



**INTERFOLIO, INC.**  
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February 24, 2022

**INTERFOLIO**

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**George Mason University**

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George Mason University  
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## RENEWAL ORDER FORM

Thank you for your continued confidence in 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 02/28/2022 at 2000EST. Capitalized terms used but not defined on this Order Form shall have the meaning given such terms in the Agreement.

### Product Descriptions

#### Review, Promotion and Tenure

Annual subscription license includes all review, promotion, and tenure cases.

#### Client Advisory Service

Includes semi-annual utilization reports, product release management, advisory support and faculty adoption consultation, integration consultations, and ongoing support.

#### Faculty Activity Reporting

Annual subscription license includes access to the Interfolio Faculty180 software application.

Year 1	
Product Name	Net Price
Review, Promotion and Tenure	\$64,797.19
Client Advisory Service	\$10,400.00
Faculty Activity Reporting	\$62,099.22
<b>Total:</b>	<b>\$137,296.41</b>

<b>Initial Term Contract Value</b>	<b>\$137,296.41</b>
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#### Term:

- The term begins upon 02/07/2022 ("Effective Date") and execution of this Order Form, and extends for a one-year period.
- 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").
- **Implementation Services.** The services, as provide herein, shall be performed by Interfolio to Customer pursuant to an executed Order Form. Services related to implementation ("Implementation Services"), shall be used within one year from the Effective Date, as defined within the Order Form. Furthermore, in the event such Implementation Services are not used within the first year of the Agreement, the Customer acknowledges and understands additional costs may incur to complete the scope of implementation, upon an executed Order Form. The proposed services are priced as indicated in the Order Form.

#### The Service Includes:

- Customer support for your users, applicants, and candidates via Scholar Services team.
- Pricing is based on Customer's current FTE as of Effective Date.

#### Notes:

- The first invoice will be sent upon full execution of this agreement. All other payments under this Order Form are due within thirty (30) days of the date of the invoice sent by Interfolio.
- The license granted herein provides access for Customer's indicated department or school 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 Standard Contract GMU-1506-18 dated February 6, 2019 between Interfolio and Customer, including any amendments thereto or 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.



*Andrew Rosen*

BY:

Authorized Signing Authority

Andrew Rosen  
Printed Name/Title

2/28/2022  
Date

CUSTOMER



*James Russell*

BY:

Authorized Signing Authority

Chief Executive Officer  
James Russell  
Printed Name/Title

2/28/2022  
Date

PO #:

Purchasing Director

Remit to:  
Remittance Dr.  
Dept. 6842  
Chicago, IL 60675-6842

**Exhibit B**  
**INTERFOLIO PROFESSIONAL SERVICES - STATEMENT OF WORK**  
**George Mason University**

This Statement of Work ("SOW") is a preliminary expectation of both Interfolio and George Mason University ("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 in writing if 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 George Mason University an Interfolio Professional Services effort to support the continued implementation of 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 client advisory 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. The project is based on current Interfolio functionality and not future product availability.

**Activities and Deliverables**

The Interfolio Project Manager with the support of other members of the Services team as necessary will lead and train the Customer in a series of activities as shown below. The Customer will assign the appropriate resources to support this effort (aka "core team," ideally 2-3 members) that will include a project manager, executive sponsor and other stakeholders where appropriate. The Customer core team will work closely with the Interfolio team to successfully deploy the solution using the Interfolio project methodology.

The order of tasks may vary slightly but generally the activities critical to the success of the effort are organized into a phased methodology approach. Interfolio also understands that the client prefers a more iterative approach to implementation and the team be as flexible as possible to adhere to this directive, with the understanding that there will be one primary implementation with a high level timeline.

**Faculty Activity Reporting proposed phased approach:**

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 estimated timeline and schedule. They will also define the communications tools (i.e., Customer dashboard), file transfer method and meeting cadences to ensure the team is meeting regularly to discuss progress, timeline and potential risks around the implementation.

As part of the Faculty Activity Reporting (FAR) planning phase, the Customer will need to provide sample files for all the data sources they plan 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 and agreed upon in writing between Interfolio and Customer. Should additional data sources be needed post this initial scoping effort, a separate change order may be required and additional fees may apply.

2. **Inform & Configure**— The Interfolio Project Manager and Customer project team will begin this phase by preparing the basic setup of the system to prepare for loading the base data set. 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, or the SFTP autoloading process.

**Faculty Activity Reporting Data**

**A. Base Data Loads**

The standard data files required for Faculty Activity Reporting to establish the system foundational structure for your institution. Included with the Implementation Fee:

- a. Units

- b. Faculty
  - c. Current Positions
  - d. Secondary Unit Assignments
  - e. Faculty Classifications
  - f. Courses
  - g. Courses Taught
  - h. Course Prefixes
  - i. Committees
  - j. Scholarly Outlets
  - k. Scholarly Outlet Metrics
- B. Data Transfers**
- Customer has identified additional activity data sources they would like to be imported and configured in the Faculty Activity Reporting module beyond those indicated in the Base Data above. The additional data types and sources agreed upon are as follows:
- a. Universal/Enterprises source systems (required for early adoption)
    - i. Banner Data as required
    - ii. Explorance Blue - course and student evaluation system
    - iii. Degrees – Homegrown degree system
    - iv. Grants – OSP/Grant Management System/Huron
  - b. Universal/Enterprise source systems (not required for early adoption)
    - i. Faculty Credentialing Database (source tbd)
- C. Data Transfer Process**
- a. **Configuration** - Interfolio and Customer must agree upon configuration of the software prior to starting the data transfer process.
  - b. **Source Identification** - Interfolio Project Manager and Customer will identify the sources of data, as detailed above, to collect the agreed upon data.
  - c. **File Formatting**- Interfolio will provide the Data Models, which include a detailed explanation of the format required, and Customer will provide files following the Interfolio Data Models. All files for data transfer provided by the Customer must follow the Data Model format; any files provided that are not compatible with the Data Model may be rejected. The Data Model requirements include, but are not limited to, file type, character set, and specific data type formatting (date, degree, etc).
  - d. **Transfer** - Customer will transfer files to Interfolio. Methods of file transfer include SFTP (preferred) or attached to a support ticket.
  - e. **Data Load Preparation and Sign off on System Configuration**
    - i. Interfolio will review the file and validate it against the Data Model fields and data formatting
    - ii. Interfolio will check the data file against the system configuration to verify setup
    - iii. Interfolio will communicate if any file or configuration modifications are needed.
    - iv. Interfolio will map all data fields into the FAR system
    - v. Interfolio will provide Customer with access to a transfer database for review
    - vi. Customer will review all loaded data and report any findings
    - vii. Interfolio will work with the Customer to verify at this stage and can support changes, edits and updates in an iterative manner. This is the most critical step of the process.
    - viii. Customer approves the configuration and prepares for full data loading activities.
  - f. **Data Load Procedures**
    - i. Customer provides all data in agreed upon format from section e and review for final sign off.
    - ii. Interfolio will include revisions to data fields, structure, and formatting if required. But note that if full data has been loaded, this will be very time consuming and could impact the timeline.
    - iii. Once approved, Interfolio will copy the data from transfer to customer development or production database
- D. Legacy System Data Migrations**
- Interfolio will migrate data from your existing legacy systems to FAR. Data is faculty activity data that is stored in an institutional repository or existing activity reporting system. Examples include teaching, research, service, and professional development activities stored in an electronic format
- a. Faculty activity data – Sedona
  - b. Faculty activity data – Homegrown system (Law School)
  - c. Faculty activity data – Homegrown system (College of Education)

- d. Faculty activity data – Homegrown system (College of Science)
- e. Faculty activity data - Homegrown system (Carter School of Peace and Conflict Resolution)

**E. Legacy System Data Migration Process**

- a. **Source Identification** - Interfolio Project Manager and Customer will identify all sources of data, as detailed above, to migrate the agreed upon data.
- b. **Sample Files** - Customers may be asked to provide sample files of data to be migrated from the legacy system. Ideally, the final full files will be provided by the Customer. For known vendor systems, the configured corresponding database will be used for implementation. If the data is from an unknown system, Interfolio will map data fields from the legacy system to corresponding fields in Interfolio, resulting in the configuration of the software.
- c. **Configuration** - Interfolio and Customer must agree upon configuration of the software prior to starting the process of data migration.
- d. **Transfer** - Customer will transfer complete data migration files to Interfolio. Methods of file transfer can include SFTP or as an attachment to a support ticket
- e. **Data Handling and Delivery** - will be handled in the same manner as the Data Transfer Process above.

**Client Advisory Service**

This service is applicable in year two and each year beyond the first-year license period. It ensures a focused level of engagement and consultation to your institution's core team to ensure steady communications and overall smooth operations. The service provides the following:

- 1. Advisory & Guidance**
  - a. Assigned Customer Success Manager to provide guidance on best practices, assist with any workflow modifications and change management support, and review open support tickets
  - b. One hour of training per year for a new administrator joining the institutional team
  - c. Two hours of end-user faculty training per year
- 2. Executive briefings** – Twice per year, Interfolio will schedule a review and deliver a report of your in-production products that will:
  - a. Review usage statistics, analyze any trends, risks, and overall adoption
  - b. Provide an overview of the latest changes in the product(s) that your institution has purchased
  - c. Review the Interfolio roadmap, future initiatives, and significant upcoming events and milestones
- 3. Technical Services Consultation & Data Loads**– 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.
  - a. Support of existing data uploads and integration services including management of recurring data transfers or product integrations
  - b. Interfolio can work with the Customer to review new data sources, analyze relevant touch points and discern whether additional data loads should be utilized in the system
  - c. Basic support for API questions via support tickets, as well as consultative meetings to support API integrations
- 4. Interfolio University**
  - a. Provides continued access to our Interfolio University course catalog for your institutional administrators
  - b. Subscription to one Interfolio University course to support faculty training efforts

**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:** Your primary point of contact for your core team through implementation, 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 from 9:00am – 6:00pm Eastern Time, Monday through Friday and via email from 5:00am – 10:00pm Eastern, Monday through Friday.
- 3. Client Success Advisors:** As part of the Scholar Services support team they serve as a second level resource during the implementation should there be complex process or product issues that need additional troubleshooting. If the Client Advisory Service is purchased, they will be a part of the various activities that are included.

4. **Consultant:** Will be brought in if/when needed by the Interfolio Project Manager to help work through specific details/processes within Interfolio's products. Additionally, depending on services purchased, they will help in coordination and delivery of specific deliverables included in the agreed upon project plan for Customer.
5. **Account Manager:** Will serve as your overall primary point of contact at Interfolio for the length of your partnership with us. This is your contact regarding contract related matters, best practices for using Interfolio's suite of products, help in accomplishing goals, or any general questions you have about working with Interfolio.

#### **Customer Responsibilities**

To support initial implementation and ongoing support of Interfolio, Customer 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. Provide access to resources and executives as necessary for this project;
3. Follow-up on questions and circulate materials as appropriate;
4. Facilitate scheduling, invite and confirm participants for online presentations and working sessions if appropriate;
5. Ensure 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
3. 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 formally close out the project once the above tasks and activities are completed. This includes incorporating feedback, identifying key insights and scheduling a debrief session with Customer team and executive sponsors to review findings.

#### **Change Management**

Once Customer has agreed upon the activities included in this proposal along with an estimated project schedule with the list of deliverables (in the Plan phase), the combined project team (Interfolio and Customer) will utilize change control if a change occurs that may 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.

#### **Other Data Transfers**

Any 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.

#### **Fees**

The services, as provided herein, shall be performed by Interfolio to Customer pursuant to an executed Order Form. Services related to implementation ("Implementation Services"), shall be used within one year from a mutually agreed upon date of implementation, as defined within the Order Form. Furthermore, in the event such Implementation Services are not used within the first year of the Agreement, the Customer acknowledges and understands additional costs may incur to complete the scope of implementation, upon an executed Order Form. The proposed services are priced as indicated in the Order Form.

