Orientation to Phase III-IV
SIS Vendor Selection

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July 1-2, 2013
TOPICS TO COVER THIS AFTERNOON

1. Four Phases of the Project
2. Project Timeline
3. UC Staffing Requirements
4. Questions
TOPIC 1: OVERVIEW OF THE FOUR PHASES
THE FOUR PHASES OF THE VENDOR SELECTION PROJECT

1. Initiation and Planning
2. Prepare and Release the RFP’s
3. Vendor Response Interlude
4. Vendor Evaluation and Selection
PHASE 1: *(3 WEEKS)*

PROJECT INITIATION AND PLANNING

- Initial planning sessions
- Validate the project governance structure
- Decide on the most appropriate model for a “dual” solicitation
- Agree on the scope
- Agree on minimum qualifications
- Agree on evaluation factors for both SIS software vendors and implementers
PROJECT INITIATION (CONTINUED)

- Agree on all screening mechanisms to be used
- Agree on a multi-step decision process
- Develop a project schedule with key milestone dates
- Update the project communication plan and project website
- Launch communication sessions, as needed
PHASE 2: **(6 WEEKS)**

**PREPARE AND RELEASE THE RFP’S**

- Select an RFP template
- Make assignments for selected SMEs
- Working with procurement, CPS will develop a draft RFP document for review
- Finalize detail functional and technical requirements
- Set up a dedicated vendor environment for DD responses from software vendors
- Develop spreadsheet templates for recording cost data from vendors (software, hardware, implementation services)
PREPARE AND RELEASE THE RFP’S (CONTINUED)

- Facilitate and oversee the development of demonstration scripts for software finalist presentations
- Develop the scripted demo schedule and guidelines for software finalists
- Develop the presentation schedule and guidelines for implementers
- Final agreement on the RFP document
- Alert the vendors
- UC releases the RFP documents to the market
PHASE 3: (5 WEEKS)
VENDOR RESPONSE INTERLUDE

• Provide answers to vendor submitted questions
• Plan logistics for software finalist scripted demos and implementer presentations
• Determine UC participants for scripted demos and implementer presentations
• Develop a process to tabulate scoring from finalist software vendor demos and implementer presentations
• Develop a plan for collecting reference information from schools that have implemented the finalist software solutions
PHASE 4: (11 WEEKS)
VENDOR EVALUATION AND SELECTION

- Evaluate vendor responses to include compliance with minimum requirements
- Analyze vendor responses to functional and technical requirements (gap analysis and estimates of customization costs)
- Help the UC selection committee to choose software and implementer finalists to invite to campus
- Oversee reference checking activities
- Oversee scripted demos and implementer presentations
- Collect and synthesize all evaluation data
- Help the UC selection committee to develop a final recommendation
TOPIC 2: PROJECT TIMELINE
SIS Replacement Project – Phases III & IV
Software and Implementation Services Vendor Selection
Proposed Timeline

Last updated: 7/3/2013

6/17
Begin Vendor Selection

8/6
BOT Info Session (date TBD)

8/19
Release RFP’s

8/30
Deadline for Submitting Questions

9/20
RFP Responses Due

10/18
Finalists Selected

12/6
Winning Vendors Selected

12/10
BOT Info Session (date TBD)

12/20
End Vendor Selection / Begin Contract Negotiations

6/17 - 7/5
(15d)
Initiation and Planning

7/8 - 8/16
(30d)
Prepare and Release RFP’s

8/19 - 9/20
(25d)
Vendor Response Interlude

9/23 - 10/18
(20d)
Evaluate RFP Responses and Select Finalists

10/21 - 12/6
(35d)

12/9 - 12/20
(10d)
Transition to Contract Negotiations
TOPIC 3: UC STAFFING REQUIREMENTS
### PROJECT TEAM

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<tr>
<th>Team</th>
<th>Activity</th>
<th>Effort</th>
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<tbody>
<tr>
<td>A cross-functional group of key functional and technical SME’s (the Project Team)</td>
<td>Carry out a variety of activities related to reviewing the RFP document, develop demonstration scripts, score RFP responses, check vendor references, score vendor demos and presentations, and make recommendations and presentations to the steering committee</td>
<td>• Two to three hours a week during the vendor selection process  &lt;br&gt; • Can require more hours during certain critical project milestones</td>
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### STEERING COMMITTEE

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| Composed of the Project Steering Committee and procurement specialist | Set policy, determine goals and criteria, review progress, approve recommendations, provide guidance, make the final recommendation to the Executive Sponsors, and have overall responsibility and accountability for the project. | • Two to three hours a week during the vendor selection process  
• Can require more hours during certain critical project milestones                                                                                                                                  |
## PROJECT LIAISON AND PROCUREMENT LIAISON

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| Project Liaison (PM’s)   | • Provide support to CPS in dealing with key project stakeholders  
                          • Help in overcoming project barriers  
                          • Serve on the Project Team                                                                                                              | • Up to five hours a week during the vendor selection process  
                          • May require more frequent meetings during critical project milestones                                                                 |
| Procurement Liaison      | Attend all steering committee meetings, provide counsel as needed, and “own” the RFP process                                                                 | • Up to three hours a week, except during certain critical project times in which there is intensive work for procurement. |
QUESTIONS?