Decision-Making Criteria for Selecting and Reviewing Assistive Software Technology

Version 1

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Table of Contents

Background

As part of the [Digital Learning Strategic Framework](), McMaster has committed to creating a clear and transparent process for the lifecycle for teaching and learning technology which would include procuring, deploying, supporting, and decommissioning technologies. As part of this commitment, the University is beginning with a review of technology and software licenses to assistive technologies (AT) to support access to education for our learners with disabilities.

We define assistive technology as any tool which might help learners with disabilities access and engage with course material and the broader university environment. It can be a tool dedicated specifically to learners with disabilities, such as Kurzweil, or something that many people use but still offers additional support to those who need it, like Office 365.

A key step in this process is to have clear criteria for guiding decisions regarding the future of assistive technology at McMaster. Having consistent guidelines for choosing how and when to renew, upgrade, replace, etc., licenses for assistive technology will help ensure that every relevant group remains informed about how McMaster seeks to manage AT. For this first phase of developing criteria, we focused exclusively on assistive technology software. These criteria should be considered by anyone looking to procure, renew, upgrade, or decommission assistive technology software.

Once these criteria have been tested and refined, they could be expanded to include hardware and spatial contexts as well.

Methodology

The project team conducted a series of interviews with key informants from units around campus. These informants spoke about how their units handle assistive technology software, which forms of AT software are most common among their userbases, and what factors they would want considered when purchasers at McMaster makes decisions about AT software. The project team then compiled notes from the interviews and started to make thematic connections between them. The criteria and recommendations below come from some of the major themes discussed by multiple informants.

Please see **Appendix A** for a checklist version of the criteria.

Criteria

These are the factors which came up most often in the interviews. They form the basis of what we should consider when investing in assistive technology.

1. Vendor Vetting

Before signing with a new vendor – or even a new tool from a familiar vendor – we should find out what working with them is like. This includes everything from assessing their accessibility standards to researching their development plan to their feedback intake methods. Some things to consider:

- Do they have a VPAT (Voluntary Product Accessibility Template) or Internal Accessibility Report available for us to read? Has someone independently verified their claims?
- How open are they about their development? Do they have a timeline for improvements and upgrades for their product?
- Do they accept feedback from clients and is that feedback incorporated into their development?
- Does the vendor provide any usage metrics within their software?

2. Access

One of the biggest ways to support users of assistive technology software is simply making sure they have access to it. We use "access" here broadly, in the sense of meeting users where they are. Many users of AT will come to McMaster with a personal device equipped with what they need – and what they can afford. For a tool to be useful, we must strive to use ones which can help the greatest number of users. Similarly, if a tool is compatible with users' own devices, it reduces the cost burden of buying new devices. When considering a new tool, we might ask:

- Is this tool compatible across platforms? Does it integrate well with the institution's learning management system?
- Is there a more affordable (and therefore more financially accessible) version of the tool that people already use on their personal devices?
- Is this tool approachable for new users? What is the learning curve like? Is there a "lower tech" version with similar usability?
- How flexible is this tool? Will users be able to leverage their own devices?
- Who will have access to this technology? Is it a site license where everyone on campus can use it, or should it be designated to one specific department's users?

3. Ease of Maintenance and Use

Tools which require extensive upkeep or regular maintenance to continue running can lead to the groups responsible for them going over capacity. When considering a new tool, or even whether to renew a current one, ask:

- How are updates handled? Are they automatic or manual, and if manual, how much work is involved? How are they communicated to clients and end-users?
- Has someone already agreed to do this work? Are there technical experts available to support this tool?
- Does the vendor have resources readily available for tech support, such as documentation or video tutorials? Does the vendor provide training?

4. Communication

People can only use the tools that they know we have. If we are going to pay for a license, we should make sure that everyone who has access to the license is aware we have it, so that users are not left searching when they need something specific. We also need to make sure that all relevant groups are considered before making a purchase. Some questions we may ask include:

- Has everyone who works in assistive technology had a chance to consider the purchase (e.g. someone from Student Accessibility Services, someone from Library Accessibility Services, someone from the MacPherson Institute, etc.)? Does another unit on campus already have a license with this vendor?
- How will we advertise to the campus community that we have this tool? Where can we share it so that people are aware of what we have?
- How will we communicate who provides support for the tool?

Additional Recommendations

These are suggestions for ways to improve the assistive technology experience at McMaster but are *not* specific to the procurement or maintenance of new tools.

 These additional recommendations align well with the AODA PSE Recommendations report, specifically Barrier Area 4: digital learning and technology.

1. Formalized Feedback Mechanics

None of the units on campus dealing with assistive technology have formal channels for users to provide feedback on our AT. The closest thing to a formal mechanic in place is someone submitting a ticket to the campus' learning management system support team, who then forward the issue to the vendor.

Having something more substantial in place would allow us to track how many people are using each AT tool as well as inform us if there are certain tools which we should either not be renewing or be expanding our licenses.

2. Minimum Standard for Digital Accessibility

McMaster as an institution should determine a minimum standard for digital and end-user accessibility for any new software it is interested in trying. Anything which does not meet this standard should not be considered. Determining these standards would require the time and cooperation of stakeholders across campus.

3. Paid User Testing by Accessible Technology Users

Users of AT software around campus should have the opportunity to test new software before we commit to making a full purchase. This testing should be paid both to value the time and skill that assistive technology testers employ as well as to express within McMaster that this work is essential to the IT procurement process and digital accessibility practices.

4. Centralized Support

Support for AT software should be provided centrally. Distributing support across different units can lead to inconsistent support standards and gaps in what AT software is actively being supported and maintained.

Appendix A: Assistive Technologies Criteria Checklist

Before making any decisions regarding assistive technology software, please go through this list and ensure that any new software meets McMaster University's standards.

1. **Have you vetted the vendor?**

   - ☐ Do they have a VPAT or Internal Accessibility Report?
   - ☐ Are the vendor's accessibility claims independently verified, e.g., through end-user testing by persons using assistive technologies?
   - ☐ Have you checked their development timeline?
   - ☐ Do they accept user feedback?
   - ☐ Do they provide usage metrics in their software?

2. **How widely accessible is this tool?**

   - ☐ Does this tool work across different platforms?
   - ☐ Does it accept/export to multiple file formats?
   - ☐ Does this tool integrate with Avenue to Learn / Brightspace instances?
   - ☐ How costly is this tool for individual users?
   - ☐ Can users provide their own devices?
   - ☐ How steep is the learning curve for this tool?
   - ☐ What kind of licenses does this tool have?
       - ☐ Open/Unlimited
       - ☐ Network
       - ☐ Site
   - ☐ Where would this tool live?

3. **How will this tool be maintained?**

   - ☐ Are updates automatic or manual?
   - ☐ Has a unit or individual agreed to provide technical support?
   - ☐ Has a unit or individual agreed to provide periodic maintenance?
   - ☐ Are there resources available on the vendor's site to help with training?

4. **How will this new tool be communicated across campus?**

   - ☐ Have you reached out to other groups on campus for their input?
   - ☐ Does anyone else on campus already hold a license to this tool?
   - ☐ How will you advertise this tool to the campus? To whom?
   - ☐ How will you advertise who is providing support for this tool?