

# FOPP

FUNDAMENTALS OF PROFESSIONAL PRACTICE

**TO: FOPP PARTICIPANTS**

**FROM: JOHN P. BACHNER, PROGRAM DIRECTOR**

**RE: RESEARCH-ASSIGNMENT COMPENDIUM**

FOPP participants complete a research assignment. You can select an assignment from one of the 88 we've described below or *you can create one of your own*. In either case, you *must* make your preferences known to us in writing, via mail, fax, or e-mail, by *no later* than Thursday, August 30, 2018. The sooner we receive your correspondence, the more likely we are to assign the topic you prefer. (We will finalize assignments on Friday, September 7, 2018.)

We cannot guarantee to assign your preference. We need to have balance in presentations. We prefer to have every topic covered.

*If you are considering an assignment of your own creation, confer with your mentor. We want you to use your firm and/or peer community somewhat as a laboratory, to make your research assignment as practical and "real world" as possible. **Note:** If you create your own assignment, describe it *exactly* as if it were part of the compendium; e.g., no passive voice, no reference to firm names. If you don't, we will not consider it and you will waste valuable time – yours and ours!*

When stating a preference, indicate your first several choices, including those of your own design.

## **FOPP ASSIGNMENT NO. 1**

Prepare a comprehensive checklist of pre-engagement-acceptance factors your firm's representatives should consider to assess the potential risks and benefits posed by a given client/project combination. Provide separate background information about each factor, so those using the checklist can easily understand the meaning of a factor and why you listed it. In developing your checklist into an evaluative tool, consider the establishment of a weighting/rating system through which each factor's evaluation leads to a numerical result. In that way, a given numerical total (or range) may mean "do not accept," another may mean "accept with caution," etc. Test the checklist against at least one of your firm's recently completed projects.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of the research you performed and the individuals from whom you obtained input, the number and nature of the factors considered, the weighting/rating system developed, if any, and observations based on trial usage and revisions made;
- the draft checklist;
- a copy of the checklist as completed for a given application;
- the finalized checklist; and
- a description of any lessons you learned as a result of the trial application.

Also include an annotated bibliography identifying the sources you consulted and, for each, its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 2**

Assuming one does not already exist, create a comprehensive checklist of factors firm managers could use to evaluate your firm's performance on any given project. Performance factors could range from techniques used to establish a scope of service and fee, through assignment of personnel, performance monitoring, time spent, client satisfaction, and so on. Identify when the analysis should be conducted and by whom. Apply your materials to a recently completed project; evaluate their effectiveness and changes needed; make the changes; apply to another project; and report results.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of the key elements of your checklist and the manner in which projects should be evaluated, lessons learned from applying your approach, and why you made the changes you did;
- the draft and final checklists and instructions for their application;
- a summary report of your material's application, indicating when, where, and so on;
- an indication of any changes still needed (modifications, additions, deletions); and
- observations about others' response to the procedure.

Also include an annotated bibliography identifying the written sources you consulted and, for each, its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 3**

“What makes your firm different?” a client representative might ask. How would you respond? In fact, you should know what to say immediately, as should everyone else in your firm who regularly, or who may have occasion to, answer that question as part of the firm’s overall sales and marketing efforts. To fulfill this assignment, identify your firm’s major competitors in its geographical marketing area (GMA). Compare your firm to those and identify the principal characteristics that make your firm different, with an emphasis on those differences that make your firm better. You should be able to accomplish this easiest by working with peers in your firm who are familiar with other firms, and who may have their own opinions about “them vs. us.” Perform additional research, as necessary, by working with client representatives and those who provide goods and services to you and your competitors. Prepare a matrix identifying differences. Prepare guidance material that permits you to identify those differences that make the most sense in light of the clients involved (e.g., “We have more resources than many of our competitors” may be good for some client representatives, while “We’re a smaller, more intimate firm” may be better for others). Conduct at least one seminar with others in your firm who could benefit, to get used to the material and to apply it in practice on one another. Then at least one of you will have to “try it out” on a genuine prospective-client representative (whether or not the individual asks “What makes you different?” you need to answer the question) and report results.

Your submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project’s purposes and goals,
- a discussion of how you conducted your research,
- the matrix you developed,
- a report on results of the seminar,
- a report on your “real life” application,
- a discussion of any changes you plan to make to the matrix or other materials,
- a discussion of how the material will be used in the future,
- other material that you believe is appropriate, and
- analysis sheets (one per competitor) indicating how your firm differs (these can go in an appendix).

Also include an annotated bibliography of written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 4**

*(For those associated with larger firms)*

Identify and describe a major project on which your firm is working. Assume the project manager (this could be you) gives two weeks' notice tomorrow morning. What problems would result? How much would this resignation cost, in terms of actual dollar outlays (as for personnel agency fees, if an agency is used), as well as time values (bringing in other people to become familiar with the work, picking up where others left off, overtime, etc.), and opportunity costs (e.g., proposals not submitted)? Identify every "ripple" you and others you call on can think of, without exaggerating, but without leaving stones unturned. What would be the actual cost or range of actual costs of the notice-through-replaced-and-“up-to-speed” cycle?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of the project and work/responsibilities of the individual involved, the actions which your firm would take to compensate for the loss (in terms of completing ongoing work), the specific new tasks/responsibilities created for different levels of personnel, the procedures used to replace the departing professional, and the out-of-pocket expense, time cost, opportunity cost, etc. associated with each aspect of the foregoing; and
- your conclusions about the value of effective human resources management, assuming effective human resources management achieves less turnover.

Also include an annotated bibliography of written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 5**

Prepare an easily understood description of your firm's professional-liability insurance (PLI) policy, to acquaint yourself and other members of the firm with the types of claims the policy does and does not cover. Provide examples (related to your firm and its practice) of the policy's inclusions and exclusions to explain concepts such as "contractual liability." Also explain whom the policy does and does not cover and under what circumstances (e.g., while with the firm and when not; on moonlighting assignments; for *pro bono* services). Be sure to point out whether or not coverage is per-incident or aggregate (and the differences between the two), and whether the deductible applies on an aggregate or per-incident basis. In addition, explain how much money the firm is likely to expend (including time values and opportunity cost) before the insurer is called upon to pay anything in defending a claim. Be sure to address issues such as prior acts, extended discovery, copayment, and subrogation, among others. Obtain comments from your insurance agent or insurer.

After you complete the description, prepare a written test to use later to assess how well various, appropriate people in your firm understand the issues just touched upon. Announce a "brown-bag" seminar for these folks, before work, during lunch, after work, or at some other convenient time, and submit a copy of the test to each. Collect the test sheets at the door, conduct the seminar, and then have participants take the same test again, to determine the extent to which their understanding improved. Also, submit your written description to them, and have them critique it in terms of how well you expressed the issues.

Your submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project's purposes and goals,
- the written explanation of the policy,
- your written test,
- a description of the seminar,
- seminar results,
- a copy of the seminar sign-in sheet, and
- any written or summarized-oral comments of your insurance agent or insurer.

Also include an annotated bibliography of written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 6**

Evaluate the extent to which your firm's personnel (all personnel) understand how the methods clients use to select and retain your firm may affect the firm's response and individual performance. Consider qualifications-based selection (QBS), the traditional method of retaining design professionals, and alternatives to it. Determine to what extent various categories of employees understand procurement issues and, as a result, what their knowledge deficits may be. Determine the extent to which various categories of employees or individuals need to know about these issues (if anything at all), and develop and conduct at least one in-house seminar designed to overcome any existing information shortcomings, being sure to point out why a specific category of personnel should understand more about the issue.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of the assessment method you used (including a copy of any questionnaire or checklist you developed), your findings, the attitudes and/or knowledge deficits (if any) characterizing each group, and nongroup-related commonalities, such as age or experience that seem common to certain knowledge deficits and/or attitudes;
- a description the seminar's effectiveness;
- a copy of the seminar lesson plans and related materials; and
- a description of the seminar you actually gave, along with a copy of the expanded lesson plan, any supplementary materials or techniques (e.g., before and after quizzes) used, the date, time, and place of the seminar, a brief description of attendees, your opinion of results, and the basis for your opinion.

Also include an annotated bibliography of written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 7**

Firms typically use a hierarchical management structure. Each project and administrative task group usually reports to a manager who, in turn, is part of a group of managers that reports to a common administrative manager who is one of several who report to the CEO.

Describe your firm's structure and select at least three groups to participate in this project. (Preferably, at least one group will be managed by an individual who is part of another group that is also engaged in this project.) Work with these three groups to identify suggestions each has for improving performance of the group; e.g., techniques for improving communication, steps that could be taken to reduce time wastage, methods that could be used to enhance quality, and so on. Prepare a draft report for each group's review and comment, and work with each group until its members consider its list of recommendations complete and accurate. Submit each report to the manager of the group involved and have the manager respond to each suggestion

made, as to why it will or will not work, changes that might be necessary to make something work, time required, dollars required, and so forth.

How does each manager prefer to respond to the group? In person? In writing? Otherwise? What does the group think about the manager's responses and methods of response? What does the manager think about responses and methods of response? What do you think? Describe what you have learned because of this exercise and how it will affect you.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a detailed description of the firm's structure and management hierarchy, the culture it believes it represents, and the culture actually revealed because of the exercise;
- a detailed description of each group in the firm;
- a description of how you selected each group, the way in which you worked with it, and a copy of the report developed with each;
- a description of each manager's response and how the response was made; and
- a description of each manager's and each group's thoughts about the exercise, along with your own.

Also include an annotated bibliography of written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 8**

Develop a comprehensive "niche-marketing" plan for your firm, relying on a new "subsidiary" or division you develop specifically for niche-marketing purposes. Learn *exactly* what niche-marketing involves. Identify the marketing unit and niche in which you will concentrate and explain your decisions. Prepare a detailed marketing plan and also prepare a detailed business plan that identifies projected revenue and expenses for the first five years, beginning with start-up. Justify all assumptions.

Your submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project's purposes and goals,
- a narrative explaining the methods you used to select the niche,
- a description of the decision-makers and decision-influencers involved in the niche,
- an annotated itemization of marketing communications techniques you will employ to reach the decision-makers and decision-influencers, and
- your overall business plan.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 9**

Create a survey sample of five firms, including your own, to identify factors that may bear upon the length of time professional employees (including graduate engineers, architects, and environmental scientists on their way to earning professional registration or certification) stay with a firm. Factors to consider, among many others, could include:

- asking prospective employees a uniform set of questions,
- an up-to-date personnel policy manual,
- job descriptions,
- support of continuing education, and
- an ownership-transition plan.

Factors could also include:

- information on how the firm hired its professional employees (via the employees' own initiative, references from another firm or someone in the firm, personnel agency, etc.);
- the age of those employees; and
- the size of the firm and economic conditions in the area, possibly among others, depending on the extent of information available.

To establish length of time, determine how many professional employees hired within the past five, four, or three years are still with the firm that hired them, and, of those who left, how long they stayed with the firm. Can you draw any conclusions from your data? In other words, if some firms seem better able to hold on to their employees than others, why?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of the nature of the other four firms that participated in your research and your evaluation of the overall human resources management programs in place (including those at your firm), the extent of turnover, and factors which your research suggests may be responsible for the turnover;
- the questionnaire or questions you developed;
- tabulation of responses;
- your findings based on responses; and
- your conclusions based on findings.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 10**

Review five, client-developed contracts that your firm has accepted within the past year, each one of which creates potential problems through inclusion or omission. How serious are these potential problems? Have any real problems already materialized? Has your firm done anything to help prevent any of these exposures from materializing? If not, is there anything it can do, given the practicalities which exist?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a brief description of each contract (e.g., purchase order-type) and the type of client and project involved;
- a narrative description of omissions and/or onerous inclusions, the types of exposures resulting from these, and actions which were, could or should have been, or still could or should be taken to help minimize exposures; and
- in an appendix, the general conditions of each agreement.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 11**

Using the telephone, written questionnaires, or, preferably, face-to-face interviews, determine:

- what at least 25 registered architects, engineers, geologists, or land surveyors (each with ten or more years' experience) consider professionalism to be;
- what they believe the most significant challenges to professionalism will be in the next ten years;
- what they believe can be done about these challenges; and
- what they are doing about the challenges right now.

What conclusions can you draw from others' responses? What is your own opinion about:

- the meaning of professionalism?
- the top ten challenges to professionalism?
- measures that can be taken to meet the challenges on a professionwide basis, firmwide basis, and personal basis?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of:
  - the persons with whom you spoke (inside and/or outside your firm) in terms of average age, experience, and so on;
  - the definitions each has of professionalism;
  - challenges cited (listed by frequency of mention); and
  - the actions suggested and degree to which they are being taken now;
- tabulated data derived from your interviews;
- your conclusions drawn from respondents' comments;
- your conclusions about the real challenges and what can be done practically to meet them; and
- in an appendix or elsewhere, a copy of the questionnaire or list of questions you developed.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.



## **FOPP ASSIGNMENT NO. 12**

*(For those associated with larger firms)*

Firms face significant risk when their project managers misunderstand the requirements of the contracts under which they operate. This is particularly true of larger firms that employ regional managers and office managers. If your firm is “larger,” identify at least three active contracts from three separate regions and interview the regional manager and office manager associated with each. Use the interviews to learn the managers’ expectations about a project manager’s knowledge of specific contractual issues. Apply that information in developing a questionnaire to assess a project manager’s knowledge of some of the specific issues associated with the active contract with which the individual is working. Using appropriate survey protocol, distribute the questionnaire to each project manager (one or more) associated with each contract. Review the responses you receive to identify gaps between management’s expectations and the project managers’ knowledge. Use those results to develop proposed guidelines and/or policy improvements and present them to the regional managers and office managers for their consideration. Speak with each to assess their opinions, and then prepare your report.

Your report should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project’s purposes and goals;
- a description of each active contract;
- a description of the techniques you used to learn how to conduct surveys, conduct interviews, and develop questionnaires;
- a description of each interview with regional and office managers;
- a description of each project manager, emphasizing the individual’s experience;
- a description of management’s contract knowledge expectations vs. the actual skill level revealed via questionnaires;
- a copy of the questionnaire you developed;
- a copy of the guidelines and/or policy improvements you proposed; and
- a description of management's assessment of your proposed guidelines and/or policy improvements.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 13**

Prepare a questionnaire designed to identify who your fellow FOPP participants are, how old they are, how long they have been in practice, etc., and, most important, why they chose the profession they did, and the degree to which their current positions are fulfilling their expectations. Have FOPP staff issue the questionnaire for you. Based on the responses you receive, what do these people want more of? less of? What are the implications for the future of the individuals involved, of the firms they now are with, and of the professions involved? If you believe problems exist, what are they? What actions can firms take to prevent problems from occurring and to deal with those that already have occurred?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a narrative description of your procedures and findings, the nature of your questionnaire (include a copy), and the make-up of the survey sample;
- a compilation of questionnaire responses; and
- your observations based on results, with most attention being given to the satisfaction which respondents express and, where less than optimal satisfaction exists, the nature of the dissatisfaction, the implications created, and corrective measures you suggest.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 14**

Your firm employs people who represent several professions and, probably, a number of disciplines within each; e.g., engineers of various disciplines. What are the different professions involved? What benefits does or can your firm derive from supporting or advancing these professions? What is your firm doing to support or advance these professions, as in terms of paying for membership in various groups, providing personnel for committees, and so on? What is your firm doing on its own or in concert with others to create more awareness of or appreciation for these professions, as through community involvement? How does your firm compare in these respects to at least two others of similar size? In your opinion, is your firm doing enough? If not, what else should it do and why? If you believe the firm should do more, what are some of the constraints which the firm's leaders sense? Can these be overcome? If so, how? Develop a plan for improvement, obtain senior management feedback, and report.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a narrative identifying the professions upon which your firm relies, the benefits derived from supporting these professions, the extent to which your firm supports them, the techniques you used to identify that support, how other firms provide support, your beliefs as to the adequacy of your firm's support, the reasons for your beliefs, what else you would do (if more should be done), and why some of these proposals are or are not practical; and
- a description (if appropriate) of your plan and management's comments about it.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 15**

Identify the marketing units (MUs) associated with projects for which your firm has been retained in your geographical marketing area (GMA) during the past three, complete years. Identify your competition in each MU and estimate your firm's MU penetration vs. the competition's. Identify, obtain, and review information sources that could predict likely future developments for these

GMA MUs. Develop predictions and discuss them with colleagues in your firm, client representatives, and others. Given the trends indicated by the firm's recent history versus your predictions for MUs, and given what you know about the competition, develop a plan for the next five years, indicating how your firm can get to where it needs to be, and relative penetration factors along the way. Should your firm continue in its current direction or should it begin planning for some changes? If changes are needed, what directions should they consist of?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a listing of specific resources; and
- a discussion of your research findings about the past and future, the impact on your firm's development if it continues on its present path, and adjustments needed to maintain prosperity given the predicted future.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 16**

Review the one standard contract or one of several standard contracts your firm uses and identify its weaknesses. What should be said differently, added, or deleted? Prepare revised provisions. Speak with the person in your firm responsible for overseeing contracts. Who is that person and what is that person's opinion of your proposed changes? Speak with the representatives of at least three types of clients to learn their opinion of your proposed modified contract.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a narrative description of every step you took, your overall impression of the firm's standard contract and its principal weaknesses, the nature of the revisions you developed, the reactions of firm and client personnel, and the overall reasons why certain of your revisions could be or should not be applied;
- a copy of the firm's existing contract indicating areas of perceived weakness; and
- your revised and/or additive language.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 17**

Identify a marketing unit (MU) which your firm wishes to enter or penetrate further. Refer to an advertising media guide to identify several periodicals that reach decision-makers in the MU. Obtain copies of the publications to identify the types of articles each publishes and the style used. Develop one or several topics you could address in an article and flesh out each with notes about the key points you could address. Call the editor of the most widely circulated of the

publications you have identified to determine if he or she would be interested in an article from you. If so, develop such an article for submission. If the first editor is not interested, contact another, *until one expresses interest*, and develop an article for submission.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a narrative description of the procedures you used to identify and rank publications, the various topics you considered, the topics you deemed most worthy, the reaction of the editors, and the time required for you to develop an outline, obtain feedback, develop an article, etc.;
- identification of potential uses for the article once it is published; and
- a copy of the manuscript you prepared, your covering letter of submittal, and other pertinent correspondence.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 18**

Have your immediate supervisor independently prepare a comprehensive job description for the position you now fill and for the one the supervisor now fills, indicating the percentage of time spent on fulfilling each responsibility. At the same time, independently prepare a comprehensive job description for your supervisor's position and for your own, including percentage of time estimates. Exchange what each of you has developed and then meet to discuss common misperceptions as to what each of you does and how much time you spend doing it. Next, to the extent necessary, revise the terms you use to describe what you do so you both use the same (e.g., you both would use "marketing" rather than "selling" or "bird-dogging" and "proposal development" as tasks separate from "marketing"). Then you should prepare modified job descriptions for yourselves, based on the ones you each prepared earlier for yourselves, indicating desirable changes, that is, tasks that you would add or delete, and the percentage of time to you would allocate to each. Exchange these and later meet to discuss how you could work together to make each other's job more satisfying, as well as constraints that may make such modifications impossible or impractical.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- your job description as prepared by you and your supervisor;
- your supervisor's job description as he or she prepared it and as you did; and
- a narrative relating your observations about your and your supervisor's misconceptions, your and your supervisor's modified job descriptions, constraints that affect the "ideal," and specific measures (if any) that the two of you could or will apply to make your mutual responsibilities more rewarding.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 19**

Converting clients to “clients for life” is essential for a thriving future. Through literature search, identify what recognized authorities say are appropriate client-relations activities while a project is ongoing and during the interim periods, before the same client offers new engagements. The sources you consult do not necessarily have to deal only with design- or environmental-professionals; general guidance or guidance prepared for other professions or industries may be applicable. Once you have familiarized yourself with these procedures, determine what your firm and at least four other design- or environmental-professional firms do to help enhance client relations, to create clients for life. Next, speak with representatives of at least four clients and at least two prospective clients to identify the characteristics they admire in service providers they love to deal with (doctors, dentists, lawyers, barbers, auto mechanics, restaurateurs, etc.). Go over the list with each to ensure it is complete, then ask client representatives how your firm compares on a characteristic-by-characteristic basis. Ask representatives of prospective clients how they rate your competitor they most like to deal with (they don’t need to identify the name of that firm if they don’t want to). Based on your research, determine what your firm could be doing in addition to or instead of current client-relations activities. Determine about how much time and money each of these activities might take, and then confer with your firm’s management to learn which would and would not be acceptable, when, and why.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project’s purposes and goals;
- a series of sections that use narrative description to focus on the sources you consulted and some of the major recommendations, what your firm and others are doing now, what representatives of your clients and prospective would like to see, and what your firm intends to do and not do, and why; and
- appendixes (samples of questionnaires, and so on).

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 20**

Identify five engagements your firm is fulfilling. For each, review the contract involved and the project files, and speak with the project manager and project design professionals to identify any real or potential problems that may exist or any that have already materialized. Describe these problems and determine why they exist. Identify and describe the measures available to prevent them from becoming worse or from materializing at all. How practical are these steps? What are the pros and cons of each? What are the potential costs of taking them or not taking them?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project’s purposes and goals;
- a description of each project and the current state of its development;
- a description of what you did to obtain information about the projects;
- a description of the problem(s) you discerned relative to each;

- observations about any commonalities among the problems and/or commonalities among the causes of the problems;
- a description of the specific steps that could be taken to mitigate potential problems and/or of the modifications affecting common causes for such problems; and
- a description of the reactions of those to whom you present your suggestions.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 21**

What types of projects and clients (two separate issues) do your firm's principals, associates, project managers, and project professionals most like to pursue and least like to pursue, and why? What are the commonalities, if any? What specific steps could the firm take to obtain more of the projects and clients that principals, et al. consider best, and less of those considered least desirable, or steps that could overcome some of the problems that make a given type of project or client undesirable? How realistic are the measures you propose?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of the number and type of people interviewed;
- a listing of the persons interviewed within each category;
- identification per category of the types of projects and clients most and least preferred and the reasons given, and your observations as to those comments in terms of commonalities discerned or other factors; and
- a description of the steps the firm could take to obtain more of the most-desirable projects and clients or which could help make the least desirable more attractive, and constraints that make some of your suggestions impractical.

Also include an annotated bibliography identifying the sources you consulted and, for each, its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 22**

Help your company develop a new branch office. Discuss the specific geographical areas considered, the one selected, and your reasons for these selections. Identify the marketing units (MUs) in which you will concentrate and prepare a comprehensive marketing plan that identifies how you will penetrate the MUs. Also prepare a detailed business plan that identifies projected revenues and expenses for the first five years, beginning with start-up, and including the cost of HQ oversight. Justify all assumptions.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a narrative explaining the methods employed in location selection;

- a description of the types of people within prospective client organizations that decide about retaining firms such as yours, a description of the people and things (e.g., others in the company, periodicals, local newspapers) who influence procurement decisions, and a description of the methods you will employ to reach these decision-makers and decision-influencers; and
- projected revenue/expenses for the initial five years.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 23**

The typical geotechnical-engineering report has not changed much over the past 50 years, adding fuel to the “all-geotechnical-engineers-are-about-the-same” fire. Assuming your firm’s geotechnical-engineering reports still exhibit the “tried-and-true” methods, and given that the six most powerful marketing words any firm can utter are “We are the only firm that...”, identify what others firms have done to make their reports different and better. You should be able to query fellow FOPP participants and others you know to learn what they’re doing, such as:

- eliminating the passive voice,
- flushing copy left instead of justifying,
- using color,
- inserting maps, tables, and portions of tables, with captions,
- upgrading the quality of the binder used,
- reorganizing (as by putting recommendations first and most everything else into appendixes),
- preparing a video executive summary, and
- embellishing a video with aerial views.

Speak with a client representative with whom you have a solid relationship and to whom you recently submitted a geotechnical-engineering report. Contact the individual to learn if he or she would be willing to review the same report, modified. Assuming you receive a “yes,” modify the original report as radically as seems reasonable, possibly doing all of the above and then some. Present the revised version in person and learn which modifications the representative liked and did not like, possibly using a 1-5 rating system.

Prepare a report indicating what you did and what the client’s reaction was. Consult with at least one senior executive within your firm to learn what the next steps should be, assuming the client representative indicated that some changes would be welcomed. What are those next steps? Do you believe those are the steps the firm should take?

Your submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project’s purposes and goals,
- a discussion of procedures you used to identify what some firms are doing to make their geotechnical-engineering reports different and better,
- a discussion of what you did and how you did it,
- a discussion of the client representative’s reactions, and

- a discussion of the senior executive’s reaction and your attitude toward it.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 24**

Identify at least five technical and/or nontechnical positions within your firm and, for each, describe:

- how your firm defines excellence in performance of the functions involved;
- what your firm does to help ensure affected individuals are aware of the definitions; and
- what the firm does to encourage, help employees achieve, measure, and reward excellence.

What, if any, changes would affected employees make? What changes would you make? Be specific.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project’s purposes and goals;
- identification of the five (or more) positions selected, and – for each – the definition of excellence, the means by which this definition is transmitted, the consistency of transmission, the degree to which the definition is understood, the techniques used to encourage and help employees achieve excellence, and suggested techniques for enhancement of definition, transmission of the definition, etc.; and (if applicable)
- management's response to your suggestions.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 25**

Environmental professionals do not necessarily consider the reader’s perspective and understanding when generating tables and figures to represent data in their reports. Compile several examples of data tables and figures from reports submitted to clients and review them for:

- clarity and ease of understanding;
- missing elements (e.g., units or definitions);
- level of complexity;
- ability to convey meaning (the “point” of the data set); and
- meeting the client’s needs.

Conduct a literature review of “best practices” for presenting data and graphics. Also obtain input from others in your firm who may be familiar with methods used at other firms. Modify the data tables and figures using techniques identified through literature review and you own and others’ experience. Have at least three colleagues and three client representatives review the original and revised data tables and figures. Interview the reviewers for their opinions about the effectiveness of the modifications, overall format, and their preferences for presenting data tables



and figures. Discuss your findings and recommendations with senior personnel in your firm. Report the results.

Your submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project's purposes and goals,
- a description of the review of the data tables and figures and the proposed revisions,
- a discussion of reviewers' comments and your conclusions,
- a discussion of senior management's viewpoint, and
- a description of lessons learned.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 26**

Describe your firm's documentation policies with particular emphasis on note-taking or otherwise committing to writing that which would otherwise be oral and subject to memory. Also describe the steps your firm takes to help ensure all persons within the firm are introduced to the importance of documentation, are taught about the firm's documentation policies and how to fulfill them, and are monitored for ongoing compliance with preferred methods. In reviewing the firm's activities in these regards, identify any shortcomings you detect; e.g., the absence of anything in writing or failure to conduct documentation orientation and training. In addition, review the files of the five most substantial recent projects in which your firm has been involved and determine to what extent project files indicate firm employees are adhering to documentation policies.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals; and
- a description of existing policies (even if only oral), those affected by the policies, the degree to which those affected are aware of the policies, the extent to which file review shows policies are being followed and the basis for your conclusions, and specific procedures you would recommend to improve in this area, assuming improvement is possible.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 27**

Quality assurance should permeate everything a firm does, in areas of technical pursuits, business management, human-resources management, marketing, promotion, and so on. Prepare a list of at least 50 specific actions a firm can take to help establish and/or improve quality assurance, and determine how your firm compares to at least five others of relatively similar size.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a narrative description of what you did, why you did it, the general areas of quality assurance you considered, the total number of activities identified, the number of firms surveyed and the practice and size differences among them, the overall areas of commonality and difference, and how your firm stacks up;
- the list/questionnaire you prepared;
- general characteristics of the other firms questioned;
- the results of your survey shown in tabular format; and
- a discussion of your observations and conclusions about the results.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 28**

What does your firm do to create a sense of teamwork among all its personnel in general, and those assigned to given projects? How do its activities compare to those of three or four other firms, such as those represented by other FOPP participants? Could or should your firm be doing more? If so, what? Why do you believe implementation of your suggestions would be worthwhile? How much time or money would be involved? What do your firm's leaders think of your suggestions? Why hasn't your firm done this in the past and what is preventing it from doing it in the future?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of the general and project-specific actions now being taken by your firm, the nature and location of other firms you contacted and what they do, how your firm compares, what your firm should consider for the future, and the constraints which may prevent your firm from taking these actions; and
- research details, that is, a listing of the other firms contacted, a table indicating what your firm and the others do insofar as developing teamwork is concerned, actions which your firm could consider, and for each action, the constraints which may exist.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 29**

Existing clients are the best of all. Why is that true? How many commissions does your firm obtain from existing clients vs. new ones? What steps does your firm take to obtain new clients and to maintain effective relations with its existing clients? What steps do at least five other successful engineering, architectural, or similar firms in your area take? How effective have your firm's measures been vs. others'? How much do your firm and the others spend on these

measures? Does your firm spend more or less on retaining existing clients than it spends on finding new ones? What about the other firms? What else can or should your firm be doing? What constraints may prevent your firm from doing them?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of why existing clients are best, what your firm does to obtain new clients and maintain good relations with existing clients, how its programs compare with techniques used by the other firms (identify their type and size), the relative success of the programs and their comparative cost-effectiveness, additional steps your firm could be taking and their cost, and constraints which make some of the preferred measures impractical;
- your rationale for performing each step and the method(s) you used;
- identification of specific measures used by your firm to obtain new clients and maintain effective relations with existing clients (and approximate cost of these measures); and
- discussion of the measures used and costs experienced by at least five other successful firms in your area, and specific additional actions your firm should consider, along with the cost of each and any constraints which may make them impractical or otherwise unusable.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 30**

Identify five architects and/or engineers and/or environmental professionals who have served as expert witnesses in cases where a complainant has accused a design professional of negligence, and the actions they took to establish that the design professional did or did not breach the standard of care. The case did not have to reach trial, but it is necessary for you to learn exactly what the expert did to identify the standard of care at the time the alleged negligent act occurred. (You may report on more than five actions, in that one or more of the five people you interview may report on several cases.) Based on your own research on how the standard of care is determined and by whom, how appropriate were the techniques used by each expert? Were the techniques used affected by the time and/or budget involved? What would you have done?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals; and
- a description of who was interviewed (in terms of age, experience, and the number of cases involved), the types of negligence that were alleged, the techniques used to establish standard of care, the degree to which techniques were affected by time and/or budget, and additional or otherwise modified steps the expert would have preferred were it not for the time and/or budgetary restraints, and the disposition of the case (e.g., settled before trial, decided by judge, jury or arbitrator in favor of or against the expert's client), and your observations.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 31**

Using actual case histories of professional-liability losses as models, develop a hypothetical case history related to your firm's practice, for use in evaluating a new hire's or prospective new hire's knowledge of professional-liability loss prevention, and/or for purposes of in-house education. The hypothetical case should be realistic in every respect and your materials should include questions users should respond to as well as appropriate responses. Test your case on at least five others in your firm who should be in a position to answer most of the questions. Report the results and their implications.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a narrative description of the case in general terms, the specific errors made that led to problems, and the actions not taken that could have prevented or mitigated the next problem;
- identification of the individuals who tested your work in terms of age, position, experience, and so on, how well they did, and conclusions you drew;
- the case history; and
- questions and answers.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 32**

Interview at least two to three persons of different rank in each of your firm's departments to learn the top five changes each would make to improve the firm's productivity, professionalism, and profitability. Review the various suggestions and rewrite them as necessary for purposes of consolidation; e.g., by taking three similar suggestions and combining them into one. Prepare a revised list and circulate it to all members of all departments, asking each person to identify his or her top five; use personal interviews (if necessary) to obtain input from those who do not return written materials in a timely fashion. Once results are in, rank the various suggestions in order of frequency of mention, separating those that are department-specific from those that apply to the entire firm (other divisions may suggest themselves, too). Next, meet with the firm's CEO or a senior principal to discuss the suggestions, which ones are practical (and why), which ones are impractical (and why), etc. Identify suggestions that the firm will and will not implement. What is the schedule for implementation of each acceptable suggestion and what is the cost-benefit?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a narrative description of the total number of suggestions received initially, the number of consolidated suggestions, the top suggestions for firmwide application, and the top for departmentwide application;
- lists of suggestions (department-by-department);
- the consolidated list of suggestions;

- ultimate rankings;
- results of discussions with the firm's leadership, a discussion of those suggestions that will and will not be implemented and reasons;
- a discussion of costs and benefits; and
- appendixes showing questionnaires issued and other materials that may have been used or developed.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 33**

How much is your firm worth? You can apply various methods to develop an answer. Identify and read some of the literature available, prepared by individuals and organizations known for their work in the field of firm valuation. What are the top three methods used? What are some of their commonalities and differences? What do those who actually buy firms think about these methods? How much is your firm worth per each of the three methods? Which method or combination of methods do you think is best and why? How much do you believe your firm is worth? What's the CEO's opinion? Do what it takes to answer these and additional questions that may be worthwhile, possibly by consulting with your firm's CEO. Speak with individuals within your own firm or in other firms (possibly two or three represented by fellow FOPP participants) who actually buy firms.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals; and
- a description of the top three methods used, the most significant differences and commonalities of the three, the buyers you spoke with and their opinions, your application of the processes to your own firm and the results you obtained, the CEO's responses to your evaluations, and such other information as you believe is worthwhile (e.g., opinions of the methods used).

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

*Note:* At the course-concluding seminar, you will not have to reveal how much your firm is worth, but we will expect you to indicate the degree to which different methods yield different results, and why, and which method (of the three, or of your own design) you believe is best.)

### **FOPP ASSIGNMENT NO. 34**

If your firm does not now have a written file-management policy, interview five project managers separately and ask each to identify who is responsible for file management, and to list and/or describe what should be kept in the file once the project is complete, what should be discarded, and when. Discuss factors the five project managers agree or disagree about. Next,

examine at least five typical, closed-project files to determine the degree to which their contents indicate the project managers' understandings have or have not been complied with, and identify and discuss the problems that could arise from compliance or noncompliance. Ask the same question of the firm's CEO, the firm's in-house or retained counsel, and the firm's professional-liability insurance (PLI) agent or insurer. Based in part on these responses, and based on other resources you are able to gather, develop in draft a comprehensive file management plan, indicating who should be in charge of file management, the procedures people should follow, when people should take various steps, what should be kept, what should be discarded, why, when, and so on. Submit your draft plan to each of the persons you interviewed to obtain their comments. Based on those comments received, make appropriate changes to your draft plan and submit it again to the same people. Based on their comments, make whatever additional changes you believe are called for and submit your plan to your firm's CEO. What is the CEO's opinion of your plan? Will the CEO implement it?

Your final submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a detailed narrative description of what the project managers thought file management consisted of and the degree of consistency involved, a comparison with results of file search, and a comparison with comments made by the CEO, and others;
- summaries of content descriptions developed or furnished by each of the interviewed parties;
- a copy of your draft plan;
- an executive summary of the various comments made; and
- a copy of your final plan, as submitted to the CEO.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 35**

When two people use the same word or phrase, but have different concepts of what the word or phrase means, problems can result, or can be alleged to have resulted. Examine some of the contracts your firm uses or has signed and identify some of the most commonly used words and/or phrases that, to your mind, are most often misconstrued or misunderstood. Also identify important words that are or may be used only rarely. Survey key members of your firm to learn what they believe certain words and phrases mean. (If your own people do not share common understandings, how could you possibly expect your client representatives to know what you mean?)

Based on your survey results, begin development of a definitions section for your firm's standard contracts and, possibly, for contracts clients want you to sign. At the outset, you probably will be able to prepare a "short list" of words and phrases. Assuming that to be the case, share the list with appropriate parties to determine words and phrases that you should delete, change, or add. "Appropriate" includes or could include outside specialists, such as your professional liability insurance agent or retained counsel. Once you have what you believe is a good list, begin to develop definitions, using various sources. Submit your draft list to appropriate persons, consider comments, and modify as necessary. Resubmit and revise again, if you believe doing so is

warranted, and then submit your final version to a decision-maker in your firm; i.e., the individual who can decide whether or not to include a definitions section in contracts. What does this person think of the work? Will it or will it not be used? If not, why not? If it will be used, how will it be used? How will people be trained in its use?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals; and
- a narrative discussion of every step you took, why you took it, and the results, along with your various deliverables, e.g., draft list of words, final list of words, draft section, first revision, second revision, final, etc.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 36**

Assuming the CEO of your firm is willing to participate, your assignment is to direct the entire firm in conducting a performance review of the CEO. Based on reading and/or other research you perform, determine the types of questions that should be asked, the best medium for asking them (written, face-to-face, etc.), and who should be asked the questions (assuming a representative sampling will be required. If you use a sample, describe how you developed it.) Once you have all of this in the form of a plan, go back to your CEO and show him or her how you plan to proceed. Obtain comments and make appropriate adjustments. (Must you follow the CEO's suggestions, or do you have discretion? Ask the CEO.) Once you get to a final, acceptable plan, conduct the performance review. What are the results? What do people seem to agree on most? disagree on most? To what extent do comments agree/disagree with respect to respondents' positions, tenure with the company, and so forth? What else do you discern?

Share your findings with the CEO. What is the CEO's reaction? To what extent does the CEO agree or disagree with what you and others have said? What don't the others understand? Which findings will the CEO really take to heart? Which ones will the CEO probably ignore (based on the CEO's own admissions)? Based on what you have learned about performing performance reviews, to what extent do the CEO's comments seem just like any other employee's? To what extent do they reflect the CEO's unique position and the person's role within the firm?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals; and
- a narrative description of each step you took, why you took it, results, and so on; and
- in one or a series of appendixes, all significant deliverables, such as your proposed list of questions and plan, the finalized list of questions and plan, typical survey instruments, data about results, the final report, etc.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 37**

Statutes, regulations, and civil-court decisions have a profound effect on the professional business environment that comprises the context of your practice in the state (or one of the states) where that practice is located. These statutes and court decisions could comprise:

- professional-licensure statutes,
- continuing-education requirements,
- sole-source workers' compensation statutes,
- merited-claims laws,
- contractor and corporate-licensure requirements,
- statutes of limitations,
- statutes of repose,
- joint-and-several-liability statutes or decisions,
- anti-indemnification statutes,
- limitation-of-liability rulings,
- economic-loss doctrine rulings,
- procurement requirements,
- state registration board prohibitions on the submission of bids,
- legal form of practice entity, and
- enforcement of oral agreements, among many others.

Your research assignment is to obtain information on each of these issues in general, including information on how each affects or could affect your practice, and then determine what the status is in the state where you practice. For example, "The economic-loss doctrine holds that third parties may not sue in tort to recover for damages that are purely monetary. Some states have ruled otherwise, meaning that contractors, among others, would have far more leeway in mounting a delay-based negligence claim. In my state, the rulings have been...."

*Do not limit your research to the issues given above.* Although you *must* consider all the foregoing, a number of others probably have an impact (e.g., third-party reliance on reports).

Once you have done your research, prepare a multiple-choice quiz designed to assess your peers' and superiors' knowledge of the issues that affect them every day. Collect responses and grade them. Give each participant a copy of your final submission.

Your report should comprise:

- a written summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of the research methodologies used;
- identification and detailed description of the statutes, regulations, decisions, et al., with each being amplified to indicate how the issue affects practice, in general; and
- in an appendix or elsewhere, a copy of the quiz you created and details about how well participants did, who they were, and so on.



Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 38**

Law firms, accounting firms, architectural firms, engineering firms, environmental firms, and other professional service firms are structured much the same. In some cases, however, their approaches to marketing are far different.

Identify:

- at least three law firms,
- at least three accounting firms,
- at least three design professional or design professional-type firms (e.g., surveying firms, home inspection firms, etc.), and
- at least three firms similar to your own

and learn how each approaches marketing, specifically as it relates to younger staff and their involvement with clients, prospects, and associations, giving talks, and so on.

Does the firm say to someone on day-one, or day-one-plus-one year, etc., “Establish your own practice in the firm. We expect you to be billable for X hours per year, and to spend at least Y hours on marketing,” or does it say, “Don't do anything until we tell you to”? How much guidance is given? Are budgets and/or timetables set? What type of encouragement, oversight, or reward do firms provide? What is the downside if people do not achieve their goals or objectives?

Do the people in other types of firms have character traits that are so different from people in your firm and firms like it that the approach others use wouldn't work for your and similar firms? These are just a few of the issues you need to consider. Identify others.

Once you have gathered information on others' marketing approaches and their relative successes, analyze what your firm does. Based on your research, what types of changes would you make? Speak with those who would be affected by those changes, including your peers, superiors, and subordinates. What are their attitudes? Will changes actually be made?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of how you approached the outside research;
- a description of the law firms contacted and interviewed, a detailed account of the marketing outreach they encourage younger staff members to engage in, and a discussion of the success of those efforts and participants' reactions to them;
- a description of the other firms contacted, and details about their programs;
- a discussion of what your firm does;
- a proposed, new approach based on your research;
- a description of the reactions of various, representative persons within your firm; and
- a discussion of any changes that have been or will be made.

Also include an annotated bibliography identifying the sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 39**

Obtain a complete copy of a major proposal that your firm submitted within the past year, for a project it did not obtain. Eliminate any general conditions included, along with any dollar amounts. What you have left should be something on the order of a covering letter, introductory material, descriptions of similar projects, biographies of proposed company representatives, and so on.

Go through what you have and do the following:

- correct grammatical errors (e.g., subject/verb disagreement), misspellings, slipshod synonyms, hazardous homophones, accidental words, and the like;
- delete absolutes, absolute superlatives, and taboo words, and replace them (as necessary) with less onerous words or phrases;
- delete superfluous words, like “very,” “quite,” “current,” “different,” and so on;
- replace the passive voice with the active voice; and
- delete expletives and restructure the sentences or clauses involved to rely on a more action-orientated verb.

As your next step, go through what you now have and eliminate every use of the verb “to be,” except when it is part of the verb, to indicate time (e.g., “will happen,” where “will” (the future form of “to be”) is used to modify “happen” by indicating when the event will occur). Replace the verb “to be” with verbs that connote action (e.g., “Joe and I are here” would become “Joe and I have arrived.”)

Go through the material again and eliminate useless or superfluous words, redundancies, and so on. Also replace “ten-dollar” words with something less grandiose, e.g., use “give” instead of “provide with,” “about” instead of “in regard to,” and “use” instead of “utilize” or “employ.” Also replace any archaisms or clichés you find, such as “Enclosed please find” or “Please do not hesitate to call.”

As your next step, determine if the proposal was organized as it should have been. If you can improve the organization, do so.

Examining what you have left, is what you have said somehow geared to this particular prospect or type of prospect? In your judgment, does it relate information that will be of interest to the prospect? Does it make any reference to the prospect’s point of view or concerns, such as could be found at the prospect’s website and/or through discussions with the prospect’s representatives? Could you do more in that respect? If so, do so. Likewise, does the proposal include material the prospect could not care less about? If so, either delete it or append it, possibly referring to summaries within the proposal itself.

What about the format? Is it dull and uninteresting? Does it look like an explosion of words with nothing provided to make following along any easier? What could you do to make the proposal easier to read, as with heads and subheads to emphasize key points? What about something to somehow grab the reader’s attention? Is something in there to do that? Can you add something like that, assuming it will be consistent with your approach and image?

Now, on your next-to-final review, examine the client's request for proposal. Does your proposal address every issue the client asked for? If not, add the necessary information.

As your final review, ask yourself if the proposal somehow helps set your firm apart, or is it merely just another proposal in a group of proposals that are basically the same? If the latter is true, make changes that immediately set your proposal – and, thus, your firm – apart.

Identify at least three people in your firm who regularly prepare proposals. Have them review the original proposal and your revised version. Obtain their comments and opinions. At about the same time, do the same thing with at least three client representatives, or prospect representatives, preferably including the individual for whom your firm prepared the original proposal. What is their opinion of the new approach? Would it have made a difference? What guidance do they have for you?

Your submission should comprise:

- a written summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of what you found and changed as you went through each stage indicated above (append a copy of the original and each interim modification of the proposal, noting changes with track changes or some other device);
- a discussion of comments made by others in your firm and client representatives;
- your conclusions and recommendations; and
- a description of the lessons you learned.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 40**

Assuming that for each of the past three years your firm has performed at least 50 projects that have not been profitable, identify how many projects actually are involved over the three-year period and their various commonalities (if any), in terms of size, time requirements, nature of client, etc. Using remote questionnaires and selective face-to-face or telephone interviews, survey the project managers involved to determine why their projects either broke even or lost money. Be circumspect about the reasons cited and probe; e.g., an answer such as "The client representative asked us to do more than we agreed to" usually means, "We didn't ask for a change order." Get to the root causes of the problems and develop suggestions for project/client screening, general staff training, specific staff training, and any and all other reasonable techniques you can think of to help remedy the problem. Have your suggestions reviewed by the firm's senior management and, if appropriate, by the project managers who participated. Incorporate their suggestions to the extent you agree with them, and report on which ideas your firm's management is likely to implement.

Your submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project's purposes and goals,
- a description of the overall project and the procedures you used to pursue it,

- a description of the firm’s overall project mix vs. the mix of projects that broke even or lost money for the last three years,
  - a description of commonalities among the projects that have not been profitable,
  - explanations given by project managers,
  - techniques suggested for overcoming the problems, and
  - a description of techniques you did not include or which you modified based on others’ input.
- Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 41**

Many client representatives tend to think that most providers like your firm are about the same. What makes firms different in the eyes of many client representatives is not their technical expertise, but rather the firm representatives’ understanding of the client’s and client representatives’ needs and preferences. This concept is summed by the dictum, “Know what keeps your client representatives awake at night.”

Your assignment is to identify the largest or one of the largest types of clients you have, or a major client or type of client you would like to add to your firm’s client mix, and then perform extensive research on the client type’s industry to identify the issues that the type of client should be concerned with. To the extent that there is at least one major example of that type of client you could “pitch,” learn about that client in particular. Meet with colleagues in your firm to “pick their brains.” Do likewise with others you work with on a regular basis (client representatives, suppliers, et al.).

Once you have assembled your list of factors, determine the types of services you could provide to the client or client type, and identify how you could shape (or at least discuss) these services to address the client’s principal concerns; e.g., “We assume that you . . . , and therefore, when we . . . , we . . . .” Then send a letter to a prospect, or (far more preferably) meet with a prospect, or propose to a prospect, or any combination thereof, and apply this client-focused approach.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project’s purposes and goals;
- a discussion of how you conducted your research;
- a list of the issues you developed, identifying how your firm can shape its services or presentation;
- a report on results of your “real-life” application;
- a discussion of how you will use your experience within the firm; and
- other material that you believe is appropriate.

Also include an annotated bibliography of written sources you consulted and, for each, a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 42**

Conduct research into lawsuits, settlements, etc., via insurance agents, attorneys, or others, to learn about the consequences of inadequate proofreading (e.g., misplacing a decimal point or leaving the word “not” out of a sentence). Take a proofreading course or otherwise learn how to proofread. Prepare a seminar or series of seminars or other means to teach proofreading to others in your firm. Develop whatever written and graphic materials may be required. Be sure the course has a before and after component, so you can evaluate what they have learned. Identify those in your firm who would benefit from being able to proofread better. Invite them to attend your class(es). Evaluate your results. Next, identify those who did not have the time to attend, and challenge them to a contest with one or two who did attend, and conduct the contest.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project’s purposes and goals;
- a discussion of how you conducted your research;
- information about the impact of inadequate proofreading;
- copies of the written and graphic materials you prepared;
- a discussion of the course, indicating how many attended, what their attitudes were, and how much they learned;
- a discussion of the follow-up contest, and what results were;
- a discussion of how the material will be used in the future; and
- other material that you believe is appropriate.

Also include an annotated bibliography that identifies the written resources you consulted and, for each, a brief description of a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 43**

Principal owners of privately held professional service firms should formulate and agree upon an ownership transition plan long before they are ready to retire, so they have adequate time to fine-tune the plan, gain “buy-in” from others, and make adjustments as events dictate. Through literature review and other means, research the issue of ownership transition among privately held professional service firms. Identify the most commonly used ownership transition methods and the steps involved in those methods. Interview up to five consulting firm owners (the five may include retired former owners) who have been through an ownership transition to learn about the methods they used, what worked, and what they would do differently if they could do it all again. Interview the CEO and other principal owners of your own firm, to learn their ideas about ownership transition. Also interview at least two consultants (including attorneys) who specialize in ownership transition services. Develop a proposed ownership transition plan for your firm and obtain the CEO’s comments about it.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project’s purposes and goals;
- descriptions of the three most commonly used ownership transition methods, significant differences and commonalities of the three methods, comments of the firm owners you spoke

with, how the three methods would apply at your own firm, and responses of your firm's CEO and other principals;

- an ownership transition plan (including a timetable) for your firm, in light of what you have learned to date; and
- a report of your CEO's comments about your proposed plan.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

You do not have to reveal how much your firm is worth, but you can indicate how various methods of accomplishing ownership transition affect firm valuation and the methods used to accomplish it.

#### **FOPP ASSIGNMENT NO. 44**

Review several published sources that discuss the role of project managers in professional-service organizations. Next, read at least one publication about conducting surveys, using and conducting interviews, designing questionnaires, and so on.

Here are some of the questions you should answer as they apply to your firm:

- What does it mean to be a project manager?
- What responsibilities does a project manager have?
- What authority does a project manager have?
- What education, training, experience, and character traits should a project manager possess?
- Has your firm prepared any written standards, policies, or procedures for project managers? If so, how do they compare to other firms' or to models included in the publications you reviewed?
- How does your firm evaluate project managers?
- What content and format would make written project-management policies and procedures useful to project managers, or more useful if your firm already has written policies and procedures?
- What are some obstacles to project management?
- How do the opinions of project managers on the foregoing issues compare to the opinions of operation managers and senior executives at your firm?

Design a survey and, using questionnaires and/or interviews, query your firm's project managers, operation managers, and senior executives about project-management issues. Working with your mentor, peers, and others in your firm, expand the list of questions beyond those indicated above. Administer the survey to the project managers in the firm, excluding from that sample any project managers who also are operation managers. Also administer the survey to a second group consisting of the firm's operation managers and senior executives.

Compile results for the two groups in terms of frequency of response. Compare the responses of the project-manager group to the responses of the operation-manager/senior-executive group. Prepare a report that describes the survey technique, summarizes results, and relates your judgment about issues that:

- are of the greatest concern to the sample groups;
- if unresolved, pose the greatest financial risk to the company;

- can be resolved by means of preparing and applying written policy and procedure documents; and
- will require additional effort or outside resources to improve.

Also prepare a draft implementation plan and include it in your report.

Submit your report to the operation managers and senior executives and, at a meeting with them, review your findings and suggested plan. Take notes about their suggestions and, when the meeting is over, prepare written, company-specific project-management policy and procedure documents. Submit the documents to the project-manager group to obtain their feedback. Make appropriate revisions and submit your proposed document to management.

Your submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project's purposes and goals,
- a description of the range of project management issues identified in the project-management publication review,
- a description of the information used to design the survey,
- a copy of the questionnaires,
- a tabulation of responses for the two sample groups,
- a copy of the report submitted to the operations/executive group,
- a description of the comments of operation managers and senior executives,
- a description of what project managers had to say about your proposed document, and
- copies of the project management policy and procedure documents.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 45**

Performance reviews can be among the most important of all human-resources-management activities. Why is that? What benefits do organizations and their employees derive from an effective performance-review procedure? What do knowledgeable individuals suggest that a performance-review procedure should comprise; e.g., steps that should be taken before the review and when they should be taken, the review itself, and follow-up activities? Based on your research, develop what you believe could be an effective procedure for your firm. Next, delineate the procedure your firm uses. Who performs the reviews? How? What does the process consist of? How often is an individual reviewed? Does everyone use the same procedure or does it vary depending on who has the lead?

Interview at least five members of staff who have gone through the process as individuals who have been reviewed and another five who have led a review process. (That's a total of ten people, even though most or all of those who have led a process probably have themselves been reviewed. If your firm's HR director handles performance reviews, interview the HR director and at least ten people who have gone through the process.) What's their opinion of the existing system? What improvements do they suggest? Based on that information, revise (assuming

revisions are needed) the effective procedure you developed initially, and submit it to those you interviewed for comments and suggestions. Finalize the procedure and, if you have not already done so, meet with your firm's senior leadership to discuss your research, survey findings, and suggestions. Include senior management's comments in your report.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of the benefits effective performance reviewing can provide;
- your initial "effective procedure" and a discussion of how you developed it;
- a discussion of your internal research, including your development of an interview-question guide, how you learned how to conduct effective interviews, etc.;
- a discussion of your research findings;
- your "revised effective procedure" and a discussion of reviewers' comments about it; and
- your finalized procedure and a discussion of senior management's comments about your research, findings, and suggestions.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 46**

"Hunt where the ducks are" is an aphorism that applies to any number of situations, including the recruitment of professional staff. Using at least your fellow FOPP participants and fellow staff members as the sample, conduct a survey to identify the most significant factors a professional-personnel recruitment program should consider. Then develop recommendations for a

professional-staff-recruitment program your firm could use. How you define terms and the factors you inquire about are up to you, based on the background research you perform. At first blush, however, an effective program would seem to be one that considers factors linked to employees' tenure with a firm; e.g., a program that brings in large numbers of candidates is not particularly effective if those hired stay on staff for less than a year. What factors should a program consider? For example, if you find that those who stay longest with a firm are those who went to college in the area where the firm is located, the firm would probably want to emphasize recruitment of area colleges' alumni. What about a person's age at the time of hire? Is that important? What about an individual's experience? academic concentration? gender? And, no doubt, you should identify many other factors. Your research should also consider how individuals came to a firm; e.g., referral from another employee, on-line ad, ad in a professional periodical, use of a "head-hunter," etc. Develop suggestions your firm could apply to most cost-effectively attract and retain more of those they most want.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of the research you did to identify appropriate factors for research, including the cost of various types of recruitment methods;



- a discussion of the research you performed to develop a questionnaire and conduct a survey, and a copy of the questionnaire;
- a discussion of survey findings; and
- your recommendations for a cost-effective recruitment program your firm could apply.

Also include an annotated bibliography of written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 47**

Identify ways in which safety affects your firm, then evaluate your company's existing safety program. Assuming your firm has room to improve, explain why and how; offer recommendations. Assuming one does not already exist, develop an outline for a comprehensive plan to reduce the number of injuries to personnel working for your firm overall, or in one of your firm's offices, regions, or service divisions. Review the draft outline with others in your firm and safety officers of other companies. Revise the outline as you believe appropriate. Submit the final outline to managers of your firm and report their comments.

Research should include:

- interviewing your commercial-general-liability insurance provider to determine how safety ratings are determined and calculated;
- discussing financial ramifications of an unsafe work environment with the CEO, CFO, and principal(s) of your company;
- identifying incidents where your company was excluded from working on project(s) because of a safety audit;
- interviewing your peers and safety officers from at least three other companies to determine the effectiveness of their safety programs and safety strategies; and
- reviewing past safety records in an effort to identify trends or recurring behavior.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of the research you performed and the individuals from whom you obtained input and information;
- a discussion of the key elements of your safety strategy; and
- your initial draft and final outline.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 48**

Undertaking projects in a country where a company has not established an office may pose several types of risks resulting from:

- an unstable political climate or economy;
- uncertain factors affecting project logistics (e.g., importation of materials and consumables);

- invoicing, accounts receivable, and foreign taxation obligations;
- visa and immigration issues, valid entry and stay approvals for project staff;
- language barriers and local customs; and
- personal safety of staff, which may be affected by increased political, civil or religious unrest, or ill will toward the project or client for which you are working.

Develop a risk-assessment procedure your firm can apply during the proposal-evaluation stage. The procedure should help the firm evaluate risks inherent to prospective, foreign projects and/or clients. Focus the risk-assessment procedure on (at least) the bullet points indicated above, and incorporate all the issues you address into a weighting/ranking system (matrix) for simple assessment. Allow the possibility of incorporating risk-reduction factors (e.g., project-specific rate schedule, establishment of satellite office) to the weighting/ranking system.

Completing the procedure should indicate whether or not the firm should proceed with proposal preparation and, if so, the risk-reduction factors that should be incorporated into the proposal. Apply the developed risk assessment procedure to three completed or in-progress foreign projects and assess if the procedure would have permitted commencement of each project. If not, why not? Were risk-reduction factors established?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a copy of the checklist of data required for project evaluation;
- a copy of the weighting/ranking system template, with accompanying instructions for application;
- descriptions of example risk-reduction steps and the application of these factors
- against identified project risks; and
- a description of the risk assessment undertaken on completed or in-progress foreign projects, including discussion of the resulting risk profile and actual in-country experience to compare against.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 49**

What can your firm do to improve its employee-attraction and employee-retention practices? To learn that, identify your firm's employment value proposition (EVP); i.e., what prospective and existing employees perceive as the value they gain through employment at your firm in light of factors such as: the career opportunities employees believe are available at your firm, the rewards your firm offers, the type of work available, the make-up of the organization, and the quality of the firm's people. How important are these factors to all employees in general and according to employees of varying demographics (e.g., age, years of professional experience, geographic location).

To complete this project:

- evaluate how your firm attracts and retains employees,

- conduct an all-employee employee survey to determine what existing employees perceive as the value they receive from employment at your firm,
- survey former employees who voluntarily left your firm to learn what led them to resign,
- interview a representative group of recently hired employees to assess what key factors led them to choose your firm as an employer,
- review industry trends to better understand what prospective and existing employees desire in an employer to compare against the employee data you derived, and
- survey human-resource professionals from other firms to understand how they address matters of EVP.

Based on your findings, evaluate various EVP factors and develop recommendations to improve your firm's current EVP. Submit your recommendations to the firm's CEO and its HR manager. Discuss your recommendations and describe what they have to say for your report. What recommendations will they use now, later, or not at all? Why?

Your final report should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of how your firm currently attracts and retains employees and the success achieved;
- a summary of the questions that were asked of those surveyed, including those you interviewed;
- a summary of what existing and former employees view as the value derived from working at your firm;
- a summary of factors employees consider in selecting an employer, based on what industry trends and human resource professionals suggest employees desire in an employer; and
- recommendations for aligning your firm's employee attraction and retention practices with a positive EVP.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 50**

Research published information on training/professional-development programs in professions such as yours. Review your firm's technical-training/professional-development program. Interview at least five of the firm's senior principals and at least one employee from each technical grade to obtain their input about the strengths, weaknesses, and needs of the company's technical-training/professional-development program. Ask: What training/professional development does the firm provide for new staff with varying degrees of experience and for existing staff? How many times do employees perform a new task under supervision before being asked to perform the task on their own? Do employees feel comfortable with the level of training/professional development they receive? Are standard operating procedures in place and current for these activities? In addition to performing the technical activities, is staff being trained to properly document their work? Develop a plan for improvement, obtain senior feedback, and report. Interview representatives of at least two other firms for information about their technical-training/professional-development programs, and their opinions about their

programs' effectiveness. Pose the same questions you asked of in-house employees. Compare the other companies' technical-training/professional-development program to your firm's.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of your firm's existing technical-training/professional-development program;
- a narrative description of your review and interview procedures and findings;
- a description of the other firms' general characteristics (location, size, age, etc.);
- a comparison of your firm's and other firms' technical-training/professional-development programs;
- recommendations for improving your existing technical-training/professional-development program, including recommended topics and frequency of technical training/professional development; and
- an evaluation of whether these changes are likely to be implemented, based on management buy-in and other factors.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 51**

*(For those associated with larger firms)*

Identify which offices within your company are larger than yours based on revenue, employee count, or other factors. Also identify two or three offices that are generally about the same size as your office. Describe the management structure at those offices and yours. Identify key personnel who have experience with the transition from working in an office the same size as yours, to managing one of the larger operations. Include regional or corporate management as well as office-level management, if possible.

Learn how to conduct surveys and interview the identified personnel to create a catalog of issues that arise as growth forces changes in management operations or the management structure of an office. Create a list of management changes that office managers implemented to identify changes your office should consider if growth continues. If possible, also identify management tactics, changes, approaches, or initiatives that were attempted, but later abandoned. Work with the interviewees to develop suggestions for improving performance of your office as growth continues. Include specific techniques for workflow management, communications, meeting protocols, office space, quality control, and so on. Prepare a draft report for your office manager as well as the managers of the offices identified as being about the same size as yours. Submit the report to the managers and ask for a response to each suggestion made, including why it will or will not work, changes that might be necessary to make something work, time required, dollars required, and so forth. Do not consider other service lines; limit yourself to your own department.

Describe what you have learned from this research and how it may affect you. Your submission should include:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;

- a general description of your research methods;
- a general description of how you selected offices and personnel included in your research;
- a description of the overall management hierarchy of your company as well as offices such as yours;
- a description of the management hierarchy of offices larger than yours;
- a description of the issues that arise as growth forces changes; suggestions for management changes that could be considered as growth continues;
- a description of management changes that may or may not have been successful when implemented;
- a description of each manager's response; and
- a description of each manager's thoughts about the exercise, along with your own.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 52**

Three generations of Americans (Baby Boomers, Gen Xers, and Millennials) are working together in today's work force. The common experiences shared within each generation influence its members' predispositions toward authority, individual rights, work ethic, recognition, and professionalism. These predispositions also influence how the generations view and interact with each other. Using written questionnaires with open-ended and numerical-ranking questions to guide discussions, interview at least five to seven licensed professionals (or soon-to-be-licensed professionals, as may be the case for some Millennials) in each of the three generations. Design your interview questions to learn each person's views and opinions about:

- their own generation's strengths and weaknesses and the strengths and weaknesses of other generations currently in the work force;
- the definition of professionalism;
- the importance of the five basic attributes of professionalism (as established by Ernest Greenwood);
- the future challenges to professionalism; and
- recommendations for the next generation to improve the status of professionalism.

In your submission, compare and contrast the responses of the interviewees and seek to identify intragenerational commonalities (as well as differences) about the topics identified above. If you are able to identify intragenerational commonalities, seek to identify intergenerational commonalities (as well as differences) among the three generations.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of common experiences and traits associated with the three generations;
- a presentation of interview methodology;
- a presentation of tabulated data, statistics, and direct responses;
- an intragenerational and intergenerational evaluation of the responses;
- an identification of intragenerational and intergenerational commonalities and differences

- with respect to the interview topics;
- your conclusions about professionalism among the generations; and
- in an appendix or elsewhere, a copy of the questionnaire you developed.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 53**

Retirements and promotions require engineering, environmental, and similar professional firms to transfer responsibility, institutional knowledge, and established client relationships from senior staff to "up-and-coming" professionals. To facilitate the "hand-off," firms invest considerable resources to enhance the professional responsibilities, consulting experience, and client relationships of younger staff. When successful, the effort contributes to the well-being of the firm and to the well-being of the professions of which the younger staff are members.

Survey a sample comprising at least fellow FOPP participants and personnel within your own firm to identify their knowledge and attitudes toward the transfer of responsibility, institutional knowledge, established client relationships, and the factors up-and-coming professionals consider important for a successful transition. From your survey findings and literature research, develop recommendations for a professional succession plan your firm could use. The plan should address the transfer of responsibility, institutional knowledge, and established client relationships. Finalize your draft plan and share it with senior management to discuss your research, survey results, and recommendations. Revise your plan based on senior management's comments.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of the motivating factors that cause a firm to implement a professional-transition plan;
- a discussion of the research you performed to develop a questionnaire and conduct a survey, and a copy of the questionnaire;
- a discussion of survey findings;
- recommendations for the transfer of responsibility, institutional knowledge, and established client relationships from senior staff to up-and-coming staff;
- a discussion of senior management's comments about your research, survey results, and recommendations; and
- a copy of your draft and final recommendations.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 54**

Effective project close-out procedures provide an array of benefits, such as documented client feedback and evaluation, improved quality assurance, better management of risk, punch-list

items, and financial performance. Assuming your firm has not yet prepared a project close-out procedure, create a questionnaire to gather information about close-out procedures currently used by your firm's project managers. Identify at least five firms that offer services similar to yours and that have formal project close-out procedures in place. Use the same questionnaire gather as much detail about those procedures as each firm's representative is willing to share. Review the responses and create a comparative matrix of the internal and external close-out procedures identified through the survey. Discuss the similarities and the differences.

Develop a project close-out procedure for your firm, addressing methods, reporting requirements, and necessary forms. Submit it to your firm's senior officers and to the project managers you interviewed. Obtain their input and suggestions; modify the procedure as appropriate.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of the research you performed and the individuals from whom you obtained input, the number and nature of the factors considered, additional observations, and a list of documentation received;
- a sample of the questionnaire and the responses;
- a discussion of the comments you received on the draft procedure; and
- a copy of the draft and final project close-out procedure you developed.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 55** *(For those associated with larger firms)*

Assuming that your firm plans strategically, identifying strategic markets or market units, identify a major market sector or major-market unit (MMU) within your firm that has been successfully developed and maintained in one geographic location (division, region, or local area), but that has not been successfully developed in others. Identify the geographic areas within the firm that have been successful in business development efforts, major project/contract wins, and generally establishing/maintaining trusted-advisor relationships with these similar types of clients within this MMU. Further, identify key personnel within the firm who are instrumental in these successful efforts. Through interviews, identify major factors that lead to and feed this success. Next, speak with representatives of at least two existing clients and two prospective clients in this MMU to further identify the characteristics they prefer service providers to exhibit.

Based on your research, evaluate for this MMU:

- the strategy and tactical method(s) to identify clients;
- a summary of service-provider attributes (size, service mix, etc.) client representatives prefer;
- the most important success factors to capture contracts; and
- changes in the internal marketing organization, approach and/or collaboration needed to enable success.

Evaluate how to best pursue and capture work within a geographic location of your firm and use that knowledge as the basis of the business plan for this MMU in the location by using proven experiences and resources in other locations of your firm.

Your submission will include:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of how you conducted the research;
- a general description of how you selected market leads or market champions in other geographies within the firm included in your research;
- a general description of how you identified client representatives included in your research; and
- a series of descriptions to focus on the major recommendations the research leads to by identifying specific measures for implementation within the firm.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

**FOPP ASSIGNMENT NO. 56**  
*(For those associated with larger firms)*

Assuming that your firm plans strategically, identifying strategic markets or market units, identify a major market sector or major-market unit (MMU) within your firm that has been successfully developed and maintained with one type of client (e.g., contractors), but that has not been successfully developed with others (e.g., owners). Identify successful business-development efforts and major project/contract wins within your firm. Generally speaking, how successful has your firm been at establishing/maintaining trusted-advisor relationships with similar types of clients within this MMU? Further, identify key personnel within your firm who are instrumental in these successful efforts. Through interviews, identify major factors that lead to and feed this success. Next, speak with representatives of at least two existing clients (e.g., contractors) and two prospective clients (e.g., contractors or owners) in this MMU to further identify the characteristics they prefer service providers to exhibit.

Based on your research, evaluate for this MMU:

- the strategy and tactical method(s) to identify clients;
- a summary of service-provider attributes (size, service mix, etc.) client representatives prefer;
- the most important success factors to capture contracts; and
- changes in the internal marketing organization, approach and/or collaboration needed to enable success.

Evaluate how to best pursue and capture work with the prospective clients identified as part of this research and use that knowledge as the basis of the business plan to pursue these (and similar) clients by using proven experiences and resources in your firm.

Your submission will include:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;



- a discussion of how you conducted the research;
- a general description of how you selected market leads or market champions within the firm included in your research;
- a general description of how you identified client representatives included in your research; and
- descriptions of the specific steps your firm should take to implement the major recommendations the research leads.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 57**

Prepare a comprehensive review of the effects of working an alternative work schedule, year-round or seasonally, versus the traditional five eight-hour days. Identify at least four alternatives; e.g., four ten-hour days; 80-hours over nine days with every other Friday off; either of the prior two on a summer-only basis; and either scheduled such that at least half the staff is in every Friday. Many other schemes are available. Discuss the four alternatives with your mentor and co-workers. Research at least two through literature review and by interviewing managers in firms that have implemented a modified work schedule. Has productivity increased or decreased? What challenges arose and how were they handled? Did implementing the schedule have any unforeseen effects? Were departments excluded from participation? How did they respond? What effect did this implementation have on overall morale of the company, good and bad? What types of firms have successfully implemented this schedule? What firms tried the system and elected to convert back to a traditional approach and why? Meet with management of your firm and discuss your research findings and suggestions. Include senior management's comments in your report.

Your submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project's purposes and goals,
- a discussion of your research findings,
- a description of the assessment method used (including a copy of any questionnaire and/or checklist developed), and
- a conclusion relative to the value and effectiveness of implementing a modified work week.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 58**

Firms such as yours face two important challenges: attracting high-quality technical employees and retaining them. While offering competitive salaries and benefits is important, almost all firms do so. To differentiate itself from others, your firm could also offer to its current and prospective technical employees an attractive opportunity for professional growth.

The objective of this assignment is to develop a career-advancement system that motivates current employees to grow professionally and helps prospective employees envision their potential career paths and contributions to your firm. This career-advancement system should incorporate far more than job-title changes.

To develop this system, interview at least eight professional engineers or professional geologists in your company. Select employees who have worked as technical professionals for five to twenty-five years. At least 40% of the interviewees must be females. Interviews must be face-to-face or telephonic.

Use interviews to learn at least:

- why interviewees pursued employment with your company;
- why interviewees left a previous company (if applicable);
- what differentiates your company from other companies, according to interviewees;
- interviewees' professional goals;
- interviewees' personal goals;
- interviewees' definition of career advancement;
- the three professional accomplishments interviewees are proudest of;
- the one thing interviewees wish your company would provide as a benefit; and
- benefits your company offers, other than salary, that are most important to the interviewees.

Based on the interviewees' comments, as well as literature review, develop an outline of a new career-advancement system for your company's technical employees. Present this outline to three members of senior management and obtain their feedback. Use this feedback to refine your proposed career-advancement system.

Your submission should include:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of how you learned how to interview;
- a discussion of the persons with whom you spoke in terms of age, position, number of companies previously worked for, and number of years with your company;
- tabulated results of your interviews;
- conclusions drawn from interviewees' comments;
- the first draft of the new career-advancement system presented to senior management;
- a summary of feedback offered by senior management; and
- a second draft of the new career-advancement system that incorporates senior management's feedback.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 59**

If your firm has not yet formulated a future-leaders program, interview at least one senior manager (preferably the CEO) to learn about the firm's plans to identify, mentor, and train individuals for leadership positions. Interview mid-level and management-level staff about potential career paths and opportunities for advancement at your firm. Interview management staff from at least four similar firms to learn how they identify, mentor, and train individuals for leadership positions. How can your firm encourage mid-level staff to find or create opportunities for promotion and advancement in their careers? What other issues should a future-leaders program address?

Develop a highly detailed outline of a future-leaders program, then, using yourself as an example, identify what you want your future role in the firm to be and, by taking advantage of the future-leaders program, how you could identify pathways for achieving your leadership goal.

Have the senior manager you first interviewed review and comment on your draft program and personal-development example and, based on the comments you receive and your own professional judgment, modify (if need be) your program outline and personal-development example.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of the methods you used to develop your questionnaires and conduct interviews;
- a description of the people you interviewed at your firm and the results and implications of the interviews;
- a description of the people you interviewed at other firms and the results and implications of the interviews;
- your initial program outline and personal-development example;
- a description of the senior manager's reaction to your program outline and example;
- a description of the changes you made, if any, to your program outline and example;
- your final program outline and example; and
- a copy of each questionnaire you used.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 60**

Similar to FOPP Assignment No. 58, above, but assuming your firm already has a future leaders program in place, interview at least one senior manager (preferably the CEO) to learn what plans the firm has to identify, mentor, and train individuals for leadership positions. Interview mid-level staff to learn how aware they are of the future leaders program. What do they think about it? Are they taking advantage of it? Do they plan to? Do they find or create opportunities for promotion and advancement in their careers? If so, how? Is it part of a personal plan or do they take advantage of what they can when "things" happen?

Based on what you have learned, and also on literature research and review, develop a highly detailed outline of a revised, improved future leaders program. Then, using yourself as an example, identify what you want your future role in the firm to be and, by taking advantage of the future leaders program, how you could identify pathways for achieving your leadership goal.

Have the senior manager you first interviewed review and comment on your draft program and personal-development example and, based on the comments you receive and your own professional judgment, modify (if need be) your program outline and personal-development example.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals
- a summary of your firm's existing future leaders program;
- a description of the methods you used to develop your questionnaires and conduct interviews;
- a description of the people you interviewed at your firm and the results and implications of the interviews;
- a description of your suggested improvements to the future leaders program and your personal-development example;
- a description of the senior manager's reaction to your revised program outline and example;
- a description of the changes you made, if any, to your revised program outline and example;
- a copy of the existing future leaders program description developed by your firm;
- your final program outline and example; and
- a copy of each questionnaire you used.

Also include, an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 61**

Evaluate your firm's communication protocol with emphasis on internal marketing, cross-selling of existing service lines, and development of new service lines. Describe and, through examples, illustrate the steps your firm takes to communicate aspects of service-line capabilities to employees. In reviewing the firm's protocol, identify any shortcomings detected and develop methods to increase cross-selling and additional opportunities through added value, client education, and leveraging existing relationships with the firm's target clients. Discuss your findings with at least one senior manager at your firm.

Your submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project's purposes and goals,
- a summary of existing employee opinion about internal communication,
- a summary of an interview performed by you with your firm's marketing department with respect to internal communication and cross-selling,
- a description of existing protocols or methods of internal communication and the degree they are being used,

- a plan that contains recommendations and specific procedures that could be implemented to improve internal communication within the firm (regionally and practice-specific); and
- comments of the senior manager(s) who reviewed your suggestions.

Also include an annotated bibliography that identifies the written resources you consulted, and for each, a brief description of its contents and your opinion of them.

**FOPP ASSIGNMENT NO. 62**  
*(For those associated with larger firms)*

If yours is a multioffice firm, how well do the different offices share physical and personnel resources together and with headquarters? What are the impediments to resource-sharing within your firm (e.g., lack of information, lack of trust, lack of communication, us-vs.-them attitudes)? In what ways do these impediments:

- restrict your firm from providing an optimum team effort?
- increase the cost of providing services?
- lower the firm's likelihood of being selected for professional services?
- impair the firm's ability to provide timely and quality-oriented professional services?
- impair the firm's ability to maintain/develop effective relationships with the firm's clients and the clients' representatives?
- impair or restrict your firm's ability to pursue business opportunities?

What would be the effects of lessening or eliminating these impediments (e.g., more sharing of staff, projects, and resources; greater efficiency; more marketing intelligence; more lead generations; and higher profits)? About how much would such benefits be worth to your firm? What can the firm do to lessen or eliminate these impediments? Approximately how much would it cost to lessen or eliminate these impediments?

To answer these questions, develop a questionnaire that addresses the issues and distribute it to top company executives, regional managers, branch managers, project managers, and marketing staff in each office. Compile results of the questionnaires and distribute the report to all staff, asking for their comments. Conduct literature research to identify how other firms have dealt with such issues, then contact managers of at least three firms similar to your own to learn about the issues they have or had, and what they did or are doing about them. Use the results of the questionnaire, all staff members' comments about those results, and your research to draft an analysis for the firm that identifies impediments to resource sharing, the difficulties they are causing, techniques for lessening or eliminating those impediments, and the cost/benefits involved. Based on your analysis, prepare a plan for increasing resource sharing within your company. Submit your analysis and plan to management.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of the techniques you used to learn how to conduct surveys, conduct interviews, and develop questionnaires;
- a copy of the questionnaire you developed and a tabulation of responses;
- a description of the key points raised by writers you consulted in your literature review;

- a description of interviewees and the points they raised;
- a copy of your draft analysis and plan; and
- a description of management’s reaction to your draft analysis and plan.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 63**

The increase in women and ethnic minorities (native and foreign-born) employed at firms like yours reflects trends in the overall workforce. Ultimately, these trends will affect firms’ leadership and management demographics. To prepare for this change, firms’ leaders and managers need to ask:

- do we have a plan to identify, encourage, and mentor future managers and leaders of diverse backgrounds? If so, how can we improve or expand it?
- do we have a plan to recruit qualified managers and leaders of diverse backgrounds from “non-traditional” sources? How does this plan compare to those of similar-sized firms’?

What effect would an increase in the number of qualified women and minority leaders and managers have on:

- the culture and morale of the firm? Would it be seen internally (the firm) and externally (clients) as a net “positive” or not even noticed?
- the potential for gaining access to new markets (domestic and/or international)?
- the leadership styles prevalent in the firm, including new ways of managing a more diverse work force?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project’s purposes and goals;
- a discussion of procedures used to learn more about the existing policy and its background; e.g., the objectives involved, the success achieved to date, successes and failures, and other issues that permit development of a questionnaire designed to help you learn other employees’ opinions and suggestions;
- a discussion of how you learned to conduct surveys, develop questionnaires, and conduct interviews;
- a discussion of the procedures you used to identify other firms that have such plans in place, identify interview candidates, and learn about their experiences;
- overall survey results and implications;
- your suggestions for identifying, encouraging, and mentoring future leaders and managers;
- senior management’s reaction to your suggestions; and
- a copy of the questionnaire used.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 64**

Many client representatives regard firms like yours as commodities and, therefore, they often select the firm that offers to perform the service for the lowest fee. Most professional firms prefer to be selected based on factors other than lowest fee, because bidding affects their quality of service, revenue, and risk.

Identify and interview representatives of three surveying, three engineering, and three architectural firms. Discuss their reactions to lowest-fee selection and experiences as the lowest-fee firm.

Also, interview personnel within your firm to identify their experiences and how they have addressed lowest-fee selection. Discuss their experiences, lessons learned, opinions, and recommendations.

Based on your research discuss:

- how other firms were retained and responded despite not being the lowest-fee factors causing selection besides lowest price, for example, changes in scope, qualifications, experience, schedule and/or business or personal relationships;
- how your firm, or individuals within your firm, approach lowest-fee selection compared to other consulted sources' methods;
- how these projects have led to repeat or additional services;
- types of strategies having success or failure;
- profitability of lowest-fee projects and impact on risk; and
- trends based on the client's or client representative's background or profession.

Your submission should comprise:

- an executive summary,
- an orientating overview,
- a description of the approach to the research,
- a description of the people interviewed,
- a discussion of the information obtained from the research,
- a discussion of proposed changes and new approaches to lowest-fee selection, and
- a discussion of the reaction to your suggestions by a senior manager of your firm.

Also include an annotated bibliography identifying the consulted sources, and, for each, its contents and reaction to them.

## **FOPP ASSIGNMENT NO. 65**

*(For those associated with larger firms)*

Review your firm's current processes (if any) related to identification of and attendance at networking and professional development activities (including technical conferences, professional-society meetings, client-sponsored events, and educational opportunities). Prepare a questionnaire designed to identify criteria, decision-making processes, or formal policies that are being used across the firm to:

- identify appropriate networking and professional development opportunities,

- identify appropriate staff to attend (including alignment with staff and company goals),
- obtain approval from management for individuals to attend,
- pay for registration/fees (i.e., from general overhead or from funds earmarked for professional development),
- compensate employee time and expenses (if at all) to attend, and
- disseminate the information obtained at the event to others across the firm.

Distribute the questionnaire to employees and management from a representative group (based on size and geographic location) of branch offices and/or organizational units to gather the information. Review and summarize the responses to the questionnaire and evaluate what processes are being used across the firm. Are they consistent from branch office to branch office or within different organization units? Administer the questionnaire to representatives of at least two other professional engineering firms of similar size and geographic diversity to gather information on how other firms in your industry handle professional development and networking opportunities. Prepare a summary report to present the results and make recommendations to improve the efficiency and consistency of the processes at your firm. Present the findings and recommendations to management for comment.

The submission will comprise:

- an executive summary;
- an orientating overview or introduction in which you discuss the project's purposes and goals;
- a description of existing processes (if any) at your firm;
- a copy of the questionnaire, a discussion of the survey sample, and tabulation of responses;
- a description of how branch offices or organizational units within your firm of varying size and geographic location handle networking and professional development activities and also what is being done at other firms in your industry;
- recommendations for improving the efficiency and consistency of the processes at your firm; and
- a summary of comments obtained from management about the findings and recommendations.

Also include an annotated bibliography identifying the written sources consulted, and for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 66**

Owners of privately held, professional-service firms that are committed to internal ownership transition should create and follow an effective, internal, ownership-transition plan. An effective plan links the growth (i.e., the number of future owners and associated staff) required to sustain internal ownership transition to the profitability of the firm, and the appreciation of the shares' value. The ownership-transition plan should also consider the balance between stock affordability and positive, long-term return on investment.

Through literature review and other means, research internal ownership-transition plans that consider growth, profit, and share value. Review your firm's ownership-transition plan and identify how it could be improved. Research interviewing techniques and then interview the



president and chief financial officer of your firm to learn about your firm's worth, yearly profit, and growth goals as they relate to internal ownership transition. Interview at least one outside business consultant with experience in the development and implementation of successful, internal, ownership-transition plans. Interview owners of your firm to learn their perspectives on ownership-transition. Develop a revised, sustainable, ownership-transition plan that links growth, profit, and share value. You do not have to reveal how much your firm is worth, but you can indicate how the revised plan may accomplish the goal of long-term sustainability for internal ownership transition for your firm. Present your findings and revised plan to your firm's strategic planning steering committee and your firm's ownership group.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of your firm's ownership-transition plan and how it could be improved;
- a description of your research on interviewing techniques;
- a summary of whom you interviewed and what you learned;
- a revised internal, ownership-transition plan; and
- a summary of the outcome of your presentations to the strategic planning steering committee and your firm's ownership group.

Also include an annotated bibliography identifying the written sources consulted, and for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 67**

Co-op and/or internship programs create opportunities for college/university students to gain valuable work experience and evaluate a company for potential full-time employment. Firms gain the opportunity to evaluate co-op/intern participants for potential full-time employment. Your assignment is to survey current co-ops and interns to identify factors that affect their decision to seek full-time employment with the co-op/intern firm when they graduate. Also, survey former co-ops and interns to identify the factors they considered when choosing to stay with the firm.

The information you gather should identify:

- what the co-ops and interns are learning about the company and how;
- what could be done to enhance the co-op's or intern's experience;
- how the firm selects co-ops/interns (e.g., asking prospective interns or co-ops a uniform set of questions); and
- factors full-time employees considered when they were interns or co-ops.

Factors could also include:

- information on how the firm hired its interns and co-ops;
- the age of those employees and what their educational backgrounds were at the time of internship or co-op involvement; and
- the size of the firm and economic conditions in the area, possibly among other factors depending on the extent of information available.

Can you draw any conclusions from the data? In other words, if some co-ops or interns come back for full-time employment, what's driving them and why? If others decide to look elsewhere for full-time employment, why? Is it due to factors beyond the firm's control? If so, what are those factors? If not, what can the firm do to effect improvement?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of what the firm can do to hire the right interns and/or co-ops, hire them back for full-time employment, and retain them;
- a discussion of the roles full-time employees and human-resources personnel could play in optimizing the plan and its implementation;
- a summary of the questions you asked of your survey sample, including those you interviewed; and
- based on your findings and conclusions, a discussion of a detailed program that will enhance the intern's or co-op's experience.

Also include an annotated bibliography identifying the written sources consulted, and for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 68**

Interview company leaders to identify a new service line that your firm wants to offer. Develop and execute a process to assess the demand, competition, implementation approaches, and development cost for the new service line. The evaluation should also consider potential revenue and other factors that you can expect management to consider when making a decision about adopting a new service line. Assemble for management a presentation of the materials, including a general plan for taking the next step and implementing the proposed service line. Include such items as personnel training, certifications, marketing materials, and standard text for proposals and reports.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a list of specific resources; and
- a discussion of your management's perception of how you approached the task and conducted the presentation, including suggestions or comments about the need for additional information.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 69**

Retreats can be used for many purposes. Research retreat processes. Survey representatives of at least ten firms that use retreats to discuss the strategies and techniques they use to build teams,

formulate goals, etc. Use the survey to also learn how the sample's retreats are structured, organized, financed, located, scheduled, facilitated, attended, etc. Review your firm's last retreat program and post-retreat survey. Recommend improvements to your firm's retreat process. Review your recommendations with a senior manager of your firm (preferably the CEO) and make changes, if you believe changes are truly called for.

Your submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project's purposes and goals,
- a description of the retreat processes,
- a narrative describing research procedures,
- a narrative describing surveys and findings,
- a description of your initial recommendations,
- a description of the senior manager's reactions and suggestions, and
- a description of the changes you made, if any.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 70**

Service consistency is an important attribute of professional firms, especially those with multiple offices or service lines. It comprises an important element of branding and image that establishes client expectations. An operations plan is a critical tool for developing, implementing, and maintaining/improving service consistency. An effective operations plan sets and explains performance standards based on the firm's specific needs, priorities, goals, and culture. Firms also use such plans to communicate performance expectations to employees.

Assuming your firm does not now have an operations plan, develop one for a significant department, service line, practice, or business unit within your firm. Conduct literature review to obtain information about operations plans and, as necessary, obtain some from collegial firms. Once equipped with the requisite knowledge, identify your firm's existing practices by interviewing others. (Be sure to learn how to conduct surveys and interviews; perform literature research.) What do others think about these practices? What do they recommend for improvements? Based on your research, draft an operations plan, being sure to incorporate methods for evaluating performance. Submit your draft to coworkers and colleagues. Obtain their feedback, modify your draft, and have it implemented on at least one project. Interview project personnel to learn what they think of the draft plan, how they would modify it, and so on. Based on this feedback, modify your draft and submit it to senior management along with a description of how the barker draft fared in its trial application. Report what management had to say.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a narrative describing the selected unit or practice, how this unit or practice affects the firm's performance, the desired outcome of your modifications, and financial ramifications associated with the implementation of the operations plan;

- a summary of the research methods you used to identify best practices for the selected unit or practice;
- a copy of your final draft operations plan; and
- a report of management's response.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 71**

Your firm employs people who donate time to community involvement; e.g., involvement in nonprofit business groups, fraternal orders, "Good Samaritan" organizations, youth-focused organizations, professional communities, and marketing-focused organizations. Many people consider community involvement an important component of professionalism. Staff members' active community involvement can also expose your firm to client and prospective-client representatives and other project stakeholders and obtain goodwill for your firm, leading to the reinforcement of existing relationships and the development of new business.

In what types of community involvement do your firm's employees engage? To what extent does your firm support these activities? Has your firm ever developed a strategic community-involvement plan through which the firm would assign employees to selected organizations, specifically to bolster existing relationships or establish new ones? If not, develop such a plan on a limited scale. Identify five client organizations and five prospective-client organizations. Using the Internet, networking, and other means, identify some of the community organizations served by key decision-makers within the ten organizations. Identify at least three organizations involvement in which could yield good contacts. Speak with the executive director or other personnel in those organizations to identify the committees or service groups the prospective contacts are involved with and then join them. Report your results and what you believe your results could be over time, the cost and benefit involved, and whether or not such strategic community involvement should be adopted firmwide. Discuss your results with senior management and report management's decisions.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a narrative identifying the type and amount of your firm's employees' community involvement, the extent to which the firm supports these activities, the techniques you used to identify that support, research you conducted to develop your plan, and results of implementing the plan;
- management's response to the plan; and
- appendixes containing the plan, any questionnaires used, and other relevant materials.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 72**

Many professionals are choosing to work part-time schedules to balance career goals and personal responsibilities. As such, firms should develop part-time policies that promote retention of these employees while considering the needs of other employees and the overall health of the company.

Identify and review part-time employment policies at five sample firms (including your own). After learning how to conduct surveys and interview, develop questionnaires, etc., conduct telephone interviews of human resources managers or principals of the five sample firms to evaluate how the firms are responding to part-time work requests. In addition, interview three senior managers of your own firm (e.g., CEO, COO, and CFO) plus the human resources administrator to understand their perspectives on how your firm manages part-time work requests. Does a part-time policy exist at each sample firm and, if so, what are the details of the policy? Is a case-by-case approach used or is the policy applied consistently across the company? What are each firm's concerns and challenges with offering part-time work schedules? What problems could arise with full-time employees? What conclusions can you draw?

Using a written questionnaire, poll employees of engineering and similar firms about part-time policies offered. Evaluate whether employees believe their company's part-time policy is beneficial. For those working part-time schedules, how are internal (company) and external (client) communications handled? How are client demands met? How are internal staff needs met?

Interview at least four individuals who are working part-time schedules. Focus on individuals with varying levels of responsibility. How are they managing their part-time schedule? Are they able to find the balance they desire? Has their part-time schedule affected career advancement? Do they believe their company's part-time policy has been implemented fairly?

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of the techniques used to perform the interviews and survey;
- a discussion of the policy research findings, including similarities and differences between policies, and concerns about part-time policy implementation;
- a discussion of the survey and part-time employee interview results, including whether the desired life balance has been achieved, how staff and client needs are being met, and the effect of part-time schedule on career advancement; and
- copies of the questionnaire and interview questions used.

Also include an annotated bibliography identifying the written resources you consulted and, for each, a brief description of contents and your reaction to them.

## **FOPP ASSIGNMENT NO. 73**

Assuming your firm does not now have a rapid-response project intervention team system in place, to deal with risk molehills before they become mountainous losses, learn what such a

system is (GBA has material; others may, too) and develop a program plan, identifying specifically who will do what. Review the draft plan with proposed key participants and modify as appropriate. Also develop the attendant “bells and whistles”; e.g., where the plan will be kept, how staff will be made aware of it, the training staff will require, evaluating the plan’s effectiveness, updating it on a regular basis, introducing it to new hires, and so on. Have the plan reviewed by senior management and by your firm’s professional liability insurance provider. Have all project managers and project professionals review the draft plan and comment. Finalize the plan, develop all required training materials, and implement the training (including record-keeping to indicate who did and did not participate in training). If during the research phase an opportunity for program use occurs, report the results.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project’s purposes and goals;
- a narrative discussing the research you performed, the process of developing the initial plan, the response of those who reviewed it (from project professionals to senior managers and your firm’s insurer), the training materials you developed, the training process, an actual application (if the opportunity arose), and other relevant issues;
- a copy of the initial plan and the final plan; and
- copies of the training materials.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

#### **FOPP ASSIGNMENT NO. 74**

Cultural-resources studies (archaeology and historic architecture) have become standard elements of many broader studies performed in support of construction projects. In some cases, these cultural-resources studies become complex, because of:

- the nature of the labor-intensive fieldwork;
- changes in design alternatives requiring additional studies;
- contracting with subcontractors and subconsultants;
- discovery of significant historic resources requiring more intensive studies or avoidance studies;
- artifact analyses and curation; and
- the need to consult with landowners, native tribes, state and federal agencies, and other interested organizations.

Expansion of the cultural-resources study can also result in the assignment of additional principal personnel to handle new or more substantial tasks. And because projects are frequently spread over months or years, principal staff changes. These complexities can lead to subtasks being overlooked and/or inefficiency when personnel new to the project must perform research to identify tasks that have been completed, and those that are in-progress or not yet initiated.

Assuming that your firm has not yet created a cultural-resources project-management plan (CR PMP), or that the existing CR PMP is ineffective, develop a new one to help cultural-resources project managers:

- improve their tracking of the overall cultural-resources services schedule;
- outline the numerous and varied subtasks and the personnel responsible for seeing them to completion;
- improve coordination with other departments; and
- record the completion of each subtask.

The new CR PMP should also include guidance for organizing and maintaining paper and digital records in a standardized way so personnel newly assigned to a project know where to locate information about tasks that are completed, on-going, or scheduled for later in the project.

In order to develop this CR PMP:

- ask your firm's cultural-resources project managers and project professionals to share their opinions about the benefits and drawbacks of a CR PMP;
- examine any other project-management manuals used in your firm;
- read at least one written resource about the purpose and benefits of PMPs;
- get input from company staff who have experience with cultural-resources PMPs at other companies;
- identify one other cultural-resources department in a larger company that has implemented a PMP and interview one of that firm's project managers to learn about the individual's experiences with the PMP;
- present your draft PMP to your firm's cultural-resources project managers, have them review it, and obtain their feedback to revise the document; and
- have at least one cultural-resources PMP apply all or a part of the PMP to a new or ongoing project, and report results.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of the research you performed and the individuals from whom you obtained input, the number and nature of the factors considered, the weighting/rating system developed, if any, and observations based on trial usage and revisions made;
- the draft checklist;
- a narrative description of the typical complexities associated with cultural-resources studies, with examples of relevant problems;
- a list of the cultural-resources PMP benefits and drawbacks that identified by your firm's cultural-resources project managers;
- a list of the issues your PMP should address, based on your review of other PMPs used by your firm and the cultural-resources PMPs used by at least one other firm; opinions and suggestions made by project managers and task managers in my company's cultural resources department about the possible advantages of a cultural resources focused PMP;
- comments/suggestions of the cultural-resources project managers who reviewed your first-draft PMP; and
- results of your second-draft PMP application.

Also include a copy of your first-draft and second-draft PMP, a copy of any questionnaires you used, and an annotated bibliography identifying the sources you consulted and, for each, its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 75**

Most geoprofessional firms encourage employees to bring in new business, yet few actually have established the marketing and sales organization needed to do this on a consistent basis. Your assignment is to establish such an organization in your office, preferably after you perform some effective how-to research; i.e., more than five or six brief papers available via the Internet. Appoint an individual who will lead the effort. Identify those who will participate by performing marketing and sales. Together, identify at least five clients your firm wants to attract to the firm. Identify individuals within each client organization with whom personal relationships could lead to service opportunities. Identify strategies for meeting the individuals involved and for growing the relationships once a meet-up has occurred. Through regular meetings – no fewer than one every two weeks – identify the progress being made and plan changes that may be needed to achieve the objective. Track progress on a client-by-client basis.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of the techniques you used to identify the prospective clients and appropriate points of contact within the client organization;
- a discussion of the strategies you considered; those accepted and rejected; and the reasons or accepting some but not others;
- a description of the progress made with each prospective client and possible changes to approach to effect better outcomes; and
- a discussion of continued reliance on the plan after the FOPP activity concludes and changes that the firm will make to achieve better outcomes.

Also include an annotated bibliography identifying the written resources you consulted and, for each, a brief description of contents and your reaction to them.

## **FOPP ASSIGNMENT NO. 76**

Provide guidance for future acquisitions by interviewing senior managers and employees (project managers, scientists, engineers, architects, and technical staff) of the acquiring firm and a firm it recently acquired. After learning how to conduct interviews, prepare interview outlines, and so on, ask senior management to identify:

- the intended benefits of the acquisition;
- whether or not the acquisition met management's expectations and why or why not; and
- whether or not the acquiring and acquired firms realized improved market position, expanded client base, and enhanced revenue.

Ask employees of the acquiring and acquired firms to:

- identify what they hoped to gain from the acquisition;
- rate the success of the integration and discuss what went well and what did not, and why;
- discuss their perceptions of the acquisition and understanding of the services offered by the other firm;
- discuss their willingness to cross sell and take on project management of new services; and
- what they did or did not do to facilitate integration success.



Assemble for management a report that summarizes the interviews, highlights lessons learned, and provides recommendations to develop a strategic approach to improve the realization of cost, revenue, and opportunity synergies through better integration of future acquisitions.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a discussion of interview protocols;
- an account of past acquisitions studied;
- summaries of the interviews;
- a summary of your recommendations for future acquisition integration;
- a copy of the report you submitted to management; and
- senior management's reaction to your recommendations.

Also include an annotated bibliography identifying the written sources consulted and, for each, a brief description of their content and an opinion of them.

### **FOPP ASSIGNMENT NO. 77**

Research published information on management-training programs that would be appropriate for professions or firms such as yours. Also research effective techniques for preparing for and conducting interviews. Become familiar with your firm's management-training program. Obtain input about the program's strengths, weaknesses, and needs by interviewing at least two principals and at least one employee from each technical grade. Ask:

- What management training does the firm provide?
- What is the program's overall objective?
- What topics does the program cover?
- How is the program structured (e.g., webinars, seminars, weekend retreats, one meeting a month, FOPP)?
- What types of internal, external, and other resources does the program rely on?
- What is senior management's involvement, if any?
- Does the program involve mentoring? If so, how?
- How long does the program last and how does one complete it?
- Who administers the management training and how are they qualified to do so?
- How does the firm identify a potential manager and what criteria must the individual meet to gain program entry?
- What are the responsibilities/expectations of the trainee?
- What are the expectations of the graduate beyond management training?
- What are the costs associated with the program?
- How does the program affect the firm?

Interview representatives of at least two other firms for information about their management-training programs and their opinions about their programs' effectiveness. Pose the same questions you asked of your firm's personnel. Compare the other companies' management-training program to yours. Based on the information you received, plan a new or revised, sustainable, cost-effective management-training program tailored to the needs and resources of your firm. Identify

anticipated costs for instructors, participants, and management. Establish metrics to determine the success of your training program. Submit your plan to senior management for review and feedback. Work with your firm to implement your plan. Report your findings.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of the existing training/professional development program;
- a narrative description of your program review and interview procedure and findings;
- a description of the other firms' general characteristics (location, size, age, etc.);
- a comparison of management-training procedures at your firm and others contacted;
- recommendations for creating or improving your existing management-training program; and
- an evaluation of whether these changes are likely to be implemented, based on management response and other factors.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 78**

Assuming your firm offers multiple service lines, evaluate the effectiveness of your firm's internal collaboration. Focus your evaluation on the development of internal teams for multidisciplinary and/or multioffice projects. How well do your firm's service lines and/or offices work together to develop an effective team and meet or exceed the client's expectations? What are the impediments to more effective internal collaboration at your firm? How do these impediments affect the efficiency and quality of services and deliverables? What can your firm do to reduce or remove these impediments or their impact?

As part of your evaluation, develop a questionnaire addressing these issues and distribute it to company executives, partners, regional managers, office manager, and project managers. Ask respondents to cite examples of successful and unsuccessful collaboration; identify differences between the examples. What factors contributed to successes? To the lack of success? Interview representatives of at least three clients or owners for which your firm has provided collaborative services; learn their opinions about your firm's collaboration efforts. Also, identify executives or managers of at least two firms similar to yours and interview them for insight about how they approached the challenge of internal collaboration. Compile, present, and discuss the findings of your questionnaires and interviews and submit your material to your internal-survey respondents and ask them to comment.

Using your findings to date, internal-survey respondents' comments about them, and your literature research, prepare a draft plan that identifies:

- the benefits of collaboration;
- factors affecting collaboration outcomes at your firm (the good, the not so good, and the bad);
- the impediments to enhanced collaboration now being experienced and their effect; and
- methods for eliminating or reducing the impediments or their impact, the time/cost involved, and the potential value of the benefits to be received.

Submit your draft plan to management, obtain comments, and finalize the plan. Then work with management to develop metrics to evaluate the plan's implementation and its results.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of techniques you used to learn how to conduct surveys and interviews;
- a copy of your questionnaire and interview-question list;
- a tabular summary of the results of the survey and respondent comments;
- a description of methods that other firms have used to improve internal collaboration;
- a copy of your draft plan and final plan;
- a summary of management's response to your plan; and
- a description of the metrics developed to evaluate collaboration.

Also include an annotated bibliography identifying the written sources you consulted, and for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 79**

Describe your firm's systems and processes to document and share intellectual capital – critical knowledge and experiences – before it is lost to retirements or downsizing. Research methods that can help the firm's leaders and employees apply this knowledge to their projects and decision-making processes.

Research the knowledge-management practices or systems of at least three other entities: professional firms similar to yours or governmental organizations. Describe the best practices and policies of their knowledge-management systems, including (if applicable) their methods for storage, retrieval, and validation of technical information. Review three or more case studies about knowledge management. Compare the methods organizations use to evaluate information that affects their business practices and how they implement new practices or procedures, as through refresher training or work instructions.

Review your own firm's learning systems or other means of storing and disseminating knowledge. Identify any shortcomings you detect; e.g., the absence of incentives or requirements to provide learning opportunities to update the technical practice within the firm. Develop draft recommendations for improvement and obtain senior-management feedback. Revise recommendations as appropriate and report on final recommendations.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a review, description, and analysis of the knowledge-management systems and case studies you researched;
- a description of your firm's policies and procedures (even if only oral) that contribute to knowledge management; and
- specific procedures you would recommend to improve in this area, management's comments about them, and your final recommendations.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 80**

Assuming your firm does not now have one, develop a project-management-protocol handbook either as a draft document or as an extensively detailed outline. The handbook should serve as a reference for both novice and experienced project managers, to help them manage the various aspects of a project, from project authorization to closure. To develop the handbook, interview or survey at least 25 firm employees to collect institutional knowledge about:

- general stages of project management (e.g., project initiation and planning, staff selection and assignment, analysis and design, production of deliverables, implementation, and closure);
  - companywide project-management tasks; and
  - ways to make the handbook relevant to all firm managers, regardless of their region or state.
- The manual should provide references and guidance for project elements such as permitting, insurance, staffing, scope items (e.g., tasks, schedule, budget), project implementation, and closure, among many others.

The project submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project's purposes and goals,
- a narrative explaining the methods used to collect project-management protocols,
- an overall plan to develop and implement a project-management-protocol manual,
- a summary of the firm's current general project-management practices that can be applied to its common projects, and
- preliminary checklists for each of the defined stages of project management.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 81**

Develop a business plan your company can apply to identify and penetrate market opportunities emerging from climate-change mitigation, preparedness, and adaptation. The research you will perform to support this business plan includes: identifying and reviewing articles and books; identifying market trends; and interviewing subject-matter experts and other professionals like yourself. Also identify existing clients that may wish to use your climate-related services and interview representatives of at least three to obtain their reactions to and suggestions for your plan.

Your report should include: a summary of the markets and market potential; a breakdown of the services your firm can provide in the climate-change-driven market; and a strategy to meet climate-change mitigation, preparedness, and adaptation needs as they emerge (i.e., anticipatory entrepreneurship). Also include a summary of market size, your firm's potential market share, and revenue/profit potential.

Your submission should comprise:

- an executive summary,
- an orienting overview or introduction in which you discuss the project's purposes and goals,
- a narrative summarizing your research methods and findings, and
- a business plan (including a summary of existing capabilities/client types/geographies and where you can and should expand to leverage this market).

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 82**

Firms like yours are often engaged as subcontractors on large-scale design-build projects led by one or more large construction companies. Identify individuals in your firm and within your FOPP class who serve or served in management roles on such projects and interview them about their experiences. What challenges arose? How did they address those challenges? What were their results and what lessons did they learn? How can your firm anticipate, avoid, or overcome such challenges either during the proposal and cost-estimate phase, or during the course of the project?

Your report should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of what you did to obtain project information;
- brief background descriptions of individuals interviewed and their roles in the projects;
- a description of each design-build project;
- a description of the challenges interviewees encountered on each project;
- a description of the measures they took to address problems during project execution, and the effectiveness of those measures;
- observations about any commonalities among the challenges identified; and
- a description of lessons learned to help avoid or mitigate potential problems on future design-build projects.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 83**

The economy is back! Office-building, condominium, and retail development in your urban area is at an all-time high. Because highly desirable sites are rare – and costly – continually more developers are becoming involved with brownfield properties, making the environmental-consultant market increasingly competitive. To expand its market share in a mature environmental-services market, your firm may need to alter its strategy for winning projects, developing relationships with new-client representatives, and maintaining those relationships.

By pursuing this research assignment, identify the primary factors that influence selection and long-term retention of an environmental consultant in a fast-paced, evolving market and evaluate what

your firm can do – if it needs to do anything at all – to meet new needs. Survey five associate or principal representatives of your firm to identify generally accepted and currently practiced client-development-and-maintenance activities. Next, identify up to ten potential client organizations you'd like to work with; reach into your network to identify links between you and the potential-client representatives; use your common links to arrange and conduct interviews of two prospective-client representatives and up to four current-client representatives to identify the primary factors they use to select an environmental consultant for a contaminated-site-redevelopment project. After you complete the interviews, identify actions your firm can take to better position itself to win projects, develop relationships, and maintain clients over multiple projects. Seek top-management's opinion of your suggestions and what the company will do with them.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a description of the procedures used to identify and contact of the potential-client representatives and complete the interviews;
- a series of narrative descriptions indicating:
  - your firm's generally accepted business-development and client-maintenance activities,
  - your client- and prospective-client representatives' opinions about the principal factors they consider when selecting an environmental professional, and
  - your firm's potential areas of change to expand their position in the market place; and
- appendixes (samples of questionnaires, and so on).

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 84**

Unanticipated subsurface conditions encountered during construction usually have a negative effect on project costs and schedule. Because unanticipated conditions comprise a known risk, the owner, design-team members, and constructors can address them during contract formation. How they allocate the risk can mean the difference between a minor problem that project principals can take in stride, or a major problem that truly “upsets the apple cart.” Projects are structured differently, however, especially with respect to design/bid/build vs. design/build. Does that matter when it comes to allocating the risk of unanticipated subsurface conditions? And if it does, what can your firm do about it? To answer those two questions, review four design-build contracts that your firm has accepted, and analyze each in terms of how they allocate the risk of unanticipated subsurface conditions.

Questions to consider when performing this analysis:

- How do the risks differ when your firm contracts with an owner or design firm and when the firm is contracts or subcontracts with a constructor that heads the design/build project?
- What are the risks and how serious are they?
- What has your firm done to help prevent the exposures from materializing or tamping down their impact when they cannot be prevented?
- Have any problems already materialized?

As part of your research and analysis, interview the senior managers who executed the four contracts and have them review and comment on your assessment.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a brief description of each contract and the type of client and project involved;
- a narrative description of the risk allocation, the types of risk exposures resulting from these, and actions which could or should have been taken to help reduce risk exposures;
- a description of interviews with the senior managers who reviewed and executed the four subject contracts;
  - a description of senior managers' review and comments on your assessment;
  - any actions that your company took during execution of the project to address potential problems;
  - a description of lessons learned to help avoid or mitigate potential problems on future design-build projects, and
  - in an appendix, the general conditions of each agreement.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 85**

If your firm performs environmental-consulting services and routinely subcontracts an environmental-remediation capability to satisfy the design/remediate preferences of your clients, evaluate adding environmental remediation to your firm's in-house service mix. You will consider starting your own environmental-remediation service line as well as the alternative of acquiring an environmental-remediation company. As part of the project, develop and execute a process to assess the types and amount of services your company routinely subcontracts to environmental-remediation companies, including total revenue and profitability. Meet with appropriate senior managers of your firm to ask questions about the pros and cons of adding environmental remediation to the service mix, types and sizes of companies you should consider acquiring, competition/client impacts, implementation approaches, developmental and ongoing costs, and other factors that management will consider when making a decision about adding environmental remediation, doing it through growth or acquisition, the type/size of remediation company to acquire, area firms that may be suitable, likely pros and cons of each, the opportunities and threats involved, and such other factors that you and management consider important. Prepare a presentation and deliver it to management. Develop such additional information as management deems important in order to make a decision.

Your submission will comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a report of your initial discussion with management;
- an annotated list of the specific resources you used to address the issues involved,
- a discussion of the analysis you performed, the conclusions you reached, and highlights of the plan you developed;

- a description of management's response to your presentation and what you did as a consequence; and
- a description of what you have been told or what you believe will be the next steps, if any.

Include as appendices a copy of your plan and the presentation (including visuals and other materials, if any). Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

### **FOPP ASSIGNMENT NO. 86**

Accurate, clear, and effective job descriptions are essential for the effective hiring, supervision, and management of employees. They help recruiters find the right people for a function, and form a basis for establishing performance expectations, professional development, and career advancement. Perform research to learn what leading human-resources (HR) professionals believe an effective job description should include, how it should be organized, how often it should be reviewed/updated, etc. Working with the individual in charge of your firm's HR activities, obtain job descriptions for employees in nonmanagement positions at your firm. Review these descriptions in light of what you have learned from your research. Identify elements if concern not now reflected in your firm's descriptions, as well as information that may be unnecessary. Develop an outline for a new job-description format and, using that, interview at least three members of staff from each of the first four technical-grade positions in your department. From the interviews, learn what employees understand their job descriptions to include, obtain a summary of their daily tasks and responsibilities, and obtain the additional information you would need to comply with the requirements of a more effective job-description format. Based on information you gathered, draft new job descriptions that accurately define employees' responsibilities; meet with the employees involved to review and comment on your drafts; update drafts as needed; then submit to and subsequently meet with their immediate supervisors and the firm's HR leader(s) for comments. Based on those comments, finalize the draft job descriptions and submit them with guidance for how management could keep them up-to-date.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- narrative descriptions of your research and interview findings, the quality of job descriptions now used, the accuracy of the job descriptions, and the types of changes needed to effect improvements;
- a narrative description of the types of changes you made to job descriptions and why the changes were needed;
- comments of employees who reviewed the revised job descriptions; and
- comments of supervisors and HR leader(s).

Include in the appendix copies of the original job descriptions and copies of the final material you submitted. Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.



## **FOPP ASSIGNMENT NO. 87**

Firms that lack a program for training new, staff-level field representatives (including geologists and engineers who may begin their careers in the field), one can assume that new, staff-level field representatives exhibit significant variation in terms of their knowledge and skill level. Is that the case with your firm? Perform research to find out, by inquiring about any programs that exist, and by interviewing new staff-level field representatives to assess how much they know about what your firm wants and expects of them, and the degree to which new, staff-level field representatives exhibit uniformity of knowledge and skills, including writing skills. Assuming you identify a lack of uniformity, develop a manual – or at least a comprehensive manual outline – that project-level to senior staff could use for training new staff-level field representatives. Having the manual – and using it – would help the firm achieve greater consistency in its deliverables across the company, and should also reduce the firm’s exposure to professional-liability claims and losses. The manual could contain, among other things, recommendations and procedural guidelines for:

- training timelines, methodologies and benchmarks for employee evaluation;
- key field skills, and advanced skills for geologists, engineers, and technicians;
- basic project set-up and management, including record keeping and budget tracking; and
- fieldwork operations including selection and application of appropriate techniques and methodologies, procedures for sample collection and processing, field documentation and geologic mapping, basic geotechnical instrumentation installation, and collation and presentation of data.

Establish suitable content for the training manual by developing a questionnaire designed to identify guidelines for performance of various tasks. Provide the questionnaire to at least ten management-level staff members and other key, senior-level staff, to obtain information that can be incorporated into the training manual. Also distribute the questionnaire to staff working in different offices. Meet with respondents (face-to-face or by other means) to review and discuss their answers and opinions.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project’s purposes and goals;
- a description of the research you performed to learn how to develop, issue, and assess questionnaires and how to conduct interviews;
- a discussion of the responses to your questionnaire and interviews; and
- a comprehensive manual outline, or – better – a draft of the manual, or – better still – a finalized version of the manual that has been reviewed and commented on by those you interviewed and those to whom you issued the questionnaire.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.

## **FOPP ASSIGNMENT NO. 88**

Providing consistent deliverables can improve repeat clients’ comfort with the firm’s engineering reports and provide an additional layer of quality control. Engineering practice differs from

region to region, however, and different offices – sometimes different teams within the same office – generally have their own preferred communication style. The resulting disparities in deliverables prepared by separate teams or offices can range from relatively minor to significant.

Review the standard appearance and organization of your firm's reports, and – in particular – the report language your firm uses. Compare the language, flow, technical terminology, and methodology used by different teams or offices within your firm. Identify report sections that are generally consistent across the firm and between separate offices. Create an organized database of common report language used in your firm's engineering reports. Provide the draft database to management within your firm for review, and update the database to address their feedback. Your firm can use the database as a tool to promote efficiency and consistency in document generation, and will help management monitor and guide the overall diction of the firm's reports. Involve at least three client representatives and your firm's professional-liability insurer by having them review and comment on the updated report's appearance, organization, diction, and format, and incorporate their feedback into the database system.

Your submission should comprise:

- an executive summary;
- an orienting overview or introduction in which you discuss the project's purposes and goals;
- a narrative explaining the methods and documents you used for the review;
- a discussion of the report sections that were typically consistent across the firm, variable between each office, or variable between each team;
- a description of steps your firm can take to mitigate inconsistencies in report diction and technical judgement, when necessary;
- a discussion of the client representatives' and professional-liability insurer's feedback about the updated report language and format;
- a description of the database system that you created; and
- a guide for personnel within your firm to use, maintain, and update the database.

Also include an annotated bibliography identifying the written sources you consulted and, for each, a brief description of its contents and your opinion of them.