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| To: | Kyle Harms |
| From: | Bob Holstein |
| Subject: | Proposal – Consulting Engagement in support of INFO 5900/5901 |
| Date: | December 22, 2017 |

The following is my proposal for a consulting engagement to address the following three opportunities that we discussed in previous correspondence:

* Reexamination of the expectations and required artifacts associated with the project management aspects of the course;
* Production of templates for required artifacts with example information that illustrates the level of details expected; and
* Lecture support material that presents the whole project management process at the level of detail expected for the MPS project. And, delivery of such a project management lecture.

As we discussed, this engagement would consume between 40 and 60 consulting hours. My engagement rate is negotiable; however, my expectation is that it would be comparable with the consulting rate paid for similar engagements and guest lecture appearances.

The content of this proposal is based on my best interpretation of the opportunities for improvement that we discussed as well as my review of the curriculum materials. This content is negotiable to make sure it is properly aligned with your needs and vision for this course. Furthermore, I will start with a few assumptions and questions that we should address prior to finalizing an agreement.

# Assumptions

* This engagement would be executed promptly so that the benefits could be applied to the Spring 2018 sessions of INFO 5900/5901. Therefore, the project initiation components must be delivered promptly to support the start of the course.
* These deliverables support the INFO 5901 portion of the courses which addresses (principally) project execution and process.
* The deliverables will focus on “lightweight” project management process which is sized for the 14-week, three-student project teams.
* “Check-ins”, while not a desirable aspect of the course from the students’ perspective, are necessary to monitor progress and reflect real-world, professional expectations.

# Questions

* What did the students perceive as little value and tedious?
* One of the comments in the feedback from the students lecture was “More discussions and less lecture.” Can you provide any more detail around this sentiment? What aspects of the lectures was considered not valuable?
* Could the some of the lecture content be converted to discussions? In that case, part of this engagement could be to propose questions to prompt discussion. (That is not specifically included below).
* What is “the homework”? Why is perceived as too much and adding little value?
* While I believe the leadership discussion provided in one of the lectures is appropriate, I am curious as to the discussion regarding “free riders”. Could you expand? And, could there be an opportunity to structure the deliverables as to make such “free riding” visible and discouraged.

# Deliverable 1 - Reexamination of the expectations and required artifacts

The course would be adjusted

* **Project Charter or Scope**
* States the business objective or problem statement;
* Description of requirements, goals, and client deliverables (in addition to the required report, poster, and presentation);
* Conditions of satisfaction from and approved by the client;
* Approved by client;
* **Project Approach, Design and Assumptions**
* Compatible with the Project Charter.
* Include a first cut at risks;
* Include milestones that could be visible to the client.
* Assumptions regarding resources and engagement with the client
* **Project Plan**
* Includes the milestones from the Project Approach;
* Work breakdown into tasks that produce evidence that the task was or was not completed;
* Includes communications events and required course deliverables of report, presentation, poster;
* Includes initial breakdown of roles and who is accountable for each task;
* All tasks decomposed to not exceed two weeks in length
* All tasks to have comparable levels of effort.
* **Risk identification and mitigation strategy**
* Identification of risks and assessment of probability and impact;
* If a risk requires mitigation tasks, those tasks get added to the project plan and identified as such
* **Project Status Report**
* Aligned with (and could be a variant of) the project plan
* Updated weekly
* Tasks completed – specify the evidence and who owned it
* Risks mitigated
* Any major changes – tasks added or deleted;
* Up to three biggest concerns each week.
* This project report could be presented twice during the semester but don’t make a special event; better to keep current each week. (I assume this supplants the “log”);
* Possible student self-assessment or team assessment.
* Client communications and any major decisions or sentiments could be reported here

# Deliverable 2 – Templates for required artifacts

Produce templates with sample information for each of the artifacts, listed below.

* **Project Charter or Scope**
* **Project Approach, Design and Assumptions**
* **Project Plan (which should dovetail with the plan)**
* **Risk identification and mitigation strategy**
* **Project Status Report**

# Deliverable 3 – Project Management Lecture

* Describe the big world of project management; but don’t dwell on it
* Curtail the case studies except for a little entertainment value and to bring a few points to light that are relevant for this scope of project.
* Focus on the process the class will use.
* Drop discussion of multiple project management techniques, such as agile.
* Emphasize the importance of open, honest communication and early identification of problems and issues.