FHDA EIS Vendor Evaluation Process

An Overview of the FHDA EIS Vendor Evaluation Process June 5, 2007

EIS Vendor Evaluation Process Upcoming Activities

- Finalize Requirements
- Establish Critical Criteria
- Develop Bid Document
- Prepare for Vendor Demos

EIS Vendor Evaluation Process

Upcoming Activities – Today's Discussion

- Finalize Requirements
- Establish Critical Criteria
- Develop Bid Document
- Prepare for Vendor Demos

Completed EIS Project Activities

Facilitated by ETS, Driven by SC and Functional Teams

Project Charter Brainstorm

Input: 59 questions, 991 comments

Result: Top 10 Expected Benefits and Top 10 Concerns

Business Process Review

Input: Your FHDA Process Definition KPs (659 processes)

Input: 9030 voter-provided data points

Result: Process Perceptions and Priorities by Role

Functional Requirements Gathering

Driven by Functional Teams / Invitations to ALL Stakeholders

Functional Requirements Forum

Input: Your Requirements Definition KPs (6,214 reqs)

Input: Votes from all <u>interested/engaged</u> FHDA employees

Input: Votes from Project Teams – these are <u>CRITICAL</u>

Closes: June 15

Result: Raw material for review in Requirements Validation

Requirements Validation

Driven by Functional Teams / Approved by Steering Committee

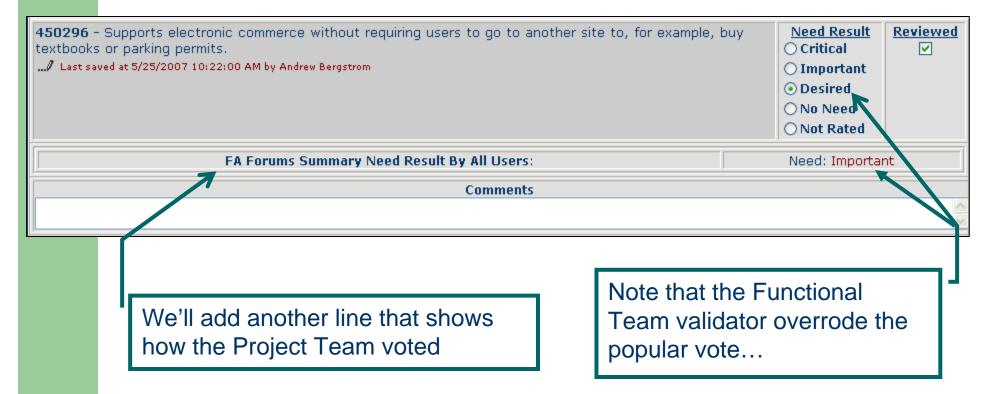
Requirements Validation Forum

- Input: Your Requirements Definition KPs (6,214 reqs)
- Input: <u>Suggested</u> requirements from all voters
- Input: "NEED" Vote <u>results</u> from FHDA employees
- Input: "NEED" Vote <u>results</u> from Project Teams
- Input: Dissonance reports that highlight where the Project Teams' NEED vote results differ from overall NEED vote results
- Task: Project Teams to review results and apply confirm/override decisions for each requirement
- Result: Final, Official, and Complete FHDA EIS
 Requirements

Requirements Validation

Driven by Functional Teams / Approved by Steering Committee

Sample Requirements Validation Forum



Requirements Weighting

Approved by Steering Committee / Input from Functional Teams

Determine Relative Weights of Modules

- Occurs within each KP (Advancement, Finance, HR-Payroll, Student, and Tech Reqs)
- 100 points to be allocated across modules (e.g. Admissions, Financial Aid, Registration, et cetera)
- Enhances vendor response analysis by emphasizing most critical modules
- Works with the "Critical", "Important", and "Desired" NEED ratings
- Provides additional focus for vendor demonstrations

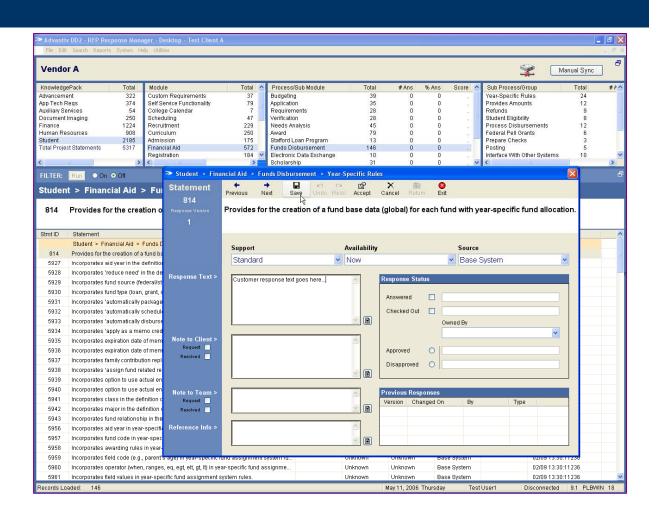
Requirements Weighting Approved by Steering Committee / Input from Functional Teams

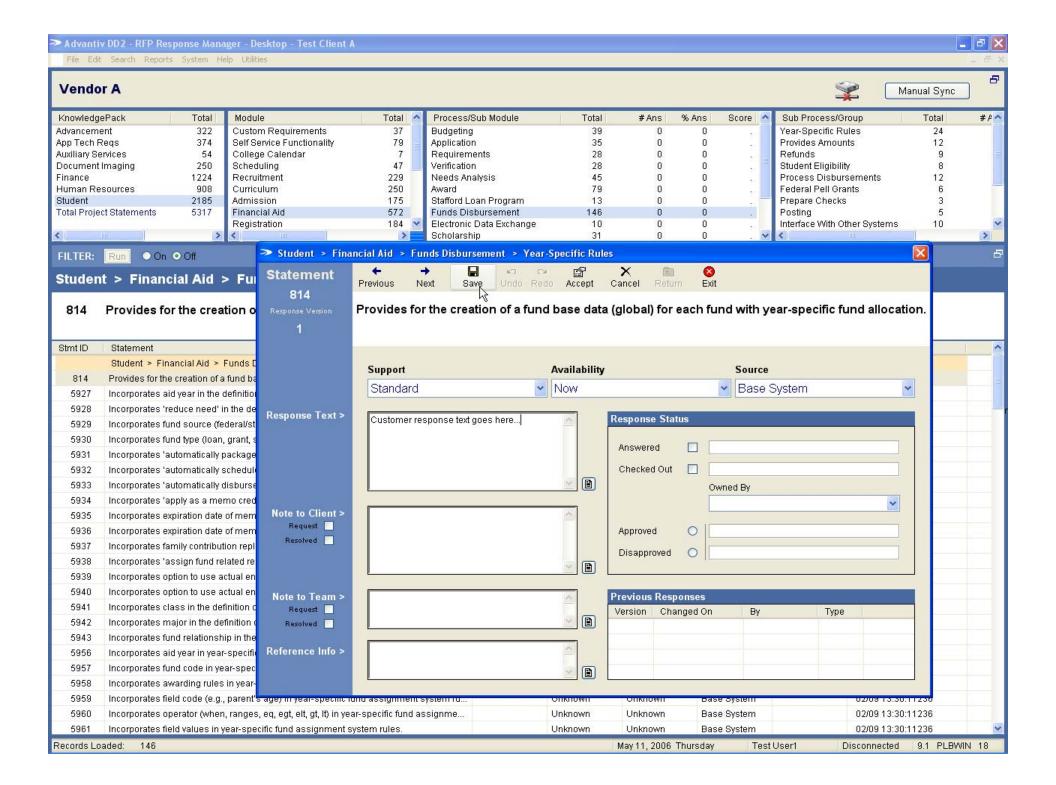
Sample Module Weighting Worksheet

KP	<u>Module</u>	<u>%</u>	
HR-Payroll	Position Management	8	
HR-Payroll	Applicant Management	8	
HR-Payroll	Benefits	8	
HR-Payroll	Employee Compensation	8	
HR-Payroll	Employee Relations	8	
HR-Payroll	Employment	8	
HR-Payroll	Payroll	8	
HR-Payroll	Personnel	8	
HR-Payroll	Workers Compensation	8	
HR-Payroll	Retirement	7	
HR-Payroll	Health and Safety	7	
HR-Payroll	General HR Functionality	7	
HR-Payroll	Self Service Functionality	7	
		100	< Must add up to 100

Vendors Respond On-Line

DD2 System is Loaded with FHDA's Validated EIS Requirements





Response Analysis

- Analysis starts with the entire set of requirements
- Then it looks at the Application or KP level
- Then at the module level
- NEED levels, module weights, and response scoring assignments are all used in this analysis
- Other reports will highlight specific gaps, etc.

Report Description

This report presents the summary analysis of the vendor's responses to the functional requirements of the RFP. Scoring and effort analysis is presented. Points are awarded to each vendor's response according to the Vendor Response Scoring Matrix established for this project.

Where the vendor responded with Effort <20hr, Effort <40hr or Effort 40hr+, we used a factor of 18 hours, 38 hours, or 100 hours, respectively to determine an estimated total hours of effort that a) would be required to achieve the capability so designated, and b) for which XYZ U would be intended hourly rate that blends employee burden rates with external consulting rates was also established, and used to determine a total ESTIMATED cost. These are all rough estimates, so it may be more useful to consider relative magnitude rather than actual dollars.

ERP Vendor Fit/Gap and Effort Summaries

								Need 9	Scope: ALL	. Items
Query Level:	ALL REQS	Fit/Gap Threshold:	270	ı	Blende	d Hourly F	ate for E	ffort Item	Cost Estima	tion: \$175
			Scor	e and F	it/Gap	Rating		Effort	Item Analys	sis
Vendor	Application	Module	#Items	<u>Points</u>	Score	Fit/Gap	#Items	%ofTot	Est. Hours	Est. Cost
Vendor A	-	-	2465	287	96.0%	Fit	162	6.6%	13,524	\$2,366,70
Vendor B			2465	278	92.7%	Fit	166	6.7%	16,518	\$2,890,65
XYZ U		-	2465	183	61.3%	Gap	0	0.0%	0	5
Query Level:	APPLICATION	Fit/Gap Threshold:	270	-	Blende	d Hourly F	tate for E	ffort Item	Cost Estima	tion: \$175
			Scor	e and F	it/Gap	Rating		Effort	Item Analys	sis
Vendor	Application	<u>Module</u>	#tems	Points	Score	Fit/Gap	#Items	%ofTot	Est. Hours	Est. Cost
Vendor A	Finance	-	1256	283	94.5%	Fit	101	8.0%	8,200	\$1,435,00
Vendor A	HR-Payroll	-	862	293	97.8%	Fit	53	6.1%	4,606	\$806,05
Vendor A	Portal	-	89	294	98.0%	Fit	3	3.4%	218	\$38,15
Vendor A	Tech Reqs	-	258	289	96.6%	Fit	5	1.9%	500	\$87,50
Vendor B	Finance	-	1256	277	92.3%	Fit	71	5.7%	7,018	\$1,228,15
Vendor B	HR-Payroll	-	862	283	94.6%	Fit	93	10.8%	9,300	\$1,627,50
Vendor B	Portal		89	252	84.3%	Gap	0	0.0%	0	5
Vendor B	Tech Reqs	-	258	272	90.9%	Fit	2	0.8%	200	\$35,00
XYZ U	Finance		1256	190	63.6%	Gap	0	0.0%	0	\$
XYZ U	HR-Payroll		862	196	65.5%	Gap	0	0.0%	0	\$
XYZ U	Portal	-	89	286	95.5%	Fit	0	0.0%	0	5
XYZ U	Tech Regs		258	72	24.0%	Gap	0	0.0%	0	\$
Query Level:	MODULE	Fit/Gap Threshold:	270	-	Blende	d Hourly F	tate for E	ffort Item	Cost Estima	tion: \$175
			Scor	e and F	it/Gap	Rating		Effort	Item Analys	sis
	Application	Module	#Items		Score		#Items		Est. Hours	Est. Cost

Vendor Response Analysis Sample Report – One of Many...

ERP	Vendor	Fit/Gap	and	Eff	ort	Su	mm	arie	s	
								Need 9	Scope: ALI	. Items
Query Level:	ALL REQS	Fit/Gap Threshold:	270		Blende	d Hourly	Rate for E	ffort Item	Cost Estima	ition: \$175
			Scor	e and F	it/Gap	Rating		Effort	Item Analy	sis
<u>Vendor</u>	<u>Application</u>	<u>Module</u>	#Items	<u>Points</u>	Score	Fit/Gap	#Items	%ofTot	Est. Hours	Est. Cost
Vendor A		-	2465	287	96.0%	Fit	162	6.6%	13,524	\$2,366,700
Vendor B	-	-	2465	278	92.7%	Fit	166	6.7%	16,518	\$2,890,650
XYZ U		-	2465	183	61.3%	Gap	0	0.0%	0	\$0
Query Level: APPLICATION Fit/Gap Threshold: 270 Blended Hourly Rate for Effort Item Cost Estimation: \$175										
			Scor	e and F	it/Gap	Rating		Effort	Item Analy	sis
<u>Vendor</u>	Application	<u>Module</u>	#Items	Points	Score	Fit/Gap	#Items	%ofTot	Est. Hours	Est. Cost
Vendor A	Finance	-	1256	283	94.5%	Fit	101	8.0%	8,200	\$1,435,000
Vendor A	HR-Payroll	-	862	293	97.8%	Fit	53	6.1%	4,606	\$806,050

Vendor Demonstration Scripts

Created by Functional Teams

Script Development

- Scenario-based
- Tied to most important processes
- Describes a situation and asks vendor to demonstrate how that situation is handled
- Lists one or more specific items that the vendor must include in the demonstration
- The listed items become the basis for the demo rating worksheets and forum
- Scripts can be weighted for scoring purposes
- Detailed requirements can be associated with each script
- Numerous and detailed samples will be distributed to teams

Demo Ratings

- Demo scripts converted to KPs
- KPs converted to worksheets
- KPs loaded into demo rating forum
- Provides for easy, fair, and rational demo evaluation and scoring

Vendor:	Evaluator:	ONYEN:	Date:

DEMO Evaluation Worksheet

UNC-Chapel Hill ERP Project

Thank you for agreeing to participate in our UNC-Chapel Hill ERP Project Vendor Demonstration Evaluation forum. While the actual evaluation activity will take place on-line via DecisionDirector, you (or your team) might find it helpful to use this worksheet to preview our list of items and write your thoughts before you go on-line.

In the on-line forum, for each demonstration script you observe, we ask you to indicate how well or poorly the vendor met your expectations for a complete and quality demonstration of their product as requested in the demonstration scripts:

- (E) EXCEEDS, i.e. Overall, the vendor's product seems to be exceptionally strong and would appear to exceed our expectations in this area;
- (M) MEETS, i.e. The vendor's product would appear to meet our needs in this area;
- (N) DOES NOT MEET, i.e. The vendor's product does not appear to meet our needs in this area;
- (F) CRITICALLY FAILS, i.e. The vendor's product appears to have critical weaknesses in the area; or
- (NR) NO RATING, i.e. We have not rated this area (this is the default response).

You can use this worksheet to check the corresponding boxes underneath the E, M, N, F, or NR headings before you go on-line to record your entries.

Space is provided for any comments you may have. Be sure to write the name of the vendor you are evaluating as well as your contact information in the space provided above.

Questions about DecisionDirector? Contact Advantiv at 602.808.0618 x1 or support@advantiv.com.

Script	t: ST1 - Prospect Submits Multiple Applications	
Recruite address generat request	RIC: Jill adds her contact information into the system via the web address she received from Joe or. She indicates the source of contact with the institution (provided on the card with the web s). Jill also requests additional information on the Marching Band. An email is automatically ed when Jill is added into the system thanking her for attending the college fair and confirming her for information on the Marching Band. Jill lives in Northampton County. Sally Recruiter is the r for Jill/Es geographic region and is assigned as her recruiter.	Demo Rating
366884	[OPTIONAL SUMMARY RATING] You may provide an optional summary rating for any vendor for this script. If you choose to provide an overall rating, it will serve override the calculated summary of any detailed ratings you enter below.	
366885	[CoE] 1a. Demonstrate how a prospect can enter contact data on-line, including contact source (college fair), major and campus of interest, and create a prospect record.	
366886	[CoE] 1b. Demonstrate how a prospect can request additional information online how this request triggers a task.	
366887	[CoE] 1c. Demonstrate how secure login information is generated once prospect record is created.	
366888	[CoE] 1d. Demonstrate how recruiter can track / report on the results of the college fair to evaluate the effectiveness of the event.	

Report provided by Advantiv Solutions, LLC 602.808.0618 x1

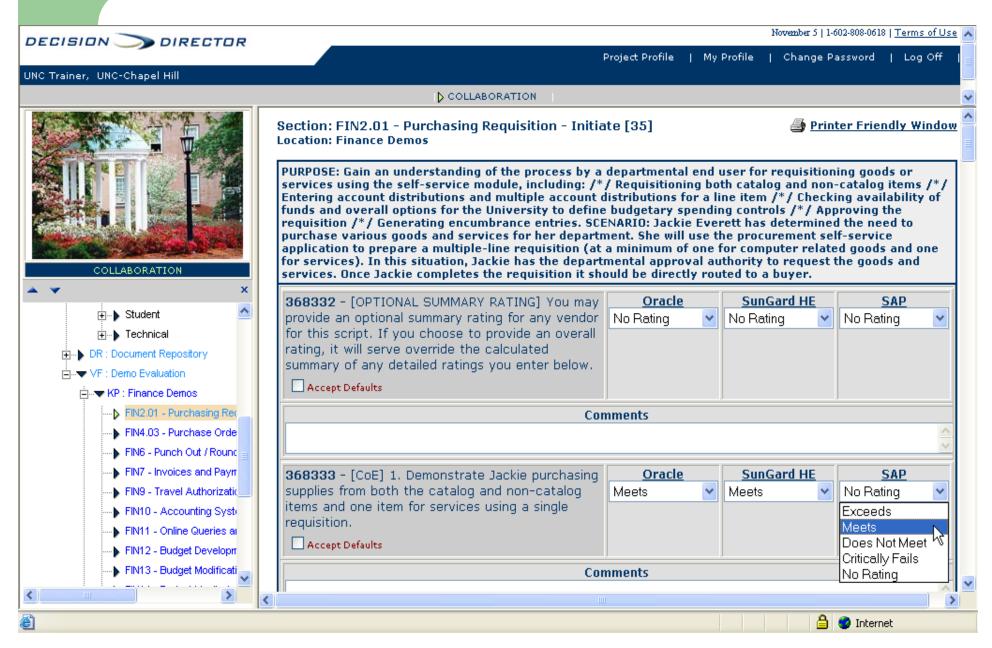
Vendor Demo Ratings

Sample Script and Rating Worksheet

Script	: ST1 - Prospect Submits Multiple Applications	
Recruite address generat request	RIO: Jill adds her contact information into the system via the web address she received from Joe er. She indicates the source of contact with the institution (provided on the card with the web et.). Jill also requests additional information on the Marching Band. An email is automatically ed when Jill is added into the system thanking her for attending the college fair and confirming her for information on the Marching Band. Jill lives in Northampton County. Sally Recruiter is the for JillÆs geographic region and is assigned as her recruiter.	<u>Demo Rating</u> <u>E M N F NR</u>
366884	[OPTIONAL SUMMARY RATING] You may provide an optional summary rating for any vendor for this script. If you choose to provide an overall rating, it will serve override the calculated summary of any detailed ratings you enter below.	
366885	[CoE] 1a. Demonstrate how a prospect can enter contact data on-line, including contact source (college fair), major and campus of interest, and create a prospect record.	
366886	[CoE] 1b. Demonstrate how a prospect can request additional information online how this request triggers a task.	
366887	[CoE] 1c. Demonstrate how secure login information is generated once prospect record is created.	

Vendor Demo Ratings

Sample Rating Forum



Final Thoughts

- Functional Teams and Steering Committee are in control of the functional content
 - Process Definitions
 - Requirements Definition, Requirements Validation, and Module Weights
 - Demonstration Scripts and Weights
- Remaining steps are easier than previous steps
- Good demo scripts will make evaluation (and implementation) easier
- Questions??