

Sample Consultant Contract and Work Plan

January 10, 2017

Ms. Merry Way
For the Greater Good, Inc.
100 Main Street
Anywhere, CT 02100

Dear Ms. Way:

Thank you for your interest in using Mighty Fine Consulting to assist your agency's strategic information technology planning. We have extensive experience helping organizations to analyze their information needs, and devising plans for appropriate investment and management of technology. Based upon our discussions, I have attached a proposed contract which includes a detailed project work plan and budget. Based on our preliminary discussions, it reflects an approach I believe would allow us to meet your needs within your requested budget and timeline.

For example, though we have suggested a number of teams be formed in order to ensure appropriate involvement of stakeholders and necessary roles, we have planned for only limited meetings of each team to take place (one for charging the team and one for making decisions). By focusing on providing appropriate written documentation and communication outside of meetings, we minimize time and "process", but maximize buy-in and results.

However, we could clearly vary the level of participation of stakeholders, management and ourselves (all of which would have an effect upon both the cost and quality of the outcomes). We would be happy to discuss and modify this proposal once you have had a chance to review it.

By way of background, I am attaching a two-page description of Mighty Fine Consulting Group, which includes a listing of recent projects and client references. Should you be interested in proceeding with this project, I would be available to meet with you next week. Should you have any questions about this proposal, please do not hesitate to call me at (860) 999-9999. I look forward to hearing from you.

Sincerely,

Reginald Fine

MIGHTY FINE CONSULTING

Proposal to Provide Strategic Information Technology Planning (SITP)

The Need/Goals: For the Greater Good, Inc (FGG) is well aware of the potential which information technology (IT) provides for furthering its mission, but would like assistance in structuring further investments in IT resources and ensuring proper use and management. This assistance falls into three closely related areas:

1. Developing a strategy for the use of IT to enable its strategic business goals;
2. Identifying opportunities for utilizing technology to extend FGG's current programs and capitalize on emerging program opportunities; and
3. Developing a strategy for markedly improved ongoing management and utilization of IT.

Work Process, Products and Timeline: The attached work plan is an integral part of this proposed contract. It documents the purpose, work process and deliverables for each successive project phase. It also reflects planning assumptions and documents our estimates of consulting hours necessary to complete the work, and the speed at which work would be completed.

We propose that the components of work - summarized on the attached table - be performed over the course of approximately twelve weeks. For each of the five phases of the planning process, we have explained its purpose, commented on intended process and enumerated its deliverables. All work products will be owned by FGG. We have also, based upon our previous discussions, included any assumptions we have made and provided an estimate of both the number of consulting hours and a reasonable date of completion. In accepting this proposal, FGG states that it has reviewed these assumptions, and the process itself, to ensure they are valid and acceptable for its purposes. Of course, adjustments can and should be discussed whenever appropriate.

This contract does not address implementation services. Should FGG require or desire assistance with ongoing implementation, we would recommend that these be defined, planned for and contracted for separately.

Project Staffing:

MFC Principal Reginald Fine will serve as lead consultant for this project. Discrete tasks may be delegated to MFC Consultant Ruben Emile and/or Millicent Fine.

Relationship/Fees:

All work is to be performed on an hourly basis at a rate of \$125/hr against this agreed-to estimate of hours, and billed monthly. Using the hours estimated above, I estimate billing for this proposal at \$6,250-9,375 between now and June 30.

If in any case an overage of more than 10% against the estimated hours is anticipated, it will be brought to FGG's attention immediately and revised only with your consent. All bills will be payable upon receipt and payment is expected within 30 days (a 1.5% monthly interest charge will be assessed against overdue balances). All checks are payable to Mighty Fine Consulting.

Termination:

Either party may terminate this agreement at any time on thirty (30) days written notice to the other party. In the event of such termination, MFC will turn over work product and files, and present a final invoice for payment of all work to the time of termination.

Modification and Acceptance:

This contract can be modified only by mutual assent. Should FGG agree to this proposed contract and scope, it should indicate its acceptance by providing an authorized signature below. FGG should keep one copy for its files, and return one copy to MFC at the address below.

Agreed to by:

For the Greater Good, Inc.

Mighty Fine Consulting

Signature: _____

Signature: _____

Title: _____

Reginald Fine, Principal

Date: _____

Date: _____

Work Plan for FGG Strategic Information Technology Planning (SITP)

Phase	Purpose	Process	Deliverable(s)	Assumptions Comments	Estimates	
					Hours	Project Week
1 Define Context	To codify and communicate to SITP participants the business context and priorities within which any technology investment decisions should be made.	Review existing organization planning documents and meet with Senior Management (or designees).	Clear, short handout with organization <u>Mission, Strategic Goals</u> and enabling <u>Priority Business Objectives</u> .	Sufficient documentation and clarity exist such that a document with which management is satisfied can be quickly and easily drafted (e.g., from strategic planning completed last Spring).	5-7	1-2
2 Stake- holders	To identify, charge and educate participants to provide clear decision-making, advisory and management roles in SITP process.	<ul style="list-style-type: none"> ♦ Meet once with management to structure, select membership and draft charge of teams. ♦ Draft charge to each team ♦ Facilitate a kickoff meeting w/each team (or assist selected leaders). 	Clearly identified and prepared individuals and/or teams to provide necessary roles for successful SITP process and implementation	<p>In this phase, we can also begin to identify the key players and capacities for ongoing roles come implementation.</p> <p>The following teams will be required/desired:</p> <ul style="list-style-type: none"> ♦ A small advisory team of trustee and outside resources for input, buy-in and the marshaling of funding efforts. ♦ A small management team for decision-making. ♦ A larger cross-functional team for advice/input and to marshal training, acculturation and change efforts. 	9-13	1-4
3 Needs	To generate and prioritize a comprehensive list of organizational business needs which are candidates for technology investment.	Attend management meetings, advise managers and query staff to build list.	A comprehensive list of organizational business needs which are candidates for technology investment.	<ul style="list-style-type: none"> ♦ Managers will provide substantial assistance and leadership in generating areas of concern, needs and ideas from their respective areas of the organization. ♦ A representative survey, staff meeting discussions (led by managers), memo and email will be used to gauge levels of end user satisfaction and need regarding IT training, support, resources, etc. ♦ No comprehensive survey will be undertaken. 	9-13	2-6
4 Research & Analysis	To provide research, analysis and recommendations for potential staffing, technology spending and external partners to accomplish both ongoing maintenance of IT infrastructure and incremental investments suggested in step 2 above	Web-based research, existing research and communications with technology vendors, analysts and potential partners.	<ul style="list-style-type: none"> ♦ A list of potential technologies, projects, tools and methodologies with analysis of how well they lend themselves to FGG's particular business needs, resources and culture. ♦ Recommendations as to the ongoing organizational structure(s), staffing and partnerships (i.e., outsourcing) which will best serve future management and utilization of IT on an ongoing basis. 	Our existing store of our current knowledge and research for previous clients will allow us to accomplish this relatively efficiently.	8-12	4-8
5	To facilitate clear decision(s)	Meet with, facilitate and/or	A practical, written summary technology	<ul style="list-style-type: none"> ♦ Will include the creation of documents or 	20-30	9-12

Decisions	about investments and IT management and utilization strategy over a 6-36 month timeframe.	assist with facilitation of meetings of decision-makers.	plan which lays out technology strategy and investments, and mechanisms for its management and utilization, over a 6-36 month timeframe.	presentations whose intent is to guide decisions and build consensus; ♦ Will require a single meeting with each of the three teams discussed above to facilitate decisions/input.		
Estimated Totals					51-75	12 Weeks