Contract and Timeline Guide

PST 315: Methods of Policy Analysis and Presentation

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The purpose of the Contract and Timeline task is to ensure you have had a successful conversation with your client about expectations for the project, including timing and deadlines, communication, and the final report. Try to be as specific as possible when filling this out with your client. Specificity will ensure you have an easier time starting and working on your report and ensure your client is pleased with the final result.

When you are in your initial meeting, you should either share your screen (if on Zoom) or show your client on your laptop (if in-person) to complete the task together. Facilitate an open discussion with your client to fill out the template, while asking any questions that may arise about the scope and the expectations of the final report.

> The rough draft and final report deadlines are **hard deadlines**. If your client requests to change these later, please reach out to your UCA to discuss.

All the other tasks on the timeline template are flexible dates which you and your client can set together based on the specific needs of your client and the project. Please note that this template is very general – not all projects will have tasks that are relevant. Use your discretion if any task is irrelevant to your project and you may delete it or replace it with another task that is not listed but relevant for you.

Below is a list of project and relationship specifics you should discuss with your client while filling out the template. This is not an exhaustive list, just some ideas of questions to ask to get more clarity:

- **Frequency and method of communication.** For example: "The contractor (the student) will email an update to the client every week on Fridays to update the progress made that week on the report and ask any necessary questions."
- **Data and research necessary for the report.** Do you need to create and send out a survey? Will the client provide you with data to analyze?
- **Timeline of collecting or receiving data.**
- **Detail the client wants in the final report.**
- **Does your client want to receive the rough draft?** Does your client want a final presentation?

After you and your client are both happy with the completed contract and timeline, you will sign and date it. Send it to your client and have them return it with their signature and date. You can sign by using a cursive font in Word or using an external signature site. When you receive the document back signed, submit it to Blackboard to receive credit.