

Consultation Project

- The Consultation Project focuses on organizational change design work. For this project, you are engaged in design and leadership of a complex change process with limited consultant control over time and other variables.

Consultation Project Objectives

The Consultation Project provides you with opportunities to:

- Demonstrate your learning achievements, skills and competencies in organization systems renewal, in line with your Learning Contract goals.
- Apply, practice and hone what you have learned in OSR courses and on Design Teams.
- Contribute to your employer and/or client organization(s) by working on real-life, real-time organizational systems change.
- Design for a client and demonstrate your competency as a systemic designer.

Selecting a Consultation Project

As you consider potential projects, remember these guidelines:

- Choose a project that appeals to you. Do you have sufficient “energy” and “passion” to see it through to completion?
- Choose a project that supports your career or community service objectives. Consider a project that is already part of your work or a vehicle to help move you toward a desired new area of work.
- Choose a project that supports your Area of Focus and the Learning Goals outlined in your Learning Contract.
- Choose a project you can complete before Graduation. If the project will not be completed by Graduation, a significant portion of it should be scoped out and completed.

You may choose multiple projects if they can be explicitly and logically linked and together they will demonstrate your targeted competencies.

OSR emphasizes applied learning, so Consultation Projects are not focused on using research to test a theory. However, original or secondary research may be an appropriate means of establishing a theory base and deriving valid data to support an application project.



It is not necessary for your Consultation Project to be a “success” (i.e. meet your original expectations). Often, we can learn our most powerful lessons from efforts that take unexpected turns



Framing Document

The Framing Document is a tool to start thinking about your Consultation Project. This document will help your Degree Committee understand the type of project you are seeking. It is discussed at the Convergence Meeting.

Your Faculty Advisor and Degree Committee will provide feedback and guidance as you move toward project selection. During the summer, talk with your Faculty Advisor about potential projects. Then, after you have framed remaining questions, contact selected Field Advisors for a Progress Meeting. Your Faculty Advisor will give final approval to proceed with your project.

Documenting the Consultation Project

The documents associated with your Consultation Project are:

- Framing Document
- Project Design
- Final Documentation and Summary Report

Consultation Project Framing Document

The Framing Document is a tool to help you sharpen your perspective on the type of project you desire. It also provides you with a way to start sharing your interests with others. For example, information from your Framing Document can be posted on the OSR community web site and viewed by alumni who are looking for help in their organizations. The Framing Document is shared with your Degree Committee after first being discussed with your Faculty Advisor.

The Framing Document is typically one to three pages long. It should include:

- A brief description of the overall desired setting and context for your project work
- The type of client you would like for your project
- A brief description of the project, including what is driving it.
- A statement of the expected benefits to the client.
- A clear statement of how you see this project helping you achieve and demonstrate competencies specified in your Learning Contract

Information in the Framing Document is incorporated into the final documentation that is presented at your Candidacy Meeting.

Consultation Project Design

After you have found a project, you will create your Consultation Project Design. This document is developed before your project begins and is designed to help you explore key aspects of your consultative work more in-depth. The Consultation Project Design is reviewed at your Progress Degree Committee meeting.

What to include:

The issue that is driving the project:

- What's happening that needs to be changed?
- What isn't happening that needs to?
- Who is the client?
- What's the opportunity your client and you would like pursued?
- What are the negative consequences of NOT doing the project (or not completing it successfully)?

A statement of your theory base:

- What theory (or theories) will you use to develop specific approaches for this project?
- Explain your theory base and the resources you are drawing from.

Expected outcomes and benefits for the client (the intended results):

- When this project is completed, what will the results look like?
- What are the specific benefits of these results for the client?

Deliverables:

- What are they? What will they accomplish? What form will they take?
- A timeline for project completion

Evaluation criteria and methods, including milestones of progress:

- What will make each deliverable acceptable to the client of your project? (Examples include quantity, quality, timeliness, and packaging.)
- What specific criteria do you have in mind for evaluating the success of this project?
- What method(s) do you anticipate using to evaluate the success of this project and when? (Are there checkpoints or milestones?) Have you contracted with your client for evaluation and feedback?



Gathering Your Thoughts

Previous OSR students have found it helpful to keep a running record of their thoughts, feelings, observations, activities and results from the moment they begin searching for a project all the way through project completion. This "action journal" will become a valuable source for Course Papers and the final report on your Consultation Project.



Quality Counts!

There is no prescribed format for documenting your Consultation Project. However, it should be appropriate to your project and of value to you. Since you will also share it with your Degree Committee and the OSR Library, you will want to present the information in a way that showcases your skills and reflects personal and professional pride.

Design specifications:

What are some critical assumptions that will impact this project, but over which you and your client have no direct control?

What are some known constraints that will impact this project (and, therefore, must be taken into account in the design of this project)? Examples of known constraints include: client availability, your availability, availability of material and human resources, conflicting projects, and conflicting priorities.

What decision process will be used to assure client comfort and to enable quality, timely decisions as related to this project?

How will this project be announced to the organization? Will your role require a formal “knighting”?

Who should be involved in this project? In what ways should each of these people or groups be involved?

How will your approach be a whole systems design?

Executive Summary

This formal documentation is like an abstract, introducing your project to a future reader who does not know you or your work. Executive Summaries are usually just one or two pages in length. Yours will be submitted first to your Advisor, then to Degree Committee members, in preparation for graduation. The final Executive Summary will accompany the project presentation at your Graduation meeting, and be placed first in your Final Documentation notebook.

Summary of Outcomes

This is a record of how your ideas presented at the Design Development stage were partially or fully tested in the Consultation Project, and the resulting reinforcement or modification of those ideas. If the project was still in progress at Candidacy, a final document, and any revisions recommended at Candidacy, should be prepared before graduation.

Questions to address when preparing the Summary of Outcomes document include:

- What are the final outcomes versus intended outcomes, as the client sees it?
- What did you learn from your evaluation feedback from your client and participants?
- To what degree did your deliverables meet the original specifications of quantity, quality, timeliness and packaging?

- What did you learn from the project -- particularly related to your learning goals?
- How was the project a whole systems design?
- How did you and your client celebrate the outcomes and learnings?

Appended Material

You may wish to include some or all of the following materials in a referenced appendix to your Project Design. Only include information that is important and necessary to the understanding of your project.

- Copies of contracting documents
- Copies of designs, agendas, handouts, etc.
- Copies of work products and deliverables
- Copies of relevant client documents
- Photographs

Consultation Project Documentation

As you near graduation, you will submit a binder containing your key Consultation Project documentation. This binder should be given to your Advisor and will be added to the OSR Library. Your project binder should demonstrate your ability to design a professional quality report, including obvious attention to esthetic presentation. Your documentation should provide appropriate third parties with an understanding of the content of your work. Since this will be a public document, do not include any confidential or identifying information (e.g., the name of the organization and/or individuals) without approval from you client.

On the cover of your binder, include your name, cohort, graduation year and project title. On the spine of the binder, include the project title, cohort and graduation year. The contents of the binder should include:

- Consultation Project Framing Document
- Executive Summary
- Consultation Project Design
- Summary of Outcomes
- Appended Material (only what is necessary to help someone understand the project)



After Your Project...

Once the Consultation Project is complete, you will finalize your documentation and incorporate an Executive Summary. This documentation will support your learning synthesis discussion at your Candidacy Meeting.



Sample Consultation Projects from previous OSR students can be viewed in the OSR Library.



Make certain that your Degree Committee is fully involved in – and supportive of – your Consultation Project.

Consultation Project Pitfalls

When working on the selection and framing of your external Consultation Project, avoid these pitfalls.

1. Determining an inappropriate or incorrect size or scope of project. Both your client and members of your Degree Committee can assist you with these early and crucial determinations.
2. Not defining clients, i.e., who is benefiting from your project. Make sure those who you have determined are clients understand and agree that they are the clients of your project.
3. Not documenting the project from start to finish. Keep a chronological journal and note your developing thoughts from the inception of the project. This will serve you well and help you gain more definition.
4. Not contracting properly. It is critical that you contract with your client for the deliverables agreed upon, the learning you will do, and the evaluation that will assist your learning.
5. Not gaining “public knighthood.” Make sure your client publicly endorses your work within his or her organization so that you may openly do your work and not have to engage in contested, “illegitimate,” or behind-the-back organizational work.
6. Not matching the project with your Area of Focus and your Learning Contract. The project will take a significant amount of your time. It must support your Area of Focus and Learning Goals.