

# idealware

## Software Review Methodology

Each Idealware report is written by a scrupulously unbiased team made up of two or three paid authors. Each author has a background in nonprofit software, and at least one is an expert in the area of the report. These authors – typically independent consultants or nonprofit staff members – are picked carefully to ensure that there are a number of different perspectives on the team.

One of the authors takes a leadership role, but the team makes each decision together. They split up the interviews and writing tasks. Informal knowledge sharing tools like wikis, daily status emails, and frequent meetings help the team work as a coordinated whole. Together, they:

- **Create the List of Tools to be Reviewed.** They begin by carefully defining the area that the report will cover. What audiences and business issues will it target? What basic criteria must the tools meet to address these business needs? Through internet research and informal polls of the nonprofit community, the team generates a laundry list of tools that meet these high level criteria. If they find more than 30 tools, they refine the business criteria to pare down the list to a number they can more reasonably compare.
- **Create the Criteria for Review.** Many organizations' needs are quite similar. To understand these needs, the team talks to a set of consultants and organizations who have worked with relevant tools. The authors then pull out the list of features and qualities that will address most of the needs of most of the target organizations. They also create profiles for a set of "typical" organizations; these profiles define the typical needs that must be addressed in the report.
- **Demo Tools and Interview Product Teams.** The report team splits up to interviews a representative from each product on the laundry list. They ask the representatives to demonstrate each of the key features over the web (if they don't have a web demo tool, Idealware provides one). This lets the team evaluate the true nature of each feature, as well as product usability. The team writes up the findings for each tool in a standardized product summary template.
- **Gather User Feedback.** Some traits – like ease of set up, vendor service, or long term stability – are hard to measure without actually using each product. The team gathers this type of data from actual users. Product users are not always easy to find; they are pulled from those who have volunteered to take part in Idealware surveys (currently, more than 375 people), clients that the team can find via the web, and (if necessary) clients provided by the vendors. The report team collects user opinions using surveys, interviews, or both.
- **Define Rubric and Guidelines.** The vast amount of data collected has to be analyzed so that others can make sense of it. The team works together to create a rubric – a grading scheme – to allow them to compare the different aspects of the tools. For instance, what are the qualities that define excellent reporting functionality? Unusually poor reporting functionality? As the authors go through this process, they also define the key difference between the tools for use in the "How to Choose" section and comparison charts.
- **Write, Revise and Publish Report.** The team writes a summary of the typical features and functions of the reviewed software tools, a set of guidelines for how to choose the right tool, detailed reviews of each product, and comparison charts. To create recommendations, they carefully pull out the tools that best meet the needs of each of the "typical" organization profiles. The authors then distribute a strong draft to a wide set of reviewers in the target audience – some with experience in the report area, and some without – and revise the draft to their comments. Finally, the finished report is posted on the Idealware website and widely promoted.