

			2014										2015																																					
PROJECT	RESPONSIBILITY	TASK	July			August			September				October				November				December				January				February			March			April			May												
			4	11	18	25	1	8	15	22	29	5	12	19	26	3	10	17	24	31	7	14	21	28	5	12	19	26	2	9	16	23	30	6	13	20	27	6	13	20	27	3	10	17	24	1	8	15	22	29
Develop RFP	Mercer/NC Mercer/NC	Needs analysis RFP Development	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█					
RFP Response	Mercer	Bidders prepare and submit response					█	█	█	█	█	█	█	█	█																																			
Response Evaluation	Mercer Mercer Mercer	Response analysis Report preparation Finalist recommendation										█	█	█	█	█	█	█	█	█																														
Short List Meetings	Mercer Mercer	Meetings and negotiation Best and final offers (fees, contracts)														█	█	█	█	█	█	█	█	█																										
Due Diligence Meetings	Mercer Mercer/NC	Due diligence meetings Board approval of contractors																							█	█	█	█					█	█	█	█														
Contracting	Mercer/NC	Negotiation Finalize contract																																																
Implementation	Mercer/NC	Implementation 1-6 months depending on assets and accounts																																							█	█	█	█	█					

Project Timeline  
 Task Not Yet Completed  
 Task Completed  
 Meeting with Client

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