****

**Green Mountain Higher Education Consortium**

**Advancement Demonstration Planning Guidelines**

**Demonstration Notes**

Each vendor will be permitted 1 day of presentation time.

9:00 a.m. to 4:00 p.m.

* For Vendors who also present ERP, Advancement sessions should be scheduled on Day 2 to allow Advancement professionals to attend Day 1 overviews.

Demonstrations will be held at varying campuses. Demonstrations will require live streaming with about 40 users being able to see and hear the presentation and be able to call in questions. Vendors will be required to provide links to the live videoconferences 2 business days before arrival.

**Agenda Guide**

|  |  |  |  |
| --- | --- | --- | --- |
| **Time or Planned Duration** | **Topic** | **Audience** | **Notes** |
| **Required Activities** | | | |
| 60 minutes | Corporate & Solution Overview | Advancement Executives & Staff & some members of Selection Committee | * Include big picture functional roadmap * No other sessions should be scheduled at this time |
| 60 minutes | Implementation Approach | Advancement Executives & Staff & some members of Selection Committee | * Could be over lunch period * No other sessions should be scheduled at this time |
| 45 minutes | Technology Briefing | IT staff & Advancement Services professionals | * Architecture & technical roadmap |
| 60 minutes | Reporting Briefing | Open to all | * This is a critical session, as the community needs to be comfortable with a decentralized reporting approach |
| 60 minutes | Q&A w/ GMHEC Steering Committee | GMHEC Steering Committee | * Scheduled as last session on last day: Likely @ 3:00 p.m. Day 2 * Can be concurrent with other sessions |
| 30-45 minutes | Gift processing & financial information import to financial management system | Gift processing, advancement services, IT and financial management staff | * How will information flow between and among colleges’ enterprise systems? The timing of this session will have to be coordinated with the demonstration schedule for the ERP so as not to conflict with other financial sessions. |
| Determined by Vendor | Feature/function sessions by topic area | Users in each of the functional areas | * Include specifics to function area roadmaps * Do not schedule the payroll session in conflict with the HR benefits session * For Advancement: do not schedule the gift recording session in conflict with the Finance endowment module * Provide detailed schedule as soon as possible so Colleges can schedule individual groups |