

Course	ITM 5300 / JA / Procurement and Contract Management for Information Technology
Term	Fall 1, 2009 – Tuesday – 6:00 – 10:00 pm 8/18, 8/25, 9/1, 9/8, 9/15, 9/22, 9/29, 10/6, 10/13
Instructor	Name: Mark Willett Home Phone: (904) 386-8923 Work Phone (904) 791-8671 E-mail: charleswillett25@webster.edu
Catalog Description	This course covers the basic concepts and practices in procurement and contract management, not from a strict legal approach, but rather in a manner that equips a student with the skills and knowledge necessary to negotiate and manage the procurement of information and communications technology, armed with an understanding of the critical issues.
Prerequisites	ITM 5000 – Information Technology Management - Overview
Course Level Learning Outcomes	After completing this course, students will: <ul style="list-style-type: none"> • <i>know and explain the important technical and management terminology, concepts, principles, techniques, practices and theories related to the procurement of information and communications technology.</i> • <i>be able to effectively apply important technical and management concepts, principles, practices, techniques, practices and theories to the process of procuring information and communications technology.</i> • <i>know and explain the important technical and management terminology, concepts, principles, techniques, practices and theories related to the negotiation and administration of contracts for large-scale information and communications technology purchases.</i> • <i>be able to effectively apply important technical and management concepts, principles, practices, techniques, practices and theories to the contract management process.</i> • <i>know and explain the critical legal issues involved in contract management.</i>
Materials	Bannister, F. (2004). Purchasing and Financial Management of Information Technology . Burlington, MA: Elsevier Butterworth-

Heinemann. ISBN# 0-750-65854-1

To Order Textbooks go to the local North FL website www.webster.edu/jack and click on Order Textbooks to select a vendor

Note: Textbooks must be ordered 2 weeks prior to class to ensure delivery

Supplemental Reading:

- **Research Paper Guidelines and Sample Paper** – See website @ www.webster.edu/jack and click on the Student Resources category.

Grading

Assignments	Maximum Points
• Class Topic Papers (4@10 points each) including Passports Internet Proficiency	40 Points
• In-class exercises, both individual and group (2@5 points each)	10 Points
• Term project and paper	30 Points
• Presentation of term project	10 Points
• Class Participation and Attendance	10 Points
TOTAL	100 Points

Letter grades will be assigned pursuant to the following scores based on the percent of the total possible points (weighted according to the scale above) that you earned in the course.

Percentage of Total Points	Grade
95%-100%	A
90%-94%	A-
88%-89%	B+
84%-87%	B
80%-83%	B-
70%-79%	C
Below 70%	F

<p>Activities</p>	<p>Classes may include individual and group exercises relating to procurement of information technology. Some case studies and exercises will be completed during class, while further written analysis of case studies will be completed outside of class. Short lectures will incorporate review of weekly assigned readings. A final project will track the evaluation, analysis, and procurement of information technology. The final project will include a written 7-10 page paper along with a presentation lasting 3 and 5 minutes. A mid-term exam will be conducted during the third week of the class.</p> <p>Class Topic Papers:</p> <ul style="list-style-type: none"> • In sessions 3,4,6 and 7 develop analyses of assigned readings (including the Webster North Florida Region paper cover page). • Grammatical and spelling errors will result in a scoring penalty. • Late submissions will not receive credit; an assignment is considered late if not received by the instructor before the start of class on the due date. <p>In-Class Article and Current Event Analysis:</p> <ul style="list-style-type: none"> • Assignments involve analyzing research articles from the Passports research database and other current events. • The format for the analysis will be distributed, discussed, and completed in class. • Assignments will be both group and individual. <p>Term Project:</p> <ul style="list-style-type: none"> • A final term project will track the evaluation, analysis, and procurement of information technology. • The final project will include a written 8-15 page analysis (including the Webster North Florida Region paper cover page) of the process • The final project will incorporate the practices and procedures learned throughout class and apply them to a real-world situation. <p>Term Project Presentation:</p> <ul style="list-style-type: none"> • Presentation of term project • Duration of presentation will be no longer than 10 minutes. <p>Class Participation and Attendance:</p> <ul style="list-style-type: none"> • Students are expected to attend all class sessions of every course for the full 36 contact hours. In the case of unavoidable absence, the student must contact the instructor. The student is subject to appropriate academic penalty for incomplete or unacceptable makeup work, or for excessive or unexcused absences. Generally, a student who misses more than one four-hour course period (per course) without a documented military or medical excuse and advanced permission of the instructor should withdraw from the class. The University reserves the right to involuntarily drop enrolled students from classes, which they do not attend. PLEASE BE ADVISED: Students who do not attend the first class session, who have
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	<p><u>not made prior arrangements with the instructor for being absent, will be dropped from their courses.</u></p> <ul style="list-style-type: none"> • Attendance the last day of class is mandatory to ensure that all work is completed and to be awarded a passing grade. An Incomplete will not be acceptable without documental proof (Death Notice, Doctor’s Letter, etc.) as to absence relating to non-completion of class work. These must be faxed 904-262-1459 or dropped off to Webster University by the Monday after the term ends. • Participants are expected to arrive on time and be actively involved in the learning experience. Each student should desire to learn, participate, and proactively contribute to the learning of others during each discussion and exercise. • Students are to participate in classroom discussions. The discussions are an opportunity for students to reveal their understanding of the assignments made for the current and previous classes. • Assignments are given to prepare the student to participate in class discussions; therefore, it is imperative that reading assignments and associated questions for discussion be completed prior to class. • A maximum of 10 points will be awarded based on the level and quality of participation and preparation. • Failure to turn in an assignment within one week will result in a grade of "0" for that assignment. In addition, failure to submit an assignment will lower the final grade by an additional two points. • All assignments are due as detailed in the Course Schedule. • Late assignments will be accepted, if they are turned in <i>no later</i> than one week later, but will be penalized one letter grade. Furthermore, late assignments will lower the student's final grade by an additional one point. • Late assignments will not be accepted for the final assignments the last week of the course to allow timely completion and grades to be submitted.
<p>Policy Statements: University Policies</p>	<p>University policies are provided in the current course catalog and course schedules. They are also available on the university website. This class is governed by the university’s published policies. The following policies are of particular interest:</p> <p>Academic Honesty The university is committed to high standards of academic honesty. Students will be held responsible for violations of these standards. Please refer to the university’s academic honesty policies for a definition of academic dishonesty and potential disciplinary actions associated with it.</p> <p>Drops and Withdrawals</p>

	<p>Please be aware that, should you choose to drop or withdraw from this course, the date on which you notify the university of your decision will determine the amount of tuition refund you receive. Please refer to the university policies on drops and withdrawals (published elsewhere) to find out what the deadlines are for dropping a course with a full refund and for withdrawing from a course with a partial refund.</p> <p>Special Services</p> <p>If you have registered as a student with a documented disability and are entitled to classroom or testing accommodations, please inform the instructor at the beginning of the course of the accommodations you will require in this class so that these can be provided.</p> <p>Disturbances</p> <p>Since every student is entitled to full participation in class without interruption, disruption of class by inconsiderate behavior is not acceptable. Students are expected to treat the instructor and other students with dignity and respect, especially in cases where a diversity of opinion arises. Students who engage in disruptive behavior are subject to disciplinary action, including removal from the course.</p> <p>Student Assignments Retained</p> <p>From time to time, student assignments or projects will be retained by The Department for the purpose of academic assessment. In every case, should the assignment or project be shared outside the academic Department, the student's name and all identifying information about that student will be redacted from the assignment or project.</p> <p>Contact Hours for this Course</p> <p>It is essential that all classes meet for the full instructional time as scheduled. A class cannot be shortened in length. If a class session is cancelled for any reason, it must be rescheduled.</p>
<p>Course Policies</p>	<p>Attendance at all class sessions is expected.</p> <p>Late assignments will be accepted if prior arrangements have been made with the instructor, but will be given reduced points based upon the number of class sessions it is late.</p> <p>Make-Up Requirements</p> <ul style="list-style-type: none"> • For each class hour missed, a one (1) page, double-spaced, typed paper, with one (1) reference will be submitted by the end of the term. The topic will be specific to organizational change and/or strategic planning in healthcare. A four (4) hour class will require four (4) pages supported with (4) references from popular or academic press. • This paper will be graded and incorporated in the class participation

	<p>grade. If the make-up work is not submitted, the student's final grade will be reduced one (1) letter grade.</p> <ul style="list-style-type: none">• (Students are responsible for any class material presented during their absence, and any assignments due should be submitted prior to the absence, if possible).
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Weekly Schedule		<p>Pre-Assignments for Session 1:</p> <ul style="list-style-type: none"> • Type out (double-spaced, with the Webster North Florida Region paper cover page [refer to the sample on the Web site] your name, e-mail address, contact phone number, where you work, and your position. In addition, describe your role in the last procurement activity you participated in and its final outcome (successfully implemented, did not purchase, etc.). If you have not participated in one at work, describe the negotiations around your last capital investment, i.e., car, home, etc. Hand in your paper at the beginning of the first class. • Read preface and Chapter 1 of Purchasing and Financial Purchasing of Information Technology
	Session 1	<p>THEME: IT Acquisition Policy</p> <p>Topics:</p> <ul style="list-style-type: none"> • Objectives of purchasing • What makes IT purchasing different? • IT strategy and purchasing • IT value • Foundations of IT purchasing policy • Purchasing procedures <p>Assignments for Session 2:</p> <ul style="list-style-type: none"> • Read Chapter 2 of Purchasing and Financial Purchasing of Information Technology • Work with your group to research and identify five examples of what a good request for proposal looks like based on your readings. Bring the examples to class, work with your team to identify the one your team will use to develop an RFP for the purchase and deployment of printers for a multi-national corporation, and be ready to defend your selection. • Develop an outline as a group that reflects your collective stance when it comes to outsourcing – pro or con. Bring your outline to class and be ready to defend your position.

	<p>Session 2</p>	<p>THEME: Dealing with suppliers RFP selection presentations Outsourcing discussion Review syllabus Topics:</p> <ul style="list-style-type: none"> • Poor supplier relationships • Joint development • Good suppliers • Supplier management strategies • Handling salesmen • Negotiating • Useful formal tenders • Total outsourcing • Sources of supplier information <p>Assignments for Week 3:</p> <ul style="list-style-type: none"> ◆ Read chapters 3 and 4 in <i><u>Purchasing and Financial Purchasing of Information Technology</u></i> and assigned readings • Work with your group to develop a comprehensive RFP for the purchase and deployment of printers for a multi-national corporation. Be prepared to evaluate the other group's RFP from a vendor perspective.
	<p>Session 3</p>	<p>THEME: IT Costs and Cost Management RFP Presentations/evaluation Topics:</p> <ul style="list-style-type: none"> ◆ Are we getting value from IT? ◆ The dynamics of IT cost growth ◆ Identifying IT costs ◆ Managing hidden costs ◆ Training costs ◆ Managing maintenance and support costs ◆ Testing, installation, and implementation ◆ Invisible costs ◆ Charge-back ◆ Outsourcing ◆ IT asset statements ◆ Principles of IT evaluation ◆ IT benefits ◆ Why IT expenditures are difficult to evaluate ◆ Methods of evaluating IT expenditure ◆ IT expenditure ◆ IT expenditure benchmarking ◆ Reviewing and auditing IT systems

		<p>Assignments for Session 4:</p> <ul style="list-style-type: none"> ◆ Read chapters 5 and 6 in <u><i>Purchasing and Financial Purchasing of Information Technology</i></u> and assigned readings ◆ You're the CIO of a national corporation. Your CEO just attended a seminar outlining how important internal training is to a corporation's continued existence and is ready to move. He's asked you to identify hidden and invisible costs associated with the purchase of a learning management system. He also wants to know if his new pet project should be built in-house or outsourced, and why. Develop a 5-7 page analysis of which way, in-house or outsourced, would be the best approach in which to lessen hidden and invisible costs associated with such a venture. Be sure to include the Webster North Florida Region paper cover page. A minimum of five sources is required.
	<p>Session 4</p>	<p>THEME: IT Budgeting, Accounting, and Cost Control Review requirements for the final paper Topics:</p> <ul style="list-style-type: none"> ◆ Prerequisites for good IT budgeting ◆ Why good budgeting is important ◆ Four basic approaches to budgeting ◆ Ownership ◆ The scope of IT budgeting ◆ Building a budget ◆ Project and expenditure justification ◆ Reporting against a budget ◆ Phasing a budget ◆ Forecasting ◆ Tracking hardware and software ◆ Accounting for IT ◆ Good monitoring and reporting practices <p>THEME: Specifying Hardware and Systems Software Topics:</p> <ul style="list-style-type: none"> ◆ Two approaches to specification ◆ Important definitions ◆ Specifying requirements ◆ System software ◆ Specifying ergonomics <p>Assignments for Session 5:</p> <ul style="list-style-type: none"> ◆ Read chapter 7 <u><i>Purchasing and Financial Purchasing of Information Technology</i></u> and assigned readings ◆ You, as the CIO, have been tasked by your CEO to

		<p>develop a process flow of how IT procurement should be handled. He's quite tired of having to approve every paper clip and blade server that the enterprise purchases. He wants standards in place in time for several operational areas to use the new process to purchase entire cube configurations, from chairs, monitors, and CPUs to keyboards mice, printers and cameras for videoconferences. Develop an outline and presentation that addresses the following:</p> <ol style="list-style-type: none"> 1. How will standards for software and hardware be developed 2. How will IT assets be purchased and tracked 3. How will the IT budget be managed – IT, finance, or a combination of both?
	<p>Session 5</p>	<p>THEME: Specification of Application Software Review outline Topics:</p> <ul style="list-style-type: none"> ◆ Importance of good software specification ◆ Specifying requirements for packaged software ◆ Functional requirements ◆ Specifying custom software requirements <p>Assignments for Session 6:</p> <ul style="list-style-type: none"> ◆ Read chapters 8 and 9 <i><u>Purchasing and Financial Purchasing of Information Technology</u></i> and assigned readings ◆ The CEO is so enamoured with your presentation and suggestions, he wants you, the CIO, to put your plan into action. Write a 7-10 page analysis of what the new IT procurement structure looks like in terms of how standards for hardware and software will be developed, how will IT assets be purchased and tracked, and who will manage the IT budget. Be sure to include the Webster North Florida Region paper cover page. A minimum of five sources are required.

	<p>Week 6</p>	<p>THEME: Purchasing Other IT Products and Services Optional: Review outline for final paper Topics:</p> <ul style="list-style-type: none"> ◆ Hardware maintenance ◆ Consulting services ◆ System integration services ◆ Contract staff ◆ Disaster recovery capability ◆ Security <p>THEME: Evaluation and Selection of IT Topics:</p> <ul style="list-style-type: none"> ◆ Evaluation steps ◆ Supplier presentations ◆ Demonstrations ◆ Benchmarking ◆ Weighted ranking methods ◆ Reference sites and site visits <p>Assignments for Session 7:</p> <ul style="list-style-type: none"> ◆ Read chapter 10 in <i><u>Purchasing and Financial Purchasing of Information Technology</u></i> and assigned readings ◆ The CEO has called you into his office. He just finished reviewing the most recent procurement budget and he's got questions. First and foremost how are you, as CIO, going to protect the millions of dollars in infrastructure that's been entrusted to your stewardship? He also wants to know how you go about determining which software and hardware those millions buy. He's curious because he's been waiting two weeks for new ink cartridges to be delivered. His admin keeps telling him the help desk says they are on back order. Develop a 5-7 page analysis of how you plan to select, manage and protect the corporation's IT assets. Be sure to include the Webster North Florida Region paper cover page. A minimum of four sources is required.
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	<p>Session 7</p>	<p>THEME: Risk and Risk Management</p> <p>Topics:</p> <ul style="list-style-type: none"> ◆ Supplier risks ◆ Hardware and software purchasing risks ◆ Custom software risks ◆ Packaged software risks ◆ People risks ◆ Major project risks ◆ Quantifying risk ◆ Principles of contracts: Standard and negotiated ◆ Licenses <p>Assignments for Session 8:</p> <ul style="list-style-type: none"> ◆ Read chapter 11 in <i><u>Purchasing and Financial Purchasing of Information Technology</u></i> and assigned readings
	<p>Session 8</p>	<p>THEME: Legal aspects of purchasing</p> <p>Topics:</p> <ul style="list-style-type: none"> ◆ Contracts: basic principles ◆ Standard contracts ◆ Negotiated contracts ◆ Escrow and related matters ◆ Licenses ◆ Other contract issues <p>Assignments for Session 9:</p> <ul style="list-style-type: none"> ◆ Finalize and submit your final paper <p>Requirements:</p> <ol style="list-style-type: none"> 1. Not more than 15 pages 2. A minimum of eight sources (Wikipedia is not acceptable) <ul style="list-style-type: none"> ◆ Finalize and submit your final presentation <p>Requirements:</p> <ol style="list-style-type: none"> 1. A high-level overview of your IT procurement policy 2. No longer than 10 minutes

	Session 9	THEME: Student Presentations, Evaluations, Class Review Topics: <ul style="list-style-type: none"> ◆ Class evaluation ◆ Student presentations of term paper (10 minutes maximum) ◆ Submit final paper ◆ Final thoughts about the class
Additional Information	None	

Revised 12/8/07