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| **PREPARED BY:** | Chartis Team |
| **WEEK Ending:** | 9/4/2015 |

**CNYCC PHM System Selection**

**Status Report**

**Weekly Status Update**

| **Project Summary** – *The project summary provides a high level overview of key focus areas during the previous week. It is not intended to be an exhaustive list.* |
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| **PHM:** The focus this week was on holding the initial Executive Steering Committee (kickoff), holding follow-up clarification calls with the vendors, confirming approach to use online web demonstrations to identify top two solutions, planning and scheduling the online web demonstrations, confirming the meeting schedules and adjustments, and holding the second Selection Committee meeting. Plans for next week include holding the online web demonstrations, analyzing the feedback, convening the Selection Committee and coming to a recommendation regarding the top two candidate vendors to bring on-site for the demonstrations. Additionally, we will continue to develop and refine the cost models, meet with the vendors to discuss their pricing proposals and plan for the demonstration sessions. |



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| ***Status Key*** | | | |
| **●** | **🞅** | **⦿** | **●** |
| Completed | In Progress/On Schedule | Watch/Potential  Schedule Risk | Critical/Affects Schedule |

| **Key Deliverables & Accomplishments** | **Target**  **Week** | **Status** | **Comments** | **Remote/**  **Onsite** |
| --- | --- | --- | --- | --- |
| **PHM System Selection** | | | | |
| **On-site Demonstrations - Planning** | Ongoing | **🞅** | - In process of collecting/finalizing information and sending out the RSVPs. | Onsite |
| **On-site Demonstration Walkthrough** | 9/4/15 | **●** | - Will conduct a walkthrough of the Holiday Inn in Liverpool with Liz Fowler for the on-site demonstrations (9/9). | Onsite |
| **RFP Follow-up Calls** | 9/4/15 | **●** | - Scheduled and met with all 5 vendors to clarify their responses to the RFP as well as discussed staffing, implementation, pricing, etc (9/1 & 9/2). | Onsite |
| **Second Selection Committee Meeting** | 9/4/15 | **●** | - Held the second Selection Committee where we reviewed the RFP results, discussed the online web demonstrations and the on-site demonstrations (9/2). | Onsite |
| **Initial Executive Steering Committee Presentation** | 9/4/15 | **●** | - Held the kickoff Executive Steering Committee presentation (8/31) where we reviewed the initial RFP responses, reviewed the high-level cost analysis and discussed the online web demonstrations. Approved reducing by one candidate solution. | Onsite |
| **Online Web Demo - Planning** | 9/4/15 | **●** | - Created online demo schedule.  - Confirmed holding the online web demonstrations with the Executive Steering Committee (8/31).  - Confirmed Exec Steering Cmte reducing by one candidate solution.  - Notified each vendor on 9/3 regarding the logistics (date/time/features).  - Online web demonstrations will be held 9/9. | Onsite / Remote |
| **Online Web Demo – Evaluation Forms** | 9/4/15 | **●** | - Reviewed the features to be shown and evaluated by with Joe and Corey offline (9/2).  - Notified each vendor of the features to be shown (9/3).  - Created the evaluation forms for the online web demonstrations (both hard copy and online). | Onsite |
| **Cost Models** | Ongoing | **🞅** | - Continued analyzing the vendor costs.  - Reviewed high-level costs with Joe and Corey (8/28) based on vendor responses.  - Reviewed with the Executive Steering. Committee (8/31) and the Selection Committee (9/2). | Onsite / Remote |
| **PHM Use Cases** | 9/4/15 | **🞅** | - Use-cases will be used to guide on-site vendor demonstration sessions.  - Developed the PHM Use Cases; reviewed with Philip, Bob and Charlie.  - Reviewed at a high-level with the Executive Steering Committee (8/31).  - Reviewed with the Selection Committee meeting (9/2). Sent document to committee members following the meeting asking for input by 9/4. | Remote |
| **Selection Committee & Executive Steering Committee Meeting Invites** | 9/4/15 | **●** | - Scheduled all Selection Committee and Executive Steering Committee meetings. All invites were distributed including location and dial-in information. | Onsite |
| **Online Web Demonstrations** | 9/11/15 | **🞅** | - Will hold the online web demonstrations for 4 vendors on 9/9. | Onsite |
| **Online Web Demonstrations Evaluations** | 9/11/15 | **🞅** | -Will summarize and present all feedback/scores from the online web demonstrations to the Selection Committee (9/10) and the Executive Steering Committee (9/14). | Onsite |
| **Vendor Cost Proposal Review** | 9/11/15 | **🞅** | - Scheduled calls with the vendors to discuss their pricing proposals. Calls to take place: 9/10 & 9/11. | Remote |
| **3rd Selection Committee Meeting** | 9/11/15 | **🞅** | -Will hold the next Selection Committee meeting on 9/10. Will review the online web demonstration evaluations, discuss which two candidate vendors to bring on-site for the demonstrations and finalize the on-site demonstration schedule and use cases. | Onsite |
| **On-site Demonstration Vendor Communication** | 9/11/15 | **🞅** | -In process of drafting a communication letter to the two candidate vendors regarding the on-site demonstrations, time/date/logistics, and guidelines.  - Communication regarding the on-site demonstrations will be sent on 9/15. | Onsite |
| **2nd Executive Steering Committee Meeting – Planning** | 9/11/15 | **🞅** | - Will hold the next Executive Steering Committee meeting on 9/14. Will review the evaluations from the online web demonstrations, the feedback from the Selection Committee meeting and decide which two candidate vendors to bring on-site for the demonstrations on 9/22. | Onsite |