

How to Compare Technology Platforms

An Introduction to Requirements Gathering & Vendor Research for Nonprofits

OBJECTIVE

Provide some guidance on how to effectively evaluate technology platforms, applications, and systems to ensure your organization can adequately shift to conducting business in a virtual fashion.

What is Requirement Gathering?

- At its core, requirements gathering is the process of understanding what you would like built and why, including the specific features you and your stakeholders would like to see in the final solution.
- Requirements allow you to communicate your vision to a vendor who can implement your vision.

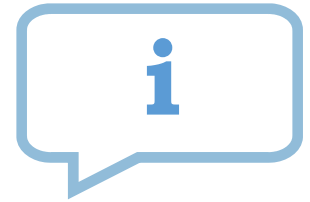
Four Steps to Requirements Gathering & Vendor Research

Step 1: Review & Understand Your Current In-Person Model

- What does your current in-person model look like? What components need to be virtualized?
- Examples: Fundraising event (Gala, Silent Auction, Race, etc.), Client consultations, Classroom learning for students or constituents, Training for employees or volunteers, Conference or convention
- Brainstorm what aspects of your in-person model could still work in a virtual model

Step 2: Key Questions You Should Review and Ask Yourself

- **General**
 - Who is your audience/user?
 - Who are your players and stakeholders?
 - What is your budget?
 - What do you want your audience to do?
 - Why is this important?
- **Product**
 - Features & Functionality
 - What are the features/functionality you require?
 - Define your Must-haves vs. Nice-to-haves
 - Maintenance
 - Is maintenance needed, or does the system maintain itself?
 - If maintenance is needed, who in your company will do this and how?
 - Cost
 - Understand one-time vs. ongoing costs
 - Do you purchase with one-time payment?
 - Are there monthly and/or annual costs?
 - Technical Support
 - What is your technical skill background?
 - Does the product you are considering have extensive technical support?
 - Does the product you are considering have good documentation?
 - Timeline
 - What are your immediate and long-term needs?
 - Will you need to break up implementation of the product into multiple projects or phases?
 - Scalability
 - Will the system grow/scale with your business growth?
 - Will the system last and work after this situation/crisis is over?



Step 3: Finalize Requirements and Create an RFP/Q

- Based off your answers to the general and product-related questions, you can now define the scope of the project and what your final product may look like before contacting vendors.
- Request for Proposal or Quote (RFP/Q): A document outlining the scope and requirements you are seeking for your virtual technology solution to solicit vendors to provide you price quotes on using their product.
- Tip 1: Some companies offer reduced pricing for nonprofits. It never hurts to ask!
- Tip 2: See TechSoup's [RFP Library](#) for examples of nonprofit RFP/Qs

Step 4: Document Responses from Vendors

- Use a matrix to help you document responses and quotes from vendors to select a final solution. The matrix can include:
 - Platform and Solution Types:** Along the top of the table, list all the potential technology solutions that are viable options.
 - Features & Functionality:** On the left side of the table, list the requirements / functionality your client is looking for, as part of their solution.
 - Assess Your Platform:** Based on the functionality of each solution, verify whether the solution meets your needs by marking the box 'Y/N' and adding any comments where necessary (for example, why requirements are not met, workaround considerations, etc.)
 - Calculate the Total Cost of Ownership:** Cost of ownership in terms of money and resources that you will incur for the solution such as the set-up costs and effort, deployment costs and effort, monthly maintenance fees, any fees associated with making updates, hosting fees, etc.

Example Vendor & Tool Comparison Matrix

A nonprofit is looking to move all their in-person volunteer training online. They specifically are looking for an online orientation and training system that will integrate into their existing web site. Some of their required features:

Requirements

- Easy to maintain and host text and video-based training modules
- Quiz capability upon completion of each training module
- Ability to assign badges as incentives when volunteers complete training tracks
- Query capabilities that allows for locating volunteers with specific training needed to fill roles
- Potential integration with existing volunteer management system to avoid multiple user accounts

	Final Solution				
	Existing Platform	LearnDash	LearnPress	LifterLMS	Sensei
Easy to Edit/Maintain	N	Y	Y	Y	N
Quiz capability	N	Y	Y	Y	Y
Badges/Certificates	N	Y	Y(+\$49)	Y	Y(+\$25)
Large volume of users	N	Y	Y	Y	Y
Single package (no add-on)	N	N	N	Y	Y
Support	N	Y	N	Y	Y
Integration Ability	N	Y	Y	Y	Y(PHP needed)
Mobile Friendly	N	Y	Y	Y	Y
True Cost of Ownership (\$)	N/A	\$159/year+	Add-ons needed (\$49 min)	Free	Free

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