

# Tool #27: Vendor Selection Committee Guidelines

Although the COE Forum recommends that the most efficient vendor selection processes typically consists of only the three to five members of the CRM leadership team (with input from different issue and process owners as needed), some organizations choose to create larger vendor-selection committees for staff buy-in purposes. Large vendor-selection committees can facilitate sharing of needs and goals among staff across unit departments but they can also require a greater time commitment from more staff and also extend the implementation time frame. The resources below are intended to help members expedite the committee process and build consensus among diverse stakeholders on vendor-selection committees. The tool also provides committee members with resources for collecting input from their respective departments. Although designed for use among COE units and their department representatives, this tool could also be brought to bear in a university-wide CRM implementation.

## Selecting Department Representatives

Ask department staff to complete the worksheet below if leaders plan to organize a vendor selection committee.

### Nominations for Vendor Review Committee Members

Please review the responsibilities of committee members listed below and nominate a representative from your department. A selection will be made from the nominees with the top three highest number of votes.

#### Responsibilities of Committee Members

- Meet six times over the course of three months; committee members must provide their availability to the committee coordinator and attend at least 75 percent of meetings
- Read and be prepared to discuss all vendor proposals
- Collect input from their department and share input with the rest of the committee.
- Make a final recommendation with majority consensus to unit leaders (*[include titles here]*), who will make final selection with strong consideration for the committee's recommendation

Department	Nominee	Department	Nominee
Marketing and Recruitment		Instructors	
IT and Analytics		Program Administrators	
Advising and Retention		Corporate Training	
Non-credit Staff		Other:	

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## Gathering Department-Wide Feedback on Vendor Functionality

Complete the worksheet below using Tool 26: Vendor Selection Scorecard by checking the functionality or characteristic that each prospective vendor offers. Then distribute the worksheet to department liaisons and ask them to collect colleagues' input in the right-most column.

### Sample Department Meeting Agenda

Facilitator: Committee member representing department

#### Directions

- Review the scorecard below and circle criteria of greatest importance for each category
- Keeping your circles in mind, enter a #1 choice for each criteria category (e.g., track record or integration)
- Discuss outcome with the committee representative

Representative Scorecard Completed with Hypothetical Scores

	Vendor 1 Alpha Vendor	Vendor 2 Beta Vendor	Vendor 3 Gamma Vendor	Top Choice Vendor
<b>Track Record</b>				<b>#1:</b>
Has experience with Higher Education	✓	✓		
Has experience with continuing/online/professional education units		✓		
Is willing to share references	✓	✓	✓	
References are positive about their overall experience with vendor and product			✓	
<b>Integration</b>				<b>#1:</b>
Has integrated with my SIS at other institutions	✓			
Can integrate (or anticipates being able to integrate) with my SIS	✓		✓	
<b>Other Categories as Applicable</b>				
[Add criteria here.]				

Department staff opine here