



Institutional Effectiveness Software Buying Guide

Managing initiatives and reporting at an institution can be daunting, which is why many seek out a software solution. However, there are so many options that this task can also be challenging! That's why we designed this **Quick Guide** - to help you get on the right track to choose the platform that's best for you.



Part 1: Needs Assessment

Fill out the questions below to help you prioritize your institution's needs. This will help you match your needs with software capabilities in Part 2.

1. What are you tracking now?		2. What do you like about your current process?	
<input type="checkbox"/> Program Assessment <input type="checkbox"/> Course Assessment <input type="checkbox"/> Strategic Plan tracking <input type="checkbox"/> Accreditation narrative/evidence <input type="checkbox"/> Faculty Credentials/Minimum Qualifications <input type="checkbox"/> Other: _____		<input type="checkbox"/> We have good buy-in/participation <input type="checkbox"/> It results in high-quality practices <input type="checkbox"/> It fits our institution and programs <input type="checkbox"/> Information/reports are accurate and available <input type="checkbox"/> Other: _____	
3. What would you change about your process?		4. Based on your current process, what problem are you trying to solve? Rank the ones you select below.	
<input type="checkbox"/> Ease of use for faculty/staff <input type="checkbox"/> Ease of use/reporting for administration <input type="checkbox"/> Ability to align various functions across campus <input type="checkbox"/> Central location for data <input type="checkbox"/> Feeling well-prepared for accreditation events <input type="checkbox"/> Other: _____		<input type="checkbox"/> Getting away from paper documentation <input type="checkbox"/> Achieving more standardization/consistency of what is collected <input type="checkbox"/> Storing plans, reports, evidence in one central location <input type="checkbox"/> Using data to improve <input type="checkbox"/> Streamlining reporting <input type="checkbox"/> Other: _____	
5. Capabilities: Check the boxes for your MUST haves and nice-to-haves, then rank the must-haves			
Area	MUST have	Nice to have	Rank
Program Assessment	<input type="checkbox"/>	<input type="checkbox"/>	
Course Assessment	<input type="checkbox"/>	<input type="checkbox"/>	
Regional Accreditation	<input type="checkbox"/>	<input type="checkbox"/>	
Program Accreditation	<input type="checkbox"/>	<input type="checkbox"/>	
Credential Management	<input type="checkbox"/>	<input type="checkbox"/>	
Program Review	<input type="checkbox"/>	<input type="checkbox"/>	
Strategic Planning	<input type="checkbox"/>	<input type="checkbox"/>	
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	



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6. Other Considerations	
Stakeholders: <ul style="list-style-type: none"> Who needs to be involved in the decision process? Who will utilize the platform and reports? This could include faculty, staff, administration, IT, etc. 	Answer:
Budget: <ul style="list-style-type: none"> How much can be afforded annually? When will funding be available? If a platform could replace one currently on campus, could those funds be used? See rubric below for other important pricing questions.	Answer:
Timeline: <ul style="list-style-type: none"> When is an ideal rollout date? What initiatives and work are the top priorities? When does data need to be entered and reports completed? 	Answer:
Migration: What form is data currently in and does it need to be reformatted, moved, or archived?	Answer:
Project Owner(s): <ul style="list-style-type: none"> Who will lead product selection? Who will implement it? Who will maintain it? 	Answer:

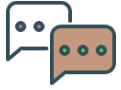


Tips and Thoughts

- **Be open** to different solutions to your challenges; often a platform can solve for something in a unique and even simpler way!
- **Integration:** There usually is no silver bullet to tie all data on a campus together in one central system or through interfacing multiple platforms. Instead, it is efficient to focus on what data will inform decisions.
- **Realistic Expectations:** Gathering input from various stakeholders ensures voices are heard and viewpoints considered, but keep in mind it's unlikely to find a solution that is perfect for every desire. Focus on priorities and long-term usage.
- **Accreditors** want your best evidence, not all your evidence. Focus on what clearly demonstrates meeting the standards.
- **Usability Success:** With software, more complexity = harder interface = less adoption. Again - what information will be used to add value, not complexity?



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Part 2: Rubric for Platforms

Now that you've identified your challenges and prioritized your needs, you can narrow your search to just a few companies that have those critical features.

- ✓ **Compare** platform capabilities that match your needs and MUST haves. You can gather information via a search engine, or even ask your colleagues.
- ✓ **Use the rubric below** to drill down to other important functionality and service areas that will be critical to success.

	Weave	Platform 2	Platform 3
Support			
Does support include faculty end users?	Yes		
Is all support included without extra fees?	Yes		
Are support staff trained in institutional effectiveness areas?	Yes - all Weave staff have used the system at a school		
Can users access support from within the app?	Yes		
Staff			
Are employees industry specialists, and do they play an active role in design and customer support?	Yes - all Weave staff have used the system at a school and been with the company a minimum of 5 years		
Are resources or help provided around developing best practices?	Yes - we attend conferences to learn new best practices and share them		
Implementation/ Rollout/Training			
Is implementation/ training included in the price?	Yes		
Is training conducted by an institutional effectiveness expert?	Yes		
What is the time for onboarding?	60 days on average		



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	Weave	Platform 2	Platform 3
Software Capabilities			
Assessment plan/report	Yes		
Accreditation narrative/evidence (regional and/or programmatic)?	Yes		
Strategic/Operational Plans	Yes		
Professional Development Tracking	Yes		
Credentials Management/ Reporting	Yes		
Program Review	Yes		
Ad hoc reporting	Yes		
Customizable templates to accommodate other tracking	Yes - unlimited templates		
Pricing			
Are all areas of functionality included or are they priced separately?	Included		
What is the annual maintenance fee?	\$0		
Cost of implementation and training?	\$0		
What is the fee for single sign on?	\$0		
Is there a fee for support?	\$0		
Technology			
Is there a limit to number of users/data storage?	Unlimited		
Who owns the data?	The institution		
Can users run their own unlimited reports?	Yes		
Can a VPAT be provided?	Yes		
Can a security statement be provided?	Yes		