COLLEGE SOCCER SOFTWARE EVALUATION TOOLKIT

1. Define what you actually need

Start here, before vendor demonstrations. Complete the six pages with relevant staff. Write no real athlete health information. Decide which needs are essential and which are optional; a long feature list is not the goal.

FICTIONAL EXAMPLE USED ON ALL SIX PAGES

Northbridge College's women's soccer staff already have clinical records and a staff platform. They want clearer follow-up ownership and current coach-facing participation information. All systems, vendors and amounts in these examples are fictional.

ESSENTIAL = MUST BE MET. OPTIONAL = USEFUL, BUT NOT A CONDITION OF BUYING.

Requirement	Why it matters	Priority
R1: Show who accepted follow-up.	Staff know who owns the next step.	Essential
R2: Show coaches current participation information without clinical notes.	Coaches can plan without unnecessary clinical access.	Essential
R3: Provide a weekly summary chart.	Convenient for a staff meeting.	Optional

When you finish: You have a prioritized requirements list. Agree priorities with the people who use and approve the system. Add another sheet only if a further need matters.

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2. Check what you already have

Ask each system's owner to show what it can do before assuming you need another platform. Match your needs from page 1 to the current systems. This can avoid buying a capability you already own.

COMPLETED EXAMPLE: NORTHBRIDGE'S CURRENT POSITION

Clinical record: Keeps clinical notes; remains the authoritative clinical record.
Current staff platform: R2 role separation was shown in a fictional test. Its owner says R1 follow-up can be configured, but that has not been tested.
Next step: Ask the owner to demonstrate R1 using fictional information.

FOR EACH NEED, WRITE: WORKS NOW / NEEDS A CHANGE / MISSING / NOT CHECKED.

Need from page 1	Existing system and current position	Who will check the gap?
R1: Follow-up owner	Staff platform: needs a change; not yet demonstrated.	Platform owner: run a fictional test.

Keep medical records in their approved system. If information must be copied elsewhere, agree who maintains it and which version staff should trust.

When you finish: You know what is genuinely missing and what still needs checking. Include the current or configured system in the comparison on page 3.

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3. Compare the same requirement

Show each option the same fictional task. Enter a result and one line of evidence in each cell, as below. Do not add up scores. An unmet essential need cannot be canceled out by extra optional features.

Shown: you saw it work. **To check:** claimed or not yet tested. **Not met:** the option failed the requirement. Note the demo date or document where practical. A demo is not a complete security assessment.

YOUR OPTION NAMES: CURRENT _____ A _____ B _____

FICTIONAL COMPLETED ROWS; USE THE SAME FORMAT IN THE TWO BLANK ROWS.

Requirement / priority	Current system	Candidate A	Candidate B
R1: Follow-up owner **Essential**	**To check** Owner test not yet run.	**Shown** Fictional demo recorded the accepting role.	**Not met** Demo could not identify an owner.
R2: Coach view excludes clinical notes **Essential**	**Shown** Fictional role-view test.	**To check** Role access not yet tested.	**Shown** Fictional role-view demo.

When you finish: Circle essential "To check" or "Not met" results. Request the missing evidence or rule out an unsuitable option. Check institutional requirements next.

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4. Get the right people to review it

Send the questions below to your institution's usual reviewers. You are identifying owners and missing evidence, not making legal or security judgments yourself. An unresolved required approval means "not ready to buy."

COMPLETED EXAMPLE: A REVIEW REQUEST

Northbridge's Athletic Trainer lead asks IT to test coach access and account removal. IT replies: "Coach view checked; account-removal test still needed. IT owner to confirm by Friday." The team records the open check rather than marking the system approved.

Who reviews access and technical protection?

Ask IT about role limits, account removal, security, backups and incident handling. Example answer: IT owner; account-removal test due Friday.

Who reviews data use, retention and exit?

Ask privacy/legal staff about necessary data, storage, vendor use, deletion, export and applicable student-record rules. Example: Privacy lead; deletion terms requested.

Who approves purchase and clinical fit?

Ask procurement about contracts, accessibility and signing authority; clinical leadership confirms clinical records and decision authority. Example: Procurement lead; contract review pending.

When you finish: You have named reviewers and open checks. Obtain their required approvals before purchase or use with real athlete information.

A "HIPAA compliant" label alone does not settle college student-record obligations. Follow institutional privacy and clinical authority arrangements.

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5. Compare cost and staff effort

Use written quotes for the same team size, users, period and currency. Include the current-system option. Separate money paid from staff time so a low subscription does not hide extra operating work.

USE ONE YEAR FOR BOTH OPTIONS. ADD OTHER REQUIRED QUOTED CHARGES.

Option	First-year cost calculation	Internal staff effort
Candidate A (fictional example)	$1,200 annual fee + $300 setup **$1,500 first-year vendor cost**	4 setup hours; 20 minutes of weekly administration.
Current system		
Candidate		

These are invented examples, not vendor prices or expected savings.

Confirm what is included: training, support, hardware or connections to other systems if needed. Ask about renewal increases, cancellation and data-export or exit charges.

COMPLETED EXAMPLE: IMPLEMENTATION PLAN

Northbridge assigns the platform owner to setup and the Athletic Trainer lead to a fictional test. Training must fit staff capacity; IT/privacy checks must be complete before real use. Until then, the approved current process continues.

Your plan: owner, training/support needed, and what must be ready before use.

Result: Compare the affordable, approved options using both cost and realistic staff effort.

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6. Record a practical recommendation

Choose a next step you can explain: keep, configure, test, buy or pause. Use the evidence from pages 1-5. A sensible recommendation may be to improve the current system or wait for missing information.

COMPLETED EXAMPLE: NORTHBRIDGE'S RECOMMENDATION

Recommendation: Test the current platform's R1 configuration before buying.
Reason: It already showed R2; Candidate A still needs its access test and Candidate B did not meet R1.
Next step: Platform owner and Athletic Trainer lead run a fictional test by Friday. Keep the approved current process; do not introduce real data into an unapproved trial.

What do you recommend, and why?

Example: Test the current configuration because one essential requirement remains unverified.

What evidence or approval is still missing, and who owns it?

Example: Platform owner to demonstrate R1; IT/privacy reviewers to close the required checks.

What happens next, by when, and after the result?

Example: Test by Friday. If it meets the agreed requirements and approvals, configure; otherwise compare remaining options.

When you finish: Share this recommendation with the authorized decision-makers. It records a proposed next step, not permission to purchase.

Further guidance: EDUCAUSE vendor review · FERPA / HIPAA guidance · NCAA medical authority (NCAA context). Original educational worksheets; not a vendor ranking, clinical tool or institutional approval.