

Working with clients

1. build a relationship

2. organize a plan

3. communicate

4. deliver

what does my client want? why?

ask questions early

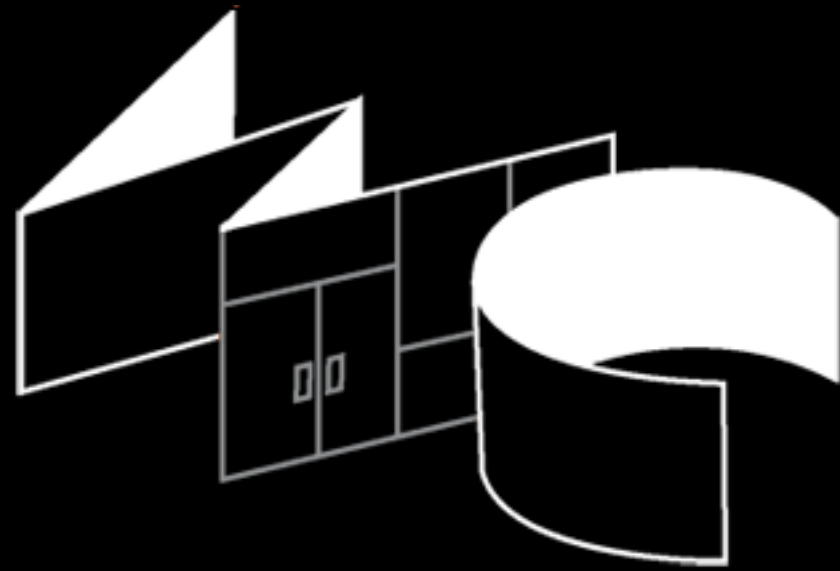
know the organization

values, goals, events



“The SU Writing Center is a collaborative space where students invent, compose, and revise for a variety of audiences and purposes. Its vision is to create an open and inclusive environment that highlights literacy, connects personal and public experiences, inspires inquiry, generates conversation, evokes experimentation, and sparks ideas in order to help writers see multiple possibilities for revision. By providing a variety of resources, the SU Writing Center encourages writers to be engaged, confident, and inspired.”

know the stakeholders
who's affected?



The Writing Center

students

consultants

instructors

administrators

the director

know the deadlines

know the parameters

know your resources

1. build a relationship

2. organize a plan

3. communicate

4. deliver

main function of the proposal

Thinking ahead to next week...

Your proposal will:

- be emailed to your client (I should be cc'd)
- propose a feasibility report that addresses a problem
- demonstrate a thorough understanding of the client's **problem**
- briefly discuss the **criteria** necessary for solving the problem
- provide a detailed plan for **research**, including methods, a schedule/timeline, potential costs to completing the study, your qualifications
- summarize **objectives** -- a promise on what the report should deliver

2-3 single-spaced pages

Structure of the proposal

2-3 single spaced pages

1. **Intro** (10-20% of proposal): Start by reminding the client of your relationship to them and/or the problem and, if applicable, your role in the organization.
2. **Problem/need/goals** (30-50%): Articulate why the feasibility report is necessary. Even if the client knows, this is a chance to prove you understand it in the same way. You might also discuss criteria for alternatives here.
3. **Objective** (10-20%): Your objective is to get permission to conduct a feasibility study, so describe the deliverable in terms of expected length, textual features, and technical aspects.
4. **Methods** (40-50%): Describe the process of research you'll use in terms of: what you'll need from the client (resources/costs), time (a schedule with dates, actions, and details), and your research methods (interviews, usability tests, surveys, or sources). If you did not discuss potential criteria in #2., then you might do it here instead.

proposal

introduction

problem

objective

method

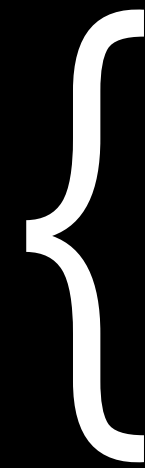
proposal

objective = deliverable

objective:

deliverable

the feasibility report
described in terms of



size

features

technical aspects

proposal

introduction

problem

objective

method

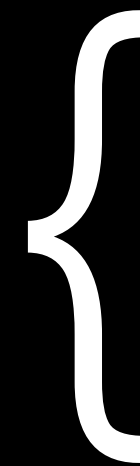
proposal

method = the process

method:

process

described in terms of



client's contribution

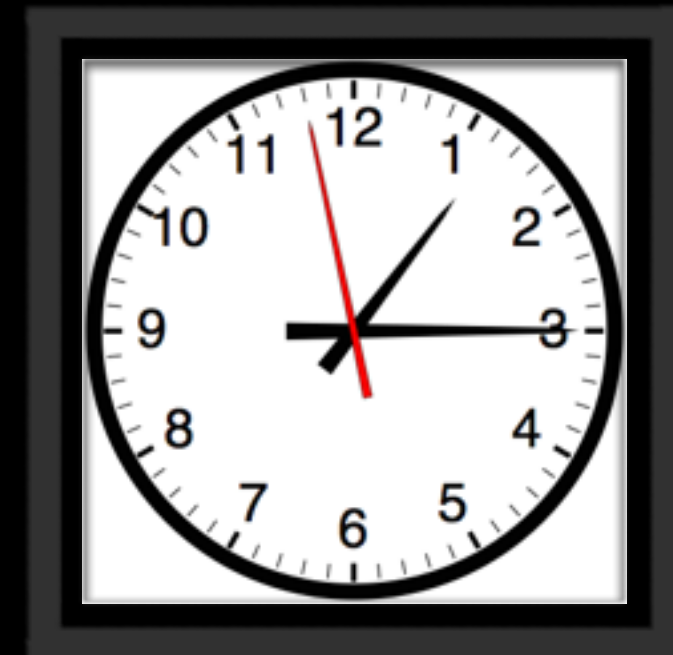
schedule

research methods

client's contribution



Five Year Estimates Pension Plan 50,000 Sq Foot Retail/Apartment Building				
Financial Measure		Sale Price based on the income for the last year		Sale Price based on the income for the year following the sale
Potential Gross Income Multiplier	8.50	\$8,160,955	8.50	\$8,374,096
Effective Gross Income Multiplier	9.00	\$8,488,916	9.00	\$8,502,822
Capitalization Rate	8.80%	\$7,708,082	8.80%	\$7,712,894
Net Income Multiplier	11.76	\$7,704,999	11.76	\$7,709,808
Compounding Annual Growth Rate	3.80%	\$8,130,412		
Uniform Annual Increase	4.00%	\$8,112,000		
Sale Price Selected:				
Financial Measure:	Capitalization Rate	8.50%		
Based on:	Income for the year following the sale			
Sale Price Estimate:	\$7,712,894			



schedule

process { client's contribution
described in terms of research methods

Schedules

shape **workable** plans

are a **communication** tool

prevent **scope creep**

It's **not** just a procedure.

~~While we have more time available than we had when we planned the basketball tournament in spring of 2009, it is still of the essence. I will go Archbold this week to see what days we have available. I believe that a weekend afternoon in December, perhaps during the days leading up to finals, would work as it would be a nice way for students to have fun and burn off steam as they try to get away from their books for a little while. This would give us around six weeks to finalize all of our plans. Meanwhile, we can begin looking for possible manufacturers for wristbands, or whatever item we decide to sell.~~

Schedules are DAD:
dates, actions, and details

Research and feasibility study April 2011
Planning and budget remodeling July 2011 to
Workshop or retreat September/November 2011
Professional Staging First to Third Week January 2012
Recruitment Late January-Early February 2012

Schedule

I can conduct the employee feedback and discuss an appropriate budget in 3-hour days beginning November 8.

Task	Hours
Feedback	3
Define Budget/Scope	3
Options	6
Total	12

Dates (years + semesters)

Major activities (goals)

Writing Center Task Force 3-Year Plan

Tasks (bullets)

Person(s)
responsible

Goals →		#1: Develop best practices for all staff in the WC	#2: Strengthen and make consistent the WC's relationships with the WP and the larger university	#3: Revise and maintain a virtual and physical space that reflects the values of the WC and the university
Year 1	Summer 09	<ul style="list-style-type: none"> Research the use of observations at other WCs and draft observation form(s) (Jason) Design evaluation forms for online consulting, WRT 120, and community consulting; revise workshop evaluations (Jason) Compile current WC web documents and categorize toward handbook; identify gaps in categories (Jason + consultants) 	<ul style="list-style-type: none"> Draft an online guide to instructors about classroom support services we already offer, including a pricing guide for outside programs (Jason) Contact Bron Adam about potential to pilot brownbag writing workshops for new/jr. faculty (Jason) Pilot podcast with CCR faculty member; feature on front page of WC website (Jason + consultants) Summarize WAC assessment findings from Howard and Rodriguez (Jason) Talk with DUGS about including "WC visit" in shared syllabus (Jason) 	<ul style="list-style-type: none"> Upload promo video onto website (Jason + George) Upgrade WCOnline (Jason) Produce screencasts for WC site (Jason + George) Place suggestion box in the WC (Jason + consultants) Remove walls from office and fix furniture (George + Kristi) Design and purchase temporary signs for door & front windows (Jason, Kristi, + George) Contact VPA and Student Art Initiative (SAI) to explore possible student installations/submissions that reflect WC values statement (Jason)
	Fall 09	<ul style="list-style-type: none"> Propose draft of observation form(s) to WC Committee Propose evaluation form drafts for online consulting, WRT 120, community consulting and workshops to WC Committee. Write 50% of handbook toward gaps as identified in Sum09 (Jason + consultants) Solicit Sp10 staff meeting agenda topics from admin staff with teaching responsibilities, DUGS, and Director at Director's meeting Write rough agenda for Sp10 meetings (WC Committee) Work with Academic Coordinator to revise Sp10 teaching preference form and consultant expectations (Jason) Identify two times for monthly staff meetings, soliciting suggestions from consultants and coordinating with AD for Prof Dev (Jason) 	<ul style="list-style-type: none"> Revise "online guide for class visits" (WC Committee) Make contact with admissions and mapmakers to advocate for the WC to appear on campus maps and become a part of University tours (WC Committee) Produce first podcast on non-WP faculty writing to build composite of campus writing culture (WC Committee) Meet with new/jr. non-WP faculty to assess demand for writing support (WC Committee) 	<ul style="list-style-type: none"> Craft values statement for space (WC Committee) Design and implement survey for various stakeholders to determine WC's physical and virtual needs (WC Committee)
	Spring 10	<ul style="list-style-type: none"> Begin monthly one-hour staff meetings (consultants use consulting time). Publish entire semester agenda at beginning of semester. Also publish meeting minutes on WC listserv (Jason + consultants) Distribute evaluations for online consulting, WRT 120, workshops and community consulting (Jason + consultants) Implement observations on a small scale (WC Committee + consultants) Propose plan for incorporating consultant observations to merit/evaluation process and adding category to PD form (WC Committee) 	<ul style="list-style-type: none"> Revise "online guide for class visits" (WC Committee) Produce another podcast on faculty writing (WC Committee) Plan 1-2 workshops for new/jr. non-WP faculty; develop assessment tool (WC Committee) 	<ul style="list-style-type: none"> Continue conversations with VPA/SAI about installation process; plan for F10 (WC Committee) Continue to survey stakeholders and check suggestion box to determine physical and virtual needs; report findings at end of semester (WC Committee) Identify software for F10 pilot, allocate funding (WC Committee + George/tech intern)

When crafting a schedule...

See page 534 for example

1. Chunk **major activities**.
2. Add **specific tasks** under each activity.
3. Work **backward** from your final deadline to add specific milestones.

Use our unit calendar

Th 10/23: Usability testing continued in HBC 227.
Tech briefing: Advanced features of Google Docs (Evan & Lucas)

T, 10/28: The Feasibility Study unit. Review final delivery requirements for the Instructions. Introduction to the [Feasibility Study](#) unit. Tech briefing: Zoho (Tim & David)

Th, 10/30: Writing Proposals. In-class lecture is based on "Chapter 23: Writing Reader-Centered Proposals," so you might check that out again before class. Tech Briefing: Go2Meeting for webinars/presentations (Alina & Tian). Tonight: Email your Instructions Project to me before midnight and complete [the team evaluation form](#).

T, 11/4: Working with Clients. In-class lecture is based on "Chapter 21: Managing Client & Service Learning Projects." Tech briefing: LinkedIn (Julia & Kelly). We'll also look at some examples of proposals from previous years.

Th, 11/6: Writing & researching reports. In-class lecture is based on "Chapter 25: Feasibility Reports," "Chapter 6: Gathering Reader-Centered Info" and "Chapter 7: Analyzing Info & Critical Thinking." Tech briefing: InterviewStream (Kathryn & Anisha). Email me your proposals before midnight (75 points)

T, 11/11: Writing & delivering a presentation. In-class lecture based on parts of the book *Presentation Zen* and [this handout](#). Tech briefing: Facebook & Twitter for professional use (Andrew, Rachel, & Lexi)

Th, 11/13: Organizing your report. In-class lecture based on "Chapter 12: Front and Back Matter."

T, 11/17: Briefings

Th, 11/19: Briefings

T, 11/25-11/27: THANKSGIVING BREAK

T, 12/2: Briefings


When crafting a schedule...

See page 534 for example

1. Chunk **major activities**.
2. Add **specific tasks** under each activity.
3. Work **backward** from your final deadline to add specific milestones.
4. Be **realistic**. A proposal is a contract.

research methods

process
described in terms of



client's contribution
schedule

Talk



Read



Survey



Test



1. build a relationship

2. organize a plan

3. communicate

4. deliver

be candid

be specific

be constructive

be respectful