Name of the Community Partner Organization
Context Analysis

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I. About the Organization

Organization

The report title should be in Arial Black typeface, size 16 (style "Title"), level one headings in Arial Black size 14 (style "Heading 1). As demonstrated in this document, each level 2 subsection (style "Heading 2") should in Arial Black size 12. No section or subsection heading should be "orphaned", that is, fall at the end of a page without body text below it.

The main body of the report will be in the Times New Roman typeface size 12 (style "Body Text"). It should remain single spaced and left justified with a new line without indentation indicating each new paragraph.

The mission statement of the organization should be in italics (style "*Block Text*"). In the words of the author,

> *The mission of this template is to serve the students of Technology Consulting in the Community with an outline for their final consulting reports.*

If the organization has an official logo or word mark, its use is encouraged in place of the 16pt Arial Black title shown above. The graphic should be located ½" below the top paper edge and not exceed 2 ½" in width or length.

Give an overview of the organization, ministry, authority, business, school, nonprofit, or NGO you are working with. Include its location, relationship to the community or market, its mission / purpose / goals, major program or business areas.

It is useful to get a sense of the size of the organization. E.g. # employees, # people served, or budget size. Anything relevant to understanding problems and issues related to technology.

Identify any organizational problems related to technology, or any new opportunities that technology could afford them. Include in this section only problems or opportunities that are related to the whole organization, impacting its identity, governance, fundraising, or promotion. If the problems are more specific, include them in the appropriate section below.

Facilities

Provide a description of the facilities (e.g. buildings, offices) of the organization.

Describe space, size, security, lighting, who uses space, etc. Include especially anything relevant to placement of computers. Are there problems related to technology, e.g., access to the space, physical security, furniture, climate controls, lighting, adequate power.

Programs

Describe the major programs, activities, product lines, or services of the organization.

Describe these activities in general, how the activities support the mission of the organization, and briefly how computers are used. More details about specific databases, information systems, web sites, or other technical issues will be included below.

Include anything relevant to past activities that sheds light on computer use now or in future.

Staff

Describe the staff working at the organization. Include an overview of the whole organization, but focus on those you will be working with most directly, and those who will be most impacted by your likely work there.

Besides giving their positions and responsibilities, include how they currently interact w/computers. Do they have access to relevant computer office applications? What applications do they use on a regular basis? Do they know what they need to make use of the technology available to them? What training is available to them?

Technology Infrastructure

Give a detailed description of the technology infrastructure in the organization.

Specify hardware, network, Internet connection, OSs, peripherals, types of software programs, etc. Be specific. A table is often a useful way to organize the information.

Are their problems related to this technology infrastructure? This is at the devices, OS, networks, and peripheral level. Problems with use and maintenance will be included in later sections.

Is there new hardware or software that would make their technology infrastructure run better?

Technology Management

How is technology managed at the organization?

Who is responsible for managing their technology infrastructure? What is included? Problem solving? Reporting problems? Fixing problems? Logging problems? Maintenance of equipment?

Do they have a technical go-to person? An IT support team? Do they then escalate to external support? Who do they contract with?

Separate from troubleshooting, how are operational tasks handled: such as backing up critical data, installing and updating software, updating virus definitions.

Is this done on a planned or ad-hoc basis?

Technology Planning

Describe how technology planning is done at the organization.

Who is responsible for planning and budgeting for their technology infrastructure? Do they have a technology planning committee? Who is on the committee? Is technology planning one person's job? The executive director, an IT director, CEO, or someone else? Is it anyone's job?

If they have one, how long has their current technical plan been in place? Have they had a plan in the past that is no longer used? Have they ever attempted to do a plan? Do they have a long list of problems across all areas of information management, communications, management, etc that

suggests a need for coordinated technology planning? E.g. are organizations like theirs using technology in a myriad of ways that they are not?

Communication

How is information shared internally and communicated externally?

Can files be shared internally? Are mechanisms in place to ensure data security? Do staff have internet email accounts? Does the organization have the capacity to access the web? Does the organization have a web site supporting its mission that is regularly updated? Does the organization manage the email and web addresses of its donors, funders, clients, and volunteers in the same way it manages other contact information. How have they shared information within the office in the past? How have they communicated to their constituents and/or donors in the past? Where are there difficulties and slow-downs in communicating. Where does information get lost? E.g. how would the organization benefit from an intranet? How would the organization benefit by using YouTube, Skype, LinkedIn, or other external communications tools.

Besides computer communication, are there problems in communication of information that is currently done by paper, such as forms, applications, orders, or invoices? Are there problems with this current approach in terms of it taking too long, requiring repeated actions, or having too many errors?

Information Management

How is information managed by the organization?

What information is critical to the organization (e.g. donor information, client information, case management, orders, invoices)? How is the information managed? Is it managed electronically, via paper, or mixed? Does it have information systems to manage its critical information needs? How does information flow electronically among staff in the organization? Is information entered only once, or need it be entered repeatedly? Have they tried to automate in the past? How has that gone? How have their current databases been built? By staff? Volunteers? Interns? What are the shortcomings of their current information systems? Duplication of work? Erroneous reports? How could their operations or programs be enhanced by managing information better?

Business Systems

Describe how their business systems (e.g. accounting) is managed in the organization.

How does the organization manage its accounting processes? Payroll? Other benefit systems? How long has it been in place? Is it causing problems? Are reports accurate and adequate? Does it meet their funders' requirements? Can it be done more fluidly? Do cheaper or better alternatives exist?

II. Give the Task a Name Based on the Problem or Opportunity

Section I is descriptive, and provides a picture of the organization. Section II is persuasive and prescriptive. It argues that there is a problem, the problem is important to solve, alternative solutions have been considered, and a solution is being proposed.

Begin by describing the problem or opportunity that the consulting partnership is going to address. Give some detail, drawing on the detail you provided in Section I.

Then it is critical to argue why this problem is important to solve. Does the current situation result in too many errors, wasted money, wasted time? How would solving the problem allow the organization to better meet its mission? That is, how will it allow them to do what they are intended to do better? Just improving technology for its own sake is not a justification. What is the value in terms of better service, products, or return on investment?

Describe what alternative solutions exist, and how they were evaluated. Provide a persuasive argument for why the solution you are proposing is the best alternative.

Expected Outcomes

Describe the approach you intend to use (i.e. what steps you will implement toward the solution). Itemize and explain the major steps you will use in your approach to the problem/opportunity. Describe the expected outcomes for each for each activity, and include how the outcome will be measured and that the baseline measurement is currently. The outcomes, how they are measured, and baseline measurements often are best presented in a table.

Additional Impacts

Besides the outcomes you have already mentioned, what *other* impacts will the approach have? Describe how the task will impact positively or negatively (whatever is applicable) the organization, facilities, program(s), staff, technology infrastructure, technology management, technology planning, internal and external communications, and information management. If necessary, use level-3 headings to break up this section.

Feasibility

Discuss the feasibility of the proposed work. Include whether there is time to complete what is proposed, whether the partner is motivated (passionate / committed / lukewarm), whether the required resources are available, whether it fits the consultant's skills, whether it fits the partner's skills, and what are the risks. Discuss how the work will be sustained after the consultant leaves.

III. Name of the Next Major Consulting

... repeat...

n+1. <Name of Major Consulting Task n>