### Report Criteria

### Analysis of Outcomes & Recommendations

There are 2 sections to this report. Section I deals with outcomes from the consulting work. Section II deals with recommendations that fall outside of the actual consulting work but relate to how the organization/client can continue to increase their capacity.

# I. Outcomes

## Name of the problem/opportunity addressed by Task 1

As the heading, use a brief title of the problem solved, or the opportunity addressed. Do not use the solution. For example, use the heading "Improve management of client data" instead of "Implement a database" and "Expand marketing to potential volunteers" instead of "Use Facebook".

Begin the section by briefly summarizing the consulting approach you took, the activities you did, and the expected outcomes. This is very brief because you would have already described this in detail in the Scope of Work section of the final consulting report. For now, since this document is separate from the Scope of Work, you have to remind the reader what you were doing.

Then in detail, describe the processes steps you used that demonstrate the robustness, due diligence, and best practices you used to solve the client’s problem (process indicators). Describe milestones, including decisions made, artifacts created, and other intermediate outcomes that make clear the details of the complete solution. And describe any summative outcomes from the work. Provide concrete evidence of these outcomes by using examples of what is observable. For example using statements such as "the requirements were gathered and documented in a report (see appendix)", "multiple software packages were evaluated and a decision matrix was created to aid in choosing the best solution", "30 pages of content were added to the web site. These were divided into six navigational sections 'About the Organization', 'Programs', 'How to get involved', 'How to donate', and 'Contact us.'" (In your report, a list like this should be formatted into a bullet list, not prose.)

Organize the outcomes paragraphs such that you methodically cover (a) outcomes related to any new tools that were implemented, such as CMSs, databases, software packages, or Facebook. Describe the important features of this tool for these are new capacities the organization can now use. If you developed something new, describe the interim requirements and design process artifacts that were produced.

Next (b) describe the outcomes related to the configuration of the tool. Such as configuring features, or choosing or developing CSS formats. Then (c) discuss the outcomes in terms of the content that has been added to the tool. For example, database records migrated from another source, web pages created, or calendar events added. It is a good idea to include who did the configuring for (b) and the content for (c) for that provides outcomes related to the new capacity of the staff and organization (d). Furthermore for (d) discuss what your client and their staff did that demonstrates new understanding and capacity.

And finally (e) discuss any summative outcomes that have resulted from the new solution. For example more people served, time saved, volunteers recruited, or whatever your higher-level goals were. Include its impact on the mission if that makes sense. Don't overextend the argument, however "the database will now solve world hunger."

As you are writing, look for places where contrasting a prior state is useful. For example, "it used to take 2 hours, now it takes 10 minutes." Only use this if it makes good sense.

Be sure to include throughout your discussion what outcomes were not achieved, and discuss how this suggests capacity “yet to be reached” and “risks to sustainability.”

Can this outcome be sustained? How? Give concrete evidence that it is sustainable. Else state the risk that it is not sustainable.

How has this outcome supported a new vision of how technology can support their mission. And if so, how? If not, then skip.

## Repeat for each of your tasks

# II. Recommendations

## A. Vision

Begin by providing a broad vision: if your client followed the recommended plan, what would their organization look like in the future. This short section (about a paragraph) has statements like: “Technology supports the administration of YMCA such that all staff has the information they need, and they never have to enter the same information twice” or “The computers in the after school program work reliably for the children and staff. Software applications are installed and students know how to use them such that the children regularly use the computers each day to meet their broader learning objectives.”

Broadly speaking, there are two areas of the vision

1. To sustain current technology
* What does the organization look like when the technology they currently have is working to its full potential.
1. To innovate new technology
* What does the organization look like when it is using new technology or is using technology in new ways?

## B. Goals

State a set of recommended goals that will get move the organization toward the vision. There should be at least TWO recommendations/goals and ideally they should span across a 3-year horizon.

Goals are the big targets of the plan. They should provide clear benefit, be implementable, finite in duration, with outcomes that can be measured. Section B will state what those goals are, and provide a recommended timeline for how they should be implemented. Section C will then make a persuasive case for each goal and provide strategies for pursuing it.

The goals will include statements like:

* “Create and implement a technical support plan to address issues of troubleshooting, hardware and software maintenance, computer security, and disaster recovery.”
* “Standardize on a set of creative software applications and implement curriculum to develop mastery of them in all our children.”

You may organize your goals in whatever format that makes sense as long as it has a timeline of 3 years. In addition, it will be helpful to provide a timeline chart that serves as an **overview** that shows a breakdown of the main goals for each timeframe. An example of a project timeline chart is shown on the next page.

## C. Strategies

This section then iterates through all of the goals you stated in Section B.

Keep in mind that the goal is a recommendation to your client and their organization to take a course of action in the future. You are making recommendations for how they are allocating their staff time, and how they are using their financial resources. You are putting your reputation behind a set of actions that you think they should use their charitable donations toward. People donate to your organization so that it will serve the needs and the people that they care strongly about --- and they think strongly enough about those causes to write a check, to forgo using the money for their own purposes, in order to support the work of the organization. Your goals, then, should make a clear statement for how that charitable donation should be allocated to use technology to better meet the mission of the organization. So at its core, each goal is a **persuasive case** for why your client should take the course of action you are recommending.

So how do you make a persuasive case? In broad terms:

* Argue why it is a good idea
* Argue how it would be implemented in steps the CLIENT can understand.
* Provide resources that can help the client better understand the necessary steps.



Source: http://www.alchemydes.com/samples/project\_timeline\_chart.gif

The following outline would be useful for this section:

### Goal 1: Name of goal

#### a. Background

Describe/ introduce goal 1 in detail

#### b. Justification

Build a persuasive case

If the argument is that it would support their mission better, quantify how “better” would be measured e.g. via Return on Investment (ROI)

Or if the argument is for more efficient use of resources (people or funds), quantify how “more efficient” would be measured, e.g. via ROI

#### c. Strategies

Describe the major steps, or phases, necessary to reach the goal.

#### d. Expected Outcomes

As you defined them in your Scope of Work

#### e. Resources

Research resources that are needed to complete the strategies for this goal

Internal resources: Some organizations are under another management umbrella that is able to provide resources for step 1;

Staff – who would be the key staff persons that could be used?

Facilities, computers, networks, etc

External resources: People to consult with, books to refer to, conferences to go to, websites to refer to, consultants to contract with, etc.

Budget: You only need to research the cost side. There is no need to worry about how the organization would raise money for your project recommendations. (That is the executive director’s job.)

 Create a table to show the budget

### This would then be repeated for Goal 2, 3, etc. (You need at least two.)

## D. References

It is strongly recommended to create a footnote for each data. In addition, you should also provide the main references here. The purpose is twofold, that is, to avoid plagiarism and to provide references for readers.