

Pathways Navigation – System/Tool Evaluation Rubric

Last updated: 08/19/19

Introduction

This rubric is intended to support colleges in reviewing and selecting systems/tools to support student onboarding (i.e., Intake, Differentiated Orientation, and Career Before Education Planning). It organizes system/tool requirements by category and topic areas within Pathway Navigation so that colleges can identify priorities, assess needs, and evaluate technology options. A few notes about this draft:

- This draft of the rubric reflects input provided during the March and April meetings by members of Workgroup 3 – Pathway Navigation.
- At the time, the input was largely focused on *career exploration*, *career readiness*, and *career before education planning*.
- It currently addresses very little about *intake* and *differentiated orientation* system/tool requirements.
- Additionally, *early alerts/student referrals* and *case management* were categories of requirements in the 2017 version of the rubric. These have been added to the draft for consideration and review.

Homework to Help Finalize Requirements and Rubric

By August 29, 2019, complete the following

1. Review the requirements in Sections A-E below.
2. Use the notes section to suggest revisions or ask clarification questions.
3. Use the blank rows to propose additional requirements. Add additional rows, if needed.
4. Review the scoring rubric (last page). Are the instructions clear? If not, identify needed changes or clarification.
5. **Bring your notes and suggestions to the next in-person meeting on August 29, 2019**

A. System/Tool Background

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?

ID	Requirements	Notes
A1	Required features are fully implemented	
A2	While the tool is fully operational and acceptable in its current state, updates are under development that would enhance the product	
A3	The company is reputable, with strong client references or related kudos	
A4	The company understands the community college context and nuances of the related needs	
A5	The company is consistently adapting the product with new features to address current requirements in the field based on a defined change management process	
A6	The company has a defined change order process for an individual college’s specific needs	
A7	The company is consistently adapting the product to respond to user feedback and user experience improvements	

ID	Requirements	Notes
A8	Current clients rate the company favorably for client support	

B. System/Tool 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)?

ID	Requirement	Notes
Feature: General Feature Requirements		
B1	The audience responsible for completing a related activity has access to the tool. Includes students, college staff, faculty, and employers	
B2	When appropriate, multiple audiences are served (e.g., a student builds his resume and a career center counselor has access to it to provide feedback)	
B3	The system allows for different privileges based on user role, when appropriate	

ID	Requirement	Notes
B4	The tool addresses several key activities/requirements effectively. Each feature meets the requirements	
B5	The system displays different information for different audiences. May not always be applicable.	
B6	The system has the capacity to be used as a regional installation, if appropriate	
B7	The system complies with all campus security requirements (e.g., FERPA)	
B8	The system allows for information to be imported, e.g., SIS data, course data (when APIs not possible)	
B9	Automatic activity tracking features are available, when necessary (e.g., time stamps)	
B10	Multiple language capacity	
B11	Linked to SIS	
B12	Intake, orientation, and career before education planning connected	
B13	Texting capacity	
Feature: Career Exploration		
B14	Interests and skills assessments	
B15	Personality assessment	
B16	Values assessment	
B17	Save and view results	
B18	Results of assessments recommend pathways/programs (regionwide, not college specific)	

ID	Requirement	Notes
B19	Tools to research careers, including salary and employability forecast data <ul style="list-style-type: none"> • Profiles • Videos and other multimedia 	
B20	Careers linked to local employers	
B21	Local employers linked to opportunities for job shadows, etc.	
B22	Career information linked to related educational paths	
B23	Educational paths linked to available programs at colleges	
B24	Save favorite programs	
B25	Save favorite careers	
B26	Save favorite colleges	
B27	Self-service analysis	
B28	Link to someone to discuss results	
B29	Link to salary data	
B30	Multi-cultural considerations in assessments (Holland Codes are not)	
B31	Component on financial literacy	
B32	Information about continued education needs or requirements	
B33	Real-time connection to ask questions	
Feature: Career Readiness		
B34	E-portfolio: student work, resume	
B35	Resume development tools	
B36	Training on job searching (videos)	
B37	Mock interviews	

ID	Requirement	Notes
B38	Alert system for career readiness (missing resume, etc.) - Student undecided, undeclared, or changing majors	
B39	21 st Century Skills - Tracking if students completed module(s)	
B40	Ability to track progress and complete an articulated path to develop skills (career preparation)	
Feature: Intake (pre-application/enrollment)		
Feature: Intake (post-enrollment)		
B41	Intake functionality supporting evaluation of incoming students and their career/education goals	

ID	Requirement	Notes
Feature: Orientation		
B42	Tools supporting implementation, tracking of differentiated orientation (by student, by format)	
Feature: Career Before Education Planning		
B43	Comprehensive plan includes steps customized by student's goals, program, etc.	
B44	Academic course plan builder	
B45	Student notes schedule conflicts or preferences to filter in/out certain options	
B46	Academic plan preloads with best path based on selected program, including sequencing	

ID	Requirement	Notes
B47	Ability to change preload/best path	
B48	Ability to see consequences of changing best path	
B49	Ability to view course selection in a schedule view	
B50	Plan submission/approval tools	
B51	Ability to require adviser approval before registration available	
B52	Ability to register for selected courses in real-time	
B53	System automatically returns issues (e.g., in the time it took the student to register, a course has filled up)	
B54	Plan tools available in different languages	
B55	Emails/alerts for status changes and if plan is not complete	
B56	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)	
B57	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)	
Feature: Early Alerts/Student Referrals		
B58	College can customize categories of alerts	
B59	Faculty can record course-level kudos or alerts for one student or a group of students	
B60	Faculty, advisors, and other college staff can create alerts for other activities/need for intervention	

ID	Requirement	Notes
B61	Automatic alerts generated by APIs with other systems (e.g., LMS triggers alert for low test score entered for a student/course)	
B62	Categories of issues flagged are tied to appropriate campus referrals	
B63	Student receives notification of alert with appropriate next step and resources to complete	
B64	Student can link directly to an appointment scheduling tool for follow-up activity	
B65	Alert can be tied to documentation of follow-up activities completed (e.g., counseling appointment)	
B66	Alert can be updated for status (e.g., closed)	
Feature: Case Management		
B67	List of students customized for user (e.g., faculty views students in a course; advisor sees students assigned to appointments)	
B68	Student profile includes alerts and risk index	
B69	Student profile includes history of services, interventions, appointments, etc.	
B70	What is available to view in a student's profile is customized by user role, when appropriate (e.g., private notes or restricted notes)	
B71	Place to record notes	
B72	Appointment scheduler	
B73	Reminders about appointments	
B74	Documentation of appointments	

C. System/Tool Accessibility and Usability

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?

ID	Requirement	Notes
C1	The tool aligns with student and staff technology literacy skills	
C2	The tool complies with best practices in user design	
C3	The tool provides a modern, responsive design	
C4	The tool includes a mobile app version	
C5	The tool meets all applicable ADA requirements	

D. System/Tool 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?

ID	Requirement	Notes
D1	Information from the tool can be transferred to existing institutional software e.g., career assessment results	
D2	Information from existing tools be transferred to the tool (e.g., via APIs or data exports, LMS data used for student profiles)	
D3	The tool can be customized for the college/region with branding	
D4	Content such as field labels, form contents, email messages and other elements are customizable by the college	
D5	The vendor provides technical support during regular business hours	
D6	The vendor provides technical support during extended hours	
D7	Consulting services are available to assist with planning and technical needs	
D8	The vendor provides adequate training to key staff.	
D9	The tool is scalable.	

E. Implementation Considerations

Detail the cost to acquire, implement, use, and maintain the system as well as level of effort to implement. **Note that this set of requirements is different than requirements described under Section A-D. Implementation considerations are unique to each individual college. For example, IT policies that dictate how new tools/systems may be acquired and implemented will differ across colleges and may influence decisions about which tool or system to adopt. Therefore, the requirements will need to be customized to each college. General examples are provided below.**

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?

ID	Requirement (examples)	Notes
E1	Acquisition costs are within allocated budget.	
E2	Dedicated staff are available to support implementation (e.g., training).	
E3	Dedicated staff are available to support ongoing use of the system (e.g., training, user help).	
E4	Tool is scalable to number of required users.	
E5	Vendor provides support for implementation activities.	
E6	Adoption of the new tool/system is within IT specifications and policy.	

ID	Requirement (examples)	Notes

Pathway Navigation Systems/Tools – Weighted Scoring

1. For each of the categories below, specify the relative importance of the category based on a 100 point scale. For example, if you rate all five of the categories as equally important you would assign 20 points for each.

Requirements Category	Point Value
Tool Background/Overview (Items A1-A8)	
Tool System Features (Items B1-B57)	
Tool Accessibility and Usability (Items C1-C5)	
Tool Technical Considerations (Items D1-D9)	
Tool Implementation Considerations (Items TBD)	
Total	100

2. For each of the feature categories below, specify the relative importance of each category based on a 100 point scale. For example, if you rate all eight of the feature categories as equally important you would assign 12.5 points for each.

Feature Category	Point Value
Career Exploration (Items B14-B33)	
Career Readiness (Items B34- B40)	
Intake – pre-application/enrollment (Item TBD)	
Intake – post-enrollment (Item B41)	
Orientation (Item B42)	
Career Before Education Planning (Items B43-B57)	
Early Alerts/Student Referrals (Items B58-B66)	
Case Management (Items B67-B74)	
Total	100