Carnegie Mellon University

Context Analysis

Questions / Feedback

- Questions pertaining to the class?
- Questions on the relationship with your client?
  - How many visits have you had?
  - Are schedules being negotiated well?

Rhetorical questions…

- You should now be getting closer to answering what, exactly, will you be doing?

- Why is it something important to do?
  - How do you convince their Board of Directors, patrons, or donors that this is a good use of resources?
  - How do you convince me (simulated consulting firm supervisor) that this is a good use of your time?

Alternative investments

- TCinC, Inc. is investing about $3500 in in-kind services to the organization.
  - We could assign you to some other nonprofit.
  - Why is this project in this nonprofit a valuable use of the investment?

- If I gave the client the choice of the scope of work, or $3500 in cash, which would they prefer?
  - How do you create a strong argument for choosing your scope of work?

What is a *scope of work*

- What is it?
- Have you ever read one?
- Have you ever written one?
- Where might you find them?

What is a *scope of work*

- A persuasive argument for why to do the work.
- Detailed description of what will be done
  - Not as detailed as a work plan
  - But both parties should have the same understanding of what the work is.

Why a scope of work?

- A key part of a contract or proposal
- A test of whether you and the client have the same understanding what you are doing and why.
  - It permits clarification and correction.
- It communicates what you are doing and why to other stakeholders
  - Management on both sides
  - Funders
  - Investors
- It is archival record for review, replication, or other uses.

A persuasive scope of work

- Describes
  - The problem to be solved
  - Or opportunity to be realized
- Argues why the problem or opportunity is important to the org
- Describes the proposed solution
- Gives detail to the impact
  - How it will benefit the org
  - What costs the org will incur
- Describes the feasibility and risks

Assessing Impact (+ and -)

- Organization
- Facilities
- Program(s)
- Staff
- Technology Infrastructure
- Technology Management
- Technology Planning
- Internal & External Communications
- Information Management
- Business Systems

Assessing feasibility

- How can you consider the feasibility and risk?

Assessing feasibility

- Is there time to complete it?
- Is the partner motivated
    - passion / commitment / lukewarm?
- Are required resources available?
- Does it fit consultant's skills?
- Does it fit partner's skills?
- Is the work sustainable after the consultant leaves?
- What are the risks?

Context Analysis report

- The next step in your working document

- Contains:
  - About the Organization
  - Scope of work

A working Document
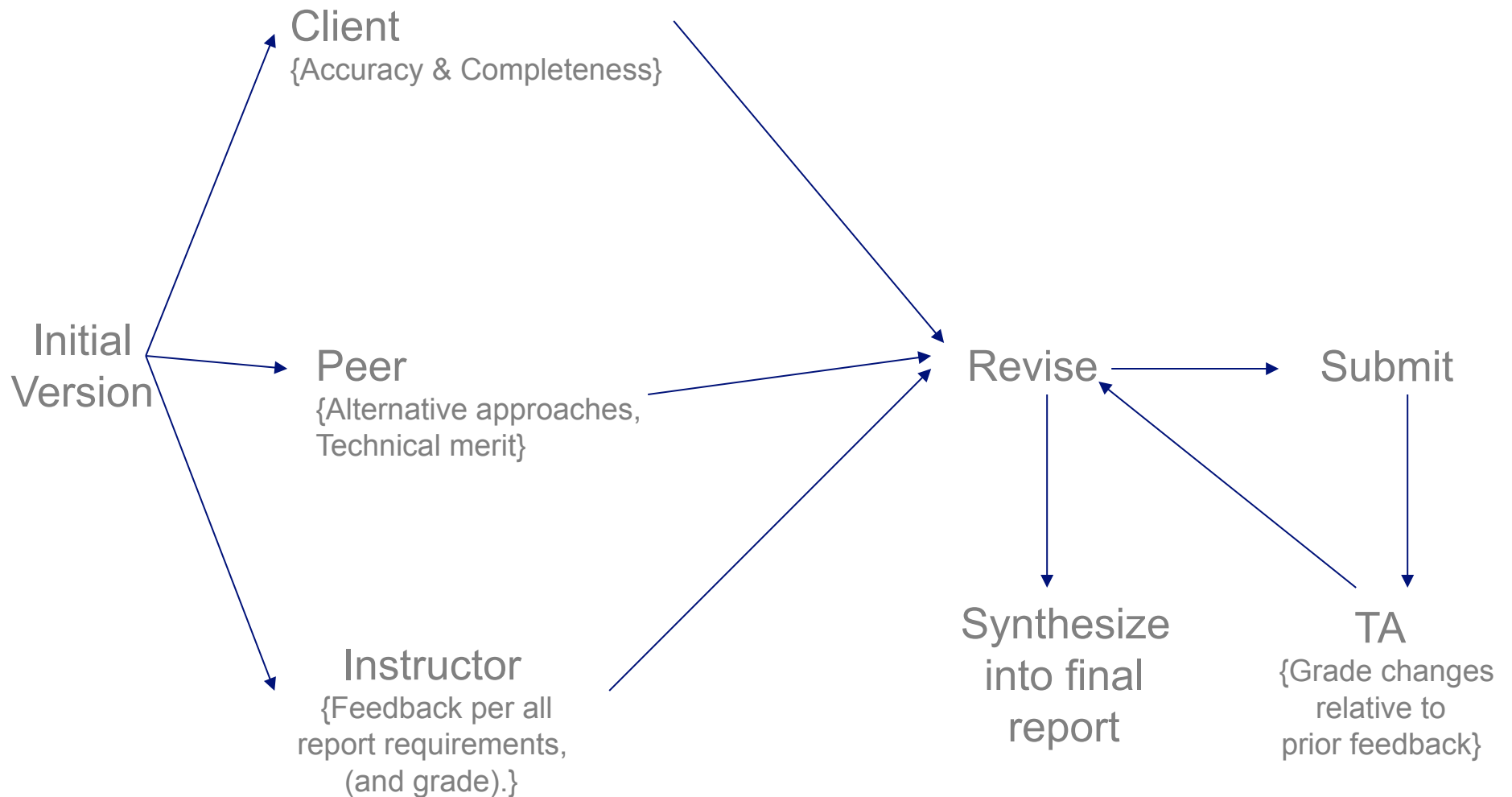
Creating the context analysis

- You will have to work with:
  - About the Organization report
  - Causal flow and work process diagrams

1. Cull your list of possible solutions down to a workable set of solutions
2. Consider the impact each would have to the organization, program, staff, etc.
3. Filter by feasibility
4. Arrive at a scope of work.

Document requirements

- Review requirements and grading criteria
- Need to use the prescribed formatting styles
  - See the template on the course calendar
- Review the timeline

Things to look out for

- When reading "About the Organization" is there enough information that the reader say:

  "Wow. They should do something about that."

- About the Organization:
  - Its role is to: DESCRIBE

- Scope of Work:
  - Its role is to:
    - ANALYZE
    - PERSUADE
    - PRESCRIBE PLANS