

Evaluating Without Getting Sold To

Score each row 1 to 5. A vendor who cannot answer a row scores 1, not blank.

This rubric scores the platform and the implementer as one thing, because that is how you will experience them. A capable platform in the hands of an implementer who has never done your kind of work will still fail you, and the reverse is also true.

A Platform capability *What the software can actually hold.*

ONE HOUSEHOLD, ONE RELATIONSHIP

Donors, members, camp families, event attendees, and customers resolve to a relationship that can be seen and reported.

____ / 5

RECURRING GIVING AND RENEWALS

Recurring gifts and membership renewals are first-class objects, not workarounds built from tasks and reminders.

____ / 5

REPORTING ACROSS ALL OF IT

One report can span giving, membership, registration, and email engagement without an export and a spreadsheet.

____ / 5

NATIVE VERSUS BOLT-ON, NAMED HONESTLY

Where a capability comes from an integration rather than the core, the vendor says so unprompted and explains what breaks if it goes away.

____ / 5

B Implementation reality *The part that decides whether any of the above happens.*

WHERE THE QUOTE CAME FROM

They can show the fact-finding behind the number. A price with no discovery behind it is a guess you will pay for later.

____ / 5

THE TIMELINE MOVES WHEN SCOPE MOVES

Change the scope in the room and watch. An honest implementer adjusts the estimate. A dishonest one holds the date and absorbs it as your problem.

____ / 5

THEY WILL SIT THROUGH YOUR CURRENT PROCESS FIRST

Will they watch you work before proposing an architecture? A reverse demo is the single strongest predictor in this rubric.

____ / 5

WHO ACTUALLY DOES THE BUILD

The people in the room are the people on the project, and they have done this for an organization like yours.

____ / 5

WHAT IS INCLUDED VERSUS BILLED LATER

Training, data cleanup, custom objects, and post-launch support are priced explicitly rather than deferred to a conversation after signature.

____ / 5

C Fundraising data fluency *Do they understand the work, or are they retrofitting a sales tool?*

GIFT MECHANICS

Splits, designations, soft credits, pledges versus cash, and receipting are discussed fluently.

____ / 5

HOUSEHOLDS AND RELATIONSHIPS

Spouses, households, and organizational relationships are handled by design rather than by naming convention.

____ / 5

MOVES MANAGEMENT

Pipeline for people, not just for deals. Ask how a prospect moves through stages and who is accountable at each one.

____ / 5

D

Data and migration

Where good projects most often go wrong.

WHO OWNS DEDUPLICATION	_____ / 5
Named clearly, with an approach described in specifics rather than in reassurance.	
WHAT HISTORY COMES FORWARD	_____ / 5
They push back on migrating everything. A vendor who agrees to bring all of it has not done this before.	
HOW ERRORS SURFACE AND GET ROUTED	_____ / 5
There is a plan for the data problems that appear during testing, when trust in the new system is most fragile.	

E

Cost over five years

Not the first invoice.

PLATFORM MECHANICS THAT DRIVE REAL COST	_____ / 5
Deliverability, send limits, contact thresholds, and what happens to the price when you cross one.	
HOW LONG THE DISCOUNT ACTUALLY LASTS	_____ / 5
Ask for the year three and year five number in writing. Nonprofit pricing that expires quietly is the most common surprise in this sector.	
THE COST OF OUTGROWING IT	_____ / 5
A cheaper tool you migrate off in three years costs more than the one you do not. Score the option you would not have to redo.	

TOTAL, ALL FIVE SECTIONS

_____ / 90

READING YOUR SCORE

- 80+

Strong fit. Verify with two references who did a similar migration, and get renewal terms in writing.
- 60–79

Workable, but every low row is a named risk. Put each one in the SOW explicitly.
- <60

The gap between the pitch and the reality will be paid for in your staff time.

THE TEST THAT OUTRANKS THE RUBRIC

After every vendor meeting, ask the person who will actually live in this system how they feel. **If the vendor talked past them to leadership, you have learned everything you need to know, whatever the score says.**

Weighing two vendors and want a second read?

We are happy to look at a scorecard with you, including the rows where we would score badly ourselves.

ALL THREE TOOLS LIVE HERE

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