



# Checklist for iPASS Predictive Analytics Technology

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*Below is a compilation of questions and items for institutions to consider as they embark in considering and deploying a Predictive Analytics system.*

## What do you need to know about the vendor?

- How long has the vendor been in business?
- How many active clients is the vendor currently serving? Of these active clients, how many are newly signed, in the design phase, in early implementation, or established users employing all product features?
- What is the planned growth trajectory for the vendor? How many clients have been added in the past six months? In the past year?
- Given planned growth, does the vendor have sufficient existing capacity?
- What is the client retention rate?
- What is the current utilization of the product by the current client base? For example, are most institutions using all features of the product across the institution? Or is the product being used by select colleges or units?
- Can the vendor provide an overview of the product when first developed and launched, and provide a comparison to show the evolution of the system?
- What are the planned system upgrades in the next 30, 60, 90 days and beyond?
- Is a well-developed template already available that defines elements including the composition of the leadership team, frequency of meetings, and major milestones?
- What implementation services does the vendor use? Is there a dedicated consulting team? Will your institution have a dedicated consultant?
- Is there a remediation process when cases arise where the client presents unresolved issues?
- What is the typical timeline from the signing of contract to launch?
- What technical support does the vendor provide during each of the key project phases? This especially includes product launch and the post-launch period where platform adjustments and modifications are common.



## How will the software interface/integrate with other critical systems in your student support work?

- Will it integrate with your Student Information System (SIS)?
- Is there out-of-the-box integration, or will scripts be needed to be written to integrate this information? If so, consider time, maintenance, effort and resources.
- How often can you be sending SIS updates to the system? And how often is it needed? The frequency will depend on what the predictive model is reading and doing.
- Can you force a refresh of the updates more frequently during critical times on campus (such as registration windows, just prior to drop deadlines, etc.)?
- If the system is hosted, can you maintain secure data connections?
- Has the system passed a security scan? If required by your campus, can certain data be encrypted?
- How many data sources is it possible to integrate into the system? Can the system operate with a limited set and grow over time? Can the institution integrate additional data sources on its own, or will it require vendor changes?
- Which data elements are updated in “real time” versus in batch? Can different data elements be updated on different schedules?
- Will it integrate/harvest the data from your early alert system and your advising case management system (if you have one)?
- Will it harvest your CRM (usually used in admissions)?
- What other systems do you have on campus that might have important student information (for example, tutoring support systems, swipe card systems, etc.)? Investigate whether this information can be harvested/used in the predictive models.
- Will it integrate/ harvest the learning management system (LMS) used by faculty? Consider how your institution is using the LMS currently and its plan for the future as well. If your institution captures student success data such as grades and attendance tracking in the LMS, then you should consider these data points as critical.
- Will it integrate with other “adaptive learning” systems your faculty may be using? Consider and explore how you may leverage these systems in your predictive models.
- Can the information from the predictive analysis be displayed/ stored in another system that may be the one you use for faculty and staff to do their work? If so, how often will you need to refresh this information? Consider effort to integrate.



- Does the system allow for single sign-on? How?
- As an additional platform, what features are available that will facilitate the work of users? This would include search and filter functionality and ability to communicate from the platform.
- What information tracking features are available in the platform that allow follow-up with students and utilization of the systems by users?
- Is the system mobile app ready?

### How is the Predictive Score generated?

- Risk prediction for individual students can be presented at multiple levels. Is there a “risk prediction” indicator or score? Are there other risk prediction measures that could be easily employed by users to allow the identification of students?
- Can you determine what goes into or should be considered for inclusion in the predictive model for your students?
- Can you weight certain data points higher than others?
- Can the model be grown to include new data over time? If so, will the inclusion of new data be driven by the institution or by the vendor?
- How often can you refine?
- Are there methods in which institutions can create “watch lists” based on data within the system, such as grades or course progression?

### What kind of reports is available out of the box with the system?

- Can any user with permissions run reports, or can only system administrators run reports?
- Can advisors run reports on groups/lists of students? If so, can these be downloaded and printed?
- Can reports be customized?
- Can actions/work lists be created based on reports?
- What are the most commonly used reports and why? How are these reports related to informing users and administrators about application of the system strategically?
- Can certain data, such as financial information, be masked or hidden for certain groups?



## How much time and effort will it take to implement?

- Does the vendor provide a “test system” to deliver training and/or provide quality assurance? For example, can the test system allow training of staff to send messages – without really sending out the messages?
- Does the system come with any easy help or training embedded in the software?
- Has the vendor provided estimates for the time and effort required to implement the system? What are the best practices other institutions have followed to go live?
- How much time and effort will you need to devote to training staff to use the system? Take into account that you may want to provide training for your advising staff and faculty, as well as for your IR staff. Institutional researchers may need a more detailed understanding of the predictive model/scores and the analysis.
- Does the vendor have a “users” platform where institutions share best practices, etc.?
- Is the vendor willing to provide benchmarks for utilization of the system that would allow the university to assess its progress as the system is rolled out?

## Other things to consider:

- When addressing your implementation plans, consider implementing in phases with the initial phase being one of discovery. The use of this “new” predictive information usually brings more questions, than answers in how to best train staff to utilize these tools.
- Be prepared to embed staff development time that goes beyond simply training in software utilization as the use of predictive analytics in student support efforts leads staff to recognize the need for new approaches. .