

# RESOURCES

## Phase III: Stable, but Not Static



### Activity: Context Mapping

#### Goals

1. Evaluate resource plans in response to the broader trends in the domain the program serves
2. Understand how changes in the environment may affect long-term sustainability

#### Prerequisites

None

#### Who Should Participate?

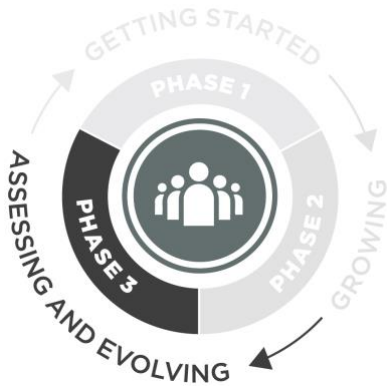
Program leadership (strategic thinkers), Program management (tactical thinkers), Program staff (operational expertise)

#### Length

90 minutes

#### Activity Instructions

1. Start with a virtual or physical whiteboard with four quadrants labeled Social, Technological, Economics, and What Else? If your group has more than 6-8 participants, you may break into smaller groups through Step 3.
  - a. Social factors: these are values and cultural ideals and how they affect the value and necessity of a product or service.
  - b. Technological factors: these include changes in technology, technology advancements, technology lifecycles, and how those factors can positively or negatively impact a product or service in the marketplace.
  - c. Economics: elements such as budgets, priorities, opportunities, and how they can positively or negatively impact a program's resource sustainability.
  - d. What else: trends that don't fit the above categories, e.g., political, legal, or environmental.
2. For each element in the map, take 10 minutes to brainstorm a list of key trends or events affecting your program and/or your stakeholders and note what evidence supports these trends.
  - a. Social examples: focus on open access, globalization
  - b. Technology examples: sunseting technology, development trends such as microservices or headless software
  - c. Economic examples: systemic budget cuts or reallocations, changing funder priorities
3. If you broke into smaller groups, come back together and report back to the group on those trends that were the most interesting, the most meaningful, those that sparked the most discussion, etc.
4. As a group, discuss the following questions. The table below can be filled in to help organize the map. Sample trends and action items are provided in the table.
  - a. What are the core trends in each quadrant?
  - b. Will the trend have a positive or negative effect on our program?
  - c. What are action steps we could take to mitigate or take advantage of the trend?
  - d. What is the priority of each action step?



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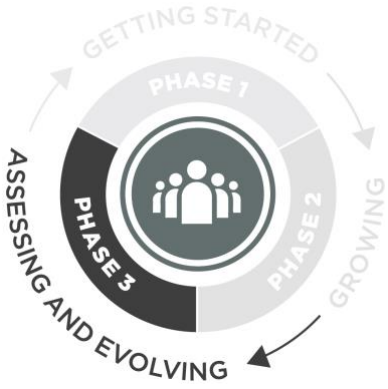


# Activity: Name

5. To wrap up, identify 1-3 high priority action steps to add to your technical roadmap, communications plan, or other strategy document. If there are too many high priority items on your map, you may use a sticker vote to decide on the most important.
  - o In a sticker vote, each participant is assigned a number of 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.).

### Sample Context Map Action Plan (examples in *italics*)

Quadrant	Trend	Positive   Negative   N/A	Action Steps	Priority (1 - low to 10 - high)
<i>Social</i>	<i>Funder focus on open access</i>	<i>Positive</i>	<i>Highlight this aspect of our work in funding requests</i>	5
<i>Technology</i>	<i>Central IT ending support for applications using PostgreSQL</i>	<i>Negative</i>	<i>Explore alternative hosting options for users</i>	10



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**Activity: Name**