

“There’s a Way to Do It Better – Find It:” A Systematic Approach to Selecting the Best Technology for Evaluations

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Summary

Many professionals recognize the need to transition to vendors that are more directly suited to their needs but picking the correct tool can be a daunting task. Based on our own experience reconsidering our organization’s survey platform, we present a participatory assessment process for selecting the best tool for your own needs. This process includes identification of relevant assessment criteria, stakeholder engagement, creation of a ratings rubric, and outreach to potential vendors.

1. Identify short list of software for consideration

- Create short list based on personal experience and online research.
- If transitioning from a current tool, make sure to include current tool in research.

2. Identify selection criteria based on institutional needs and desk research

- Criteria should utilize SMART principles.
- Include software cost and pricing structure (cost-per-user) as criteria.

4. Demo/beta test 1-2 software finalists

- Confirm prior ratings and pricing structure.
- Leave room for negotiations with software companies around cost.

3. Assess short list against criteria using numeric rating scale

- Weighing of criteria can be done, if needed.
- Add in a notes section to record qualitative observations for each criteria.
- If possible, have more than one person rate software.

Management Considerations

Have a small team (3-6 people) with 1 or 2 actively working on it

- At least one person on the team should have enough influence to get organizational buy-in for the changes/purchases
- Plan for a few meetings (one or two) with the entire group

Create a timeline for the whole project

- Specifics will depend on the urgency of your selection, funding deadlines, and any existing contract/account terms

Create a transition plan

- Factor in plenty of time for data export/migration from an existing platform (if applicable)
- Be sure to communicate these changes to the broader organization

If you could live in any time period, what would it be?

The Past	The Present	The Future	What criteria would you use to decide?

This process can be used for more than just selecting a new survey platform and adapting it to other uses is much easier than you might think. Since our time machine is currently out for repairs to its flux capacitor, this sample activity will only take you through the first three steps outlines on our poster: identify a short list, identify selection, criteria, and assess short list against criteria.

Sample Activity *If you could live in any time period, what would it be?*

For this activity, here are some questions you might want to consider:

- **When do you want to live?**
 - When you're coming up with possibly ideas don't forget to include what you already know about...the present
- **What criteria would be important to help you decide?**
 - Maybe you have a powered wig you never get to wear (clothing);
 - Perhaps there's a social issue that's very important to you that's only recently started to get traction (human rights); or,
 - You're someone who can't live without your cell phone (technology).
- **Where might you be able to get more information to help you make your decision?**
 - Books?
 - A particular website?
 - Historical societies?
- **How are you going to analyze the data you've collected to make your decision?**
 - Is there a rating scale you can use make comparison easier (e.g. 'yes/no,' '1-5,' etc.)?
 - How are you going to handle places where you aren't able to find enough information to assign a rating (if applicable)?
 - Are some factors much more important to you than others? If so, you may want to weight them accordingly.

Use the space below to make notes on how you might work through this activity.

Where might you get the information you need for your ratings? This can be either possible resources for a particular time period or for criteria you want to rate.

Rating Scale	
How Well is Your Criteria Met?	Score
Not at All	1
Poorly	2
Moderately	3
Well	4
Very Well	5

Criteria What factors are you going to consider (e.g., food, technology, etc.)?	Possible Time Periods			Scores	
	The Present	_____	_____	Weight	Final Score
				X	
				X	
				X	
				X	