

# ALIDADE

A guide to choosing technology wisely  
for your social change project

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# STEP 1

This step will help you explain how a technology tool could help your organisation meet its objectives.

You will complete three activities:

1. Defining your objective.
2. Describing what you need a technology tool to do.
3. Understanding your users.

## 1.1. WHAT IS YOUR PROJECT'S OBJECTIVE?

Even a well-designed tool will be a failure if it doesn't help you achieve your goals, so it's best to start by explaining your project's objective.

**Write a short, clear statement of what you want your project to achieve.**

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**Example:**

Our project aims to allow clinic users to monitor the quality of service provision at 10-15 clinics in our city.

### Case Study:

An organisation chose a mobile survey tool to collect data for a project in which citizens monitored the quality of government services. The tool allowed the organisation's team to collect data effectively. However, the organisation found that the tool was a failure, and had to re-develop it. Why? Because it did not help them achieve their primary objective: to encourage dialogue between citizens and the government. They hadn't told the technical partners they were working with that this was one of their objectives, and it hadn't been factored into the design as a result.

## 1.2. WHAT DO YOU NEED THE TOOL TO ACCOMPLISH? HOW WILL THIS CONTRIBUTE TO YOUR PROJECT'S OBJECTIVES?

There are many ways of meeting needs. Adding new technology isn't always the best solution.

**Write a brief description of what you want a technology tool to do. Then, explain how you hope a tool could improve your project.**

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### Example:

We want to find a mobile data collection tool that will let clinic users rate how well a clinic met their needs by sending an SMS message. It should be able to send this information to us in a format that we can use and analyse.

We hope it will improve the project in three ways: it could encourage more people to send feedback because it is easy for them to send an SMS; it could allow us to access information faster than if we

used on a paper feedback form; and it could give us data that is easier to process, analyse and use in our advocacy.

### Case Study:

An organisation wanted to speed up its collection of data from community monitors, which they had been doing using paper, scanning and email. However, the tool they introduced actually slowed things down. It took longer to format the data from the form than it had when collecting it on paper.

## 1.3. WHO DO YOU EXPECT TO USE THE TOOL?

This is a very important part of the process. If you think deeply now about your users, you will be more likely to choose a tool that is a great fit for everyone.

### Research finding:

"To work well, technology for transparency and accountability initiatives need to be integrated into people's existing ways of doing things... Case after case and study after study show that significant behaviour change cannot be expected to ensue from telling potential users what is good for them."  
— Rosemary McGee and Ruth Carlitz, [Learning Study on 'the Users' in Technology for Transparency and Accountability Initiatives](#), p.30.

### Research finding:

Less than one-quarter of organisations we spoke to did any field research with users. They often told us that they regretted not spending more time on thinking about who would use the tool, and how they would use it.

### 1.3.1. Describe your typical user

Write down what you already know about them. Pretend you are describing them to someone who knows nothing about them.

#### Tips:

Include demographic information such as age, location, occupation or gender, etc. If your user group contains many different types of people, break them down into sub-groups: Men aged 30-45, Men aged 46-60 etc.

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#### Example:

Our typical intended user is a woman aged 18-25 that lives in District X of City Y. She cares about their local area but does not have time to attend public meetings or demonstrations. She is generally dissatisfied with the quality of public service delivery but isn't sure that complaining about it will help to improve it. She doesn't often contact the authorities to make a complaint or ask for changes to services, but if she does she usually does so through phone calls to the general number for her local area.

#### Tips:

- Think about the best ways to get this information:
- Talk with people who are like the users you are trying to reach. If the group is small, try one-on-one conversations or arranging a short meeting with them.
- If your group is larger or based in different places, try meetings or finding places where they already group together.

- You will not be the first organisation to try to reach those people. Are similar initiatives reaching that same population, and how did they go? Are there networks or community groups where conversations with your target users are already happening?}
- Think about who might be left out by these methods, and try to find ways of reaching them too.

## Resources:

- The [Transparency and Accountability Initiative's Fundamentals guide](http://tech.transparency-initiative.org/fundamentals/appendix-ensuring-that-your-tech-project-is-usable/) gives good guidance on thinking about your users.  
<http://tech.transparency-initiative.org/fundamentals/appendix-ensuring-that-your-tech-project-is-usable/>
- The Digital Principles' section on [Designing with the User](http://digitalprinciples.org/design-with-the-user/) gives useful guidelines and resources. <http://digitalprinciples.org/design-with-the-user/>
- Tactical Tech's [Know Your Audience](https://howto.informationactivism.org/content/who-are-you-talking-know-your-audience) guide has useful steps for finding out more about your users.  
<https://howto.informationactivism.org/content/who-are-you-talking-know-your-audience>
- Keystone Accountability's [Learning from Constituents](http://www.managingforimpact.org/sites/default/files/resource/3_learning_with_constituents_0.pdf) offers detailed guidelines on how to get information about your users, from surveys to formal dialogue processes.  
[http://www.managingforimpact.org/sites/default/files/resource/3\\_learning\\_with\\_constituents\\_0.pdf](http://www.managingforimpact.org/sites/default/files/resource/3_learning_with_constituents_0.pdf)
- The UK Government Digital Service's [digital principles](https://www.gov.uk/design-principles) and guide to [writing user stories](https://www.gov.uk/design-principles) are also useful resources. <https://www.gov.uk/design-principles>;  
<https://www.gov.uk/design-principles>

### 1.3.2 Why would they want to use your tool? What will they get out of it?

Write why you think your users would be interested in the tool.

This means making assumptions. You will check them later in Step 3.

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### Example:

We assume that our users will want to send feedback about a clinic they have used because they think it will improve the service they are given. We assume that they will be more likely to send feedback if they can use their phones to do so, because this will make it easier and cheaper for them.

### Case study:

We decided to use Facebook in the project. Later, we found out that it was very popular only with white middle-class people, not the black, working-class communities the project was trying to reach.

## 1.3.3. What technology tools does your target audience already use?

Some questions that might help:

- Do users have habits built around those tools?
- Are there specific times or places that your typical user accesses information or interacts with other people?
- What are the main methods your typical member uses to achieve this?
- Do they prefer to use particular tools for some activities, and different tools (like email) for others? Find out why.

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### Example:

Our typical user does not use internet-based messaging services like WhatsApp because mobile data is currently too expensive for them. They get information about politics through newspapers rather than the internet, and prefer to access information through their phone rather than a desktop computer. They use social media (mainly Facebook) for talking to friends several times a week, but do not use it for talking about other topics. They only rarely use email.

### Case study:

*"We expected, as everyone said, that everyone would use SMS. All the techies were crazy about it. Then when you really talk to [a person with a similar project] he says that 99% of the complaints came in by telephone, and 1% by SMS. That is a striking number. He says, 'well, you can be try to be as fancy as you want, but it does not work.' "*

## 1.3.4. Could anything prevent them from using a new tool?

Thinking about this in advance will help you plan.

Here are some questions to help you start:

- Do they already think they need a tool, or will you have to persuade them to use it?
- Do they have the technical skills they need? Will they have enough time to learn how a new tool works?
- Are there costs involved, and can they afford them?

**There may be other questions that are worth asking for you. Write them down.**

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### Example:

Many people in our target community have smartphones and intermittent data coverage, but data is expensive. People might not think that our tool is worth their money.

They might also be suspicious of us because similar initiatives often come to their area looking for participants but haven't told them about the results. So we'll have to be careful about how we introduce and market our project.

People might not use the tool if it's too complicated, and we don't have enough the resources to train them, so we will have to test it with them to make sure that it's really easy to use.

## STEP 2

This step helps you define what you need a tool to do, and research what options are available.

You will complete three activities:

1. Writing down everything your tool needs to do.
2. Finding tools that do what you need.
3. Listing projects that have used similar tools.

### Common mistakes - from our research:

- Organisations rarely looked at more than one tool.
- They rarely conducted user research as well as tool research.
- Most organisations stretched, and some completely exceeded, their own capacity when adopting new tools. Initiatives often felt that they lacked enough expertise to make informed choices.

For more, read [the research report](#).

## 2.1. YOUR REQUIREMENTS

Make a list of features that the tool must have. This helps you focus on what you can achieve with the time and budget that you have.

Put the features into three lists:

- essential - for the most important features.
- desirable - for less important features.
- nice-to-have - for features that you could manage without.

When asking for more features, think carefully - do you *really* need them? Every feature will take time and cost money to include.

### Example:

We need a database that includes basic information about our volunteers.

### Essential:

- The database should include fields for a person's name, address, telephone number and job description.
- Users should be able to attach a PDF file to each person's entry, for CVs and other information.
- Users should be able to search using any of these categories.

### Desirable:

- Users should be able to print information from any person's entry in .csv format, without including the PDF document.
- Users should be able to search for information inside the attached PDF files as well as information in the database.

### Nice to have:

- Users should be able to attach multiple PDF files to each entry.
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## Resources:

Check Fabriders' [Tech Specs](#) post for ideas on features to include: <http://www.fabriders.net/tech-specs/>. Remember to include features that protect users' security and privacy - read the [Responsible Data Handbook](#) for more.

## Case Study:

One organisation asked a technical provider to build it a tool, but missed discussing key features, including whether it could integrate with their existing systems or work without internet access. The tool did not fulfil the organisation's needs. The organisation is now looking for another technical provider.

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## Case Study:

An organization hired a developer to create a tool but didn't specify that it needed to allow offline access. The problem was only discovered late in the project, and the entire tool needed to be re-designed.

## 2.2. WHICH EXISTING TOOLS HAVE THE FEATURES YOU NEED?

Write down as many tools as you can. List tools that your organisation has already used, ask people you know, and search online.

Starting by looking for existing tools is useful because:

- You can often compare and test them easily, before you have spent any money.
- Paying to use an existing tool often costs less than building a new tool. Some tools are free or cheaper for non-profit organisations.

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### Lessons learned from research:

Many organizations did not look for tools that existed that could have done the job they were looking for. Instead, they developed a completely new tool, which was often harder and more expensive than they expected.

### Tips:

Don't rely on online sites that list tools - they are often out of date. If you are considering a tool, try calling or emailing the people behind it directly. If you can't get in touch with anyone, it is probably not the right tool for you. In our research, organisations that relied on a technical provider found that delays in contacting them sometimes disrupted their projects.

## Resources:

If you still need ideas, try these links:

- General [overviews](#) of tools
  - [mobile data collection](#) ([here](#) and [here](#)),
  - [mobile devices](#);
  - [tools for working with data](#);
  - [visualisation tools](#);
  - [field survey data](#);
  - [online survey tools](#);
  - [web analytics tools](#);
  - [Sensors](#);
  - [blogging platforms](#).
  - [SMS platforms](#)
  - [Simple GIS data collection tools](#)
- Kopernik's [Impact Tracker](#) tool provides comparisons of data collection tools, SMS communication tools, geospatial mapping tools, and remote sensors.

## Case study:

"We didn't really use any criteria to make a decision on a specific platform. Next time we'd do things differently by developing a custom SMS platform that allows for more active engagement. It would have been nice to know what options were out there." — A participant in our research

## 2.3. WHICH OTHER PROJECTS HAVE USED TECHNOLOGY TOOLS TO DO SIMILAR THINGS?

List any projects or organisations that have used technology tools to meet a similar objective.

This helps you to:

- rule out tools that aren't right for you.
- avoid mistakes that others have made.
- get ideas for using a tool more effectively.

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## Resources:

Need ideas? Try looking at:

- Results for Development's [Social Accountability Atlas](http://saatlas.org/): <http://saatlas.org/>
- Sunlight Foundation's [list of organizations using Open Data](https://docs.google.com/spreadsheets/d/1jP6WIkEPczb8MBn6DNOU2PhKp9Prwe4HokqhUQVsxEO/edit#gid=0):  
<https://docs.google.com/spreadsheets/d/1jP6WIkEPczb8MBn6DNOU2PhKp9Prwe4HokqhUQVsxEO/edit#gid=0>

## Case Study:

“In the UK we saw the website of a peer organization and saw what others in similar monitoring networks were working on. We actively communicate with and gather information from a range of peer organizations in other countries, and this contributed to changes and additional functions.” — A participant in our research

## 2.4. WHAT COULD GO WRONG? LIST RISKS AND MITIGATE THEM

1. List things that could threaten your project's success.
  2. Rate the severity of each threat to your project (use: *very low/low/medium/high/very high*).
  3. Rate how likely each of these threats is (use: *very low/low/medium/high/very high*).
  4. Write down how you could prevent or mitigate these threats. Start with the threats that are most severe and most likely.
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**Example:**

The tool takes much longer to use than we planned for (impact: low; likelihood: high). We could prevent this by taking more time to test the tool and removing non-essential steps.

We might not have enough staff time to keep using it after the pilot period (impact: high; likelihood: medium). We could mitigate this by looking for ways to make it less time-consuming to use, and talking to staff to check if it is really essential to their work.

The tool is too expensive or complicated for the target users to use (impact: high; likelihood: high). We could prevent this by testing different options with them beforehand (see Step 3).

## 2.5. DECIDING ON THE BEST OPTION

Compare the tools you have found and identify the best options.

Then select one of the following:

We will use an existing tool

We will adapt an existing tool

We will build a new tool

**Describe your decision in 2-5 sentences. Writing it down will help you to clarify your thinking.**

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### Example:

We looked for a mobile data collection tool that lets users save information offline and send it later, send information once a week, and will let us host data on our services. It needs to be available in 3 different languages. We found several existing tools that have these features. We searched for other organisations that had used these tools, and contacted one. They recommended Tool X and suggested that we contact the tool provider first to discuss our needs.

## 2.6. THINKING OF BUILDING A NEW TOOL? THINK TWICE

Only consider building a tool if you can commit significant time, technical skills and resources to it. Building a new tool took longer and cost more than the organisations we spoke to expected. In fact, it hardly ever did exactly what they needed. You will also need to allow a lot of extra time to adapt and make changes in response to testing.

**Explain your capacity to build your own tool. Describe how you will prepare for delays, respond to unexpected problems and build in changes from feedback.**

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## What did the research say?

In more than half the cases, (10 out of 20 in Kenya; 11 out of 18 in South Africa) organisations decided to build or commission new tools rather than use existing ones. Many problems arose, most often problems in the relationship with suppliers or technical partners (3 out of 10 in Kenya; 4 out of 11 in South Africa).

Read more about it in [the research report](#).

# STEP 3

This will help you trial technology tools before you make a decision.

## You will complete three activities:

1. Plan a trial.
2. Record what you find.
3. Decide what to change afterwards.

In our research, the most common problem was that people did not use the tool organisations chose. Getting a small group of real users to try the tool can help avoid this. Our research suggests that even a short, simple trial is better than none at all.

## Case study:

“Now, because we had seen with the first tool the things that were not working, we had a clearer picture of what we were looking for. It was not like the first time, when you want something but aren't sure what. This time, we had a pretty good idea. We wanted to improve on all the things that were not working.” — A participant in our research

### Lessons learned from research:

- Hands-on experience with a tool helped organizations check if it met their needs before committing.
- Even when an organization found the tool they tried wasn't right, they often learned more about what the 'right' tool should do.

## 3.1. CREATE A USER STORY

**Write down the reason why your user might need to use your tool.**

A 'user story' include three things:

1. The person using the tool;
2. what the user needs the tool to do;
3. why the user needs it.

They're usually written in the format:

As a... [who is the user?]

I need/want/expect to... [what does the user want to do?]

So that... [why does the user want to do this?]

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### Case study:

“As a journalist at a national newspaper, I want to view structured, accurate information about incidents where politicians have been involved in corruption so that I can write better reports that include all the necessary information.” – A participant in our research

### Case study:

"Treating myself as a typical test user was a mistake. Testing [it] with users before the launch would have pointed out many of the flaws." – A participant in our research, reflecting on the fact that few people used the platform they had developed.

## 3.2. PLANNING A TRIAL

Writing a plan for your trial will help test if your tool can do what the user wants. Read the tips below and write your plan at the bottom of the page.

### 1. Set time limits

Describe how long you will take to trial each tool.

### Example:

A simple social media tool could be trialled in two hours if only one person in your organisation is using it. A system to collect complaints submitted online and by telephone in three regions will take much longer because there is more to test.

### 2. Choose your test users

Try it with the people you hope will use it. If you only try it yourself, you won't learn as much about what your users really want. Pick a range of different types of people to ensure that you get a representative picture.

### Lessons learned from research:

When trialling did not help the organisation, it was often because they only tried it with people who were not like their intended target user.

### 3. Find or create a basic version of the tool to test

Look for free versions of a tool that you can try out, or ask a tool provider for a 'demo' version. Alternatively, you can show users a 'beta' version of the tool with the same basic features you want to test.

Include 'dummy' data or content that is similar to the real-life data in the finished tool. The tool provider may be able to provide this 'dummy' data.

### Case study:

After a short trial period, an interviewee said: "there are some lessons we have learnt... maybe some features we included aren't very necessary and we can omit them." – A participant in our research

### 4. Write open-ended questions to find out:

- General impressions: How do you find using it? How does it look? Could you imagine using a tool like this?
- Ease of use: Which parts are easy to use? What was frustrating?
- Reliability: How did everything work?
- What would they change? Are there any unnecessary features or is some feature missing?

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## Case Study:

"It would have been good to have tested the platform with users before launch. This would have pointed out many of the flaws [early]. [Later on, we realised] the site was far too complex with far too many functions and choices for users to make... and we realised that the platform was not very mobile-friendly, which constrained growth." – A participant in our research

5. Host a training or introduction to the trial. Explain to the test users (in person or a written test plan) how much time you expect them to contribute ('expect to spend 30 mins on this'). Explain that the tool will have problems (or 'bugs') and that this is normal. State clearly how you want to receive feedback - for example, in an online form or through notes you will make on a conversation.

Write your plan below:

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## Example:

We will trial two tools with 20 users, all of whom are people that use publicly provided water services in the area that our project focuses on. We will aim to include people from a range of We will use a free 'demo' version of each tool with short questions like the ones we hope to use in the full project. Then, we will sit with each user for 1 hour as they use each tool, and ask them to describe what they are thinking as they use the tools. We will ask them open questions about: how they might use the tool; where and when they might use it; whether anything is unclear or difficult to use; what would make them more likely to use it; if they would change anything; and what they thought of the tool overall.

Next, trial your tools and record the feedback. You will summarise it on the next step.

### 3.4. WHAT DID YOU LEARN?

**Write the key things you discovered from the trial.**

- What were users' general impressions? Did users like to use it? Did they find it useful?
- Did users find it hard to use? In what ways?
- Did users want any changes? Did they complain about any missing features?
- Did the tool fail at any point? Could it perform better?

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If the tool has any limitations that you can't get around, consider other options. You can go back to Step 2 and its resources to help you .

### 3.5. DO YOU NEED TO CHANGE ANYTHING AFTER THE TRIAL?

Write down anything that you need to change after the trial.

Do you need to change any of the tool's requirements? Could you consider any alternative tools?

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#### Example:

Users struggled to understand what kind of information to enter into the tool - so we need to explain this more clearly with graphics and explanation text. They found it took too long to complete using the tool, so we need to remove some less essential features to make it faster to finish.

#### Case study:

"It was during these trials that I noticed two or three failures [in the tool]. So I said, you know what? I need to be trained. So I went for a training with the provider and the guy from the IT department who was operating the system, so that I could understand what was happening and what was going on." – A participant in our research

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Do you need help from a technical partner to introduce a new technology tool? The next step will help you understand what you need and how to get it.



# STEP 4

The fourth step helps you find and work with technical partners or advisers.

There are three things to consider:

1. Deciding what kind of help you need.
2. Finding the right partner.
3. Setting up a strong working relationship.

## Lessons learned from research:

Many organisations had relationships with tech providers that were difficult to manage. There were often long delays, bugs in tools, tools not meeting expectations, and communication challenges. Many had to terminate their relationships several times.

## Case study:

An organisation created a request for proposals and selected the technical provider with the lowest offer, which never finished the database it had been contracted to set up. The organisation then tried two other suppliers. The organisation said that they wished they had invested more effort in choosing a technical partner that properly met their needs at the beginning.

## 4.1. WHAT KIND OF HELP DO YOU NEED?

Select all options that apply:

- Help to choose the right tool
- Design a tool
- Build a tool
- Help our organisation to implement a tool
- Maintain a tool that we have already introduced

[ ] Give ongoing support to people using the tool.

### Resources:

The Transparency and Accountability Initiative's [Fundamentals guide](http://tech.transparency-initiative.org/fundamentals/technology-project-planning-and-management/) has useful tips on what you might need from different types of technical partner.

<http://tech.transparency-initiative.org/fundamentals/technology-project-planning-and-management/>

## 4.2. WHAT ATTRIBUTES SHOULD YOUR IDEAL TECHNICAL PARTNER HAVE?

Questions to ask could include:

- Have they worked with organisations like yours before?
- Do they have an interest in the mission of your organisation?
- Are they impartial or do they have a bias towards some types of tools?
- Are they happy to give advice without providing support on other issues?
- Do you need them to train staff?
- How should they involve you in the process?
- Are they practitioners of human-centred design?
- How would you like them to engage with your target users?
- Do you need to own the intellectual property of the designs they create?
- Do they need specific technical skills?
- What times can they guarantee to provide support?
- Will they be available at the times you need them?
- Can they prepare support documentation for people to use or train staff?
- Do you need them to be in the same city or country as you?

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**Case study:**

An organisation created a request for proposals and selected a technical provider because it had made the lowest-priced offer. The provider was unreliable and never finished the database it had been contracted to set up. The organisation then tried two other suppliers before finally building the tool. It wished it had invested more effort initially in choosing a technical partner that properly met their needs.

### 4.3. WHO COULD GIVE THE HELP YOU NEED?

List organisations or people that have the attributes you are looking for.

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**Tips:**

**Ask people you know for recommendations.**

Does anyone you know have contacts that they recommend? Ask at least two different people or organisations.

### **Ask your peers.**

Contact organisations on the list of similar projects you created in Step 2.

Email them or call them directly, and ask them if they would recommend (or avoid) anyone.

### **Create a request for proposals.**

If you need support from elsewhere, requests for proposals (or tenders), allow other people to state why they are right for your needs.

### **If you can't find what you need, look more widely.**

Visit any local technology hubs or events, and ask people there for advice. Talk to your donors or funding partners, and ask them for ideas. Ask university computer science departments, researchers or other research groups that work on ICT for development (ICT4D)-related areas.

### **Get references!**

Before choosing a provider or an existing tool, talk to at least one person who has worked with them before. Ask about their technical skills, communications and rates - and how it was to work with them.

### **Case study:**

"We knew that we'd need a platform with certain features, and we introduced those needs to [the potential provider], who met all of the criteria that we had outlined: all the features we were looking for, everything we needed, and it was appropriate for the intended audience. So we decided just to move forward with them... It was easy to use, both for us and for the people we work with." – A participant in our research

### **Resources:**

- The Transparency and Accountability Initiative's [Fundamentals guide](http://tech.transparency-initiative.org/fundamentals/technology-project-planning-and-management/) has useful tips on how to hire a consultant or developer.  
<http://tech.transparency-initiative.org/fundamentals/technology-project-planning-and-management/>
- TechSoup offers several useful resources, including a [guide](http://www.techsoup.org/support/articles-and-how-tos/overview-of-the-rfp-process) to producing and publicising requests for proposals  
(<http://www.techsoup.org/support/articles-and-how-tos/overview-of-the-rfp-process>), [advice](#) on choosing consultants

(<http://www.techsoup.org/support/articles-and-how-tos/how-to-choose-and-work-with-technology-consultants>), and a checklist of points to include when creating a contract for IT services.

- 54 Degrees provide a [presentation on producing a good brief for your project](#), while Fairsay also offer [advice](#) on their blog.
- Aspiration provides a [free template for requests for proposals](#). (<https://aspirationtech.org/training/workflow/templates/rfp>)

## 4.4. MAKE A SHORTLIST

Write one-to-three organisations that you feel most comfortable about working with. Explain why.

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### Case Study:

"Talking to many (potential partners) [helped us increase our technical capacity]. Of the people we met with, even the ones who couldn't do what we wanted, still gave us helpful information." – A participant in our research

### Case Study:

"We checked on the provider we had selected, and other people were talking about them, and had had good experiences with them, which I think influenced us: good references." – A participant in our research

## 4.5. WHAT COULD GO WRONG?

Write how you will prepare for risks before you agree to work together.

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### Tips:

Ask these questions:

- Bad, inefficient communication or unresponsiveness
- After launch, who will provide support to fix bugs and make changes?
- What if the tool is so complex that nobody in our organisation will be able to maintain it (or even understand it) without external help?
- If we need more control of some aspects of the project later on, would you be able to accommodate that?
- What will happen when the project ends? What happens if something goes wrong later?
- What happens if we need to end the relationship early? Can we break the project into phases and review progress at the end of each phase?

### Case study:

An organisation partnered with another organisation to use SMS to help citizens participate in the budgeting process. However, the technical partner organisation managed the entire process, and when the project ended the organisation was unable to continue it themselves.

## 4.6. SET UP A STRONG WORKING RELATIONSHIP

Write a detailed description of what work the technical partner(s) will do.

You can then use this information to create a 'terms of reference' document.

Agree this and then combine it with a contract defining dates and practical details.

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### Tips:

This should include: title of the assignment, the objectives of the assignment, what activities will be carried out, what products or services will be delivered, schedules and logistics, and deadlines for completion. Describe how you will coordinate with your technical partners.

### Resources:

The UK network [Bond](https://www.bond.org.uk/resources/getting-best-out-consultancy) produces a guide to working well with consultants: <https://www.bond.org.uk/resources/getting-best-out-consultancy>. The Transparency and Accountability Initiative's [Fundamentals guide](http://tech.transparency-initiative.org/fundamentals/technology-project-planning-and-management/) has information on working well with a consultant. <http://tech.transparency-initiative.org/fundamentals/technology-project-planning-and-management/>

# CONGRATULATIONS!

## YOU HAVE COMPLETED ALIDADE.

You have collected a comprehensive set of information that can help you make a wiser tech choice.

How can you use this?

- To help your own planning;
- to discuss and agree a plan with your colleagues;
- to show partners and advisers - so they have a better idea of what you want;
- to show donors that you've really thought through your project.

### Case Study:

"I see the tool as a good test for seeing how serious a grantee is about working on a problem using tech." Sanne van den Berg, Country Engagement Developer, Making All Voices Count

### LET US KNOW HOW IT WENT!

Was Alidade helpful? Was anything missing? Let us know at [research@theengineerroom.org](mailto:research@theengineerroom.org).