Pathway Navigation – System/Tool Evaluation Rubric

<div align="right">Last updated: 09/17/19</div>

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, April, and August meetings by members of Workgroup 3 – Pathway Navigation.
- This draft 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 September 13, 2019, complete the following

1. Review the requirements in Sections A-E below.
2. Use the notes section in the charts 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. **Complete your proposed changes in the Google document by Friday, September 13, 2019. Send any questions or additional comments to ecarter@wested.org.**

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?
- Does the tool allow for customizations or add-ons?

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	
A8	Current clients rate the company favorably for client support	<mark>Is it helpful to ask for pros and cons about the company or perhaps the use of this particular tool?</mark>
A9	Data produced or maintained by the system will be available to the colleges/region even after the termination of the contract	
A10	The data contained in the system are owned by the colleges/region	
A11	Vendor provides a live demo (versus a staging environment of features that are not yet live) and/or provides access to a sandbox site	

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 Set 1: General Feature Requirements		
B1.1	The audience responsible for completing a related activity has access to the tool. Includes students, college staff, faculty, and employers	
B1.2	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)	
B1.3	The system allows for different privileges based on user role, when appropriate	
B1.4	The tool addresses several key activities/requirements effectively. Each feature meets the requirements	
B1.5	The system displays different information for different audiences. May not always be applicable.	
B1.6	The system has the capacity to be used as a regional installation, if appropriate	
B1.7	The system complies with all campus security requirements (e.g., FERPA)	
B1.8	The system allows for information to be imported, e.g., SIS data, course data (when APIs not possible)	
B1.9	Automatic activity tracking features are available, when necessary (e.g., time stamps)	
B1.10	Multiple language capacity	
B1.11	Linked to SIS	
B1.12	Intake, orientation, and career before education planning connected	
B1.13	Texting capacity	

Feature Set 2: Career Exploration		
B2.1	Interests and skills assessments	
B2.2	Personality assessment	
B2.3	Values assessment	
B2.4	Save and view results	Do we need the option to be able to download? Some vendors allow to save and view but download is not always in a format that is easy to use.
B2.5	Results of assessments recommend pathways/programs (regionwide, not college specific)	
B2.6	Tools to research careers, including salary and employability forecast data ● Profiles ● Videos and other multimedia	
B2.7	Careers linked to local employers	
B2.8	Local employers linked to opportunities for job shadows, etc.	Direct Internship and volunteer opportunities are listed. Can they provide a list of employers who have been working with this tool? Alert to students about employment opportunities in their major.
B2.9	Career information linked to related educational paths	
B2.10	Educational paths linked to available programs at colleges	
B2.11	Save favorite programs	
B2.12	Save favorite careers	
B2.13	Save favorite colleges	
B2.14	Self-service analysis	
B2.15	Link to someone to discuss results	
B2.16	Link to salary data	
B2.17	Multi-cultural considerations in assessments (Holland Codes are not)	
B2.18	Component on financial literacy	

B2.19	Information about continued education needs or requirements	
B.2.20	Real-time connection to ask questions	
		Note: clarify career exploration from the career development component and not the wbl components

Feature Set 3: Career Readiness		
B3.1	E-portfolio: student work, resume	
B3.2	Resume development tools	
B3.3	Training on job searching (videos)	
B3.4	Mock interviews	
B3.5	Alert system for career readiness (missing resume, etc.) - Student undecided, undeclared, or changing majors	
B3.6	21st Century Skills - Tracking if students completed module(s)	
B3.7	Ability to track progress and complete an articulated path to develop skills (career preparation)	

Feature Set 4: Intake (pre-application/enrollment)		
B4.1	Ability to automatically send text/email an intake form (e.g., "Thank you for your interest, please fill out this form.")	
	Ability to showcase career pathways available at the college	

Feature Set 5: Intake (post-enrollment)		
B5.1	Intake functionality supporting evaluation of incoming students and their career/education goals	
B5.2	Ability to do proactive follow-up (e.g., alerts to relevant programs/services to connect with student)	
Feature Set 6: Differentiated Orientation		
B6.1	Tools supporting implementation, tracking of differentiated orientation (by student, by format)	
B6.2	Virtual live orientation (like virtual job fairs)	
B6.3	Follow-up triggers, alerts: students or staff	

B6.4	Education planning within orientation	
B6.5	Forward relevant information to relevant departments upon completion of orientation	
Feature Set 7: Career Before Education Planning		
B7.1	Comprehensive plan includes steps customized by student's goals, program, etc.	
B7.2	Academic course plan builder	
B7.3	Student notes schedule conflicts or preferences to filter in/out certain options	
B7.4	Academic plan preloads with best path based on selected program, including sequencing	
B7.5	Ability to change preload/best path	
B7.6	Ability to see consequences of changing best path	
B7.7	Ability to view course selection in a schedule view	
B7.8	Plan submission/approval tools	
B7.9	Ability to require adviser approval before registration available	
B7.10	Ability to register for selected courses in real-time	
B7.11	System automatically returns issues (e.g., in the time it took the student to register, a course has filled up)	
B7.12	Plan tools available in different languages	
B7.13	Emails/alerts for status changes and if plan is not complete	
B7.14	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)	
B7.15	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 Set 8: Early Alerts/Student Referrals		
B8.1	College can customize categories of alerts	
B8.2	Faculty can record course-level kudos or alerts for one student or a group of students	
B8.3	Faculty, advisors, and other college staff can create alerts for other activities/need for intervention	
B8.4	Automatic alerts generated by APIs with other systems (e.g., LMS triggers alert for low test score entered for a student/course)	
B8.5	Categories of issues flagged are tied to appropriate campus referrals	
B8.6	Student receives notification of alert with appropriate next step and resources to complete	
B8.7	Student can link directly to an appointment scheduling tool for follow-up activity	
B8.8	Alert can be tied to documentation of follow-up activities completed (e.g., counseling appointment)	
B8.9	Alert can be updated for status (e.g., closed)	
B8.10	Be able to forward information to department or program that needs to follow up (from orientation or any other step)	

Feature Set 9: Case Management		
B9.1	List of students customized for user (e.g., faculty views students in a course; advisor sees students assigned to appointments)	
B9.2	Student profile includes alerts and risk index	
B9.3	Student profile includes history of services, interventions, appointments, etc.	
B9.4	What is available to view in a student's profile is customized by user role, when appropriate (e.g., private notes or restricted notes)	
B9.5	Place to record notes	
B9.6	Appointment scheduler	
B9.7	Reminders about appointments	
B9.8	Documentation of appointments	
B9.9	Automatic forwarding to relevant program/office/department upon completion of certain steps	

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	
	Does the tool have the ability to track and save so that one can pick up where left off?	
	Are there video tutorials available for users needing help to use the tool?	

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.	
D10	When connections are possible, the system allows for single sign-on.	
D11	The product doesn't require connections to other systems (e.g., API to SIS) to be operational	Connections enhance the use of the system or increase ease of use but are not critical
D12	Best practices are conducted for backups and redundancy planning	
D13	Encryption and other data privacy and security requirements are met	
D14	Configurations are self-service and don't always require the vendor to implement	

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?

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- 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.	
E7	The cost model is not based on number of users (this model can be prohibitively expensive as number of users increases).	

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-A11)	
Tool System Features (Items B1.1-B9.9)	
Tool Accessibility and Usability (Items C1-C5)	
Tool Technical Considerations (Items D1-D14)	
Tool Implementation Considerations (Items E1-E7)	
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 (Item Set 2)	
Career Readiness (Item Set 3)	
Intake – pre-application/enrollment (Item Set 4)	
Intake – post-enrollment (Item Set 5)	
Orientation (Item Set 6)	
Career Before Education Planning (Item Set 7)	
Early Alerts/Student Referrals (Item Set 8)	
Case Management (Item Set 9)	
Total	100