PROJECT PROPOSAL

GAP ANALYSIS, PRIORITIZATION, & RECOMMENDED SOLUTIONS 2023

The initial gap assessment of the company's current business processes, prioritization of tasks, and recommended long-term and sustainable solutions.

ASSOCIATES OF PATHOLOGY, P.C.

5475 S 500 E Ogden, UT 84405
1-801-429-2392

CREATED BY:
Kendra Johng
Beus Freelance Writing and Design LLC

CREATED FOR:
Associates of Pathology, P.C.

DATE:
May 15, 2023

Contents

Revision History

Version	Date	Author	Description of Change	Reviewed By / Date
0.1	5/3/23	Kendra Johng	Initial draft for the Associates of Pathology, P.C. (AOP) Project Proposal	Andrew Johng mm/dd/yy

Who is Beus Freelance Writing and Design LLC?

Beus Freelance Writing and Design was established in 2020 by Kendra (Dadisman) Johng. For the past four years, this freelance writing and design business has helped over 35 clients produce critical process documents for small businesses, operation manuals for large manufacturing companies, workflows, policies and procedures for various industries, onboarding/training materials, and more.

In addition to freelancing on the weekends, Kendra Johng works for an Information Technology Consulting firm that contracts to the USEPA during her 40-hour work week. At Systalex, Kendra is the documentation lead for all Software Development Life Cycle (SDLC) deliverables and project artifacts for various drinking water applications. She works closely with project managers and subject matter experts to produce quality documentation for both internal and external stakeholders. She manages project risks, as well as presents monthly project metrics to the leadership team.

To learn more about my professional experience, please connect with me on LinkedIn:

https://www.linkedin.com/in/kendra-johng/

I have also coded my own website from scratch to display some of my writing and design work:

https://kendrajohng.github.io/index/

What are the main goals for Beus Freelance Writing and Design LLC?

1. Improve client processes by establishing long-term, sustainable solutions.
2. Create uniformity and standardization across company-wide documentation.
3. Provide clients with quality deliverables that fit their business needs.

Contact: beusfreelance@gmail.com

Kendra Johng
Professional Experience
Technical Writer since 2017

January 2017 - July 2017	July 2017 - October 2019	October 2019 - October 2021	October 2021 - Present
Technical Writer for Pharmaceutical Manufacturing	Environmental Health and Safety Specialist | EHS Consultant	Technical Writer for Health Insurance Industry	Technical Writer for Information Technology | USEPA Contractor

***NOTE:** This proposal is a DRAFT. There are still questions that must be clarified and answered before this document is finalized and signed by all parties.*

Yellow Text: Indicates the section is pending further discussion or needs to be addressed by AOP.

Section 1. Overview

1.A Executive Summary

[Please describe the background of your organization's challenges. Describe your specific goals and objectives for this initiative. List your business requirements related to this project. Define what "success" means to your organization.]

1.B Project Background

Beus Freelance fully understands the importance of this initiative to Associates of Pathology, P.C. (here-on referred to as AOP). Please review the problem statement, project goal, and proposed solution below. *NOTE: The statements below are subject to change and will be rewritten after an executive summary is provided above.*

Problem Statement: The current process for managing company policies and procedures is based on outdated methods that limit the company's efficiency and organization.

Project Goal: AOP needs a sustainable, streamlined solution for managing internal policies and procedures to replace the legacy documentation management method.

Proposed Solution: Based on the information Beus Freelance has received, the proposed solution to reach AOP's project goal is to start by performing a gap analysis, followed by prioritizing those gaps based on criteria defined by AOP, and finally recommending solutions to improve AOP's business processes moving forward.

Gap Analysis → Prioritize Tasks → Recommend Solutions
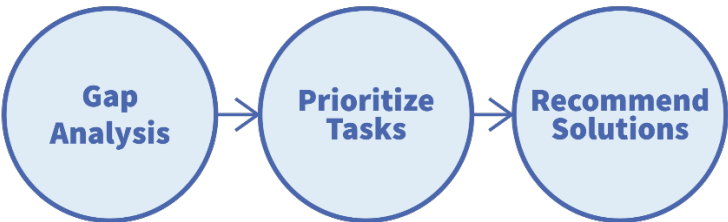
1.C General Requirements

Please review the general requirements for this project in the table below.

Requirement	Details
Designated Point-of-Contact (POC) for AOP	[insert name of POC here] • AOP will designate the point-of-contact to communicate project needs, updates, meetings, etc. with Beus Freelance's point-of-contact, Kendra Johng. • The POC for AOP will organize meetings between Kendra Johng and other department leads if necessary.
Designated Point-of-Contact for Beus Freelance	Kendra Johng
Project Status Reports	Will be delivered [insert frequency here]

Requirement	Details
	Project Status Reports will include: • Project areas analyzed • Gaps identified • Budget status • Other metrics, as requested
Method of Communication	The Beus Freelance team will maintain routine communication with Associates of Pathology staff to ensure continuous progression of the project. • The primary method of communication will be E-mail
Storage of Project Artifacts and Deliverables	• Presentation materials will be prepared using Microsoft PowerPoint. • Analysis documentation will be prepared using Microsoft Word and Microsoft Excel. • All project artifacts and deliverables will be uploaded and stored in the AOP Google Drive for both parties to access.
Logging Hours	Beus Freelance will log all contract work hours using Google Sheets located in the Project Google Drive. Categories for hours logged will include: • On-site meetings • On-site analysis and documentation • Off-site analysis and documentation • Off-site/virtual meetings • General overhead administrative tasks such as addressing email correspondence, logging contract work hours, and producing project status reports • Additional research regarding project solutions based on the findings of the gap analysis
Meetings	All meetings (on-site and off-site/virtual) will be documented using the template in Appendix X. • On-site meetings will be scheduled for no earlier than 3pm Mountain Standard Time.
Define Success (AOP)	[insert definition of success here] • [list your success metrics here] • [success metric] • [success metric]

Associates of Pathology, P.C. | Beus Freelance Project Proposal | May 15, 2023

1.D Scope

Beus Freelance will perform a gap analysis to determine the root cause of the documentation management limitations and disorganization, then they will provide a summary of the analysis, assist AOP with prioritizing tasks, and recommended solutions to establish a plan for improvement.

The Scope of Work Includes…	The Scope of Work Does NOT Include…
- Gap analysis - Prioritization of tasks - Recommended solutions - Project artifacts and final deliverables	- Design recommended solutions - Implementation of solutions - Training

AOP will have five (5) business days from the project start date to request changes to the scope of the project without going through the formal **Change Management Process**. As the scope is updated, the project timeline, milestones, budget, and all other applicable areas will be updated to reflect the changes to the scope.

If changes to the scope are requested after the five (5) business days, Beus Freelance will initiate a meeting to discuss the request with AOP. If AOP confirms the request to update the scope of work to this project, a formal Change Management Process will begin. Please refer to Appendix B to review the **Change Request Form** in detail.

Section 2. Team Structure

2.A Stakeholders

The table below describes each role and corresponding responsibilities for the duration of the project.

Organization	Individual	Responsibilities
Beus Freelance Writing and Design	Kendra Johng	- Prepare a Request for Information document along with the Project Proposal and Project Plan. - Perform a gap analysis based on the current situation of AOP. - Manage project-level responsibilities, including staffing, monitoring progress, managing risks, and defining and implementing corrective actions, as needed. - Provide expertise on key business processes and user needs for adhering to business requirements, and document management criteria. - Responsible for all project activities and deliverables. - Report to the point-of-contact established by AOP. - Adhere to the scope and requirements read and signed by all parties.
Associates of Pathology, P.C.	Dr. Steiner, Dr. Stephenson, Dr. Orton	Assume overall responsibility and accountability for the project.

Organization	Individual	Responsibilities
		• Champion the project, ensure it aligns with the organization's needs and overall strategy, and secure the budget and resources necessary to achieve project objectives.
Associates of Pathology	Andrew Johng	• Provide guidance and oversight over project execution including ensuring progress against schedule, providing input and guidance on project direction, managing scope, and supporting risk identification and mitigation. • Collaborate and meet with Beus Freelance on a regular basis to share information and synchronize the analysis efforts.

Section 3. Gap Analysis, Prioritization of Tasks, and Recommended Solutions

This section provides a background of the purpose and benefits of a gap analysis.

What is a Gap Analysis?	Why is it important?
A process of comparing your current state to your desired future state. This process includes assessing the internal performance of business functions.	The purpose of a gap analysis is to determine whether goals or objectives are being met and, if not, creating a series of actions that will bridge the identified gap. This approach to strategic planning offers a structured and meaningful way to assess your goals.

3.A Benefits of a Gap Analysis:

- Gap analysis forces you to think about your current situation, your desired future state, the gaps between the two, and your action plan in a very structured and clear manner.
- Presents a framework for collaborating on creating a strategic plan.
- Provides a structured approach by requiring responses to specific questions that can be integrated into a cohesive strategic plan.
- The assessment can be used to analyze historical performance. The first time you run a gap analysis process, you will explicitly capture the current performance of your business (in both qualitative and quantitative forms).
- You will have a benchmark against which you can compare your most recent performance.

3.B Use Cases for Gap Analysis:

- Create a new strategy for your team and want to understand the current situation

- Determine the areas of focus for your team
- Uncover the gap between your company and customers' expectations
- Discover why you aren't meeting important KPIs and strategic objectives
- Develop a change management strategy but you need first to identify the gap between the current and desired state
- Identify opportunities to improve existing processes
- Prepare for an audit and showcase how are you proactively addressing any gaps
- Prepare a strategic plan and prioritize resources

3.C 5 Steps of the Gap Analysis:

1. Define the focus area(s)
2. Identify the desired future state
3. Assess the current state
4. Choose the applicable KPIs
5. Create an action plan

If the Gap Analysis Project is successful, both parties may begin to discuss carrying out the design, implementation, and training for the new documentation management system. This is out of scope for the current project, but a new project proposal will be drafted if requested.

3.D Prioritization of Tasks

Once the gap analysis is complete, we will move forward with prioritizing the identified gaps. Prioritizing these tasks is critical to the overall success of AOP's goals (stated at the beginning of this document). By prioritizing the gaps identified, AOP will be able to implement change in incremental phases as to not overwhelm the staff with sudden change.

The table below is an example of how tasks will be prioritized. AOP will need to work with Beus Freelance to establish prioritization criteria to properly rank each identified gap. Naturally, once the tasks are prioritized, it will be up to AOP to carry out the design, implementation, and training for each gap starting with the highest priority item.

ID	Gap Identified	Description	Category	Priority	Responsible Party	Timeline
1						
2						

3.E Recommend Solutions

The Beus Freelance team will coordinate with AOP to review the findings of the analysis to provide a list of potential changes needed and recommendations moving forward. Those findings/recommendations will include, but are not limited to:
- Changes to internal systems and processes
- Determine resources and effort needed for the ongoing operational support of AOP
- Proceed with the implementation, governed by a detailed project plan

Section 4. Program and Project Management

4.A Change Management

What is Change Management?	Why is it important?
Change management refers to the process used to control the lifecycle of all changes.	The purpose of change management is to manage changes in a well communicated, planned and predictable manner that minimizes unplanned/unforeseen project issues.

Effective change management requires planning, communication, monitoring, and follow-up procedures to reduce negative impact to the project. |

As noted in Section 1.D, if changes to the project scope are requested five (5) business days from the project start date, Beus Freelance will initiate a meeting to discuss the request with AOP. If AOP confirms the request to update the scope of work to this project, a formal Change Management Process will begin. Please refer to Appendix B to review the **Change Request Form** in detail.

The changes requested by AOP will be sent to the Project Manager for Beus Freelance, Kendra Johng, for review. After reviewing the request, the Project Manager will either mark the form as "approved" or "rejected", then both Project Managers will sign the form.

NOTE: By submitting the form, the requestor understands that all project work will stop immediately until the change request form is complete.

4.B Issue and Risk Management

If risks are identified during this project, the risk matrix below will be used to determine the probability and severity.

What is a Risk Matrix?	Why is it important?
A risk matrix, also known as a probability and impact risk matrix, is a visual tool depicting potential risks that are affecting a business.

The risk matrix is based on two intersecting factors: the probability the risk event will occur and the potential impact the risk event will have. | A risk matrix helps businesses cultivate a solid understanding of the risk environment, allowing them to manage and mitigate risks before they occur. |

Impact

	Marginal	Moderate	Critical
Unlikely	Low	Medium	High
Likely	Low	Medium	Medium
Highly Likely	Low	Low	Low

Probability

1. Define Risk Category
   - **Strategic Risk:** risks associated with failed business decisions.
   - **Operational Risk:** risks associated with breakdowns in internal processes/procedures.
   - **Financial Risk:** risks associated with financial loss.
   - **External Risk:** risks associated with uncontrollable sources.
2. Determine Risk Criteria
   - **Probability:** the level of likelihood the risk will occur or be realized.
     - **Unlikely:** Risks in this category have a relatively low chance of occurring.
     - **Likely:** Risks in this category are predicted to occur and require a mitigation strategy.
     - **Highly Likely:** Risks in this category are almost guaranteed to occur and require a mitigation strategy.
   - **Impact:** the level of severity the risk will have if the risk is realized.
     - **Marginal:** The hazard may either be controlled, or would commonly result in less than minor, illness, injury, or system damage.
     - **Moderate:** The hazard may commonly cause severe injury or illness or major system damage, requiring immediate corrective action.
     - **Critical:** The hazard may commonly cause death or major system loss, requiring immediate cessation of the unsafe activity or operation.
3. Assess the Overall Risk Exposure
   - High risk
   - Medium risk
   - Low risk

An example of the risk tracker will look like this:

| ID	Risk Title	Risk Description	Risk Category	Probability	Impact	Exposure
1						
2						

Section 5. Timeline and Budget

5.A Timeline

Kendra Johng, owner of Beus Freelance Writing and Design, will provide a draft Project Proposal / Request for Information document to Associates of Pathology, P.C. by Monday, May 15th, 2023.

The Beus Freelance contractor will dedicate a maximum of 10 hours of work per week for this project.

Project schedule and milestones are to be determined after more information is gathered regarding AOP's goals, expectations, and scope of this project.

The project timeline will be tracked and maintained via an Excel spreadsheet. Below is an example.
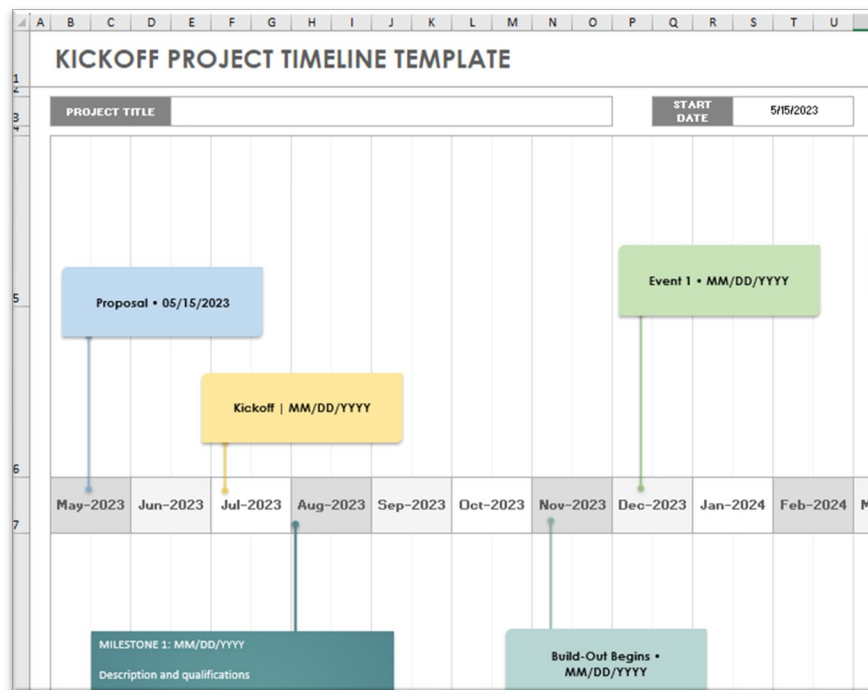
5.B Budget

A full project estimate cannot be determined until the scope of work is defined.

For reference, Beus Freelance Writing and Design consulting rate is $100 per hour. Type of work that falls under this rate are:
- Meetings with the client
- Research and analysis
- Documenting findings and delivering final project artifacts and documents

5.C Deliverables and Milestones

Deliverables and milestones will be determined once the scope and goals are established for the project by AOP.

List of Deliverables	List of Milestones
TBD	TBD

5.D Progress Reports

Project progress reports will be prepared and delivered to AOP at a frequency that is to be determined.

APPENDIX A – Project Kickoff Materials

Project Kickoff Checklist

Project Name:
Project Manager:
Point-of-Contact (POC):
Date of Meeting:
Start Date of Project:

ID	Activity	Status | Date Completed
1	Review Project Proposal/Project Plan	
2	Verify project funding	
4	Review project timeline based on resources and availability	
5	Obtain input from key stakeholders and project team to create stakeholder communications plan	
6	Determine who will attend the kick-off meeting	
7	Prepare materials for kick-off meeting	
8	Ensure team members have access to all necessary documents	
9	Schedule meetings based on participant availability	
10	Establish meeting rules and communicate to attendees	
11	Ensure that project goals, objectives, and individual responsibilities are clear to all team members	
12	Highlight key milestones, project stages and deadlines	
13	Review communication plan and required documentation	
14	Identify any requirements needed to begin initial project tasks. Does everyone have what they need to follow through with assigned action items?	

Meeting Minutes Template

Meeting / Project Name	Date	Time

AOP Attendees	Beus Freelance Attendees

ID	Agenda Item	Notes
1		
2		
3		
4		
5		

ID	Action Items	Assigned To	Due Date
1			
2			

APPENDIX B – Change Request Form

<table>
<tr><td colspan="4" align="center">Change Request Form</td></tr>
<tr><td colspan="4" align="center">Project Change Request
This section MUST be filled out if changes need to be made to one of the following: Project Name Change, Project Date Extension, OR updating scope of work.</td></tr>
<tr><td>Project Start Date</td><td></td><td>Project Manager (AOP)</td><td></td></tr>
<tr><td>Project End Date</td><td></td><td>Project Folder Name (Beus)</td><td></td></tr>
<tr><td>Request Date</td><td></td><td>Reason for Request</td><td>☐ Change Project Name
☐ Project Date Extension
☐ Update Scope of Work
☐ Other: _____</td></tr>
<tr><td>Description of Change</td><td colspan="3"></td></tr>
<tr><td>Justification for Change</td><td colspan="3"></td></tr>
<tr><td colspan="4" align="center">By submitting this form, the requestor understands that all project work will stop immediately until this change request form is complete.</td></tr>
<tr><td colspan="2" align="center">Beus Freelance Manager Approval</td><td colspan="2">☐ Approved   ☐ Rejected</td></tr>
<tr><td>Date</td><td></td><td>AOP Project Manager Signature</td><td></td></tr>
<tr><td>Date</td><td></td><td>Beus Project Manager Signature</td><td></td></tr>
<tr><td colspan="4" align="center">Additional Comments</td></tr>
<tr><td colspan="4"></td></tr>
</table>