Evaluation Guide

Laying the groundwork for a successful Learning Management System evaluation process

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Online learning becomes an expectation

By the middle of March 2020, over 1,100 colleges and universities in all 50 states had shifted to online-only instruction in response to the declaration of the global pandemic.[1] For the fall 2020 academic year, to date, 24% of institutions in the U.S. report plans to operate with hybrid models, and 9% of institutions plan to operate online only.[2]

While motivations and specific goals vary, for most colleges and universities that are planning to invest in a learning management system (LMS), the overarching objectives are threefold:

1. **Support all students to reach their potential.**
   Students are seeking an anywhere, anytime learning experience that allows them to work at their own pace and from any device. They want personalised feedback to support their growth and development, clear progress indicators to stay on track, and a defined pathway to follow that will build the skills they need for life as well as future employment.

2. **Make it easy for faculty to reach every learner.**
   Faculty simply want to teach the way they want to teach with the tools they love to use. They are also looking to save time, work efficiently, and deliver a personalised online learning experience to individual students.

3. **Implement worry-free technology with a partner you can trust.**
   Especially during these stressful times, staff and administration want to realise a worry-free LMS implementation that satisfies the institution's goals and objectives for online learning, doesn't let them down when the pressure is on, and delights faculty and learners. They believe that they deserve an LMS partner that can grow with them and allows them to approach the future of learning with confidence.

Sixty-three percent of established, prestigious universities are expected to offer full degrees online by 2030.[1]

1 https://www.ncsl.org/research/education/higher-education-responses-to-coronavirus-covid-19.aspx
2 IBID

1 https://www.timeshighereducation.com/features/will-coronavirus-make-online-education-go-viral

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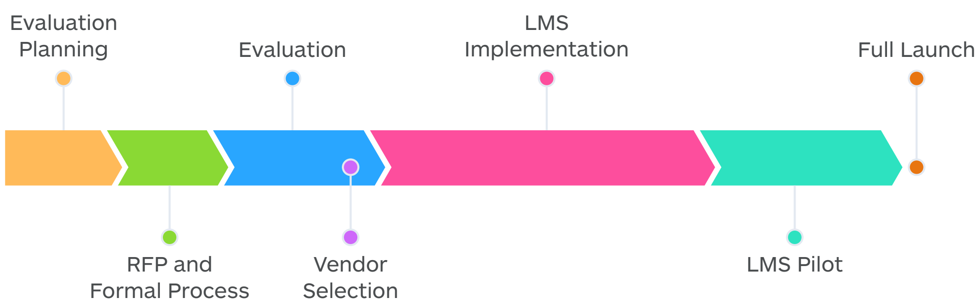
Welcome to your LMS Evaluation Guide

Whether you're evaluating LMS solutions for the first time or reevaluating your LMS needs, it's critical to listen to the specific needs of your organisation's faculty and students, and use the evaluation process to select a vendor that best meets everyone's requirements. We've created this evaluation guide to assist you in this journey.

Where to start?

There are many ways to approach an LMS evaluation process. The illustration below speaks to the most common process leveraged by higher education institutions:



The four phases of an evaluation process

An effective evaluation process typically consists of four phases:

1. **Evaluation planning:** Identify key requirements and what differentiators are important to you.
2. **RFP and formal process:** Release the RFP (if required) to the public.
3. **Evaluation:** Review all submitted materials and calculate scoring based on your evaluation criteria.
4. **Vendor selection:** Select the vendor and begin contract discussions.

The rest of this document will take a deeper dive into these four phases and provide guidance and tips to help you select the best LMS for your needs.

Phase 1: Plan your evaluation

Approximate timeline: 2 Months

Tips:

- Don't just evaluate an LMS based on a specific point in time. Be sure to also evaluate the vendor's road map and vision.
- Build a work-back schedule and timelines—start with the date you'd like to be fully live with a new system and work backward to build out your project plan.

Success checklist

- ☐ Define your committee and executive sponsor.
- ☐ Conduct your stakeholder survey.
- ☐ Define your timelines for evaluation, decision, and implementation.
- ☐ Define your RFP requirements and a minimum threshold for shortlisted vendors.
- ☐ Design the rubric for demonstrations.
- ☐ Establish your overall scoring criteria.
- ☐ Arrange for town hall-style demonstrations with vendors.
- ☐ Keep your community informed.

Online learning emerged as a safe and viable option for education continuity as the COVID-19 pandemic turned personal and professional worlds upside down. Even before the pandemic, the global elearning market was already seeing massive annual global growth. It is expected to reach $336.98 billion by 2026, at a compound annual growth rate (CAGR) of 9.1% from 2018 to 2026 (Syngene Research, 2019). The growth estimates are likely to see an update sooner rather than later, owing to the pandemic.[1]

1 http://www.guide2research.com/research/online-education-statistics

Define your committee and executive sponsor

When establishing your LMS evaluation committee, it is critical that you take into consideration the needs of all stakeholders and users at every level of online learning maturity (from novice to power user). Make sure to gather representation from different stakeholders and incorporate use cases across campus, including the following:

- Executive sponsor
- Early adopter faculty (online learning, blended learning, CBE)
- Institutional success administrator
- IT support administrator
- Director of online learning
- Continuing education personnel
- Instructional designers
- Opinion leaders
- Academic support services staff
- Student services employees
- Accessibility coordinator

Choose team members who will work well together. Include a mix of technical people and faculty from each separate college, if applicable. Appoint only those people who are truly willing to serve; having 10 committed individuals is better than having 20 who are uncommitted.

Conduct your stakeholder survey

Tailor the survey instrument provided in this guide to your own needs. Use it to zero in on specific needs, not solutions. Distribute the survey via a tool such as Survey Monkey to the following user groups:

- Students
- Faculty
- Staff
- IT leadership
- Accessibility coordinator
- Instructional designers
- Continuing education personnel
- Executives

Limit the number of responses so you can manage the data most effectively. Two to 10 participants per user group is ample. Aim for a total of 20 to 25 responses.

Make sure the survey provides some open field responses. This allows people to elaborate on their ideas rather than just offering simple yes or no answers. For example:

Question	Response
What day-to-day challenges do you wish your LMS could help with?	
How would overcoming these challenges improve your job or the quality of learning and teaching at our school?	

Focus on getting the most feedback from your students in a variety of use cases—e.g., full-time, part-time, mature, undergrad, and graduate—and in different departments.

Consider making the instrument anonymous if the participant identifies their use case and department. If you want the option to follow up, make their identity optional.

If you need more clarity or information, supplement the instrument with select interviews and focus groups.

Define your timelines for evaluation, decision, and implementation

Starting with the date you're aiming to be fully live, create a workback schedule outlining timelines for important milestones of the project. Refer to the Appendix for an example project timeline.

Define the RFP requirements and minimum threshold for shortlisted vendors

Understand your institution's procurement policies that are relevant to the purchase of an LMS. Ask your procurement manager these questions:

1. Are there accessibility requirements or technical integrations that need to be considered?
2. Do we require a formal RFP?
3. Are we a member of a purchasing consortium that enables us to receive best-value pricing or skip the RFP process? Common consortiums are E&I (eandi.org) and Internet2 (internet2.edu).
4. Do our jurisdiction's laws and our own institution's rules allow "piggybacking" off of another institution's or government entity's contract?

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Design a rubric for demonstrations

By designing a scripted rubric for demonstrations, you will ensure vendors focus on your specific needs and requirements.

In preparation for vendor demonstrations and for your own testing, you will need a tool to level the playing field. Identify ordinary tasks and functions for each vendor to demonstrate and for you and your evaluation team to try out. Create five to 10 use cases for several user groups, and tailor the template to your unique needs.

Set out the high-level goals of the LMS evaluation project so you have a good idea of what you want your project team to accomplish. Then, review these goals once your project team is in place so everyone is clear on their mission and purpose. Some sample goals might include:

- We are not getting a satisfactory return on investment from our current LMS. We need an LMS that delivers measurable results.
- Our current LMS can't scale to meet our future needs.
- We have low adoption rates for our current learning platform.
- We need to find a new LMS that both faculty and students will embrace and use to their full advantage.
- Our current learning platform is not helping us achieve our business goals. We need to find an LMS that will help us achieve the goals in our strategic plan.
- We need higher student retention and completion rates, and we need to find an LMS that will help us measure these key metrics and achieve those goals.
- We need to implement a new LMS in time for the new semester.
- Our current LMS is coming up for renewal and we want to explore other options.
- We need an LMS that can work for student learning as well as faculty professional development.
- Our current LMS does not provide the capability, flexibility, or depth that our faculty and administration demand. We need to find a new LMS that adjusts to diverse user needs and offers deep analytics for administrative insights.
- Our current LMS does not work well on mobile devices. We need to find an LMS that has a fully responsive design.

Establish your overall scoring criteria

Refer to the Appendix for an example scoring chart.

Arrange for town hall-style demonstrations with vendors

Invite the top three contenders to visit your campus or meet virtually to demonstrate their product to your evaluation team. Prior to the meeting, send them your completed LMS Demonstration Instrument and ask them to demonstrate how their product accomplishes each of your use cases.

Revisit the list of external apps and tools requested by stakeholders in the surveys. Ask your vendors to either demonstrate these integrations or prove they can integrate those tools into their platform.

Arrange a separate presentation from each vendor's leadership to better understand how the company will support your needs and goals—not just through their LMS software, but also through their account management and other consulting services. In advance, share your organisation's strategic plan with each vendor so the presenting team knows what's important to your institution and can deliver a presentation that will resonate with your team.

Ask each member of your evaluation team to take notes during the demo using a standardised framework. Leave ample time following each demo for your team to discuss their notes.

Keep your community informed

The selection of the right LMS for your institution begins and ends with meeting the needs of your community, from administration to faculty to students. Throughout the evaluation process, remember to keep your community in the loop. Leverage all available communications channels, including your website and social media.

Phase 2: Conduct the RFP and formal process

Approximate timeline: 2 Months

Tips:

- Use a scripted rubric to help evaluate each LMS and vendor.
- Break out demonstrations by topics of interest.
- Review buying agreements.

Success checklist

- [ ] Prepare your RFP.
- [ ] Arrange for deep-dive demonstrations with top vendor candidates (see Appendix for examples).
- [ ] Check your references.
- [ ] Conduct sandbox testing.

Fifty-two percent of graduate students in the U.S. found their online college-level education to provide a better learning experience than their college-level classroom education (Duffin, 2019).[1]

Prepare your RFP

- Tailor the Recommendations Report Outline (please see Appendix for examples) to your own needs.
- Translate the needs of the various groups to the potential features and functions you need in a solution.
- Present recommendations in order of importance, from what you must have to what you would like to have.
- Aim for 30 to 60 requirements. The more specific you get, the easier it will be for your team to evaluate products.
- Out of these requirements, identify 10 that your LMS absolutely must have — for example, it must align to ADA standards and it must have responsive design.
- Identify what you do not need. Determine clearly what is out of scope.

1 http://www.guide2research.com/research/online-education-statistics

Arrange for deep-dive demonstrations with each vendor candidate

All LMS solutions, no matter the vendor, have a broad set of features and tools to support the needs of a range of roles, from administration to course design to instructors and students.

Breakout or deep-dive demonstrations can go beyond the basics to address the specific needs of stakeholders on a granular level.

Please refer to the Appendix for examples of deep-dive demonstrations.

Check your references

Ask for customer references from each vendor. Make sure the references provided are current users of the LMS, as they will have fresher insights. When you speak with them, ask them whether they can share their experiences with the vendor's responsiveness, problems encountered, problem resolution, and lessons learned.

Conduct additional due diligence by researching the following for each vendor:

- Financial health and stability
- History and longevity
- Customer retention/churn
- Executive stability and capability
- Thought leadership
- Innovation, R&D, and road map
- Relevance in new trends and technology
- Expertise with implementation, course conversion, and support
- Commitment to long-term partnership

The strength of your vendor's position in the above areas will help you fully assess your partnership to ensure long-term support and reliability. This will help build your confidence that the vendor will:

- Support the product and your user community well
- Continue to grow with you
- Have the resources to finance future product development and innovation

Share your reference findings with the broader evaluation team for discussion.

Conduct sandbox testing

Ask each vendor to provide you with access to a sandbox where you can test tasks and functions inside their product. (Software used for demonstration and testing is typically called a sandbox.) For each vendor, send two of your courses (one great, one not so great). Ask them to import each course into the sandbox so you can see what your content will look like and how it will perform once imported.

Once your vendor has created your sandbox, ask one or two people from each user group to try out the activities in your Sandbox Evaluation Instrument (page 18). This tool uses the identical use cases each vendor demonstrated to you but has spaces where you can document your experience.

Phase 3: Evaluate

Approximate timeline: 3 Months

Tips:

- Don't just evaluate the LMS platform at a point in time. Evaluate the vendor's road map and vision.
- In building your timeline, start at when you'd like to be fully live with a new system and work backward.

Success checklist

- ☐ Consider best and final offers (BAFOs).
- ☐ Compare cumulative scoring from RFP responses and demonstrations.
- ☐ Write your project report and recommendations.
- ☐ Present your recommendations to the project's executive sponsor.

In a 2019 survey of 1,500 online student respondents, it was found that the top reasons why students choose online programmes include the affordability of the course, the reputation of the school/programme, and how a programme offers the quickest path to acquiring a degree (Duffin, 2020).[1]

In your final meeting with the project team, discuss your findings and establish consensus.

While each member of your team may have their own preferences, it is very important at this stage to stay focused on your objectives.

Each member of your team, and the project team, should align their evaluation of each candidate LMS to the following, in this order:

1. The goals you have established
2. Your recommendations based on the survey
3. Vendors' corporate stability, thought leadership, and long-term partnership
4. Vendor demonstrations
5. Sandbox experience

1 http://www.guide2research.com/research/online-education-statistics

Consider best and final offers (BAFOs)

At this point, the committee should review and consider best and final offers from each vendor in consideration.

Compare cumulative scoring from RFP responses and demonstrations

Compare the scoring for each vendor's RFP response and demonstrations according to the scripted rubric. This will ensure that your evaluation is objective and maintains focus on the needs and goals you identified earlier in the process.

Write your project report and recommendation

You now have enough information to select one vendor and one LMS. Congratulations on a job well done. Consider writing a report on your decision and publishing it both internally and externally. Your students, faculty, staff, and external stakeholders will appreciate hearing about your decision and the reasons behind it. You can invite the vendor to help you generate buzz surrounding your adoption of their LMS, so you get maximum exposure and buy-in from all your user groups.

Present the recommendation to your executive sponsor

You have done the legwork. Now it is time to present your selection to your executive sponsor and secure their seal of approval. Remember, you are presenting more than technical findings. You are presenting a business case. Show that your evaluation and selection process are aligned with key objectives for the institution, that the vendor you have chosen meets your partnership requirements, and that there is a clear timeline and plan for implementation.

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Phase 4: Select a vendor

Approximate timeline: 2 Months

Success checklist

- ☐ Contract negotiations that include IT, legal, and other stakeholders.
- ☐ Share with your community.

Mobile learning is one of the fastest-growing elearning markets, with an annual growth of around 23% (Technavio, 2018).[1]

Contract negotiations including IT, legal, and other stakeholders

Make sure you understand your internal contracting process. Who needs to review and sign off on this contract? What is their time frame and availability to do so? Who will be the point person with the vendor to ensure that this contract is executed in a streamlined way and does not become bogged down in bureaucracy?

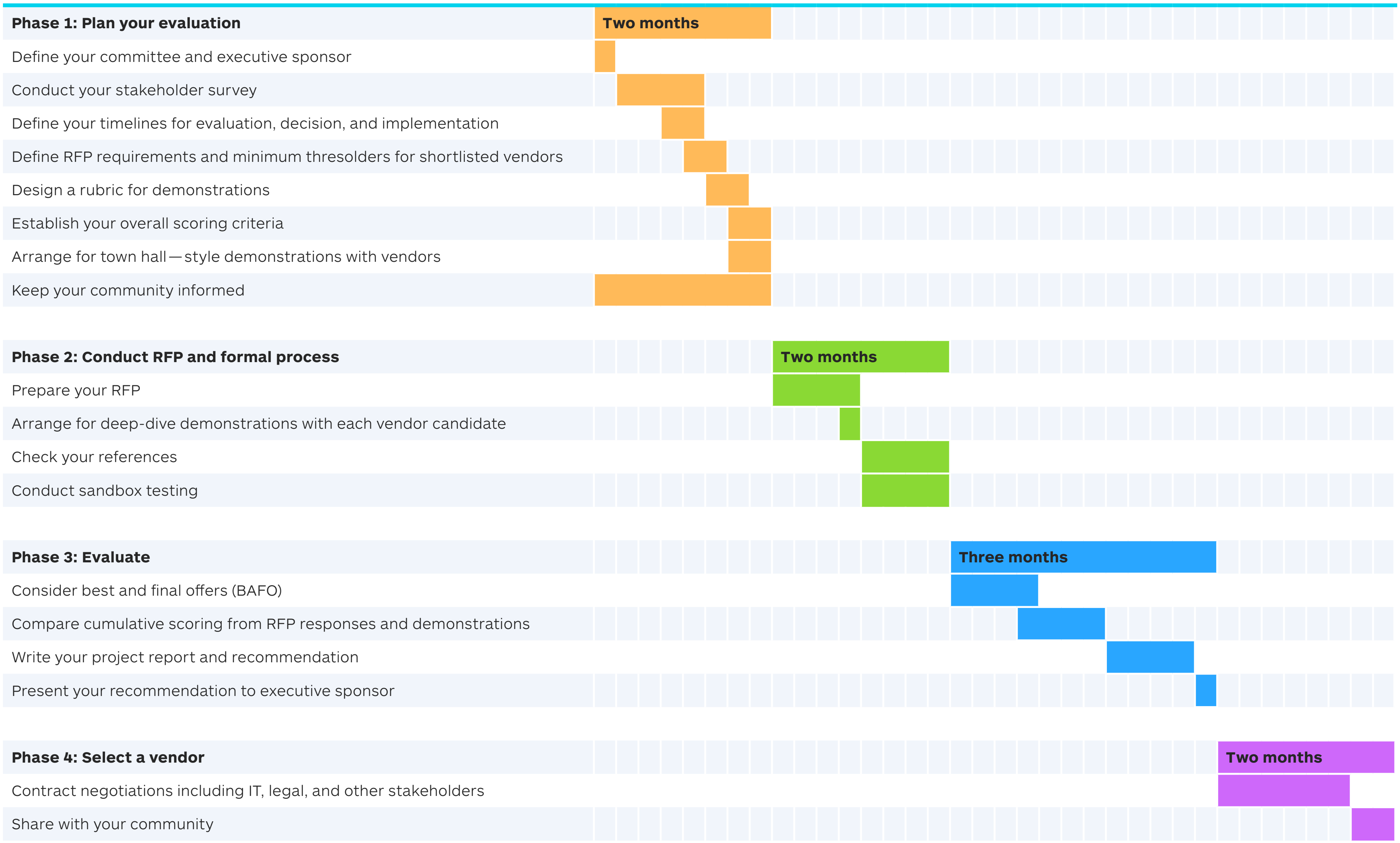
Share with your community

As recommended in phase 1, your community is what has driven your LMS evaluation. Keep your community in the loop by sharing your decision on your website and social media. Sharing will help generate adoption and buy-in of the new platform as well.

1 http://www.guide2research.com/research/online-education-statistics

Appendix

Sample timeline



Sample evaluation scoring

Below is an example of how to weight areas of an RFP process:

Criteria	Weight
Implementation plan	10%
Functional criteria	20%
Technical criteria	20%
Price	15%
Value-added services and alignment	5%
Accessibility	5%
Demonstration	20%
References	5%

Presentation topic agendas

Below is a list of recommended topics to include as part of a final RFP presentation:

Time allocation	Proposed topic	Session details
15 minutes	Understanding of strategic goals	• Vendor to confirm our understanding of <<Institution Name>>'s strategic goals and alignment to learning framework
15 minutes	Vendor introduction and differentiation	
30 minutes	Student overview	
1 hour	Faculty overview	
1 hour	Administrative overview	
1 hour	Implementation, course migration, and change management strategy	• Overview of vendor implementation • Client success stories • Course migration • Consulting services
1 hour	Road map, product strategy, and partnership	• Overview of short- and long-term product strategy • Investments for fully online • How <<Institution Name>> can influence the product road map

Time allocation	Proposed topic	Session details
DEEP DIVES		
30 minutes	Accessibility	
1 hour	Data and analytics	• Institutional data access (raw and business intelligence integrations) • Administrative learning analytics • Faculty dashboards for student success
1 hour	Student success	• Learning outcomes assessment • Predictive tools • Supporting learning success
1 hour	Supporting growth initiatives	• Noncredit and continuing education • Professional development • Corporate partnerships
1 hour	Platform hierarchy	• Institutional hierarchy • Roles and permissions • Learning outcomes • Cloud and continuous delivery

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How to evaluate usability

There are three approaches to usability testing:

1. Structured sandbox testing
2. Vendor supported testing/use-case demonstrations
3. Live pilots

Method	Pros	Cons
Structured sandbox testing		
Vendor supported testing/ use-case demonstrations		
Live pilots		

Survey Instrument Template

Help us improve our learning environment.

We need your ideas! Find your user group below and share your experiences regarding the current learning platform. Be specific. In the impact field, talk about how your suggested changes will improve your job or the quality of learning and teaching at our school. We will collect all your ideas, analyse them, and come up with recommendations for a new learning management system (LMS).

User group	Questions	Impact
Everyone	• What tasks do you currently perform on the LMS? • What would you like to do but cannot? • What do you like most about the current LMS? • What would you most like to see improved? • What is your wish list for an LMS? • In what ways do you use LMS data to inform decision-making? • If you could change one thing about your current LMS, what would it be and why?	

User group	Questions	Impact
Faculty	• Do you use your LMS only to manage content and courses? • Do you want a consistent experience when using your tablet, mobile, laptop, and desktop? • Would you like an LMS that helps you improve teaching and learning? How so? • What tasks take up most of your time when preparing for semester starts? • What tasks are the most time-consuming during a semester? • Is it easy for you to see how and where students are achieving and struggling? • What day-to-day challenge(s) do you wish your LMS could help with? • Are there programmes you would like to run but cannot (such as competency-based education) because of limitations with your current LMS? • How often do you participate in video conferences with your students or peers? • In what ways do you use assessment rubrics in your course? • In what ways do you use the data provided to you through the LMS?	
Students	• What are the most common tasks you perform on your LMS? (e.g., check grade, take test, read course content, discuss content with peers or professor, submit assignment) • How does your current experience rank when using the learning platform on your desktop, laptop, tablet, and/or phone? • Do you feel your LMS delivers personalised learning opportunities? • Does your LMS provide ways for you to take ownership of your learning? • How important is it that you are able to access all your courses via your smartphone? • Are you able to easily track your course progress in your LMS?	

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User group	Questions	Impact
Instructional designers	• What are the most common questions and complaints you receive from faculty whom you support? • How much time do you spend educating faculty members on how to use the LMS? • What kind of faculty training model do you support? • In what ways do you use LMS data?	
Continuing ed	• What is the growth potential for online courses? • What is your wish list for online capability? • Name up to 10 distinctive requirements that an LMS must have.	
IT admin	• List the tools you would like integrated into the platform. • List the tools you want to use that you cannot currently integrate with the platform. • Name up to 10 distinctive requirements that an LMS must have.	
Executive	• Do you need a new platform for professional development? • Name three distinctive requirements that an LMS must have. • In what ways do you use LMS data?	

Recommendations report outline

Our recommendations for a new LMS

A. Our goals for this project
- Our project team
- Project scope and timeline

B. How we organised the survey instrument
- Questions
- How many people responded

C. What we heard from our user groups
- Faculty
- Students
- Instructional designers
- Continuing ed
- IT administration
- Executive

D. A summary of survey instrument findings
- What we like most about the current solution
- What we would most like to see improved
- Apps and tools we need
- Our wish list for a learning platform

E. Our recommendations
- 10 things we need in an LMS
- 10 more things we would like
- What we do not need in an LMS (what is out of scope)
- Three learning management systems that may satisfy our needs

F. Next steps

LMS demonstration instrument (for vendors)

Please demonstrate how to perform the following activities in your platform:

Faculty	Log in to your course. Post an announcement on the course home page about an upcoming lecture. Within an announcement, add multimedia (create video or drop in a YouTube video). Build course content. 1. Add a module. 2. Add content into the module — with both individual and multiple files. 3. Create a file. 4. Create an assignment. 5. Create a quiz (with T-F questions, MC questions, and questions with multimedia inserted in them). 6. Create a discussion. 7. Create a video assignment. Navigate a class in progress (a class with grades and assignment submissions). 1. Identify students at risk by viewing class progress. 2. Communicate with the students at risk. 3. View all learner submissions that are awaiting evaluation. 4. Grade an assignment. 5. Grade a discussion. Log in on your desktop browser, tablet browser, and phone browser, and compare the experiences.

Student	1. Complete a quiz. 2. Submit an assignment using drag and drop. 3. Participate in a discussion. 4. Check your progress in a class. 5. Log in on your desktop browser, tablet browser, and phone browser, and compare the experiences. 6. Use the mobile app to review course content and check your calendar.
Administrator	1. Customize the home page. 2. Customize a navigation bar. 3. Manually add a user. 4. Impersonate a user. 5. Add or change a permission in the faculty role. 6. Extract data from the system. 7. Create a course.
Accessibility coordinator	Test two or three pages for accessibility.
Instructional designer	Edit the navigation bar.
Executive	Extract data or run a report showing faculty engagement in a specific course.

Sandbox evaluation instrument (for faculty)

Share your experience when performing each of these tasks in the LMS sandbox.

Activity	Experience
Log in to your course.	
Post an announcement on the course home page about an upcoming lecture.	
Post an announcement and drop in a video.	
Drag and drop content into the course module; move content around.	
Create a file.	
Create an assignment.	
Create a quiz with a T-F question, an MC question, and a question with multimedia inserted in it.	

Activity	Experience
Create a discussion.	
In a course, view all students' progress on a single screen.	
Create automated emails to students who have not logged in for three days.	
Create automated emails to students who have posted a comment in a discussion.	
Add conditional releases.	
Create a video assignment.	
Grade an assignment from the gradebook.	
Grade a discussion.	
Log in on your desktop browser, tablet browser, and phone browser, and compare the experiences.	

About D2L

D2L is the creator of Brightspace, a learning platform for associations who value member engagement as a driver of business success. Grow your membership with personalised learning experiences tailored to suit members' needs and peer-to-peer knowledge sharing that allows them to share their expertise and get feedback via video, audio, and inline annotations. The fully responsive design means they'll be able to learn anytime, anywhere, and on any device. With a fully open API Brightspace can easily integrate within your existing technology ecosystem, and smarter reporting will help you monitor performance and engagement so you can make informed decisions about training and development.

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