# **SWP Tool Evaluation Rubric – Planning and Support Systems**

1. **Background/Overview:** Detail the tool’s history, reliability, and reputation, as well as the availability of independent reviews and user community activity.

Considerations:

* How long has the tool been available?
* Is the tool produced by a known and reputable institution or company? Is the company stable?
* Has the software evolved over time? What evidence exists to indicate that the tool might keep pace with future advancements?
* What educational institutions currently use the software? Are software reviews available from these institutions?
* Have institutions experienced significant technical issues?
* Are independent reviews of the software available? If so, how is the software rated relative to other options?
* What kind of user and technical support is available? What proof is available from other institutions about the quality of the support that is provided? Is the company that produced the software committed to friendly, quick, helpful, and accurate support?
* Does the tool have an active user community?

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| **Requirement** | **Must-Have** | **Nice-to-Have** | **Notes** |
| Required features are fully implemented | x |  |  |
| While the tool is fully operational and acceptable in its current state, updates are under development that would enhance the product |  | x |  |
| The company is reputable, with strong client references or related kudos | x |  |  |
| The company is consistently adapting the product with new features to address current requirements in the field | x |  |  |
| The company is consistently adapting the product to respond to user feedback and user experience improvements | x |  |  |
| Current clients rate the company favorably for client support | x |  |  |

1. **System Features**: Detail the tool’s features and how they address the project’s use cases and requirements.

Considerations:

* Is the tool available to the appropriate audience(s)?
* Does the tool address at least one key activity/requirement of the system, as determined by stakeholder feedback? (Preference for systems that address multiple requirements.)
* Can specific privileges be assigned to various roles or does the system specify the privileges assigned to each role?
* Can tool data be viewed from a variety of perspectives?
* What security features does the tool offer? For example, does it require the use of encrypted passwords?
* Can student information be imported in bulk/batch (e.g., the names of all students and program affiliations)? If so, what form must it be in (e.g., an Excel spreadsheet)?
* Can data/files be imported and/or exported to existing or future administrative systems?
* Can the activities of all users be tracked (e.g., by their log-in time, log-out time)?

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| **Requirement** | **Must-Have** | **Nice-to-Have** | **Notes** |
| The audience responsible for completing a related activity has access to the tool. | x |  | Includes staff, faculty, students, employers |
| When appropriate, multiple audiences are served (e.g., a student builds resume and career center counselor has access to it to provide feedback) | x |  |  |
| The system allows for different privileges based on user role, when appropriate | x |  |  |
| The tool addresses several key activities/requirements effectively |  | x | Each feature meets the requirements |
| The system displays different information for different audiences |  | x | May not always be applicable |
| The system has the capacity to be used as a regional installation, if appropriate  |  | x |  |
| The system complies with all campus security requirements (e.g., FERPA) | x |  |  |
| The system allows for information to be imported (e.g., SIS data, course data) | x |  | When APIs not possible |
| Automatic activity tracking features are available, when necessary (e.g., time stamps) | x |  |  |

## Feature Checklists:

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| **Feature (Career Assessments)** | **Must-Have** | **Nice-to-Have** | **Notes** |
| Interests and skills assessments |  |  |  |
| Other assessments |  |  |  |
| Save and view results |  |  |  |
| Results of assessments recommend pathways/programs |  |  |  |
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| **Feature (Career Research)** | **Must-Have** | **Nice-to-Have** | **Notes** |
| Tools to research careers, including salary and employability forecast data* Profiles
* Videos and other multimedia
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| Careers linked to local employers |  |  |  |
| Local employers linked to opportunities for job shadows, etc. |  |  |  |
| Career information linked to related educational paths |  |  |  |
| Educational paths linked to available programs at colleges |  |  |  |
| Save favorite programs |  |  |  |
| Save favorite careers |  |  |  |
| Save favorite colleges |  |  |  |
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| **Feature (Intake)** | **Must-Have** | **Nice-to-Have** | **Notes** |
| Intake functionality supporting evaluation of incoming students and their career/education goals | x |  |  |
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| **Feature (Orientation)** | **Must-Have** | **Nice-to-Have** | **Notes** |
| Tools supporting implementation, tracking of differentiated orientation (by student, by format) |  |  |  |
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| **Feature (Comprehensive Plan)** | **Must-Have** | **Nice-to-Have** | **Notes** |
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| Interests and skills assessments |  | x |  |
| Comprehensive plan includes steps customized by student’s goals, program, etc. | x |  |  |
| Academic course plan builder | x |  |  |
| Student notes schedule conflicts or preferences to filter in/out certain options |  | x |  |
| Academic plan preloads with best path based on selected program, including sequencing | x |  |  |
| Ability to change preload/best path | x |  |  |
| Ability to see consequences of changing best path | x |  |  |
| Ability to view course selection in a schedule view |  | x |  |
| Plan submission/approval tools | x |  |  |
| Ability to require adviser approval before registration available | x |  |  |
| Ability to register for selected courses in real-time | x |  |  |
| System automatically returns issues (e.g., in the time it took the student to register, a course has filled up) | x |  |  |
| Plan tools available in different languages |  | x |  |
| Emails/alerts for status changes and if plan is not complete | x |  |  |
| Student has access to a To-Do list as part of the comprehensive plan where progress can be updated by the student (e.g., Meet with Advisor) | x |  |  |
| Student has access to a To-Do list as part of the comprehensive plan where progress can be automatically updated based on related tools (e.g., Register for Classes) |  | x |  |

1. **Accessibility and Usability Features**: Detail the tool’s user friendliness and accessibility.

Considerations:

* Is the tool user-friendly?
* Does the tool align with student and staff technology literacy skills?
* Does the tool comply with current educational policies and laws, such as the Americans with Disabilities Act?

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| **Requirement** | **Must-Have** | **Nice-to-Have** | **Notes** |
| The tool aligns with student and staff technology literacy skills | x |  |  |
| The tool complies with best practices in user design | x |  |  |
| The tool provides a modern, responsive design | x |  |  |
| The tool includes a mobile app version |  | x |  |
| The tool meets all applicable ADA requirements | x |  |  |

1. **Technical Considerations**: Detail the software, hardware, and network requirements.

Considerations:

* Does the tool integrate with existing systems?
* Can information from the tool be transferred to existing institutional software?
* Can information from existing tools be transferred to the tool?
* Can the tool be customized?
* Can the tool be branded with the institution’s name and logo? If so, is there an additional cost?
* Can you change the arrangement and format of items presented to tool users?
* What procedures must be followed to customize the software?
* What type of support is available — e-mail, chat, telephone, and/or on-site?
* What consulting services are available? Are consulting services available to assist with implementation planning and execution?
* What training will the software vendor or distributor provide?
* What are the future development plans? When is the next version of the software expected?
* Is this platform scalable? Can it be expanded easily to accommodate a larger number of students and instructors?

| **Requirement** | **Must-Have** | **Nice-to-Have** | **Notes** |
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| Information from the tool can be transferred to existing institutional software | x |  | e.g., career assessment results |
| Information from existing tools can be transferred to the tool | x |  | e.g., LMS data used for student profiles |
| The tool can be customized for the college/region with branding | x |  |  |
| Content such as field labels, form contents, email messages and other elements are customizable by the college | x |  |  |
| The vendor provides technical support during regular business hours | x |  |  |
| The vendor provides technical support during extended hours |  | x |  |
| Consulting services are available to assist with planning and technical needs | x |  |  |
| The vendor provides adequate training to key staff. | x |  |  |
| The tool is being updated/enhanced with new features regularly. | x |  |  |
| The tool is scalable. | x |  |  |

1. **Implementation Considerations**: Detail the cost to acquire, use, and maintain the system for the cost and effort to implement the new tool(s).

Considerations:

* What are the purchasing, licensing, and other acquisition costs?
* What are the ongoing maintenance costs?
* What are the hosting costs?
* How many staff will be needed to support the new system?
* According to the vendor, what are the recommended number and type of staff, such as system administrators and programmers, required to support the tool? What qualifications should these people have?
* Does the tool necessitate the hiring of additional staff with skill sets that differ from those possessed by existing staff?
* Does the tool require IT staff to receive additional training? If training is required, how much will it cost?
* Will the system require significant setup activities, such as importing data, customization and configuration of the tool, etc.?
* Will use of the system require changes to other related systems or materials (e.g., course catalogs)?
* Will the tool require in-depth training activities for end users?
* What level of support for implementation activities is provided by the vendor?

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| **Requirement** | **Must-Have** | **Nice-to-Have** | **Notes** |
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