Memorandum of Understanding
ITM490 Senior Project Spring 2009

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Course Overview

Perspective
ITM490 is not really a course; think of it like this…. You are working for a 22 person consulting company called 490Inc. We do systems development work for clients. The head of the company is Anson. He has a couple people, with years of experience in the IS field, who support and advise our project teams. All three, will be your internal consultants.

You and three or four other staff are working on a project team for one of 490Inc's clients. One member of your team was assigned as the Team Lead. And one of the internal consultants is assigned as your primary resource. Your consultant--and Anson--will regularly check in with your team. You need to use them to get feedback on your ideas and plans, discuss your progress, etc. Your team, your consultant, and Anson are all on the same side—trying to provide the best possible product for the client.

There are two value equations:

1) Management makes your team successful ➔so your project is successful ➔so the client is successful ➔ so our company will be successful.
2) Project phase after phase, and project after project, we try to keep getting better at it, try to find our mistakes, and improve our work processes.

That is what this semester--this "class"--is. It's not really a class. In a regular course, you get lectures and assignments and exams, being graded on each thing you do. In this course, I'm not pouring a bunch of new information into your head. No exams, no grades, no points. Nevertheless, you will probably learn more than you have in any class before this!

Logistics
Monday nights, from 6:00-9:00 are regular team meeting nights. You need to be there. Most nights there will be a short discussion at the start of class on relevant topics, sometimes teams will give quick presentations. That is the first 15 to 45 minutes. After that, it is your team's meeting and work time. The consultants and myself will be there to provide input, or add further perspectives and tricks of the trade to consider. It is work time that everyone has dedicated to the project.

A Google Apps site, within the Boise State domain, will be available for the course. It will include background information, sample documents, instructions, and specific schedule information. (There will not be a Blackboard site.) Each team will also create and maintain its own Google Apps site.

Projects—Service Learning
All of the teams will be working on projects for non-profit organizations. This adds another dimension to the course, learning about and becoming involved in the missions of these organizations who provide importance services to our larger community. We will take this opportunity to share what we have learned about the issues and organizations teams are working for, and the place of civic responsibility in our lives.

Course Learning Objectives

For an IT project, be able to …

1. … **plan an IT project**, and use the plan to manage/coordinate the team's work; create and present regular progress reports to stakeholders.
2. … **collect and accurately represent information** regarding functional and technical client needs and system requirements from stakeholders; and effectively adjust to changes in requirements.
3. … **create and evaluate IT strategies**, products, and business solutions for client needs.
4. … **actively seek out and research** knowledge, skills and feedback from instructor, consultants, clients, and others, to effectively address project requirements
5. … **communicate effectively** with team members, clients, and management (instructor and consultants)—one on one, in groups, in meetings.
6. … **coordinate your work effectively** in a small team proactively coordinating your work with others and working with an appointed team leader (or as team leader).
7. … **regularly review** your personal and team work processes, and apply your learning to change how you work, to continuously improve.
8. … **learn about community issues and organizations**, and the place of civic responsibility in our lives.

Roles and Responsibilities

Team Members

Each team member contributes to the team in any/every way they are able. Everyone has a clause in their contract which includes "AND OTHER DUTIES AS NEEDED" in the job responsibilities.

Teams are expected to delegate tasks to team members, and expect that team members will reliably fulfill their tasks assignments. There is no requirement for every individual to do every tasks. However, the teams are small, so each of you, including the Team Leader, will have to play many roles and take on many responsibilities. I usually recommend making some formal role assignments to make sure that someone is watching out for specific things. (See Getting Started Guide for ideas.)

Team Leader

Your Team Leader was assigned by the instructor. He/she is a "facilitator", and is not the final decision maker. They are responsible for making sure the team is organized to accomplish the interpersonal, communication, and coordination aspects of its work. Everyone does these, but the Team Leader watches out to make they are getting done.

- **plans and schedules** are developed, updated and the team progress is tracked
- **task assignments** are made so that each member has clear, constructive and appropriate work to contribute to the project with clear and feasible time frames
- **team reviews** its work products and processes regularly to catch problems early and correct problems
- **communications among team members** are constructive and supportive; all members are respected, and all are included in team decisions
- **communications with consultants (including instructor)** are frequent; that consultants are accurately informed of project progress and issues; that they are consulted for input, and their input is considered by the team in its decision making
- **communications with clients** are positive and open, and meet the client and team needs; that client needs drive the team's work; that the client is regularly informed of team progress and issues.

Clients

Your client is both the organization for whom you are doing the project and your contacts there. The clients have provided projects that they need to have done, but do not have the staff to do. They are "hiring" 490Inc to do it for them. (Well, hiring but not paying.) Keep especially in mind:

- Build a strong, positive relationship with your client!
- Your success IS the client's success.
- Get to know them individually and organizationally.
- Learn about the community services they provide, and the issues they address.
- Pay attention to communications.
- Set clear expectations for who, how, what and when—for your client and yourselves.

No surprises!

Continually build your client's confidence in your team and involvement in your project by keeping them honestly informed of your progress and obstacles. Never intentionally or unintentionally surprise them on the due date--it will be the last time that you do!

Consultants

The instructor is primarily a consultant to your team. I am working on your side to help you be successful. We will also have a couple other IT professionals to help as consultants.

Make use of your consultant–their one goal is to help your team meet your client's needs. Invite the consultants in to your discussions. Ask their opinion. Run ideas past them. Ask them to review your plan or design or whatever. You have nothing to lose and everything to gain.

Their advice is freely given. But it is up to the team how—or whether—to use their advice. They bear no responsibility for work done or not done on your project.

Evaluation

No Point System: Input from the client, the instructor, the consultants and you and your team mates will go into your evaluation. This is a qualitative evaluation based on observations and impressions.

Grading Criteria: Your grade is based on three team criteria—Product, Process, and Improvement—and one individual criteria--Contribution. The team criteria are about equally weighted, and contribution will be used to adjust your team grade.

- Product
  - Do your team products meet the client's real needs?
- Process
  - Meet Client Checkpoint and Project Management expectations (see below)
  - Does your team have a process that makes steady progress toward completing the project? Is your process (plan, schedule) documented, published, shared with the client and consultants, etc.?
- Improvement

- Does your team regularly and intentionally review team, work and communication processes to find ways to improve? Do you seek out input from the consultants and client to improve? Do you work to make the improvements?

- Individual Contribution
  - Do you individually contribute to the team processes, products and improvements? Do you commit to do an equitable share of the workload? Do you voluntarily take the initiative to contribute? Do you seek out input on your own work and work processes in order to improve?

Evaluation Process: I collect observations from various sources during, and at the end of the semester. The observations, plus your work products and reports, will enter into forming a grade. It is not a science, but it should not be a surprise to you. I will give you or your team *Instructor's Grade Feedback* when I feel you are endangering your grade, or when you ask me for it. Otherwise, I will not be talking about grades.

You do not need to worry about your grade if you are making a good faith effort throughout the semester-- showing initiative, regularly contributing, and not leaving your team or your client hanging.

If you are concerned about your grade, ask me to meet outside of class and I will give you my honest feedback about your performance.

Client Checkpoint Expectations

The three **Client Checkpoints,** plus the final Project Report due date, are the main milestones for the class (see Figure 1). These checkpoints are formal meetings with your client and instructor, usually held at the client's office. Your deliverables are presented and discussed for client feedback and approval; progress is reviewed in light of the deadline for completion; changes are discussed and decided.

These are important meetings. You want to be well prepared, with a planned agenda, presentation and handouts. Make sure you get input from the consultants on your meeting plan & materials.

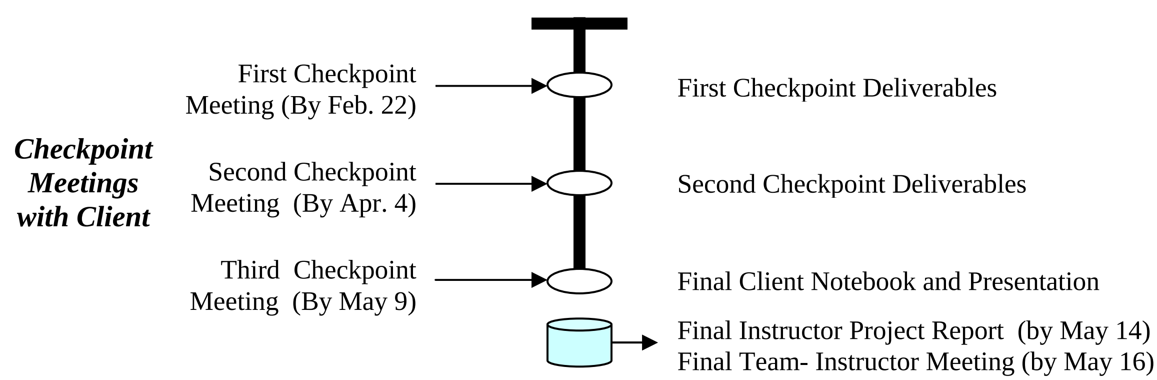

Figure 1 Key Project Milestones—Client Checkpoints

1) First Checkpoint Deliverables

Formally present the project proposal, gain client approval for the overall scope of work, deliverables, project plan and communications plan. Outcome is to gain shared understanding and expectations for team and client commitments for what the project will produce and the process for completing it. Also, outcome is to gain client feedback and buy-in to project.

- Proposed Statement of Work
- Project Plan & Schedule
- Client Communications Plan
- *Other project-specific deliverables*

2) Second Checkpoint Deliverables

Formally conduct a mid-way review of progress made, gain client approval for changes to initial Statement of Work and plan, review completed products with client and discuss issues, concerns and risks with project. If re-scoping or re-direction is needed, this is the time to make it official. Also, outcome is to gain client feedback and buy-in to project.

- Formal Checkpoint Progress Report
- Updated Statement of Work
- Project Plan & Schedule – showing work products and task status: done and to do
- *Other project-specific deliverables*

3. Third Checkpoint Deliverables (See Appendix—Final Project Deliverables)

Formally hand-off the final project report and deliverables to the client. Review entire work completed against agreed requirements in SOW. Discuss next steps for the client to take with it. Get closure on the project.

- Final Client Project Notebook
- Final Client Presentation
- *Required project-specific deliverables*

4. Final Course Deliverables (See Appendix—Final Project Deliverables)

Hand in the final team process report to the instructor

- Final Instructor Project Report

Project Management Expectations

You have a lot of flexibility to run the project as you wish, as long as you apply the following practices. In addition to the customer, the head of 490Inc. wants to make sure you are really managing the project.

⇒ keep a useful, up to date Project Schedule for the entire project, posted on your team site

⇒ track progress weekly against the Project Schedule

⇒ take informative Minutes for at least one weekly progress meeting that is posted to your team site within 24 hours of the meeting

⇒ prepare and implement a Team Process Improvement Plan for your team when asked to do so

⇒ develop a client communications plan with the client and make sure to stick to the expectations you set with the client. (Remember, the client does not see you every day or every week, so they have no idea what you are doing, or if. Keep the client informed!)

⇒ maintain a team web site in Google Apps—Sites as your documents repository with final and in process files

Course Schedule *(See Course Site for updated schedule)*

Week	Date	Class Meetings	Special Class Topics and Due Dates
X-1-X	Jan 19	*Martin Luther King Day* Class+Teamwork	Team Planning Seminar Mini-Lecture: Best practices, the SOW, Building a Plan
2	Jan 26	Class+Teamwork	
3	Feb 2	Class+Teamwork	Team Process Review SL Discussion: Community Issue
4	Feb 9	Class+Teamwork	Mini-Lecture: Client Presentation
X-5-X	Feb 16	*President Day—No Class*	***Checkpoint 1—Present SOW (Between 2/17 & 2/20)***
6	Feb 23	Class+Teamwork	Team Process Review
7	Mar 2	Class+Teamwork	SL Discussion: Team-Client Communications
8	Mar 9	Class+Teamwork	
9	Mar 16	Class+Teamwork	***Checkpoint 2—Review progress (Between 3/31 & 4/4)***
X-10-X	Mar 23	*Spring Break—No Class*	
11	Mar 30	Class+Teamwork	Team Process Review
12	Apr 6	Class+Teamwork	
13	Apr 13	Class+Teamwork	SL Discussion: Client IT needs
14	Apr 20	Class+Teamwork	Team Process Review
15	Apr 27	Class+Teamwork	
16	May 4	Class+Teamwork	***Checkpoint 3—Present final (Between 5/4 & 5/8)***
X	May 13 Wed	*Finals Week—No Class*	****Turn in Final Project Report to Instructor*** ****Final Team Review Meeting with Instructor***
	May 16	*Commencement*	

Schedule Client Checkpoint Meetings with client and instructor at least 2 weeks in advance. These will take place outside of class times unless approved by instructor.