

RESOURCES

Phase II: Diversification



Activity: Vendor / Service Provider Landscape Analysis

Goals

1. Identify the vendor/service provider ecosystem in your domain
2. Use results to identify opportunities for collaboration or partnerships

Prerequisites

None, although this activity assumes that your program has already decided to explore working with outside vendors / service providers, i.e., the activity is about *how* to identify potential vendor partners, not *whether* to engage.

Who Should Participate?

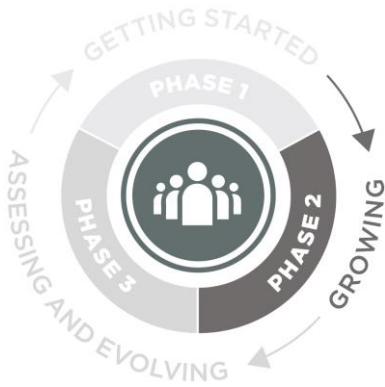
Program management (tactical) with initial brainstorming input from program leadership and program staff.

Length

90-120 minutes pre-work; 90 minutes together

Activity Instructions: Pre-Work

1. Build as comprehensive a list as possible of the vendor/service provider landscape in your domain: for-profit or non-profit organizations that are providing development resources, services (e.g., consulting, training, hosting) and/or support to OSS programs serving cultural and scientific heritage. This list can be created offline through a shared document or virtual whiteboard.
 - o Note: This list may have some overlap with organizations providing home organization / fiscal sponsorship-type services to OSS programs but should only include those organizations that are also contributing other types of resources (development, hosting, etc.).
2. Create an assessment template that includes (at least) the following categories and assign one or more people to the task of filling out the template. A sample template can be found at [this link](#).
 - a. Organization name
 - b. High level purpose (mission, vision, etc.)
 - c. Services offered (e.g., hosting, migration, design/development, etc.)
 - d. OSS programs currently supported by the org, if any
 - e. Geographic area served
 - f. Organization scale, e.g., annual revenue, # of members
 - i. Annual revenue for non-profits in the United States can be found on tax form 990. These forms are freely available via services such as Guidestar/Candid.
 - g. Core stakeholders and/or funders
 - h. General corporate form (e.g., non-profit, for-profit, public benefit)
 - i. Does the organization support OSS / open access (with evidence)?
 - j. Risks, e.g., language barriers, lack of experience with tech stack, conflicts of interest, etc.
3. Divide the list up among the activity participants and have each fill out the assessment template for their assigned vendor / service provider. Set a target completion date for this work.
4. After the assessment template is complete, share for review with all who will attend the group session.



RESOURCES

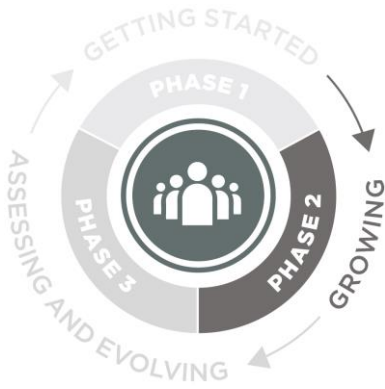
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Activity Instructions: As a Group (virtually or in-person)

1. Analyze the landscape by thinking through the following questions (feel free to add your own!):
 - a. Does the vendor have a mission/vision that aligns with our program?
 - b. What services does this vendor provide that our program does not or cannot?
 - c. Does the vendor serve a geographic area we would like to expand into?
 - d. Are there risks to consider with this vendor (e.g., reputation, would they overlap with another trusted partner, would it oversaturate a particular market or geographic area)?
2. Take a sticker vote to prioritize the organizations your program is interested in working with. As long as an organization gets one vote, keep them on the list for the next step.
 - o In a sticker vote, each participant is assigned several stickers - these can be physical stickers in an in-person event or a specified piece of text (e.g., +1) in a virtual environment. Participants place their stickers or text alongside the options they're voting for, according to the parameters of the exercise (e.g., most important, most likely, most interesting, etc.).
3. If you have identified more than three or four organizations during your brainstorm, you can create a short survey to gauge interest among identified vendors/service providers in participating in a registered service provider program. If you identified a small number, a direct conversation would work well (covering the same questions as below). Useful survey questions may include:
 - o Organization name
 - o Contact name and information
 - o Is your organization interested in participating in an RSP program? A registered service provider is an organization that makes an investment in open technologies and commits to working cooperatively with an OSS program to best serve their community of users.
 - o Is your organization currently providing services around your or other OSS programs?
 - o Select which benefits would be most attractive – see [Creating a Registered Service Provider Agreement](#) for suggestions.
 - o Select which obligations they would be most amenable to - see [Creating a Registered Service Provider Agreement](#) for suggestions.



RESOURCES

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4. Assign an activity participant responsibility for distributing the survey, collating the results, and sharing with the rest of the participants. Set a timeline for this work.
5. Depending on the results of the survey, agree to shut down the conversation due to lack of interest from potential RSPs (potentially with agreement to revisit the issue in some set period of time), or move on to the exercise [Creating a Registered Service Provider Agreement](#).