

This checklist is designed to help you determine if the solution you are evaluating is capable of providing a breadth of support for continuous data-informed improvement across an array of initiatives beyond outcomes assessment and program review, including but not limited to student success; strategic planning; diversity, equity, and inclusion; general education; and sustainability.

Institutions and individuals in higher education seek such solutions so they can plan more consistently, collaborate more effectively, make smarter decisions, and ultimately, create a culture of data-informed, goal-aligned improvement. A leading solution should leverage investments your institution has already made in business intelligence, predictive analytics, state datamarts, public databases, learning management systems, and student information systems. It should bring this information together in one place, integrated directly with metrics and strategies in an actionable plan, and be able to unite relevant data and planning processes campus- and system-wide.

Improvement Platform Capabilities - Core Planning	Solution 1	Solution 2
Vendor provides a flexible 'platform' that can be easily configured to address a wide range of planning processes as the institution's needs grow and change (e.g., the 2020 need to respond to COVID-19), not just a limited set of pre-structured modules for common processes like outcomes assessment, program review, or strategic planning.		
Solution doesn't force the customer to change its processes or workflows but can easily be configured to support and enhance the customer's existing processes.		
Vendor provides a complete, packaged solution, including cloud-hosted software, implementation, support, and ongoing access to the vendor's services team as part of a single subscription price.		
Vendor's services team configures and supports the product for the duration of the customer's subscription, without requiring customers to provide and have a system administrator trained.		
Vendor encourages customers to utilize the solution across as many processes as desired, without impact on the overall cost of the solution (for full-license subscriptions).		
Solution can scale to support any number of improvement initiatives at any size institution or system.		
Solution includes leading continuous improvement functionality that can track progress on individual outcomes and initiatives longitudinally across reporting cycles, closing the loop, enabling institutional learning and documenting progress over time as evidence for accreditation.		
Solution supports 'integrated planning,' allowing plans to be easily aligned to one another, and enabling users and leadership to see how related work is progressing.		
Solution supports goal-aligned action across the organization (e.g., mapping all unit plans to strategic planning goals) and allows for any number of goal sets (e.g., also mapping unit plans to student retention goals and diversity, equity, and inclusion goals).		
Solution allows users to enter their plans/results once and make those updates available to other parts of the organization through mapping, eliminating the need for duplicative data entry in different processes.		
Solution includes interactive dashboards that can be embedded in any process, allowing users, process owners, and leadership to monitor details of plan execution without the need for disruptive transactional emails for every step along the way.		
Solution documents institutional memory, including plans, cycle-by-cycle results, actions, and snapshots of the information used to inform decisions, which is available for future decision-makers.		
Solution supports organizational learning including the sharing of effective practices and lessons learned at every level and across the institution.		
Solution can be used to assign items to faculty and staff and collects their feedback through an email link, without those users needing to open the solution or navigate to the appropriate pages, allowing a limited or no-training scenario for infrequent users (e.g. adjunct faculty can be assigned an assessment method from the course they teach, allowing them to click on an email link to quickly load the form and submit their results without needing to know anything else about the solution).		
Solution allows resource requests to be collected as part of planning cycles and ties them to plans so it is easy to see which requests support which elements of the plan. Tying budget to goals is often an accreditation requirement.		
Solution provides reports to roll resource requests up to any planning level (e.g., unit, plan, goal, or whole organization).		
Solution allows resource requests to be exported to Microsoft Excel to support your budget process.		
Solution allows customers to build on mandated reporting activities (e.g., accreditation, program review) to move beyond compliance to continuous improvement and student success.		
Solution is proven to support multi-campus university and community/technical college systems.		
Solution streamlines and simplifies processes for faculty and staff, saving them valuable time.		

Improvement Platform Capabilities - Data-Informed Improvement	Solution 1	Solution 2
Solution supports a culture of data-informed improvement and decision-making.		
Solution allows relevant information from nearly any source (e.g., common reporting tools like Microsoft Power BI, Tableau, or Google Data Studio; documents, websites, etc.) to be displayed in context as users are working, giving them the right information at their fingertips while making decisions.		
Solution provides role-based views for leadership that include metrics on progress against each plan, as well as an ability to follow selected metrics and to drill down into areas of interest.		
Solution can target the display of information to the user and in the context in which they're working, on a screen-by-screen, or even a field-by-field level. This ensures users are automatically seeing the right information for their role, and for the topic they're being asked to address.		
Platform enables 'guided analytics', combining contextual information (e.g., department-level retention trends) with guidance for users on what they are expected to do with that information (e.g. disaggregate by student population and develop action plans), and allows their analysis to be rolled back up to provide institution-wide views into how particular topics are being addressed across the organization.		
Solution leverages the information sources that the institution is using right now, without the need for long, complex data integration projects.		
Solution allows simple incorporation of new information sources at any time, allowing it to easily grow as the institution's appetite for and capability to produce information grows, or as your information sources change and grow.		
Solution allows for the creation of an enterprise information library, pulling together relevant information from any number of reporting tools, transactional systems, subscription services, documents, websites, etc., and organizing them by topic, giving users a single place to go to easily find any information they need for decision-making.		
Solution allows you to see the impact you and your program/department are having on "moving the needle" for both your program/department and the overall institution.		

Improvement Platform Capabilities - Assessment and Planning Functionality	Solution 1	Solution 2
Solution can accommodate the nuances of academic and non-academic processes, (e.g., preferred nomenclature, different questions, different approval processes).		
Solution is highly configurable to support institution-specific fields, forms, and processes.		
Solution is configurable to support unique needs of specific units (e.g., programs with specialized accreditation needs).		
Solution supports an unlimited number of organizational reporting units at no additional charge.		
Solution supports an unlimited number of users (e.g., faculty and staff) at no additional charge.		
Solution supports role-based access to plans and information (roles defined by institution), with a very granular level of permissions.		
Solution supports access for external users, such as board members, external reviewers, etc. in a secure manner.		
Solution allows for easy access to course and student data from popular learning management systems and supports aggregation and disaggregation of results.		
Solution supports forms-based data collection.		
Solution provides a document repository for static documents (e.g., PDFs, spreadsheets) and URLs to online files/ resources, which can be shared at the unit level and with other units based on permissions.		
Solution supports recurring assessments, demonstrating longitudinal progress and continuous improvement.		
Solution allows labeling to be defined at the unit level.		
Solution allows custom fields to be defined for individual units.		
Solution offers a customizable home screen for each unit, that can be configured to show relevant information ranging from dashboards to status reports, to help guides.		
Solution allows outcomes assessment at multiple levels, including course, program, and institutional (GenEd) outcomes.		
Solution allows mapping of course outcomes to unit (e.g., program) and institutional outcomes, as well as to goals at unit, institution, and/or system levels.		
Solution provides flexible curriculum mapping using the institution's definitions for mapping.		
Solution supports an unlimited number and type of assessment methods for each outcome.		
Solution collects longitudinal reporting of results for each assessment method.		

Reporting	Solution 1	Solution 2
Solution includes ongoing creation of new custom interactive dashboards to provide insights into where institutions stand in their compliance and improvement initiatives, or to meet other information needs.		
Solution includes ongoing creation of customized interactive dashboards for any process in the solution to support individual units and roll up to institutional levels.		
Solution provides management- and board-level dashboards to provide instant visibility into the execution of planning processes.		
Solution provides dashboards that support integrated planning, displaying alignment across processes (e.g., learning outcomes to program review to strategic planning).		
Solution provides printable reports that are configured to meet the reporting needs of each process.		
Solution provides unit with a library of standard reports that can be run on demand.		
Solution enables institution to add its logo to reports.		
Solution makes printable reports available in Microsoft Word format, so end users can further customize and easily share them.		
Solution includes live links to attached documents within reports, making it easy for reviewers to access supporting information.		
Solution provides reports that display rich text formatting from data input forms and embedded content (e.g., images, screenshots, and tables).		
Solution allows dashboards to be made available from any screen within the software or shared externally.		
Solution allows data from dashboards to be exported to Microsoft Excel for further ad hoc analysis.		
Solution provides process owners with visibility into the status of users' work and other process metrics that support their rules.		
Solution delivers process-specific, customized checklists showing units the status of their work, according to institutionally defined rules.		
Solution allows dashboard content to be dynamically filtered to reflect the user's context (e.g., dashboards accessed through the Psychology Department only show that department's information).		
Solution allows reports to be generated that include information from other units (e.g., an academic department can run a report that rolls up all of its programs' assessment results).		

Advanced Technology	Solution 1	Solution 2
The solution is 100% cloud-hosted with no local requirement for software or add-ons.		
The solution is architected to take advantage of cloud technology from a leading platform (e.g., Azure Cloud).		
The solution supports all common web browsers (Chrome, Firefox, Safari, Microsoft Edge).		
The solution works seamlessly across Mac and Windows devices.		
The solution allows the institution to control when to turn on major new software features.		
Vendor provides to-the-minute back-ups for system continuity.		
Vendor provides data encryption at rest and in transit.		
Platform includes integration with customers' Single Sign-on (SSO) solution.		

Services and Support	Solution 1	Solution 2
Vendor has a services team staffed by highly experienced higher education professionals, including former assessment coordinators, IR directors, and faculty members.		
Vendor provides ongoing access to its professional services team over the lifetime of the customer's subscription, allowing the customer to deploy the solution at their own pace, and make changes as their needs evolve.		
Vendor includes professional services as part of the subscription price, with no additional fees for expanding usage of the product into new areas (for customers that purchase a full license of the product).		
Vendor provides customer with a dedicated services representative who works with them to understand their needs, configure the software, and pull in additional vendor resources as needed. Requests are handled quickly by the person that knows you, not sent into a queue.		
Vendor provides ongoing access to its reporting team, allowing customized dashboards to be built as needed to inform customer's leadership.		
Vendor has a proven implementation methodology to quickly get customers using the solution in a sustainable way.		
Vendor has extremely low turnover in its professional services team in since its founding, ensuring customer relationship continuity.		
Vendor offers annual executive-level briefings with customer leadership, helping customers maximize the value of their investment, and providing opportunity for customers to suggest product improvements.		
Vendor can provide access to world-class higher education consulting services for an additional fee, delivered by consultants familiar with the product and leading practices for using it.		
Vendor provides technical support via telephone and email, using US-based staff.		
Vendor provides highly experienced support team to quickly resolve issues that may arise.		

About the Company	Solution 1	Solution 2
Vendor has over 20 years of experience delivering institutions proven results for academic and administrative outcomes assessment, program review, and strategic planning, all within a single, integrated application.		
Vendor has had stable ownership for its entire history and has not been sold or merged with other entities.		
Vendor has low turnover, ensuring relationship continuity with customers.		
Vendor has not acquired and merged in outside applications that detract from focus or user experience.		
Vendor supports a best of breed model, providing a world-class planning and assessment solution that can be used with the customer's choice of solutions for curriculum management, learning management, course evaluation, faculty credentialing, etc.		
Vendor's solution is built on enterprise-grade, modern cloud architecture.		
Vendor has achieved SOC 2 Type II certification to demonstrate its commitment to security.		
Vendor is compliant with GDPR privacy requirements.		
Platform is externally certified by an accredited auditor for ADA / 508 to meet accessibility requirements.		