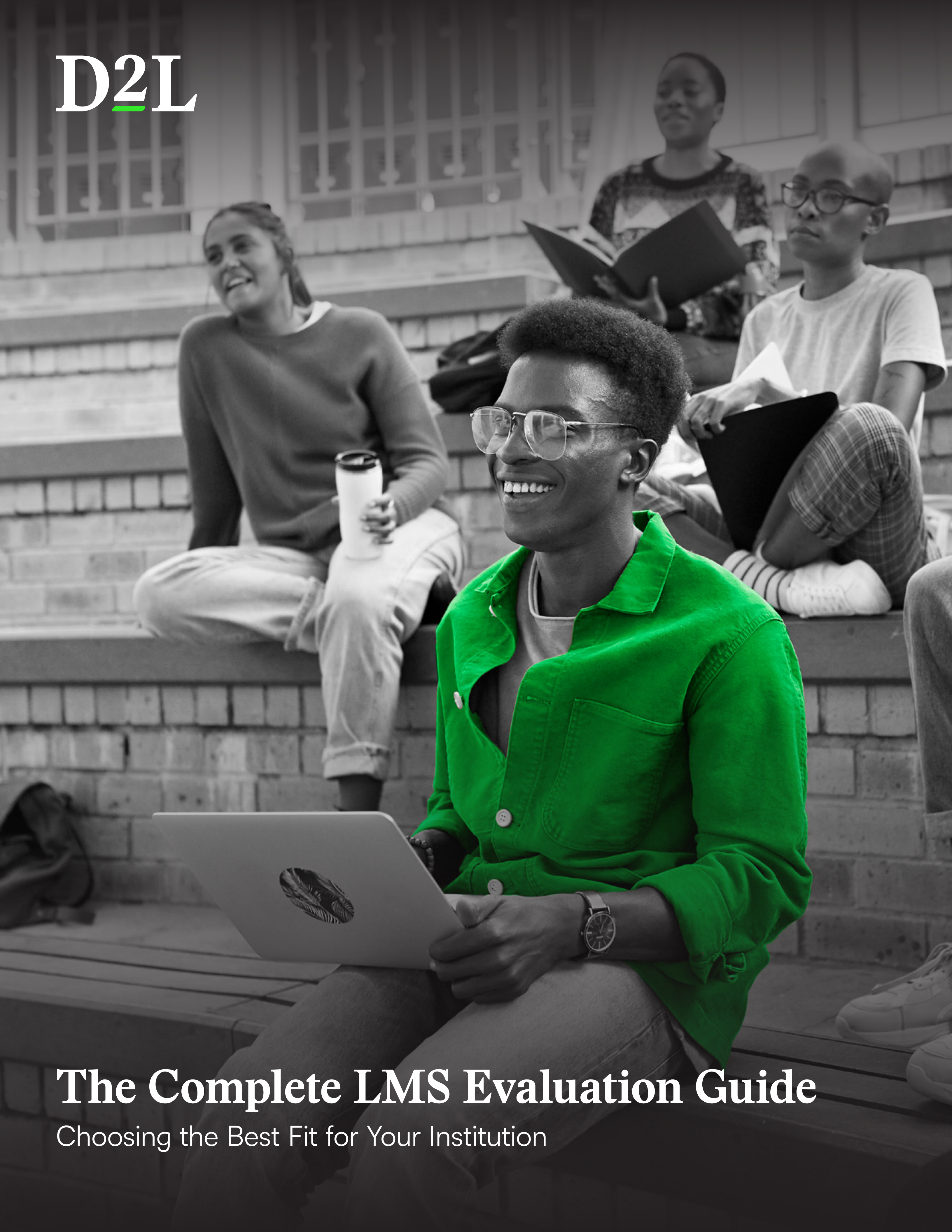


The Complete LMS Evaluation Guide

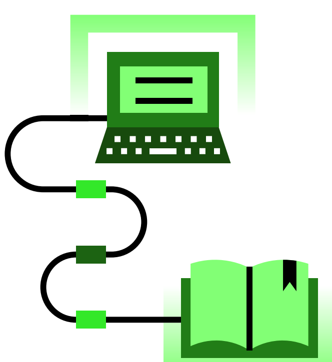
Choosing the Best Fit for Your Institution

Welcome to Your Learning Management System Evaluation Guide

Whether you're evaluating learning management system (LMS) solutions for the first time or reexamining your needs, it's critical to listen to the wants of your institution's faculty, students and staff. Your LMS is a long-term commitment—most institutions stay with the same provider for around five years and the relationship can last upward of a decade—and it's used campuswide as a part of the daily lives of your community. Switching to new tech—even with the promise of improved efficiencies and better results—will have a ripple effect throughout your campus.

Learning a new LMS on top of the day-to-day expectations of your campus community is a big ask, and it will be a team effort to navigate the change successfully. By taking the time to thoroughly understand the wants and needs of your campus along with your institution's strategic goals, you'll be able to choose the vendor and LMS that best suits everybody involved.

By following the steps outlined in this guide, you can ensure that no rock is left unturned when it comes to evaluating which LMS is best for your institution. Putting in the time to complete a thorough, fair evaluation will ultimately make the adoption of the new LMS easier. While motivations and specific goals vary, most colleges and universities keep in mind some common overarching strategic objectives when choosing an LMS:



1. **Improve the quality of the learning experience.** Learning should be accessible to as many students as possible and tailored for each individual so users can work at their own pace and from any device. Learners at your institution deserve personalized 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. **Reduce the cost of delivery.** Faculty want to teach by leveraging tools that are easy to use. Institutions can accomplish this by choosing an LMS with centralized features that reduce the number of add-ons needed to hit your goals. Faculty are also looking to work efficiently, which you can accomplish with a provider who uses something like automation to save time. Often, adoption of a new LMS includes cost savings thanks to hosting efficiencies too.

3. **Retain and attract learners.** You'll want an LMS that works for your current students and is ready to innovate to help reach future learners. Your LMS should be diverse in its abilities to meet the needs of both credit and noncredit students looking to continue their education. It should also provide robust data to improve student retention and proactively intervene to give students the resilience and confidence to reach graduation or program completion.

4. **Implement worry-free technology with an innovative partner you can trust.** Staff and administration want a seamless LMS implementation that satisfies the institution's goals and objectives, doesn't let them down when the pressure is on, and delights faculty and learners. They deserve an LMS partner that can grow with them and approaches the future of learning with confidence every step of the way.

To help prepare you for choosing your next LMS, we've divided the evaluation process into four phases, each with examples and takeaways so you can make the best choice for your institution.

WHERE TO START?

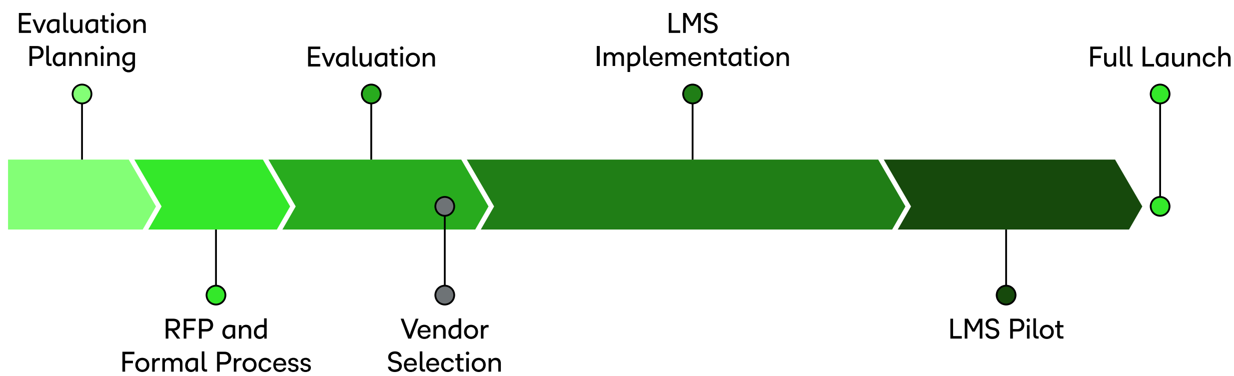
In our experience working with thousands of higher ed institutions—from being evaluated as an LMS, chosen as a provider, and supporting users throughout the adoption and its associated changes—the most common place to begin is with planning the evaluation. This is the first of four phases that we'd recommend tackling before launching a new LMS.

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. **Request for proposal (RFP):** 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 guide takes a deeper dive into these four phases and provides guidance and tips to help you choose the best LMS for your needs.



Phase One

Plan Your Evaluation

Approximate timeline: 2 Months

Tips:

- Don't just evaluate an LMS based on where the vendor is today. Be sure to also consider the vendor's road map and vision.
- Review the provider's track record of delivery. Ask for the promises they've made on their road map over the past three years and successful delivery dates.
- Build a workback 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.
- Every institution's timing will be different. Use the timeline as a guide and make adjustments based on your needs.

SUCCESS CHECKLIST

- ☐ Name your committee and executive sponsor.
- ☐ Conduct your stakeholder survey.
- ☐ Consider advice from external consultants.
- ☐ Define your timelines for evaluation, decision and implementation.
- ☐ Map strategic goals to 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.

SAMPLE TIMELINE

Phase 1: Plan Your Evaluation	Two Months
Define your strategic goals	
Name your committee and executive sponsor	
Conduct your stakeholder survey	
Consider advice from external consultants	
Define your timelines for evaluation, decision, and implementation	
Map strategic goals to your RFP requirements and a minimum threshold for shortlisted vendors	
Design a rubric for demonstrations	
Establish your overall scoring criteria	
Arrange for town hall–style demonstrations with vendors	
Keep your community informed	

Every institution's timing will be different. Use the timeline as a guide and adjust it based on your needs.

DEFINE YOUR STRATEGIC GOALS

Determining your strategic goals is one of the most important parts to keep your entire LMS evaluation on track and make it a success. These goals are what you will live by and what you will constantly return to when deciding which LMS is your best fit. Some examples of common strategic goals at a high level are:

- improving the quality of the learning experience
- reducing the cost of delivery
- retaining and attracting new learners
- working with an innovative partner

If stakeholders get caught up in small details or distracted by shiny features, make sure to refer to your strategic goals. This way you can clearly tie your decision back to what's most important to your institution and ensure you're making the right choice.

INSIDER PERSPECTIVE

THE STATE UNIVERSITY OF NEW YORK (SUNY)

SUNY is the public university system for the state of New York. It has 64 campuses across the state and is one of the largest and most complex university systems in the U.S. because it houses four different sectors of institutions.

Because of this, SUNY had 56 different LMS instances, a variety of vendors, an inconsistent user experience and a lack of security protocols. As many of its preexisting LMS contracts were coming to a close, the university took it as an opportunity to consolidate to one vendor across all its campuses.

Learn how **SUNY transformed its digital student experience** by using a clear plan and strategic goals to choose the best LMS provider for the system, unite its campuses and manage the implementation process.

NAME YOUR COMMITTEE AND EXECUTIVE SPONSOR

When establishing your LMS evaluation committee, it's critical that you consider the needs of all stakeholders and users at every level. Make sure to gather representation from all parties and incorporate use cases across campus, including the following:

- executive sponsor
- early adopter faculty
- 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 people in technical roles and faculty from each separate college, if applicable.

TIP:
Only appoint people to your evaluation committee who are invested in helping with the work. Having 10 committed individuals is better than having 20 members who lose interest.

CONDUCT YOUR STAKEHOLDER SURVEY

Go straight to the source to understand what matters most to those using the LMS. Use a survey to zero in on specific teaching and learning needs, instead of features or functions.

For example, faculty might focus on a specific feature they're interested in, such as a better gradebook. While this is valuable information, it's important to identify the specific need (to save time on grading) versus getting caught up in surface-level solutions. Once the need is identified, the vendor can bring multiple solutions to the table—such as an improved gradebook, automation and prompts—to truly help address the root cause of the feedback.

Once your survey is ready, distribute it 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

For help getting started, see the appendix for an **example survey template** you can modify to suit your needs.

Balancing perspectives from all your user groups gives you clues about the highest-priority needs across your campus. Including between two and 10 participants from each user group is ample and ensures appropriate representation for everyone.

TIPS:

- Make sure your stakeholder survey has some open field responses. This allows people to elaborate on their ideas rather than just offering simple yes or no answers.
- Don't forget about your strategic goals. If the feedback becomes overwhelming, use these goals as a grounding point to bring back clarity.

Get feedback from all kinds of students—full time, part time, mature, undergraduate and graduate—and from those in different departments. You can consider making the survey responses anonymous if you don't require the participant's use case and department. If you want the option to follow up, you can make respondents' identity disclosure optional. If you need more clarity or information, supplement the survey with select interviews and focus groups.

CONSIDER ADVICE FROM EXTERNAL CONSULTANTS

While you know your institution and its needs best, considering advice from a third-party consulting company that specializes in the field can help you better understand the LMS market. Seeking the guidance of an external ed tech consultant can provide an unbiased perspective on market reviews and professional, strategic consulting on the different tech solutions available.

Some companies that provide these services include **Gartner**, **Phil Hill & Associates** and **Tambellini Group**. Define Your Timelines for Evaluation, Decision and Implementation

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. To start, include each of the steps in this phase of the evaluation guide, such as was done in the graphic at the start of this section.

You'll also want to start thinking about what happens after you choose your vendor, including the migration process—how long it will take to transition courses to your new LMS. Many institutions take a semester or two as buffer time between the initial adoption of the new system and its campuswide adoption. This leaves plenty of time for course migration, design, testing and user training.

What's more, you'll want to get a handle on how active your new provider will be in the migration process—from its role in assisting with course migration to its lines of support, and how often staff members are available to troubleshoot and answer questions. This will help you determine how long it can take to complete a successful migration.

INSIDER PERSPECTIVE

BENTLEY UNIVERSITY

After 20 years of using the same LMS, Bentley University in Waltham, Massachusetts, knew it was time for a modern update.

To find its perfect fit, Bentley's team evaluated several platforms from a variety of providers. They included faculty, student and admin staff to help weigh in on such an important decision. Brightspace ultimately won over Bentley with its positive community feedback, flexible design and intuitive user experience.

"Every year, we welcome more students who are already familiar with using an LMS," said Gaurav Shah, director of academic technologies at Bentley University. "They're very tech-savvy and their expectations are much higher. By embracing a modern platform like Brightspace, it's easier to shape an experience that resonates with today's students."

Brightspace's clear product road map also proved to be the perfect strategic fit with Bentley's long-term learning ambitions and helped the school move in new, innovative directions.

"We have found a platform and a partner that will allow us to move learning in new directions," said Shah. "Brightspace is the next-generation LMS that gives our students the strong foundation they need to learn and develop. As a higher education institution, it gives us the tools we need to continue evolving our education and elevate learning outcomes."

Having a buffer period before campuswide adoption will also help with creating an effective change management strategy. It takes time to understand the pain points of faculty, staff and students learning a new system, as well as providing helpful documentation and support. Implementing the time for proper training not only allows for a positive change management experience, but also for a more successful adoption of the new system and its many benefits.

Refer to this timeline regularly to ensure you stay on track with your goals and start date.

MAP STRATEGIC GOALS TO RFP REQUIREMENTS AND MINIMUM STANDARDS FOR SHORTLISTED VENDORS

You'll want to keep your strategic goals top of mind when it comes to your RFP. Connecting your bigger goals to your vendor expectations will ensure their systems and services can actually help you achieve them.

Get familiar with your institution's procurement policies that are relevant to the purchase of an LMS. Make sure to 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?
4. Do our jurisdiction's laws and our own institution's rules allow "piggybacking" off another institution's or government entity's contract?

You'll also want to determine your minimum standards for vendors that make your shortlist. To avoid wasting time with those that you know won't meet your requirements, understanding what elements are nonnegotiable—such as your strategic goals—will help determine your minimum standards.

DESIGN A RUBRIC FOR DEMONSTRATIONS

Develop a scripted rubric for demonstrations to ensure vendors focus on your specific needs and requirements. Identify ordinary tasks and functions for each vendor to show you and for 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 with the team so everyone is clear on their mission and purpose. Some sample goals might include:

- Achieve the goals in our strategic plan using our LMS.
- Increase ROI with an LMS that delivers measurable results.
- Meet our future needs with a scalable LMS that grows with us.
- Increase learning platform adoption rates and effective campuswide usage.
- Attain higher student retention and completion rates with an LMS that can measure these key metrics.
- Implement a new LMS by the required deadline.
- Support student learning and faculty professional development through the LMS.
- Provide an LMS that adjusts to diverse user needs and offers deep analytics for administrative insights.
- Find an LMS that has a fully responsive design.
- Develop a partnership with the LMS vendor to maximize our results.

INSIDER PERSPECTIVE

SOUTHERN NEW HAMPSHIRE UNIVERSITY (SNHU)

SNHU is an innovative institution that has over 80,000 online students. When SNHU thought about its future growth, the institution knew the existing LMS wasn't going to be able to keep up. Brightspace was ultimately chosen as its new LMS, namely because it's cloud hosted and would have an immediate impact on the amount of work the SNHU IT department was dealing with.

D2L and SNHU were able to provide an accelerated implementation process, moving from project kickoff to instructor access in under four months. The teams at SNUH and D2L worked together to enable course design sessions, monitor performance and provide training to get the project done on time.

"If you don't have a partnership with the vendor, you don't succeed with the implementation. We went from nothing to everything in record time. We wouldn't have succeeded without D2L," said Gerry Fulbrook, AVP of academic technologies, Southern New Hampshire University (SNHU).

ESTABLISH YOUR OVERALL SCORING CRITERIA

Your campus will have unique priorities, depending on your strategic goals as well as your stakeholders and their needs. It'll be important to adjust and implement your scoring criteria to appropriately reflect these priorities. Weighing the importance of all the different areas of an RFP process will help during contract negotiations with your stakeholders. Knowing what's most important to you helps determine which LMS is the best fit for your institution.

Check out this example of how to weigh different parts of your RFP process. You can adjust these values depending on your institution's strategic objectives, as outlined in a previous section.

CRITERIA	WEIGHT
Functional and technical criteria	20%
Maintenance, support and road map	5%
Value-added services and alignment	5%
Demonstration	20%

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 demonstration rubric and ask them to show how their product accomplishes each of your use cases.

Find an example of what to look for in a **vendor demonstration** in the appendix.

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 combine 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 institution's strategic plan and goals with each vendor so the presenting teams know what's important to your institution and can deliver a presentation that will resonate with you.

Create a scorecard based on your evaluation criteria—such as the example previously given—and ask each member of your evaluation team to take notes during the demo and presentation. Afterward, make sure to leave time for your team to discuss their notes.

KEEP YOUR COMMUNITY INFORMED

The selection of the right LMS for your institution begins and ends with achieving your strategic goals and 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 Two

Conduct the Request for Proposal

Approximate timeline: 2 Months

Tips:

- Use a scripted rubric to help evaluate each LMS and vendor.
- Provide sandbox testers with scripted use cases to test.
- Consider incentivizing users whom you ask to do the testing.
- Break out demonstrations by topics of interest.
- Review buying agreements.

SUCCESS CHECKLIST

- [ ] Write your RFP.
- [ ] Arrange for deep-dive demonstrations with your top vendor candidates.
- [ ] Check your references.
- [ ] Conduct sandbox testing.

SAMPLE TIMELINE

Phase 2: Conduct RFP and Formal Process	Two Months
Write your RFP	
Arrange for deep-dive demonstrations with each vendor candidate	
Check your references	
Conduct sandbox testing	

Every institution's timing will be different. Use the timeline as a guide and adjust it based on your needs.

WRITE YOUR RFP

Your RFP will let prospective vendors know that you're on the hunt for a new LMS and what you're looking for. It'll also act as an offering to those who think they're qualified to meet your needs. Here are some tips on how to prepare your RFP:

- Keep your strategic goals top of mind when crafting your RFP so you don't lose sight of what you've set out to accomplish.
- Don't focus on specific features and functions, but rather your required teaching and learning needs.
- Consider the different elements of your scoring criteria to help inform what you're looking for.
- Present recommendations in order of importance, from what you must have to what you would like to have.
- Aim for 30 to 60 requirements. Remember, the clearer you are with your teaching and learning needs, the easier it will be for your team to evaluate options.
- Out of these requirements, identify 10 that your LMS absolutely must have—for example, it must have responsive design.
- Identify what you do not need and clearly determine what's out of scope.

An example **recommendations report outline** can be found in the appendix. You can use it to help you get started with your RFP.

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 designers to instructors and students.

Breakout or deep-dive demonstrations can go beyond the basics to address the specific needs of stakeholders and do so on a granular level. These demos are a great way to increase buy-in from the parties involved. Having their needs addressed directly by the providers proves that the change can and will make a difference where it matters to them most.

Check out the appendix for two examples of agendas for both an **RFP presentation and a product deep dive**.

CHECK YOUR REFERENCES

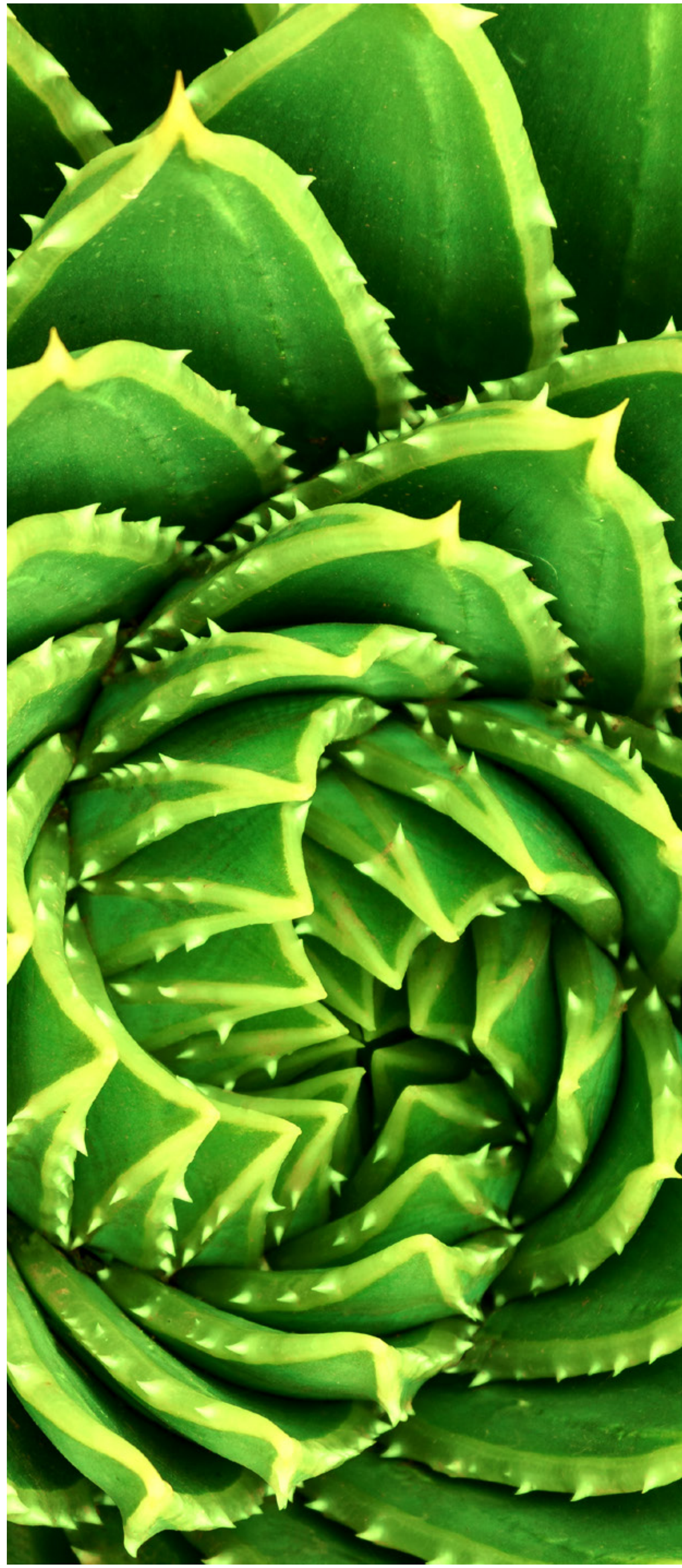
Ask for customer references from each vendor. Make sure the ones they provide are current users of the LMS, as they'll have fresher insights. When you speak with the references, ask whether they can share their experiences with the vendor's responsiveness, commitment to their road map, problems encountered and resolved, and lessons learned.

You should also research the following for each vendor:

- financial health and stability
- history and longevity
- customer retention/churn rate
- 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 these 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 be a good support for the product and your community. Solidifying a reliable partnership will also allow the selected vendor to grow with you toward future product development and innovation.

TIP:
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—software used for demos and testing—where you can test tasks and functions inside its product. Send each vendor two of your courses: one you aspire all of your courses to be like and one that needs work. Ask the vendor to import each course into the sandbox so you can see what your content will look like and how it will perform.

Once your vendor has created your sandbox, ask one or two people from each user group to try out the activities outlined in a sandbox evaluation document. This tool uses the identical use cases each vendor demonstrated to you but has spaces where you can document your experience.

Another perk of sandbox testing is that it can increase stakeholder buy-in. Hearing about what a provider can do versus actually seeing it work makes a difference. Stakeholders can witness the benefits of the change themselves, making the concept of a vendor meeting their needs a reality.

Find an example of a **sandbox evaluation tool** for your stakeholders in the appendix and use it as a jumping point for your own assessment.

INSIDER PERSPECTIVE

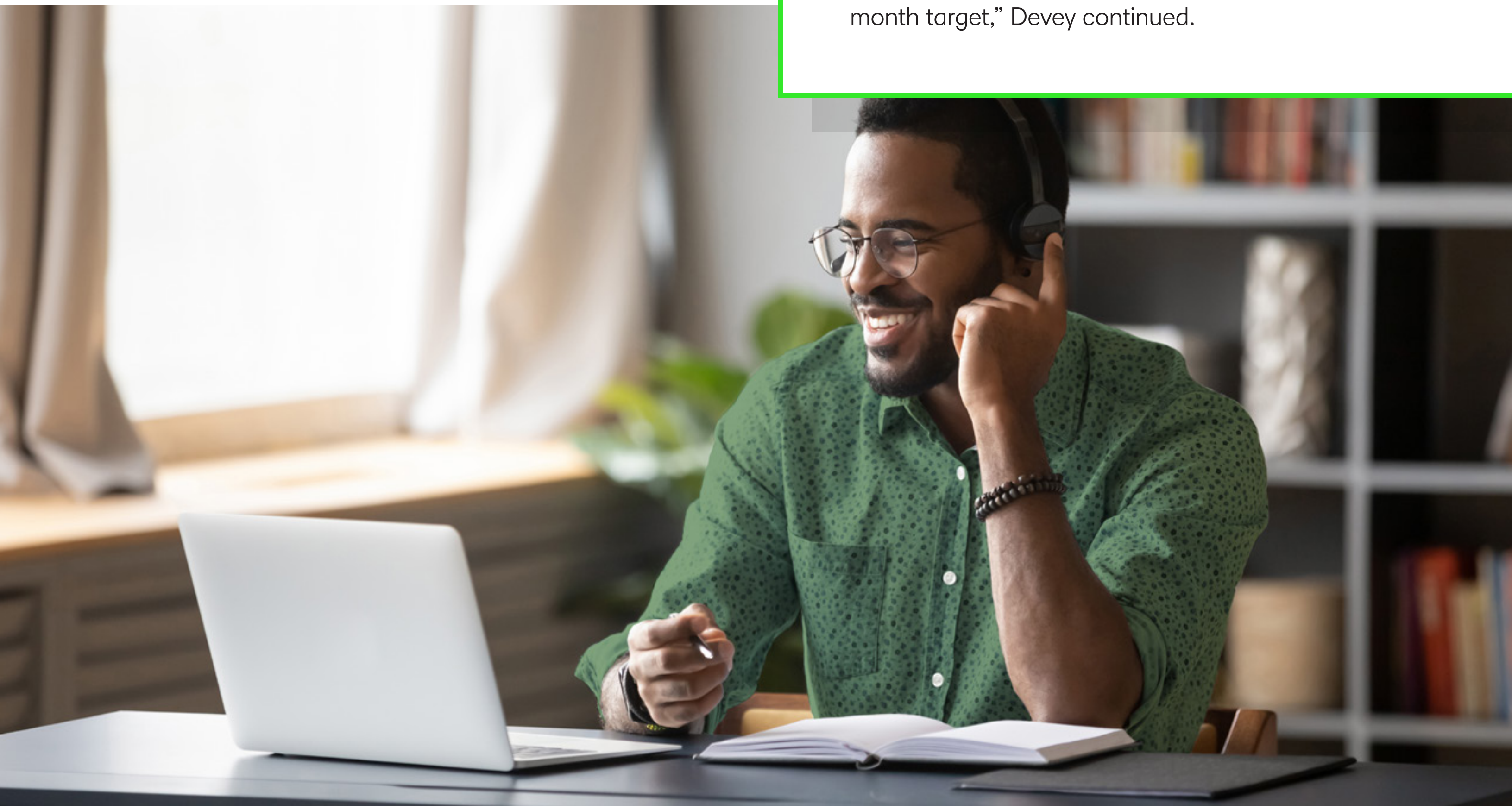
ALGONQUIN COLLEGE

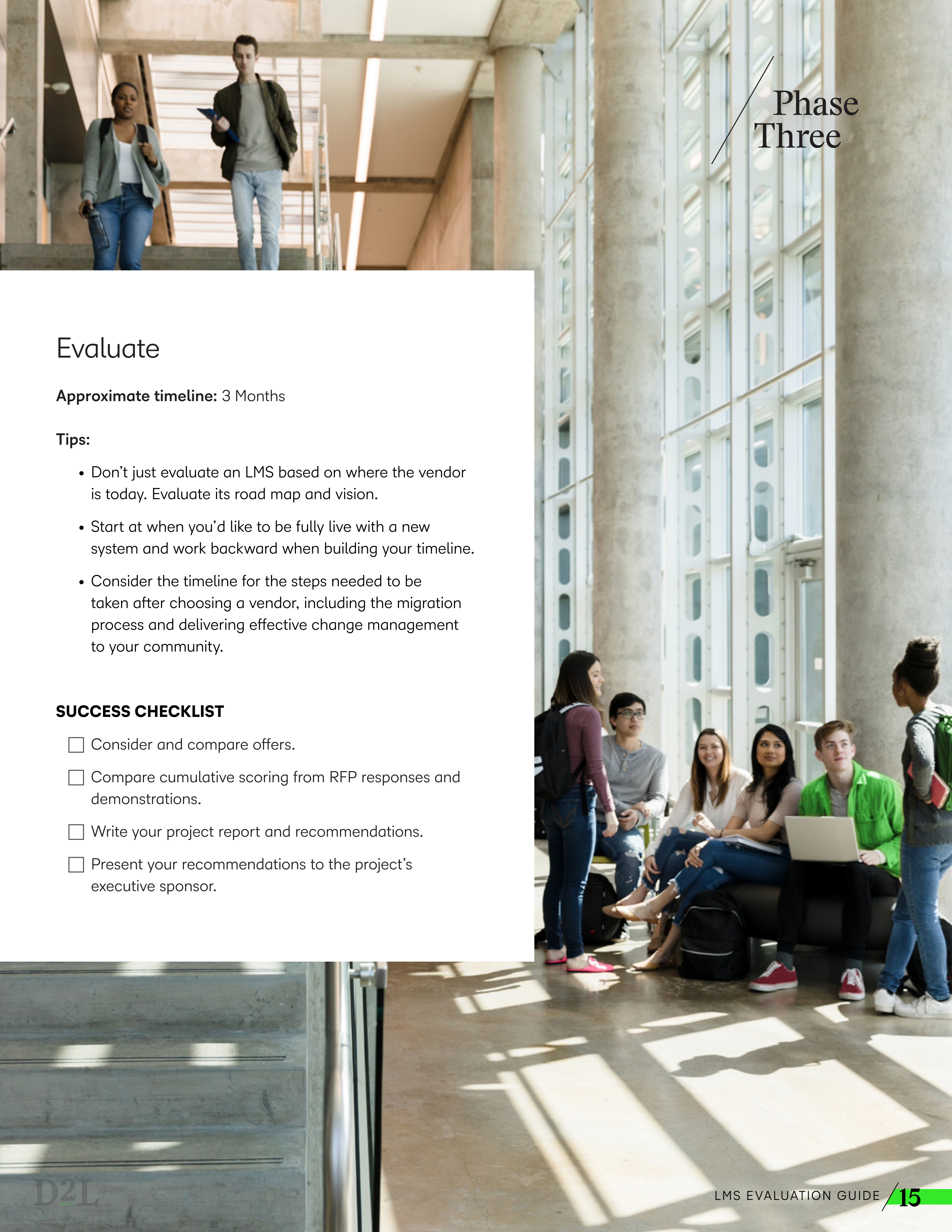
Algonquin College knew it was time to move from having six LMSs to one streamlined provider. The institution identified the provider that best met its needs by inviting the vendors to respond to an RFP.

Each supplier was interviewed and scored on performance, analytics, mobility, security and usability. For Algonquin College, D2L Brightspace was the top choice.

"D2L opened up a sandbox for us to trial the Brightspace platform, and after hearing the feedback from the faculty and students who tested it, as well as the answers we got from D2L during the interviews, we were sure it was the right choice," said Patrick Devey, dean of the Centre for Continuing and Online Learning.

"D2L laid out a detailed road map for our implementation and helped guide the training of our 1,500 faculty members within the time frame. Without their help we would never have met our six-month target," Devey continued.





Phase Three

Evaluate

Approximate timeline: 3 Months

Tips:

- Don’t just evaluate an LMS based on where the vendor is today. Evaluate its road map and vision.
- Start at when you’d like to be fully live with a new system and work backward when building your timeline.
- Consider the timeline for the steps needed to be taken after choosing a vendor, including the migration process and delivering effective change management to your community.

SUCCESS CHECKLIST

- [ ] Consider and compare offers.
- [ ] Compare cumulative scoring from RFP responses and demonstrations.
- [ ] Write your project report and recommendations.
- [ ] Present your recommendations to the project’s executive sponsor.

SAMPLE TIMELINE

Phase 3: Evaluate	Three Months
Consider and compare offers	
Compare cumulative scoring from RFP responses and demonstrations	
Write your project report and recommendation	
Present your recommendation to executive sponsor	

Every institution's timing will be different. Use the timeline as a guide and adjust it based on your needs.

Discuss your findings and establish consensus in your final meeting with the project team. 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—don't lose sight of what you've set out to do and the expectations you've set for potential vendors
2. Your recommendations based on the survey
3. The vendors' corporate stability, thought leadership and long-term partnership potential
4. The vendor's demonstrations
5. The sandbox experience

CONSIDER AND COMPARE OFFERS

At this point, the committee should do a full review and comparison of the offers from each vendor that is being considered.

Think not only about which offers hit all your must-haves, but also the ones that go beyond your expectations. Does an offer include everything your institution requires to be successful?

Be wary of upfront and surprise add-ons. These can range from messy integrations to added costs to achieve your nonnegotiable goals. Make sure the offers you're given are clear on what's included and ask questions to make sure you're getting what you need.

Don't forget about support. Make sure your offers are clear on the level of support your vendor will be providing and their response times. Be sure to understand whether you'll have an assigned employee (or more) from the vendor who will get to know your business. Working directly with the vendor's staff will start building the strong partnership needed for successful migration, adoption and growth.

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 that you remain focused on the needs and goals you identified earlier in the process.

WRITE YOUR PROJECT REPORT AND RECOMMENDATION

After all the time and careful consideration you've put into your LMS evaluation, you now have enough information to select the one vendor offering the LMS that best aligns to deliver on your goals. You can feel confident in choosing the vendor that is most qualified to support your success and meet your strategic goals. Congratulations on a job well done!

Many institutions find that writing a report outlining how you reached your decision and publishing the document both internally and externally generates enthusiasm for the path forward chosen by your evaluation team. Your students, faculty, staff and external stakeholders will appreciate hearing about your decision and the reasons behind it. You can invite the vendor onto campus or do a virtual session to help you generate buzz surrounding your adoption of its LMS, so you get maximum exposure and buy-in from all your user groups.

PRESENT THE RECOMMENDATION TO YOUR EXECUTIVE SPONSOR

With the evaluation complete, now it's time to present your selection to your executive sponsor and secure their seal of approval. Remember, you're not just presenting technical findings but also a business case. Show that your evaluation and selection process are aligned with the key objectives and strategic goals of the institution and how the vendor you have chosen meets your partnership requirements.

Phase Four

Select a Vendor

Approximate timeline: 2 Months

SUCCESS CHECKLIST

- ☐ Contract negotiations including IT, legal and other stakeholders.
- ☐ Share and celebrate with your community.

SAMPLE TIMELINE

Phase 4: Select a Vendor	Two Months
Contract negotiations including IT, legal, and other stakeholders	
Share with your community	

Every institution’s timing will be different. Use the timeline as a guide and adjust it based on your needs.

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?

SHARE WITH YOUR COMMUNITY

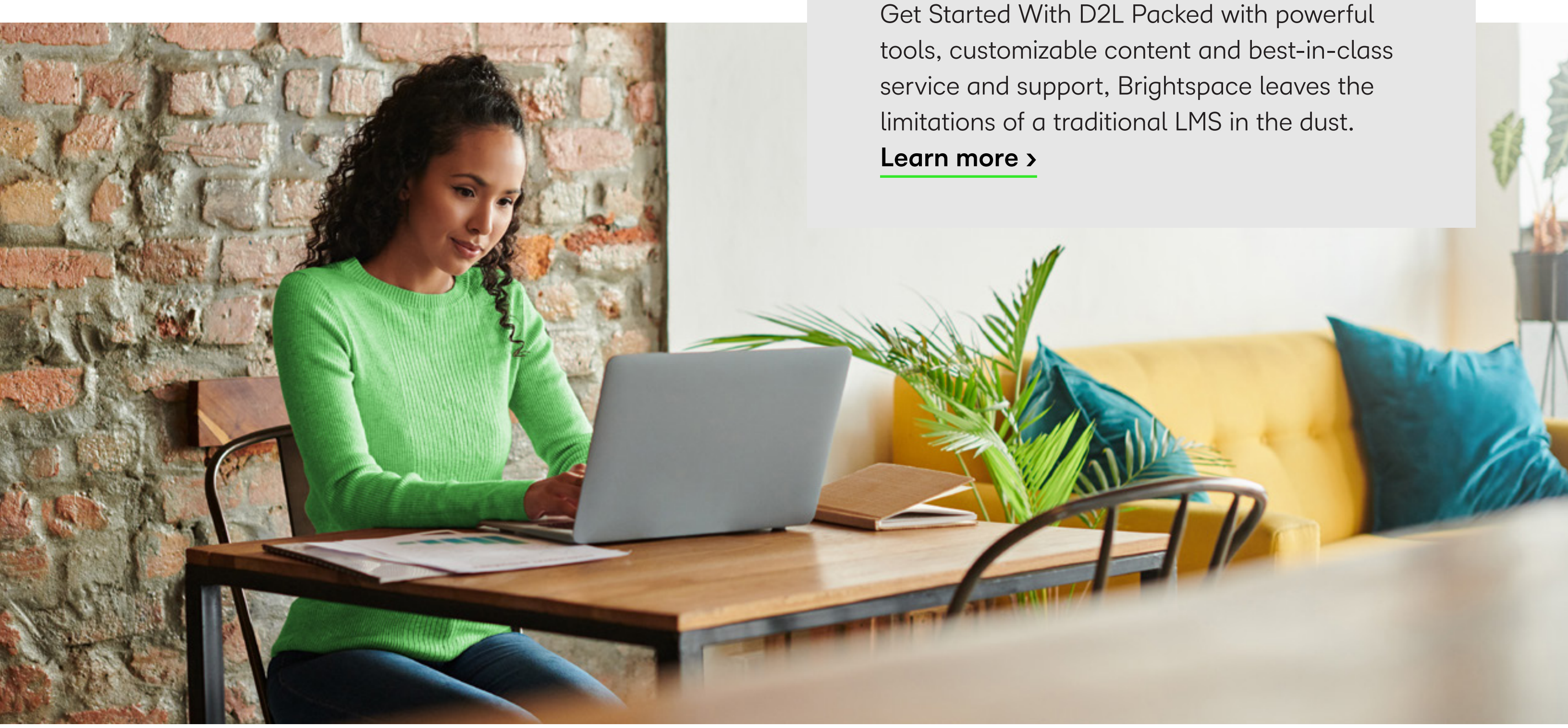
Your community is what has driven your LMS evaluation. Show them that you’ve listened to their needs and made a decision focused on addressing the goals they helped identify throughout the evaluation process. Keep them in the loop by sharing your decision on your website and social media. Celebrating the decision will also help generate adoption and buy-in of the new platform.

NEXT STEPS

While choosing the best LMS is a big step, it’s not the end of your journey. Next, you’ll need to work with your new provider to develop a change management plan including your implementation and migration strategy.

You’ll also want to have a plan of action to get your stakeholders up to speed on the LMS and manage the change to a new system.

Just because your current LMS isn’t broken doesn’t mean it’s the best fit for your institution. Make sure to establish and reflect on the goals of your institution to ensure your LMS aligns with the standards you’re striving to achieve.



Appendix

Survey Template

Use this template as a guide for creating a stakeholder survey as you consider adopting a new learning management system (LMS). Make sure to tailor it to your needs, using the specific questions and user groups that work best for your institution. Once ready, you can use a tool such as SurveyMonkey to distribute it and collect your data.

We need your ideas to help us improve our learning environment.

Find your user group below and share your experiences regarding our current learning platform. Use the provided questions as guidance and be specific with your answers.

For your responses, talk about how your suggested changes will improve your job or the quality of learning and teaching at our institution. We'll collect all your ideas and analyze them to come up with recommendations for a new LMS.

USER GROUP	QUESTIONS
Everyone	• What tasks do you currently perform on the LMS? • What would you like to do but can't? • 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? • If you could change one thing about the current LMS, what would it be and why?
Faculty	• Do you use the LMS only to manage content and courses? • On a scale where 1 is not important and 5 is very important, how important is it to have a consistent experience when using the LMS on your tablet, mobile, laptop and desktop? • On a scale where 1 is not important and 5 is very important, how important is it that the LMS helps you improve teaching and learning? • 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 the LMS could help with? • Are there programs you would like to run but can't (such as competency-based education) because of limitations with the current LMS? • How often do you participate in videoconferences with your students or peers? • On a scale where 1 is not important and 5 is very important, how important is it for the LMS to provide robust video features? • 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? • In what ways do you use LMS data to inform decision-making? • On a scale where 1 is not important and 5 is very important, how important is robust data collection provided by the LMS?
Students	• What are the most common tasks you perform on the LMS (e.g., check grades, take tests, read course content, discuss content with peers or professor, submit assignments)? • On a scale where 1 is not important and 5 is very important, how important is it to have a consistent experience when using the LMS on your tablet, mobile, laptop and desktop? • How does your current experience rank when using the learning platform on your desktop, laptop, tablet or phone? • On a scale where 1 is not important and 5 is very important, how important is it that you are able to access all your courses via your smartphone? • Does the LMS deliver personalized learning opportunities? • Does the LMS provide ways for you to take ownership of your learning? • Are you able to easily track your course progress in the LMS?

USER GROUP	QUESTIONS
Instructional Designers	• What are the most common questions and complaints you receive from faculty? • How much time do you spend educating faculty members on how to use the LMS? • What kind of faculty training model do you support? • On a scale where 1 is not important and 5 is very important, how important is robust data collection provided by the LMS? • In what ways do you use LMS data? • In what ways do you use LMS data to inform decision-making? • On a scale where 1 is not important and 5 is very important, how important is robust data collection provided by the LMS?
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 can't currently integrate with the platform. • Name up to 10 distinctive requirements that an LMS must have. • In what ways do you use LMS data to inform decision-making? • On a scale where 1 is not important and 5 is very important, how important is robust data collection provided by the LMS?
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? • In what ways do you use LMS data to inform decision-making? • On a scale where 1 is not important and 5 is very important, how important is robust data collection provided by the LMS?

LMS Demonstration Request for Vendors

You want to make sure you see everything a potential learning management system (LMS) has to offer during a demo. Use the example below for suggestions on what to ask vendors to demonstrate during your evaluation process.

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. Drag and drop content into the module—with both individual and multiple files. 3. Create a file. 4. Create an assignment (group/individual, formative/summative). 5. Create a quiz (with true-or-false questions, multiple-choice 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. View class progress in order to identify students whose learning is at risk. 2. Automatically 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 then compare the experiences.
Student	1. Complete a quiz. 2. Submit an assignment using drag and drop. 3. Participate in a discussion by recording video, adding multimedia or typing. 4. Check your progress in a class. 5. Log in on your desktop browser, tablet browser and phone browser, and then compare the experiences. 6. Use the mobile app to review course content and check your calendar or grades.
Administrator	1. Customize home page(s) or home page template(s). 2. Customize navigation bar(s) or navigation bar template(s). 3. Manually add a user or manage the SIS configuration. 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	1. Test two or three pages for accessibility. 2. Add closed captions to a video. 3. Demonstrate screen-reader functionality. 4. Test two or three pages for accessibility using a built-in or included accessibility checker.
Instructional designer	1. Edit the navigation bar(s) or navigation bar templates(s). 2. Edit course(s) or course template(s). 3. Edit content page(s) or content page template(s).
Executive	Extract data or run a report showing faculty engagement in a specific course.

Recommendations Report Outline

PROJECT OVERVIEW

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

STAKEHOLDER SURVEY

- How we organized the survey instrument
- Questions
- How many people responded

STAKEHOLDER FEEDBACK

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

SURVEY DISCOVERIES

- 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

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

NEXT STEPS

- Migration and integration planning
- Change management support
- Training

RFP Presentation Topic and Deep-Dive 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

Here are some examples of topics and session details for product deep dives:

TIME ALLOCATION	PROPOSED TOPIC	SESSION DETAILS
1 hour	Data and analytics	• Institutional data access (raw and business intelligence integrations) • Administrative learning analytics • Faculty dashboards for student success
1 hour	Supporting growth initiatives	• Noncredit and continuing education • Professional development • Corporate partnerships

Sandbox Evaluation for Stakeholders

Testing out potential LMS software will help us determine which product is the best fit for us. Share your experience when performing each of these tasks in the LMS sandbox.

ACTIVITY	EXPERIENCE
Log in to your course.	
On the course home page, post an announcement about an upcoming lecture.	
Post an announcement and drop in a video.	
Drag and drop content into the course module; move the content around.	
Create a file.	
Create an assignment.	
Create a quiz with true-or-false and multiple-choice questions, and a question with multimedia inserted.	
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, tablet and phone. Compare the experiences.	

ABOUT D2L

D2L is a global learning innovation company, reshaping the future of education and work. We're leading the way into a new era of personalized learning, driven by the belief that everyone deserves access to high-quality education, regardless of their age, ability or location. Our signature technology products—D2L Brightspace and D2L Wave—enhance the learning experience for millions of learners at every stage of life, from the earliest days of school to the working world. Learn more at **D2L.com**.

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