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| --- | --- | --- |
| Resource type Example | Date created 2021 | Last reviewed 2022 |
| Resource series  Designing donor MEL systems and practices | | |
| Project Monitoring, Evaluation and Learning Toolkit for Grantmakers and Grantees | | |
| |  | | --- | |  |   MANAGE an evaluation or evaluation system | | |

Developing a data collection platform: vendor evaluation form

Vendor name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please rate on a scale from 1–5 (5 being the highest, 1 being the lowest)

|  |  |  |
| --- | --- | --- |
| Feature | Score | |
| Meets “needed” criteria |  | |
| Meets “wanted” features |  | |
| Cost (one-time costs & ongoing costs) |  | |
| Customization (flexibility for changing features in the platform, what can be changed, who can make the changes, does it cost to make changes) |  | |
| Vendor relationship (how easy is it to work with the vendor, do they understand our needs, dedicated staff, responsiveness) |  | |
| Notes: | |

# Needed criteria

|  |  |
| --- | --- |
| Criterion |  |
| Aesthetics: Is it fun? Is it pretty? | Need |
| Data storage: Are there size limits for data stored? How is the data backed up? | Need |
| Data collection: How is data input? Ease of input? | Need |
| Charts/visualization: How customizable? How interactive? | Need |
| Disaggregation/aggregation: Is there a tagging architecture, and can data be organized in a dependent hierarchy? | Need |
| Analysis across multiple dimensions: e.g. Across time, geography, and portfolio? | Need |
| Data security: Who has access to the platform, and how? Where are physical servers? | Need |
| User roles and access levels: Log-in IDs? External access levels? | Need |
| Integration with other files and systems: Is it possible to easily or automatically pull in data from Salesforce, Lucid Chart, or SurveyMonkey, or upload files (.doc, .pdf., .xlsx)? | Need |
| Downloadability: As .xlsx, .pdf, or .doc? | Need |
| User privileges and admin control: How well are access levels for data input, edits, and design separated? | Need |
| FGP-generated data: Can it accommodate our .xlsx data that is heavy on formulas? | Need |
| Developer support: Is ongoing support included in the cost? | Need |

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# Wanted features

| Criterion |  |
| --- | --- |
| Experience with funders: How well can the platform be tailored to the funder experience? | Want |
| Dashboard capability: Possible to create team dashboards? How customizable are they? | Want |
| Levels of detail: Possible to “Click into complexity” and not overload user with detail upfront? | Want |
| Customized calculations: Can we set our own calculations of interest? | Want |
| Ability to customize: Parameters, language, look, and feel? | Want |
| Third-party data: Can we pull from external indices or datasets? | Want |
| Mobile access: Is it possible to access the platform through an app? | Want |
| Data scraping capability: Is there functionality to scrape data from reports or the web? | Want |
| Cost reasonableness: Is the cost reasonable for a project of this scale? | Want |
| Project management: Can it double as project management software? | Maybe |

# Costs

|  |  |  |
| --- | --- | --- |
| Vendor | Price | Timeline |
| ADD VENDOR HERE |  |  |