

**Context Description Chart**

	<b>Current</b>	<b>Relevant History</b>	<b>Problems</b>	<b>Opportunities</b>
<b>Organization</b>	Name, location, relationship to its community, mission/purpose/goals, major program areas. It is useful to get a sense of the size of the organization. E.g. # employees, # people served, budget size.	Anything relevant to understanding problems and issues related to technology.	Org'l problems related to technology; funders requirements, Board of Directors requirements, need to interface with other agencies or report to funders.	New ways to increase the visibility or prestige or fundraising profile of the organization.
<b>Facilities</b>	Describe space, size, security, lighting, who uses space, etc.	Anything relevant to placement of computers.	Problems related to technology, e.g., structure, security, furniture, climate controls, lighting, etc.	E.g. better ways to use the existing space. Or better ways to analyze the existing space.
<b>Program</b>	Describe program activities in general, who attends, program's focus, how computers are used.	Anything relevant to past activities that sheds light on computer use now or in future.	Within program activities, problems related to desire for tech or problems with current use.	New ways to run the programs facilitated by technology.
<b>Staff</b>	Who does what and how they interact w/computers. Do they have access to relevant computer office applications? Do they know what they need to make use of the technology available to them? What training is available to them?	How long employed, if relevant; previous experience, if relevant.	Might mention willingness to learn,	E.g. is technology understood in one job task that could be applied to another?
<b>Technical Environment</b>	Specify hardware, network, Internet connection, OS, peripherals, types of software programs, etc. Be specific.	May be relevant to know that certain items became available at a different time.	Problems related to technology.	New hardware or software that would make their technical environment run better.
<b>Technology Management</b>	Who is responsible for managing technical environment. What is included? Problem solving? Reporting problems? Fixing problems? Logging problems? Maintenance of equipment? How are operational tasks handled: backing up critical data, installing and updating software, updating virus definitions.	Background that helps explain this org's understanding of importance of tech. mgt.	Files lost, backups not performed, backups corrupt, prevalence of viruses and spyware.	E.g. new ways to manage backups and software updates.

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<b>Technology Planning</b>	Who is responsible for planning and budgeting for the technical environment? Do they have a technology planning committee? Who is on the committee? Is technology planning one person's job? Is it anyone's job?	How long has their current technical plan been in place? Have they had a plan in the past that has gone stale? 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?
<b>Internal &amp; External Communications</b>	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 such as by using Sharepoint? How would the organization benefit by using YouTube, Skype, LinkedIn, or other external communications tools.
<b>Information Management</b>	What information is critical to the organization (e.g. donor, client, case management)? 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?
<b>Business Systems</b>	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?