

RFP Planning:

PROJECT	RESPONSIBILITY	TASK	March		April				May			June		
			21	28	4	11	18	25	2	9	16	23	30	6
Project Kick-off	Mercer/NC	<ul style="list-style-type: none"> Initial meeting, confirm scope 		▲										
Data Gathering	Mercer Mercer/NC Mercer Mercer Mercer/NC Mercer/NC	<ul style="list-style-type: none"> Provide draft workplan Set date for design meeting Data gathering - largely on website Prepare plan design presentation Review Mercer reporting protocols Review workplan with NC staff 												
Design Meeting	Mercer Mercer Mercer Mercer Mercer Mercer Mercer Mercer Mercer Mercer/NC	<ul style="list-style-type: none"> Public sector DC trends Advice and managed accounts Goalmaker Marketing and education models Asset allocation tool/Goalmaker Fee structures Vendor market Investment considerations for RFP Key goals for RFP project Follow up meetings if needed 												

Project Timeline
 Task Not Yet Completed
 Task Completed
 Meeting with Client

#REF!

not needed