculty, staff, and students on campus

Research

- Scan evolving vendor landscape and research capabilities of emerging IT hardware and software offerings and higher education penetration/use cases

Key Skills and Qualifications

- **Education:** bachelors degree, or higher
- 10+ years of experience in IT management, including (but not limited to): service management, enterprise applications, IT analysis, technology acquisitions, vendor negotiations
- Working knowledge of licensing and legal requirements incumbent on universities and colleges in North America (e.g., FERPA, HIPPA, ADA regulations).
- Strong interpersonal skills and relationship management
- Service-oriented, with deep commitment to client satisfaction

Technical Contract Identifiers

Hardwiring Discovery of Campus-Wide Tech-Dependent Purchases

Full utilization of the IT contract reviewer demands rigorous identification of purchases with a technology component. The best institutions operate multi-channel discovery campaigns, focusing efforts in three areas: mandatory contract cover sheets, eProcurement system flags, and strong relationships with procurement specialists. Even where 100% contract coverage cannot be ensured, high contract throughput is high-ROI.



Contract Cover Sheets

Dual key authorization for technology-related contracts ensures reviewer oversight and sign-off



eProcurement Flags

Unit type filtering in procurement systems funnels IT purchases to the reviewer for green-slighting



Procurement Officer Judgement

Working relationships with procurement offices around campus ensure the passing of technology contracts to expert eyes



ELON UNIVERSITY CONTRACT APPROVAL COVER SHEET	
Complete all sections. Incomplete forms will be returned unprocessed.	
While University faculty/staff may sign this cover sheet to indicate concurrence with contract terms, only certain designated officials of the University may officially sign the contract on behalf of the University.	
Date of Initiation: _____	
1. Initiating Department: _____	
2. Contract Initiator: _____ Phone: _____ Email: _____	
3. Does this contract involve <u>any</u> technology related goods or services? Yes ___ No ___ If yes, approval of Sr. Business Analyst – Campus Technology Support must be obtained.	
4. Does this contract involve furniture, construction or renovation? Yes ___ No ___ If yes, approval of the University Architect <u>and</u> SVP Business, Finance & Technology must be obtained.	
5. Contract Dates: Start Date _____ End Date _____	
6. Description of Contract: _____	

Impactful Interactions Increase Repeat Custom

“ People have a great experience with the review—we save them money, or help them understand the sensitive nature of the data we’re putting out. Once they’ve worked with us, they’re far more likely to come proactively to us in the future. We’re improving relationships as we go.

Tony Rose, Sr. Business Analyst
Elon University

High-ROI without Mandates

85%+

Contract discovery through voluntary self-reporting secures reviewer ROI in averted duplications and security diligence

Fast-Turnaround Review Protocol

Expediting the Routine, Engaging Expertise for Exceptions

Elevating one individual to full-time contract reviewing facilitates routinization of dispersed and ad-hoc processes. With institutional oversight and high repetition, time-to-contracting is minimized in simple and safe purchases, and dedicated attention ensures units are kept abreast of developments in more complicated cases. High efficiency and increased transparency improve end-user experience, and due diligence is scaled appropriately across all incoming/renewable contracting.

Three High-Impact Reviewer Action Steps, Three Low-Effort End User Outcomes

1

Classic Contracting and Technology Review

- Duplications and redundancies triaged to existing services and technology offerings
- Low-risk, low-dollar purchases approved
- Identification of SaaS, data-heavy, and high-dollar purchases for contracting deep-dive



Fast-Cycle Solutions

Light-touch approvals and rapid rerouting to existing services ensures simple needs are greenlighted without complex, bureaucratic processes

2

Disadvantageous Contracting Term Rewrites

- Data storage, SLAs for uptime and bandwidth, third party access rights, disaster recovery and backup arrangements reviewed and amended
- Cost-effective enterprise licensing agreements arranged for high-demand services
- Complex vendor math assessed and corrected



Best Prices, Mitigated Risks

Combined institution-wide visibility and institution-first mentality secures safe and cost effective contracts using repeatable clauses for efficiency

3

Complex One-Off Negotiations

- Tracking and formalizing complicated third-party storage agreements for SaaS
- Parsing compliance provisions for data subject to FERPA and HIPPA regulations
- Working with end users to determine functionality expectations given contract terms and promises



Bespoke Expert Contracting

One-of-a-kind services and high-dollar investments receive cool-headed negotiation, prioritizing institutional benefit and safety throughout

Dedicated IT Contract Reviewer Value Scorecard

To assist members in making the case for recruiting a specialist, and as a template for calculating potential ROI, the IT Forum has put together the following worksheet for assessing campus need. Answer the questions on the left, and evaluate against the Dedicated IT Contract Reviewer to assess requirements for focused technology purchasing reviews at your institution.

	Contract Review Productivity	
	<i>Are We Meeting Turnaround and Coverage Goals?</i>	
	How many technology contracts do we review per quarter?	___ / 50+
	How many technology contracts do we review per year?	___ / 200+
	What percentage of contracts receive preliminary review in under 3 days?	___ / 100%
	What percentage of campus technology contracts do we review?	___ / 100%
	Contract Terms Quality Control	
	<i>Are We Avoiding Classic Procurement Errors?</i>	
	Do we have standardized processes to avoid license duplication?	Yes / No
	Do we secure enterprise-wide volume-based price discounts?	Yes / No
	Do we achieve favorable renewal terms in technology contracts?	Yes / No
	Technology Policy Quality Control	
	<i>Are We Mitigating Institutional Risks and Increasing Compliance?</i>	
	What percentage of contracts meet institutional data security standards?	___ / 100%
	What percentage of contracts consider FERPA and HIPPA compliance?	___ / 100%
	What percentage of SaaS contracts cover appropriate consideration of Business Continuity and Disaster Recovery planning?	___ / 100%
	IT Resource Planning	
	<i>Are We More Accurately Forecasting Downstream Resource Needs?</i>	
	What percentage of new technology projects are adequately staffed?	___ / 100%
	What percentage of our work is categorized as "unplanned" IT projects?	___ / 100%

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