

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 interested/engaged FHDA employees
- Input: Votes from Project Teams – these are CRITICAL
- 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: Suggested requirements from all voters
- Input: “NEED” Vote results from FHDA employees
- Input: “NEED” Vote results 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

450296 - Supports electronic commerce without requiring users to go to another site to, for example, buy textbooks or parking permits. <small>... Last saved at 5/25/2007 10:22:00 AM by Andrew Bergstrom</small>		Need Result <input type="radio"/> Critical <input type="radio"/> Important <input checked="" type="radio"/> Desired <input type="radio"/> No Need <input type="radio"/> Not Rated	Reviewed <input checked="" type="checkbox"/>
FA Forums Summary Need Result By All Users:		Need: Important	
Comments			

We'll add another line that shows how the Project Team voted

Note that the Functional Team validator overrode the popular vote...

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

<u>KP</u>	<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

Advantiv DD2 - RFP Response Manager - Desktop - Test Client A

File Edit Search Reports System Help Utilities

Vendor A

Manual Sync

KnowledgePack	Total	Module	Total	Process/Sub Module	Total	# Ans	% Ans	Score	Sub Process/Group	Total	# #
Advancement	322	Custom Requirements	37	Budgeting	39	0	0	-	Year-Specific Rules	24	
App Tech Reqs	374	Self Service Functionality	79	Application	35	0	0	-	Provides Amounts	12	
Auxiliary Services	54	College Calendar	7	Requirements	28	0	0	-	Refunds	9	
Document Imaging	250	Scheduling	47	Verification	28	0	0	-	Student Eligibility	8	
Finance	1224	Recruitment	229	Needs Analysis	45	0	0	-	Process Disbursements	12	
Human Resources	908	Curriculum	250	Award	79	0	0	-	Federal Pell Grants	6	
Student	2185	Admission	175	Stafford Loan Program	13	0	0	-	Prepare Checks	3	
Total Project Statements	5317	Financial Aid	572	Funds Disbursement	146	0	0	-	Posting	5	
		Registration	184	Electronic Data Exchange	10	0	0	-	Interface With Other Systems	10	
				Scholarship	31	0	0	-			

FILTER: Run On Off

Student > Financial Aid > Funds Disbursement > Year-Specific Rules

Statement 814

Response Version 1

Provides for the creation of a fund base data (global) for each fund with year-specific fund allocation.

Support: Standard Availability: Now Source: Base System

Response Text >

Customer response text goes here...

Note to Client >

Request ☐ Resolved ☐

Note to Team >

Request ☐ Resolved ☐

Reference Info >

Response Status

Answered ☐ Checked Out ☐ Owned By: [Dropdown]

Approved ☐ Disapproved ☐

Previous Responses

Version	Changed On	By	Type
0209133011236			
0209133011236			
0209133011236			

Records Loaded: 146 May 11, 2006 Thursday Test User1 Disconnected 9.1 PLBWIN 18

Advantiv DD2 - RFP Response Manager - Desktop - Test Client A

File Edit Search Reports System Help Utilities

Vendor A

KnowledgePack	Total
Advancement	322
App Tech Reqs	374
Auxiliary Services	54
Document Imaging	250
Finance	1224
Human Resources	908
Student	2185
Total Project Statements	5317

Module	Total
Custom Requirements	37
Self Service Functionality	79
College Calendar	7
Scheduling	47
Recruitment	229
Curriculum	250
Admission	175
Financial Aid	572
Registration	184

Process/Sub Module	Total	# Ans	% Ans	Score
Budgeting	39	0	0	-
Application	35	0	0	-
Requirements	28	0	0	-
Verification	28	0	0	-
Needs Analysis	45	0	0	-
Award	79	0	0	-
Stafford Loan Program	13	0	0	-
Funds Disbursement	146	0	0	-
Electronic Data Exchange	10	0	0	-
Scholarship	31	0	0	-

Sub Process/Group	Total	#
Year-Specific Rules	24	
Provides Amounts	12	
Refunds	9	
Student Eligibility	8	
Process Disbursements	12	
Federal Pell Grants	6	
Prepare Checks	3	
Posting	5	
Interface With Other Systems	10	

FILTER: Run On Off

Student > Financial Aid > Funds Disbursement > Year-Specific Rules

Statement 814 Response Version 1

Provides for the creation of a fund base data (global) for each fund with year-specific fund allocation.

Support Availability Source

Standard Now Base System

Customer response text goes here...

Response Status

Answered Checked Out Owned By Approved Disapproved

Previous Responses

Version Changed On By Type

Note to Client

Note to Team

Reference Info

Stmnt ID	Statement
814	Provides for the creation of a fund base...
5927	Incorporates aid year in the definition...
5928	Incorporates 'reduce need' in the de...
5929	Incorporates fund source (federal/st...
5930	Incorporates fund type (loan, grant, s...
5931	Incorporates 'automatically package...
5932	Incorporates 'automatically schedul...
5933	Incorporates 'automatically disburse...
5934	Incorporates 'apply as a memo cred...
5935	Incorporates expiration date of mem...
5936	Incorporates expiration date of mem...
5937	Incorporates family contribution repl...
5938	Incorporates 'assign fund related re...
5939	Incorporates option to use actual en...
5940	Incorporates option to use actual en...
5941	Incorporates class in the definition o...
5942	Incorporates major in the definition o...
5943	Incorporates fund relationship in the...
5956	Incorporates aid year in year-specifi...
5957	Incorporates fund code in year-spec...
5958	Incorporates awarding rules in year-
5959	Incorporates field code (e.g., parent's age) in year-specific fund assignment system ru...
5960	Incorporates operator (when, ranges, eq, egt, elt, gt, lt) in year-specific fund assignme...
5961	Incorporates field values in year-specific fund assignment system rules.

Records Loaded: 146

May 11, 2006 Thursday

Test User1

Disconnected

9.1 PLBWIN 18

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, 36 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 financially responsible. An estimated 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 Scope: **ALL Items**

Query Level:	ALL REQS	Fit/Gap Threshold:	270	Blended Hourly Rate for Effort Item Cost Estimation: \$175						
Vendor	Application	Module	Score and Fit/Gap Rating				Effort Item Analysis			
			#Items	Points	Score	Fit/Gap	#Items	%ofTot	Est. Hours	Est. Cost
Vendor A	-	-	2455	287	96.0%	Fit	162	6.6%	13,524	\$2,366,700
Vendor B	-	-	2455	278	92.7%	Fit	166	6.7%	16,518	\$2,890,650
XYZ U	-	-	2455	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						
Vendor	Application	Module	Score and Fit/Gap Rating				Effort Item Analysis			
			#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 A	Portal	-	89	294	98.0%	Fit	3	3.4%	218	\$38,150
Vendor A	Tech Reqs	-	258	289	96.6%	Fit	5	1.9%	500	\$87,500
Vendor B	Finance	-	1256	277	92.3%	Fit	71	5.7%	7,018	\$1,228,150
Vendor B	HR-Payroll	-	862	283	94.6%	Fit	93	10.8%	9,300	\$1,627,500
Vendor B	Portal	-	89	252	84.3%	Gap	0	0.0%	0	\$0
Vendor B	Tech Reqs	-	258	272	90.9%	Fit	2	0.8%	200	\$35,000
XYZ U	Finance	-	1256	190	63.6%	Gap	0	0.0%	0	\$0
XYZ U	HR-Payroll	-	862	198	65.5%	Gap	0	0.0%	0	\$0
XYZ U	Portal	-	89	286	95.5%	Fit	0	0.0%	0	\$0
XYZ U	Tech Reqs	-	258	72	24.0%	Gap	0	0.0%	0	\$0

Query Level:	MODULE	Fit/Gap Threshold:	270	Blended Hourly Rate for Effort Item Cost Estimation: \$175						
Vendor	Application	Module	Score and Fit/Gap Rating				Effort Item Analysis			
			#Items	Points	Score	Fit/Gap	#Items	%ofTot	Est. Hours	Est. Cost

Vendor Response Analysis

Sample Report – One of Many...

ERP Vendor Fit/Gap and Effort Summaries

Need Scope: **ALL Items**

Query Level: ALL REQS Fit/Gap Threshold: 270 Blended Hourly Rate for Effort Item Cost Estimation: \$175

<u>Vendor</u>	<u>Application</u>	<u>Module</u>	Score and Fit/Gap Rating				Effort Item Analysis			
			<u>#Items</u>	<u>Points</u>	<u>Score</u>	<u>Fit/Gap</u>	<u>#Items</u>	<u>%ofTot</u>	<u>Est. Hours</u>	<u>Est. Cost</u>
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

<u>Vendor</u>	<u>Application</u>	<u>Module</u>	Score and Fit/Gap Rating				Effort Item Analysis			
			<u>#Items</u>	<u>Points</u>	<u>Score</u>	<u>Fit/Gap</u>	<u>#Items</u>	<u>%ofTot</u>	<u>Est. Hours</u>	<u>Est. Cost</u>
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: ST1 - Prospect Submits Multiple Applications

SCENARIO: Jill adds her contact information into the system via the web address she received from Joe Recruiter. She indicates the source of contact with the institution (provided on the card with the web address). Jill also requests additional information on the Marching Band. An email is automatically generated when Jill is added into the system thanking her for attending the college fair and confirming her request for information on the Marching Band. Jill lives in Northampton County. Sally Recruiter is the recruiter for JMU's geographic region and is assigned as her recruiter.

Demo Rating

E M N F NR

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.

☐ ☐ ☐ ☐ ☐

Vendor Demo Ratings

Sample Script and Rating Worksheet

Script: ST1 - Prospect Submits Multiple Applications

SCENARIO: Jill adds her contact information into the system via the web address she received from Joe Recruiter. She indicates the source of contact with the institution (provided on the card with the web address). Jill also requests additional information on the Marching Band. An email is automatically generated when Jill is added into the system thanking her for attending the college fair and confirming her request for information on the Marching Band. Jill lives in Northampton County. Sally Recruiter is the recruiter for Jill's geographic region and is assigned as her recruiter.

Demo Rating

E M N E NR

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

DECISION DIRECTORNovember 5 | 1-602-808-0618 | [Terms of Use](#)

Project Profile | My Profile | Change Password | Log Off

UNC Trainer, UNC-Chapel Hill

COLLABORATION


COLLABORATION

- Student
- Technical
- DR : Document Repository
- VF : Demo Evaluation
 - KP : Finance Demos
 - FIN2.01 - Purchasing Requisition - Initiate [35]**
 - FIN4.03 - Purchase Order
 - FIN6 - Punch Out / Round
 - FIN7 - Invoices and Payments
 - FIN9 - Travel Authorization
 - FIN10 - Accounting System
 - FIN11 - Online Queries and Reports
 - FIN12 - Budget Development
 - FIN13 - Budget Modification

Section: FIN2.01 - Purchasing Requisition - Initiate [35]
Location: Finance Demos [Printer Friendly Window](#)

PURPOSE: Gain an understanding of the process by a departmental end user for requisitioning goods or services using the self-service module, including: /* / Requisitioning both catalog and non-catalog items /* / Entering account distributions and multiple account distributions for a line item /* / Checking availability of funds and overall options for the University to define budgetary spending controls /* / Approving the requisition /* / Generating encumbrance entries. **SCENARIO:** Jackie Everett has determined the need to purchase various goods and services for her department. She will use the procurement self-service application to prepare a multiple-line requisition (at a minimum of one for computer related goods and one for services). In this situation, Jackie has the departmental approval authority to request the goods and services. Once Jackie completes the requisition it should be directly routed to a buyer.

	Oracle	SunGard HE	SAP
368332 - [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. <input type="checkbox"/> Accept Defaults	No Rating	No Rating	No Rating
Comments			

368333 - [CoE] 1. Demonstrate Jackie purchasing supplies from both the catalog and non-catalog items and one item for services using a single requisition. <input type="checkbox"/> Accept Defaults	Meets	Meets	No Rating
			Exceeds
			Meets
			Does Not Meet
			Critically Fails
Comments			

Internet

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??