



NCSS
National Council
of Social Service



ThunderQuote

TECHNICAL EVALUATION USER GUIDE

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Introduction

What is this Technical Evaluation guide for?

This user guide was designed to help Social Service Agencies (SSAs) assess their current technology or software systems, evaluate the current gaps, and to identify pain points. After the evaluation is complete, the user will also be able to analyse possible solutions to bridge these gaps and begin their digital transformation.

How do I use this guide?

This guide follows a 5-step process (Fig 1). Our recommendation is for you to use this guide from Steps 1 to 5 as it will help you have a comprehensive technical assessment for your organization. However, each step can be used individually. Thus, depending on your assessment needs, you can pick the step that best suits your requirement.

Step 1: Assessment

The template in this step helps you to assess your current technology stack for gaps, challenges, and pain points. (Refer to pg 4)

Step 2: Evaluation

If you need to assess and evaluate the technology challenge(s) that you're facing and you hope to identify the root cause and the digital solutions to solve them, you can go to this step. (Refer to pg 5)

Step 3: Analysis

Looking at shortlisting potential digital solutions and analysing their strengths and weaknesses, you can go to this step. (Refer to pg 7)

Step 4: Decision

The template in this step guides you on how to decide on the best digital solution based on the requirements of your organization. (Refer to pg 9)

Step 5: Selection

The template in this step will guide you through on how to select the digital solution. (Refer to pg 10)

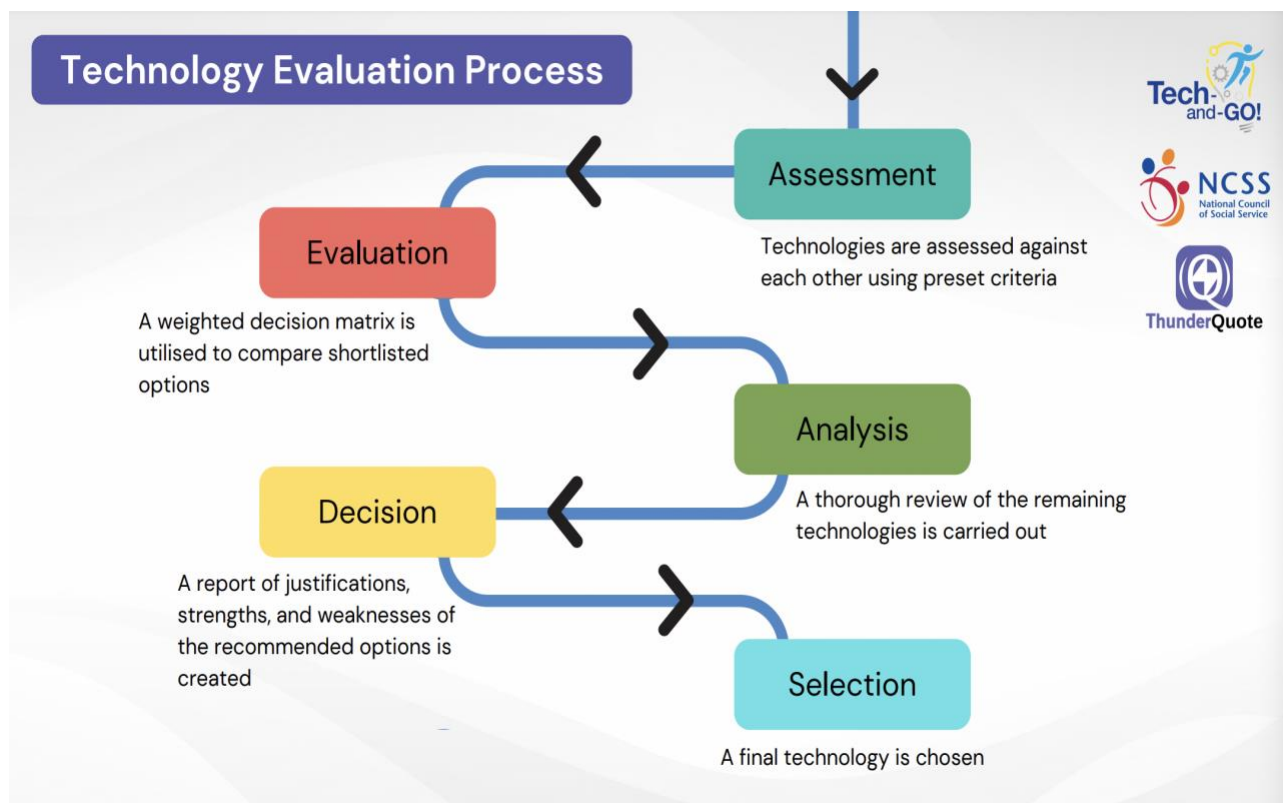


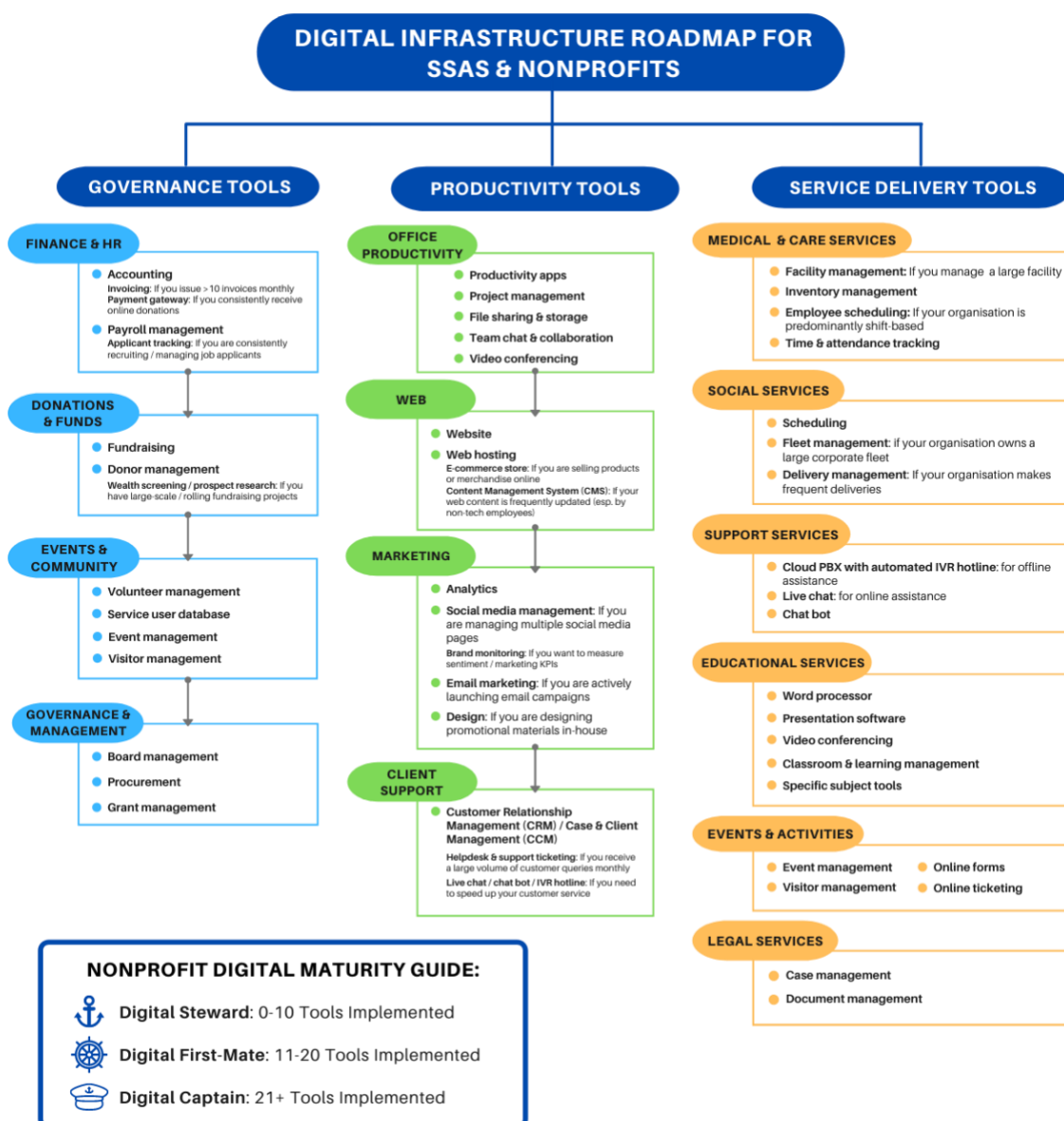
Figure I: The 5-step Technical Evaluation Process



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Step 1: Assessment

The first step of the Technical Evaluation process is to conduct a technical analysis of your SSA's current technology stack by referring to the TQ Digital Infrastructure Roadmap (below). Your SSA can then determine your digital maturity level, as well as identify the current digital gaps that your organization has. The roadmap can also be used to identify weak links / pain points in your existing digital infrastructure and pinpoint the areas that you'd like to focus on in your digital transformation.



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Step 2. Evaluation

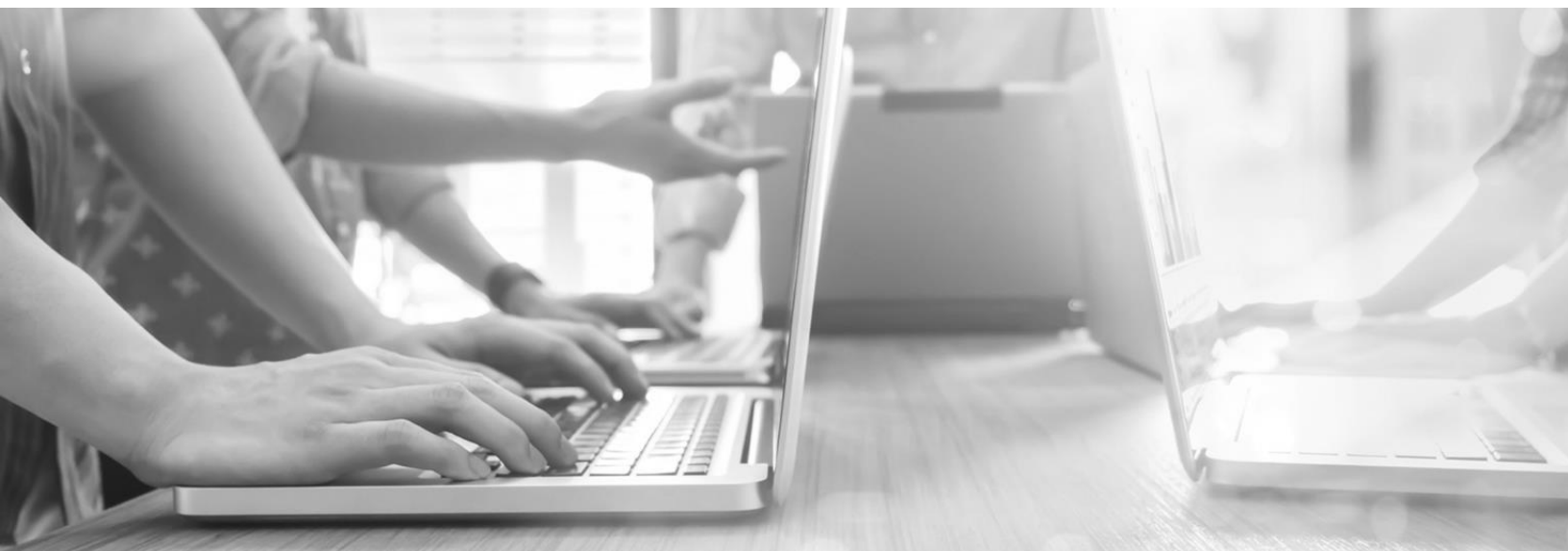
Based on your findings from the TQ Digital Infrastructure analysis, you should now be able to shortlist a few digital areas that you wish to improve on based on the gaps and pain points in your organisation. You can now conduct a gap analysis using the TQ Gap Analysis Template to further evaluate each area and determine which solutions should be focused on.

How to use the Gap Analysis Template:

1. Fill in the first column with the digital areas that you have shortlisted based on the TQ Digital Infrastructure Roadmap in the Assessment step.
2. Then, list out your current situation with regards to each digital area in the second column, along with the challenges / pain points that you are facing.
3. In the third column, identify the improvements, features, or upgrades that are required in this digital area in order to overcome your limitations.
4. Finally, compare your findings in the second and third columns and list out the gaps that have been identified between your current and ideal state.



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Example of using the Gap Analysis Template:



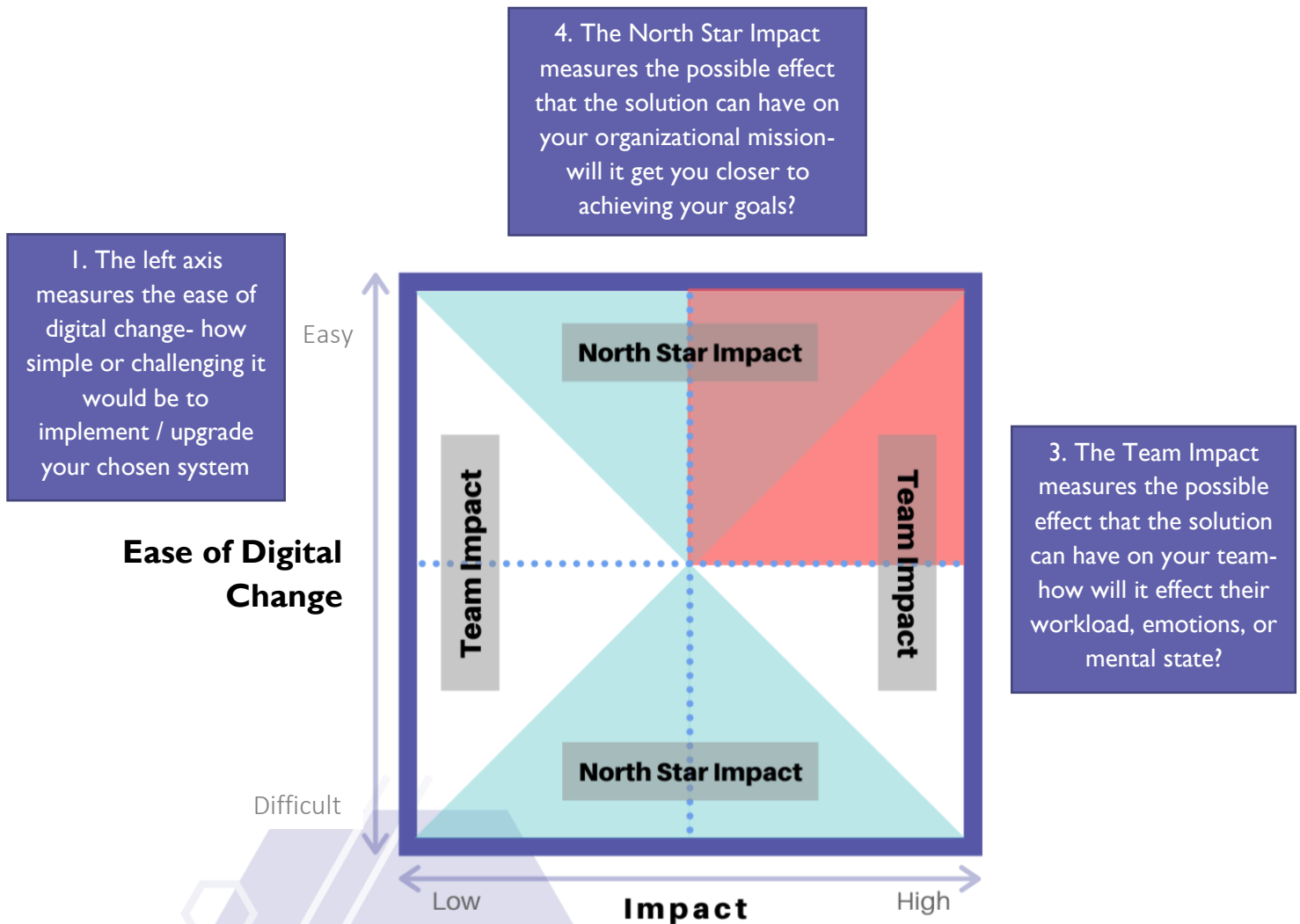
GAP ANALYSIS TEMPLATE

DIGITAL FOCUS AREA	EXISTING SITUATION & LIMITATIONS	IDEAL STATE, CAPABILITIES & FEATURES	GAPS BETWEEN EXISTING AND IDEAL STATE
Volunteer management	<ul style="list-style-type: none"> - Manual data entry via Excel - Staff unable to access files while working remotely - Heavily time-consuming and tedious to update volunteer database & manage scheduling 	<ul style="list-style-type: none"> - Volunteers able to self-service their weekly schedules and log hours - Automated data entry via connection between database and vol. system - Cloud file storage for easy remote access 	<ul style="list-style-type: none"> - In need of volunteer management system (VMS) with: <ul style="list-style-type: none"> o Self-service portal o Online calendar and scheduling o Time tracker o Cloud storage o Role-based access control



Step 3. Analysis

Once you have identified your digital gaps and focus areas, you can now start prioritizing your digital transformations according to the ease of implementation and potential impact on your organization. To do so, please refer to the TQ Digital Navigator Matrix:

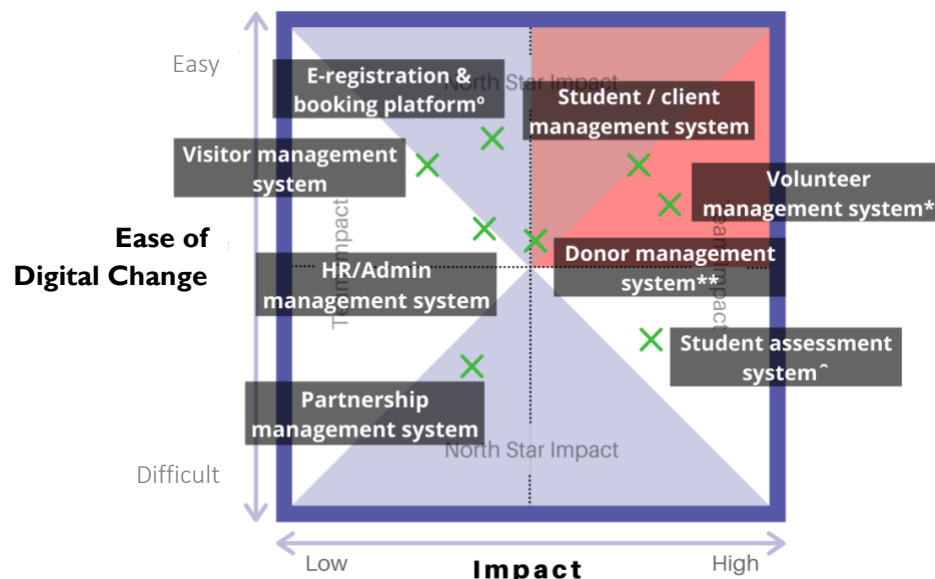


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How to use the TQ Digital Navigator:

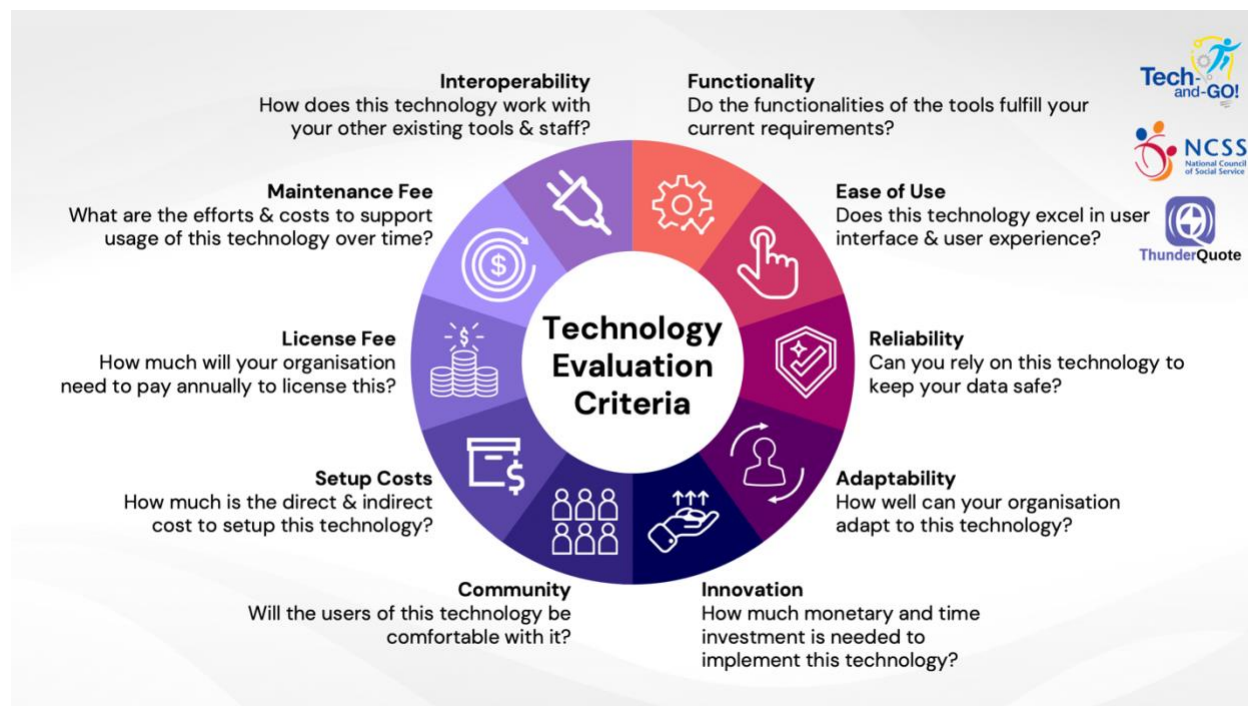
1. Select a system or solution that you wish to implement (if currently non-existent) or upgrade (if already implemented) in your organization, based on your prior analysis in the Assessment and Evaluation steps.
2. Evaluate the potential impact of implementing or upgrading that system on your organization. Is it low, high, or somewhere in between? This impact can be in the form of revenue, results, team impact, or beneficiary/client impact.
3. Then, measure how easy or difficult it will be to implement / upgrade this system. Consider whether the system is interconnected with other systems, the complexity of integrating it with existing solutions, and the potential change resistance from users (both internal or external users).
4. Finally, place the system within its appropriate quadrant in the matrix.
5. Once you've analyzed all your potential digital areas, you can prioritize your implementations as follows:
 - a. Top priority: any solutions in the Red Quadrant
 - b. Next priority:
 - i. If your organization has higher risk tolerance, and the manpower and funds to handle a larger project: any solutions in the bottom right quadrant (high impact + high difficulty of change)
 - ii. If your organization is more risk-averse and would prefer to implement smaller wins first: any solutions in the top left quadrant (low impact + low difficulty of change)
 - c. Avoid implementing any solutions in the bottom left quadrant (low impact + high difficulty of change)

Example of using the TQ Digital Navigator:



Step 4: Decision

Once you have prioritized your digital implementations, you can then focus on your top digital priority and start shopping for potential systems. It is helpful to refer to unbiased sources such as review websites (Capterra, G2, Trustpilot, etc.) or a trusted IT vendor for guidance on possible solutions. Evaluate each option using the 10 characteristics in the Technology Evaluation Criteria (below) to help you make your decision and come up with a technology shortlist of 3-5 digital solutions:



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Step 5. Selection

With your technology shortlist ready, you can now analyze each solution in more detail using the TQ Technology Selection Matrix. The matrix objectively weighs each option according to 5 criteria: functionality, ease of use, adaptability, scalability, and cost. However, you can amend these criteria to any that better fulfills the needs of your organization. Each criteria has been assigned an equal weightage, which can also be updated if your organization has different priorities (e.g. if cost is a more important factor to your SSA than scalability, you can amend the weightages as necessary).

How to use the Technology Selection Matrix:

1. List down each of your shortlisted solutions in the first column.
2. From left to right, score each option on a scale of 1-10 according to how much they fulfill each criteria. If you aren't sure of what to score each solution, it is helpful to refer to online reviews, or asking IT vendors or partners who have experience with each solution.
3. Once each solution has been scored in all five criterion, an average score will be calculated in the final column. The solution with the highest score is objectively the most suitable option for your organization to implement.



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Example of using the Technology Selection Matrix:

	FUNCTIONALITY	EASE OF USE	ADAPTABILITY	SCALABILITY	COST	
CRITERIA DESCRIPTION	The solution's ability to fulfill as many of the SSA's technical requirements as possible	The level of ease in which the SSA's stakeholders will be able to utilize and maintain the solution	The flexibility of the solution to adapt to different stakeholder groups and use cases	The solution's ability to grow and scale alongside the SSA's increasing needs	How cost-effective the solution is in relation to the SSA's budget	
WEIGHT	10	10	10	10	10	WEIGHTED SCORE
	20%	20%	20%	20%	20%	100%
OPTIONS	CRITERIA 1 SCORES	CRITERIA 2 SCORES	CRITERIA 3 SCORES	CRITERIA 4 SCORES	CRITERIA 5 SCORES	
Microsoft SharePoint	8	8	9	9	9	9
DropBox	9	8	9	9	6	8
OneDrive	8	7	8	8	9	8
Azure Files	7	7	8	8	8	8

Tip: Do you have a tie between two or more solutions? If so, it is helpful to evaluate those options with additional evaluation criteria that is crucial to your organization, such as accessibility, openness to integration, or availability of non-profit discounts / freebies.



Once you have selected your preferred technology, the next step is to evaluate potential vendors using the TQ Solutions Provider Selection Matrix. The matrix objectively weighs each option according to 7 criteria: cost, customer service, data security and privacy, accessibility, features and customisability, solution portability and service downtime or cancellation cost. However, you can amend these criteria to any that better fulfills the needs of your organization. Each criteria has been assigned an equal weightage, which can also be updated if your organization has different priorities (e.g. if cost is a more important factor to your SSA than features and customisability, you can amend the weightages as necessary).

How to use the Solutions Provider Selection Matrix:

1. List down each of your shortlisted solution providers in the first column.
2. From left to right, score each option on a scale of 1-10 according to how much they fulfill each criterion. If you aren't sure of what to score each solution, it is helpful to refer to online reviews, or asking other agencies or organisations who have experience with the listed options.
3. Once each solution provider has been scored in all seven criteria, an average score will be calculated in the final column. The solution with the highest score is objectively the most suitable option for your organization to implement.

Example of using the Solutions Provider Selection Matrix:

	COST	CUSTOMER SERVICE	DATA SECURITY & PRIVACY	ACCESSIBILITY	FEATURES & CUSTOMISABILITY	SOLUTION PORTABILITY (VENDOR LOCKIN)	SERVICE DOWNTIME & CANCELLATION	
CRITERIA DESCRIPTION	How cost-effective is the solution relative to the SSA's budget and needs	Is the solution provider able to respond to support requests and queries with your preferred mode of communication in a timely manner	Is the solution/vendor able to meet your organisation's data and privacy compliance requirements	Is the solution provider able to understand your target audience's unique challenges (e.g. senior or special needs friendly)	Is the solution provider able to meet your customisation and feature requests in the long run	Is it easy to switch to a different vendor or solution provider down the road, if needed	Is the solution provider able to handle and manage planned or unplanned outages without affecting productivity	WEIGHTED SCORE
WEIGHT	10	10	10	10	10	10	10	70
	14%	14%	14%	14%	14%	14%	14%	100%
OPTIONS	CRITERIA 1 SCORES	CRITERIA 2 SCORES	CRITERIA 3 SCORES	CRITERIA 4 SCORES	CRITERIA 5 SCORES	CRITERIA 6 SCORES	CRITERIA 7 SCORES	
A	5	3	4	8	9	1	1	4.43
b	5	8	4	6	4	7	8	6.00
c	3	4	2	7	9	8	5	5.43



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Conclusion



Now that you've completed your first Technical Evaluation, it's crucial to keep your organization's systems and digital solutions updated as new technologies are constantly being developed. We recommend conducting an annual check and diagnosis of all your digital systems to ensure that they are still working optimally and are still the right fit for your SSA.

Get in touch to learn more!



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