AmeriCorps Impact Suite | AMERICA LEARNS

Investing in the Best Technology for Your AmeriCorps Program

GRILL THE TECH VENDORS 2021-22

Do you know what bums us out?

When a program director comes to us and says, "I invested in Technology X last year.... It ended up being very different from what was promised during the sales process."

That. Shouldn't. Happen.

It especially shouldn't happen in the national service community, where most programs are led by small teams with far too many responsibilities. You don't have time to buy a piece of technology and then find out after the fact that it's not a good fit.

THAT'S WHY THIS GUIDE EXISTS.
We want you to invest in the best tools and systems for your program – even if it's not the AmeriCorps Impact Suite. So use the questions in this guide to make sure you end up getting everything you truly need from your technology partners – from features to customer service. The questions will also make sure you and your team are leading the evaluation process, rather than turning over that leadership to a salesperson.

"I was really impressed with your presentation. At the end of this month we are going live with our new database and I realized that we are missing a few pieces to our implementation and training. The biggest gap is supporting our people in the culture shift. The information you shared already is improving our training and management of the new system. I wish I knew about America Learns a long time ago!"

—Rachael Langtry
Team Manager, Friends of the Children-Portland
following a presentation of an earlier
version of this guide

OVERARCHING QUESTIONS

- Will we have a single login to access all program years' data, or is there a separate login for each program year?
- What does your price include? What doesn't your price include?
- Do you charge long-term data storage or archival fees?
- If we stop working together, will we be able to export all of our data on our own? Is there any circumstance in which we would need to pay to export our own data?
- Is the application mobile responsive? Is there an app?
- What accommodations have you made for members with physical disabilities? Intellectual disabilities?
- What is your data retention policy?
- How often do you back up data? What type of security accreditation does your backup provider have?
- If AmeriCorps were to be de-funded for six to 18 months, what would happen to your company?
  (Ask this to make sure that the company is financially healthy and can exist when the political winds blow this way and that.)
- If we were to stop working together, would we still have access to our data?
- How many full-time developers do you have? How long have they been with the company? (If the company is small and has a poor staff retention rate, the company may have a slow upgrade cycle as it can take time for new developers to understand an enterprise application.)
- Do you have a full-time quality assurance/ testing team?
- How often can I expect minor new features to go live? How often do major new features to go live?
- Can my organization use this platform for its non-AmeriCorps programming as well?
- What do you find most annoying about your application? What is the company doing about it?
- Will our data be saved in the same database tables as other programs' data?
- What are the circumstances under which your services succeed with AmeriCorps programs?
- What are the circumstances under which your services don't deliver for AmeriCorps programs?
- What's your renewal rate among AmeriCorps programs?
- How sustainable are you? Do you rely on money coming in through avenues other than revenue? (You'll want to be sure that you're not storing your most sensitive data in an application that may go poof in the short-run.)
- How often do you upgrade your service? How do you determine which features are built before others? Will I have access to all AmeriCorps-relevant upgrades?
- Can I pay you to add a feature? Will you build anything I need and can pay for?

TRAINING & IMPLEMENTATION

- How does training work? Will you provide us with one-on-one training? Will it be recorded for future staff to benefit from?
- How long will it take to set up, customize, and roll out the system to staff? Site supervisors? Members?
- What speedbumps might we run into during the training and implementation process? How will you help us avoid those bumps?
- What kind of training will you provide when new staff join the program?
- When a new staff member joins my program in the middle of the year, how will you help that person get up to speed on the system?
- Will you create all of the training materials we need to use with our members, supervisors, and staff? If so, are there any limitations to what you'll create for us?

ONGOING CUSTOMER SERVICE

- How do we submit a question or issue?
- Can we call you if we have a question? If we call, will we talk to a person or voicemail?
- What's the longest it will take for us to hear back from someone?
- Will you lead free, one-on-one screen-sharing sessions for us if we need hands-on support? If so, will you do that on our schedule, or will we have to work with your schedule?
- Are there different tiers of service to pay for? If so, why are different tiers needed?
- Can our members and site supervisors contact you for support?
- How often do you expect me or my team to ask for support after our first quarter with you? Why would we be contacting you?
- If we have an idea on how to improve the application, where can we share it?
- Tell us about the last client-sourced feature that went live. When did that happen and how did the team choose to develop that feature over others?
- How will you help us prepare for a new program year?
- How will you help us plan for staff transitions?

IMPACT TRACKING & PERFORMANCE MEASUREMENT

- Is the reporting system mobile responsive for members?
- If I'm not sure about the speciifc data I need to collect, can somebody in your company help me figure that out? What will that process look like? Cost?
- Before we sign a contract, can you show us exactly how the system will look for the specific data we need to collect?
- If life happens and we need to start collecting new/different data in the middle of a program year, can we customize the application on our own without any additional fees?
- Will your system create longitudinal reports covering any time period, including periods across multiple program years?
- How do you help ensure that members report their data accurately?
- How can we use your system to track data for individual clients, projects, and/or volunteers? Can staff and members import these records via Excel? Is there an extra fee for this?
- When members need to report multiple things (performance measurement data, Great Stories, reflection data), can they do all of that on a single form, or do they have visit multiple pages? If they have to visit multiple pages, how do you make that process easy for members who aren't comfortable with technology?

- Can members edit the data they report? Can staff edit their data? What kind of audit trail exists for those edits?
- If we need to collect data retroactively, how can we do that? Cost?
- If we realize that we forgot to include a specific question or field on a report, what can we do?
- How can we collect different types of data from different types of members? Cost?
- How can you help us track which members have submitted a report and which ones haven't?
- What kind of reminders do members receive to complete their reports? What control do I have over those reminders?
- What kind of reminders do supervisors and/or staff receive to review submitted reports? What control do I have over those reminders?
- Please demonstrate how your application compiles data so that it will eliminate or greatly reduce the time I currently spend doing that work.
- How can we customize the format of the data that's exported so we don't have to spend time manipulating Excel files--building pivot tables or the like?

TIMESHEETS

- Are the timesheet submission and approval pages mobile responsive? Is there an app?
- Before we sign a contract, can you show me exactly how the system will look for our program?
- How many time categories and subcategories can we create on a sheet?
- What aspects of the timesheets can we change after our program year begins? Can we add new time allocation categories and activity codes during the year on our own at no additional charge?
- Does your system release sheets according to our desired schedule? Can this be changed in the middle of the year? Is there an extra cost for changing this setting?
- How does your system track lunch and other non-eligible hours?
- How does your system check for and prevent zero-hour entries when needed?
- How do you make sure that members never enter hours for days they didn't serve?
- How does your system capture members' written descriptions of their time?
- What if we don't need written descriptions for each category or activity code? Can we prevent the display of the description fields?
- What does your system do to make sure members' written descriptions are accurate?
- Can we create different approval paths for members at different sites (EG, at Site A, we need two supervisors to sign off on hours, but at Site B, we only need one)?
- Are there limits to the number of members who may be included in any one report? Do you require that reports be "batched" if we are exporting data for more than a specific number of members at a time?
- If a member doesn't submit a timesheet by the stated deadline, do we need to manually reactivate the sheet for that member?
- Does your system track Accompaniment? How about teleservice activities?
- Can we use the system to track site supervisors' in-kind hours?
- Can you show us the specific steps we'll need to take when a member gets a new site supervisor in the middle of the year?
- Is the system compliant with OMB Circular A-122 (Appendix B)?
- What are our options for creating customized reports for our team, for my service commission, for the AmeriCorps agency, and for any auditors?
- Can we use the system outside of our AmeriCorps programming?

ELECTRONIC MEMBER FILES, ALUMNI ENGAGEMENT, & PERFORMANCE EVALUATIONS

- Is this side of the platform mobile responsive?
- Do you allow member files to be managed electronically, or do you just provide a checklist of what I have on file somewhere else?
- When I want to attach a document to a member file, does that document live on that member's profile or elsewhere?
- How do you encrypt sensitive text and files? How do you work to ensure data doesn't get into the wrong hands?
- Can members be enrolled through eGrants' file export tool?
- Are there caps on the number of Excel imports for creating and/or updating member records?
- How much control do we have over which fields show up on members' files?
- If, one day, we decide that we want to start tracking a new piece of information in members' files, how can we do that? Is there any chance that we'll incur customization fees or delays?
- How can members populate or update their own files?
- How do you make sure members can't delete their own files?
- How easy is it to figure out which members have missing information in their files?
- What does exporting members' files look like?
- Can alumni update specific information in their profiles?
- Can we manage mid-year and end-of-year performance evaluations through the application?

TIMESHEET & MEMBER FILE REVIEWS

- When program officers and/or auditors need to review files, timesheets, or other data how do you make life easy for us?
- Can we control which data people see?
- How much training is involved for people to review files? What kind of support is provided to them?
- Do we control when program officers and auditors access our data, or are they going to be in control?
- What kind of support is provided to people performing audits and file reviews?
- How long does it take for auditors and file reviewers to learn how to use the system?