

Guidelines for Evaluating Vendors and Training Programs

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Manufacturing, Distribution and Marketing Department

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Guidelines for Evaluating Vendors and Training Programs

Whether you are purchasing one program, product, or service to meet a specific need, or are evaluating a number of training providers to develop a complete training and development program for your facility, you will soon discover that there are a number of vendors that will meet your needs. Multimedia companies, performance consultants, product developers, workshop presenters—whatever the title—they all claim to have the answer to improving your training and development outcomes and saving you time and money in the process.

Whether you are new to the training field or are an experienced practitioner, choosing a vendor that meets your needs can be a difficult and time-consuming process of evaluation and re-evaluation. The trainer may consult other trainers from API districts or from their own network of industry contacts. But that may not provide enough guidance, and even after you have collected such information, you may still be unsure of whether you made the correct decision.

The American Petroleum Institute's Central Committee on Training and Development recognized this difficult decision making process, and based on years of cumulative experience in the training field procuring vendor products and services, they have developed a guide to help you choose a vendor.

Enclosed is a checklist and an explanation for each item. Use of the checklist and evaluation tools can help you evaluate and choose the vendor that is best for you. As the trainer goes through the checklist, he should consider the following guidelines:

1. Each criterion does not carry equal weight. Realize that some questions will be more relevant than others.
2. Not all questions will apply. The trainer should decide which are more important based on their own needs.
3. The questions are guidelines and should not be construed as requirements by the API Central Committee on Training and Development, or any other group.
4. The criteria have been divided into modules so the trainer can use all or part of the checklist.
5. There is no correct amount of “Yes” or “No” answers required to accept or reject a program.
6. Extra space has been included on the checklist to add questions specific to individual sites.
7. One or more criteria may not be relevant for the trainer’s particular needs or circumstances.

Disclaimer: This document is intended to serve only as a guide; it does not reflect API’s endorsement of any particular vendor or training program.

CHECKLIST FOR EVALUATING VENDORS AND TRAINING PROGRAMS
EVALUATION CRITERIA

	Y	N	N/A
1. PROGRAM DESIGN AND FUNCTIONALITY			
1.1 Program matches the company's learning objectives and company's strategic direction.			
1.2 Deliverable media is compatible with learning and organizational style			
1.2.1 The program content matches the culture and style of the organization.			
1.2.2 The learning design and approach will be effective with the target audience.			
1.2.3 Examples are relevant to the industry.			
1.3 Programs come with a leader's guide.			
1.4 Company has a train-the-trainer program.			