

Selecting New Software for Your Program

We've worked with a number of scholarship providers to evaluate and select new software for their scholarship programs, including scholarship management systems that facilitate the full programmatic lifecycle. It can be a long and arduous process, but we've identified important tips that will help you get organized and stay on track towards your new platform.

Key Considerations

Before diving into the evaluation and selection process, ask yourself:

- **Why are we considering new software?** Identify the specific pain points you want to address.
- **Who should be involved?** Determine the key stakeholders and their roles in the process.
- **What features are important?** Create a list of must-have and nice-to-have features.
- **How will we gather information?** Decide on the methods you'll use to collect data from vendors.
- **How will we make decisions?** Establish a process for evaluating and selecting software.

Step-by-Step Guide

With answers to these questions in hand, build out your plan for evaluation and selection.

1. **Define your goals.** Clearly articulate the objectives you hope to achieve with new software.
2. **Identify key stakeholders:** Involve relevant team members, donors, and students in the process.
3. **Create a feature wishlist.** Develop a list of essential and desirable features.
4. **Gather information.** Collect data from vendors, conduct demos, and talk to references.
5. **Evaluate software.** Use a standardized rubric to compare products and select the best fit.
6. **Negotiate and implement.** Finalize the contract, plan implementation, and train your team.