| 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:	

1. 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

2. 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

Criterion	
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

3. Costs

Vendor	Price	Timeline
ADD VENDOR HERE		