TOPIC 1: OVERVIEW OF THE FOUR PHASES
The Four Phases of the Vendor Selection Project

1. Project Initiation and Planning Sessions
2. Preparing and Releasing the RFP
3. Vendor RFP Response Period
4. Vendor Evaluation and Selection
Phase 1: (3 weeks)

Project Initiation and Planning

• Initial planning sessions and discovery activities
• Overview sessions with key stakeholder groups
• Make critical project decisions
• Develop a project schedule with key milestone dates
• Develop a project communication plan and a project website
Make Critical Project Decisions

- Define the project governance structure
- Define the project scope
- Define evaluation factors for both software vendors and implementers
- Define minimum qualifications
- Define RFP format for software solution and implementation services
Phase 2: (7 weeks)
Preparing and Releasing the RFP

• Requirements gathering with the DD online toolset
• Develop an RFP template
• Make assignments for selected SMEs
• Working with Purchasing; CPS will develop a draft RFP document for review
• Set up a dedicated SDCCD environment for DD responses from software vendors
• Develop spreadsheet templates for recording cost data from vendors (software, hardware, implementers)
Preparing and releasing the RFP (continued)

• Develop demonstration scripts for software finalist presentations
• Draft the presentation guidelines for software implementation finalists
• Finalize the RFP document
• Notify the vendors
• SDCCD releases the RFP document
Phase 3: (5 weeks)

Vendor RFP Response Period

• Provide answers to the vendor submitted questions
• Develop the scripted demo schedule and venue for software finalists
• Develop the presentation schedule and venue for implementation finalists
• Develop a process to tabulate vendor responses
• Develop a plan for collecting reference information
Phase 4: (6 weeks)
Vendor Evaluation and Selection

• Evaluate vendor responses to include compliance with requirements
• Analyze vendor responses to functional requirements (gap analysis and estimates of customization costs)
• Coordinate scripted vendor demos
• Coordinate reference checking activities
• Collect and synthesize all evaluation data
• Help SDCCD steering committee to develop a final recommendation
TOPIC 2: PROJECT TIMELINE
ERP Software and Implementation Services Vendor Selection
Proposed Project Timeline

- **6/21**: Begin Vendor Selection
- **7/15**: Begin Requirements Developing RFP's
- **7/15**: Gathering Begins Notify Vendors Release RFP's
- **9/13**: Deadline for Submitting Questions
- **10/4**: RFP Responses Due
- **10/25**: Identify Finalists
- **11/18**: Winning Vendors Selected
- **12/4**: End Vendor Selection

Timeline:
- **7/1/2013**
- **8/1/2013**
- **9/1/2013**
- **10/1/2013**
- **11/1/2013**
- **12/1/2013**

Additional dates:
- **6/24 - 7/12 (15d)**: Initiation and Planning
- **7/15 - 8/23 (30d)**: Prepare and Release RFP's
- **8/23 - 10/4 (30d)**: Vendor RFP Response Period
- **10/7 - 11/18 (31d)**: Vendor Evaluation and Selection
- **11/19 - 12/3 (11d)**: Project Slack

- **12/31/2013**
TOPIC 3: STAFFING REQUIREMENTS
## Project Oversight Team

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<tr>
<th>Team</th>
<th>Activity</th>
<th>Effort</th>
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| Composed of the project sponsors (selected Vice Chancellors, and where appropriate, Presidents) | 1. Set policy, determine goals and criteria, review progress, approve recommendations, provide guidance, make the final recommendation to the Chancellor, and have overall responsibility and accountability for the project. | • Regular briefings as necessary  
• Final approval session |
# Project Oversight Team

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|      | 2. Carry out a variety of activities related to reviewing the RFP document, review demonstration scripts, review vendor references, score RFP responses, score vendor presentations, and make recommendations | • Normally up to eight hours a week during the vendor selection process  
• Can require more hours during certain critical project milestones |
### Subject Matter Experts (SME) Teams

<table>
<thead>
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<tbody>
<tr>
<td>A broad group of functional and technical subject matter experts at SDCCD.</td>
<td>Provide input to functional and technical requirements using DecisionDirector.</td>
<td>Up to six hours of ratings based on functional areas of responsibility.</td>
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<td></td>
<td>Review/revise final RFP requirements in areas of expertise.</td>
<td>Up to four hours reviewing/revising requirements based on functional areas of responsibility.</td>
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QUESTIONS?