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## Course Syllabus

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### Course Information

OPRE 6372.PS1  
Project Initiation  
Fall 2015

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### Professor Contact Information

Sue Freedman, Ph.D. [suefreedman@utdallas.edu](mailto:suefreedman@utdallas.edu)  
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Office hours by appointment – please email to schedule an appointment

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### Course Pre-requisites, Co-requisites, and/or Other Restrictions

OPRE 6271 Project Overview and Strategic and Process Management

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### Course Description

Projects are undertaken to help organizations convert strategy into products, services, and end results. Unfortunately, many projects are not totally successful because of the lack of clearly defined and well understood requirements.

This course explores project management in a global environment, bridges from strategy to project definition with discussions of project selection, creating value from investments and project management tools, and focuses on determining and managing project requirements.

Important note: Modules from OB 6301, Introduction to Organizational Behavior, are intermixed with modules from this course. Concepts from these OB6301 modules are to be applied along with concepts from this course and the prerequisite course, OPRE6271, in your preparation of the Project Initiation Assignment.

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### Student Learning Objectives/Outcomes

Students will demonstrate the knowledge to

- Apply project selection methods to evaluate the feasibility of projects
  - Assess project contribution to business strategy, purpose and plans
  - Determine and document project goals and performance requirements by working closely with project stakeholders
  - Define and document product or service deliverables
  - Select appropriate project management practices, tools and methodologies
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## Required Textbooks and Materials

*Textbooks (purchased by student or viewed online):*

Chatfield, C. and Johnson, T. (2013). *Microsoft project 2013: step by step*. Redmond, WA: Microsoft Press. ISBN: 978-0-7356-6911-6

Heldman, K. (2013). *PMP® Project management professional exam study guide* (7<sup>th</sup> ed.). Indianapolis: Wiley (Sybex). ISBN: 978-1-118-53182-2

Larson, E. and Gray, C. (2014). *Project Management: The Managerial Process* (6<sup>th</sup> ed.). New York: McGraw-Hill/Irwin. ISBN: 978-0-07-809659-4 (ISBN-13 9781259186400 also okay; this bundles a trial CD w/MS Project)

Mantel, S. J. et al. (2014). *Project Management in Practice* (5<sup>th</sup> ed.). Hoboken, NJ: John Wiley & Sons. ISBN-13: 978-1118674666 [international edition is different – don't buy]

Morris, P. and Jamieson, A. (2004). *Translating corporate strategy into project strategy: realizing corporate strategy through project management*. Newtown Square, PA: Project Management Institute. ISBN: 1-930699-37-9 [Available on PMI eReads and Reference]

Project Management Institute. (2013). *A guide to the project management body of knowledge* (5<sup>th</sup> ed.). Newtown Square, PA: Project Management Institute. ISBN: 978-1-935589-67-9 [download from PMI Standards]

Wieggers, K. E. (2013). *Software requirements* (3<sup>rd</sup> ed.). Redmond, WA: Microsoft Press. ISBN: 978-0-7356-7966-5 (Web ISBN: 978-0-7356-8) [Available online in UTD Library]

*Articles and Cases (provided in class or download from eLearning)*

Katz, L. *Case study: Chattanooga challenge*. Richardson, TX: The University of Texas at Dallas

## Other books you might be interested in

Chatfield, C. and Johnson, T. (2013). *Microsoft Project 2013 Step by Step*. Redmond, WA: Microsoft Press. ISBN: 978-0735669116

Hooks, I. F., & Farry, K. A. (2001). *Customer-centered products: Creating successful products through smart requirements management*. New York: AMACOM. [Available as eBook from UTD Library and PMI eReads and Reference] – referenced during lecture

Howard, D. and Chefetz, G. (2013). *Ultimate study guide: Foundations: Microsoft project 2013*. New York: Chefetz LLC dba MSProjectExperts. ISBN: 978-1-934240-27-4.

Wieggers, K. E. (2006). *More about software requirements: Thorny issues and practical advice*. Redmond, WA: Microsoft Press. ISBN: 0-7356-2267-1 [Available as eBook from UTD Library] – referenced during lecture

Wieggers, K. E. (2007). *Practical Project Initiation: A Handbook with Tools*. Redmond, WA: Microsoft Press. ISBN: 978-0-7356-2521-1 (Web ISBN: 978-0-7356-8704-2) [Available as eBook from UTD Library]

## Assignments & Academic Calendar

Title/Date	Overview	Objectives	Assignments
<p><b>Project Initiation Assignment</b></p> <p>Sue Freedman Bill Hefley Carolyn Reichert</p>	<p>This assignment asks you to explore the strategic fit, technical requirements, and socio-cultural aspects of a potential project in your organization.</p>	<p>Students will demonstrate their ability to:</p> <ul style="list-style-type: none"> <li>• Assess project contribution to business strategy, purpose and plans</li> <li>• Determine and document project goals and requirements</li> <li>• Consider the financial implications of the project on the organization</li> <li>• Consider the socio-cultural impact of the project on stakeholders</li> </ul>	<p>Complete the assignment in accordance with the instructions found on eLearning Assignments.</p> <p>Submit your completed document on eLearning by <b>11:59PM, Wednesday, December 9, 2015.</b></p>
<p><b>Project Management Professional I</b></p> <p>Jim Szot</p> <p>Independent Study</p>	<p>This module begins the process of preparing for the Project Management Institute’s Project Management Professional certification exam.</p> <p>Students who have already earned the PMP® credential will begin to prepare a research paper on a project management topic of their choice or negotiate an alternate project.</p>	<p><b>Non-PMPs</b> Explore PMI’s approach to</p> <ul style="list-style-type: none"> <li>• Modeling the process of project management</li> <li>• Creating the project charter and preliminary scope statement</li> <li>• Applying professional responsibility</li> </ul> <p><b>PMPs</b> Select one of the options below:</p> <ul style="list-style-type: none"> <li>• Identify a topic of interest and describe the research approach you intend to follow</li> <li>• Describe the learning objectives and negotiate an alternate project with the Program Director</li> <li>• Begin preparing for the PgMP exam</li> </ul>	<p><b>Non-PMPs</b></p> <p><b>Read:</b> Heldman, <i>Introduction</i>, Chapters 1, 2, 3 (through “Collecting Requirements”) and 12 (“Professional Responsibility”), pp. xxv – 114, 541-560 and related content in the <i>PMBOK Guide</i>®</p> <p><b>Online Quiz:</b> Complete the online quiz (eLearning Assignments) by <b>11:59PM, Sunday, November 8, 2015</b></p> <p><b>PMPs</b></p> <p>Submit your topic proposal and research approach on eLearning, negotiate an alternate project, or complete PgMP online course modules and exams through and including Module 2A Initiating by <b>11:59PM, Sunday, November 8, 2015.</b></p>

Title/Date	Overview	Objectives	Assignments
<p><b>Project Management in a Global Environment</b></p> <p>Lothar Katz</p> <p>Saturday October 17 AM</p>	<p>We explore how differences in cultural values and beliefs affect project management practices in areas such as project initiation, stakeholder management, progress monitoring, conflict prevention and resolution, and ongoing communication.</p>	<p>Students will be able to:</p> <ul style="list-style-type: none"> <li>• Identify what cultural knowledge is critical for success in cross-cultural projects</li> <li>• Describe effective task balancing in global projects</li> <li>• Describe techniques for preventing cultural friction</li> </ul>	<p><b>Required Reading:</b></p> <ul style="list-style-type: none"> <li>• Larson and Gray, Chapter 15, “International Projects”</li> </ul> <p>Assignments</p> <ul style="list-style-type: none"> <li>• As a team, prepare answers to the “Case Study: Chattanooga Challenge” found on eLearning and bring to class.</li> <li>• Come prepared to discuss and share your own international project work experiences</li> </ul>

Title/Date	Overview	Objectives	Assignments
<p><b>Project Selection</b></p> <p>Gerald Turner</p> <p>Saturday October 17 PM</p>	<p>In this module, we review the “thinking” and applicable processes for initiating and selecting projects. We thoroughly review the following questions:</p> <ul style="list-style-type: none"> <li>• Why launch projects?</li> <li>• Exactly what is a project and how does this fit into the strategic planning and management process?</li> <li>• Who cares? Who are the key stakeholders and beneficiaries of this process?</li> <li>• What business value does the company derive from successfully conceived, planned, selected, executed and managed projects?</li> <li>• How do we ensure the likelihood of success on key corporate &amp; business projects</li> </ul>	<p>Students will:</p> <ul style="list-style-type: none"> <li>• Explore the world of corporate &amp; business projects and initiatives</li> <li>• Understand how projects are “conceived” and why through qualitative and quantitative selection techniques</li> <li>• Determine which techniques apply to certain business environments, situations and scenarios and which do not... and why?</li> <li>• Review the rationale for financial and/or economic justification for projects and programs for the corporation, business or strategic business unit – i.e., the “business case”</li> <li>• Introduce project charter concepts and foundations</li> </ul>	<p><b>Required Reading:</b></p> <ul style="list-style-type: none"> <li>• Larson and Gray, Chapter 2, “Organizational Strategy and Project Selection”</li> <li>• Mantel et al, Chapters 1, “The World of Project Management”</li> <li>• Morris and Jamieson, Chapter 2, Case Study - “How a Global Aerospace Company Moves Strategy into Projects”</li> </ul> <p><b>Please Review</b></p> <ul style="list-style-type: none"> <li>• <i>PMBOK</i> Chapter 3, “Project Management Processes,” pp. 47-61 and Annex A1, “The Standard for Project Management of a Project,” pp. 417-461</li> <li>• Heldman, Chapter 2, pp. 56-70, “Understanding How Projects Come About”</li> </ul> <p><b>Prepare</b></p> <p>Larson and Gray, <i>Film Prioritization</i> business case analysis, pp. 56-60. Develop and submit your case analysis and recommendations at the <b>beginning of the class</b> retaining a copy for your reference during in-class discussion.</p> <p>Also, be prepared to discuss all challenges, issues, risks, constraints and “safety-mechanisms” associated with the project selection process applied to Global Aerospace. Particular emphasis will be given to facilitated class discussion and a group exercise on the assigned case.</p>

Title/Date	Overview	Objectives	Assignments
<p><b>Stakeholder Management and Project Communications</b></p> <p>Bill Hefley</p> <p>Thursday November 12 AM</p>	<p>The process of developing a plan to engage and not enrage stakeholders is an important part of a project manager's role. This module discusses stakeholder identification, planning, managing and controlling and relates it to project communications planning, managing, and controlling. Also discussed is the creation, collection, distribution, storage and retrieval of project information as an important aspect of the process of project communications management.</p>	<p>As a result of this module you will be able to:</p> <ul style="list-style-type: none"> <li>Describe the critical nature of knowing your stakeholders and managing their expectations.</li> <li>Apply a method to address issues, manage conflicting interests, and foster stakeholder engagement.</li> <li>Develop a communications management plan to help manage stakeholder engagement.</li> </ul>	<p><b>Required Reading</b></p> <ul style="list-style-type: none"> <li>Heldman, <ul style="list-style-type: none"> <li>Understanding Stakeholders, pp. 223-225</li> <li>Communicating the Plan, pp. 225-232</li> </ul> </li> <li>Project Management Institute, <i>PMBOK Guide</i>, Chapters 10 and 13. <ul style="list-style-type: none"> <li>Project communications management</li> <li>Project stakeholder management</li> </ul> </li> </ul> <p><b>Individual Assignment</b></p> <ul style="list-style-type: none"> <li>Detailed instructions for building an effective stakeholder analysis and communication plan as described in the Communications Planning Assignment. Post your assignment results by <b>11:59 PM, Friday, 20 November 2015</b></li> </ul>
<p><b>Creating Value with Investments</b></p> <p>Carolyn Reichert</p> <p>Thursday November 12 PM</p>	<p>Financial value is one criteria used when selecting projects. This module introduces financial tools useful in the management of projects</p>	<ul style="list-style-type: none"> <li>Assess project contribution to financial goals by considering: <ul style="list-style-type: none"> <li>Internal rate of return</li> <li>Net present value</li> <li>Payback</li> <li>Profit index</li> </ul> </li> </ul>	<p><b>First read:</b></p> <ul style="list-style-type: none"> <li>Mantel, Section 1.5: "Selecting Projects to Meet Organizational Objectives" and Section 1.6: "The Project Portfolio Process" (pp. 11-27)</li> <li><i>The Investment Decision and Cash Flows</i></li> </ul> <p><b>Then read:</b></p> <ul style="list-style-type: none"> <li>Mantel, <i>Handstar Inc</i> (pp. 32-33)</li> </ul> <p>For the <i>Investment Decision and Cash Flows</i>, think about the following questions:</p> <ul style="list-style-type: none"> <li>What cash flows are relevant in the analysis?</li> <li>Which one(s) would you include or exclude in developing a spreadsheet?</li> </ul>

Title/Date	Overview	Objectives	Assignments
<p><b>Requirements 1: Overview - Elicitation</b></p> <p>Bill Hefley</p> <p>Friday November 13 AM</p>	<p>This module introduces the overall requirements development and management process and focuses in detail on the importance of eliciting good requirements.</p>	<p>Students will be able to:</p> <ul style="list-style-type: none"> <li>• Identify and define important elements of a repeatable, systematic process used to develop and manage different types of requirements</li> <li>• Identify the types of requirements, and apply the characteristics of good requirements</li> <li>• Define the boundaries between project scope and product scope</li> <li>• Utilize IEEE and SEI standards</li> <li>• Define the spiral method of requirements development</li> <li>• Identify and analyze stakeholders, their roles and needs</li> <li>• Utilize requirement “eliciting” techniques</li> <li>• Develop and understand real business and user needs</li> <li>• Describe the difference between features, functions, and benefits</li> <li>• Describe the importance of correctly and completely identifying the problem to be solved</li> </ul>	<p><b>Reading Assignment</b></p> <ul style="list-style-type: none"> <li>• Wiegers, 2013, Chapters 1-7</li> </ul> <p><b>Team Assignment</b></p> <ul style="list-style-type: none"> <li>• Prepare a 3 slide PowerPoint presentation on why it is so difficult to elicit and manage requirements.</li> <li>• Be prepared to present your reasons during class.</li> <li>• Post presentation to eLearning by <b>11:59 PM CT, Thursday, November 12, 2015</b></li> </ul>
<p><b>Requirements 2: Analysis and Negotiation</b></p> <p>Bill Hefley</p> <p>Friday November 13 PM</p>	<p>This module provides techniques for analyzing requirements to improve the overall success of the project.</p>	<p>Students will be able to:</p> <ul style="list-style-type: none"> <li>• Apply a method for analyzing requirements to improve the overall probability of success of the project</li> <li>• Identify and analyze priorities and risks for each requirement</li> <li>• Resolve conflicting requirements</li> <li>• Allocate system requirements to components</li> <li>• Involve stakeholders in tradeoffs</li> </ul>	<p><b>Reading Assignments</b></p> <ul style="list-style-type: none"> <li>• Wiegers, 2013, Chapters 8, 16, 32</li> </ul> <p><b>In-class Team Assignment</b></p> <ul style="list-style-type: none"> <li>• Review the Top 10 Requirement Statements written by Weigers in Thorny Requirements and posted on eLearning Assignments</li> <li>• Prepare a PowerPoint presentation with 1-2 sentences of observations, examples, explanations, etc. per requirement statement.</li> <li>• Post presentation to eLearning by <b>11:59 PM CT, Friday, November 13, 2015</b></li> </ul>

Title/Date	Overview	Objectives	Assignments
<p><b>Requirements 3: Specification and Validation</b></p> <p>Bill Hefley</p> <p>Saturday November 14 AM</p>	<p>This module discusses techniques for developing good written specific requirements and systematic methods for validating requirements.</p>	<p>Students will be able to:</p> <ul style="list-style-type: none"> <li>• Determine how to specify and document requirements</li> <li>• Apply templates in the documentation of requirements</li> <li>• Address common problems in specifying requirements</li> <li>• Use tools for specifying requirements and specification guidelines</li> <li>• Identify and apply traceability techniques</li> <li>• Identify and apply the validation process and baseline requirements</li> <li>• Validate the “goodness” of requirements</li> <li>• Determine the testability of requirements – writing test cases – acceptance criteria</li> <li>• Understand the role of prototyping and/or model validation</li> <li>• Trace requirements to the source</li> <li>• Establish guidelines for baselines</li> </ul>	<p><b>Reading Assignments</b></p> <ul style="list-style-type: none"> <li>• Wiegers, 2013, Chapters 9-11, 17</li> </ul> <p><b>Individual Case Study Assignment</b></p> <ul style="list-style-type: none"> <li>• Review the case study provided about poor requirements and answer questions per the format specified in the assignment.</li> <li>• Post presentation to eLearning by <b>11:59 PM CT, Saturday, November 21, 2015</b></li> </ul>
<p><b>Requirements 4: Management and Steps to Improvement</b></p> <p>Bill Hefley</p> <p>Saturday November 14 PM</p>	<p>This module discusses the importance of change control, version control, and the steps to take to implement a good process in an organization.</p>	<p>Students will be able to:</p> <ul style="list-style-type: none"> <li>• Use components of requirements management</li> <li>• Identify and apply the important elements of a change control process</li> <li>• Identify and apply good impact analysis techniques on change requests</li> <li>• Determine the importance of version control regarding requirements</li> <li>• Identify concepts in this course to apply to your own project environment</li> <li>• Understand how to assess current processes and environment</li> <li>• Determine the usefulness of tools in their environment and identify the kinds of tools which may be applicable</li> </ul>	<p><b>Reading Assignments</b></p> <ul style="list-style-type: none"> <li>• Wiegers, 2013, Chapters 19, 27-30</li> </ul> <p><b>Comprehensive Quiz</b></p> <ul style="list-style-type: none"> <li>• In-class open book timed quiz (90 minutes) covering Requirements Modules 1, 2, 3 and 4</li> </ul>

Title/Date	Overview	Objectives	Assignments
<p><b>Legal Considerations: Overview of the Legal System</b></p> <p>Nicole LeBoeuf</p> <p>Saturday December 5 AM</p>	<p>This module provides an introduction to the American civil law system, addressing common law, statutes and codes, state and federal courts, administrative law, litigation and alternative dispute resolution, causes of action, limitations periods, and statute of frauds, among other concepts.</p>	<p>The student will be able to discuss the key aspects of:</p> <ul style="list-style-type: none"> <li>• The court system, both state and federal</li> <li>• Torts, including intentional acts, negligence, strict liability, product liability</li> <li>• Contracts, including formation, consideration, third party beneficiaries, assignment, common “boilerplate” provisions and their meanings, and damages for breach</li> <li>• Property, including the distinction between real and personal property, sales, leases and gifts.</li> <li>• Uniform Commercial Code, including battle of the forms, secured transactions, negotiable instruments, letters of credit, bulk sales, rejection and cover.</li> </ul>	<p>In-class participation</p>
<p><b>Legal Considerations: Employment Law</b></p> <p>Nicole LeBoeuf</p> <p>Saturday December 5 PM</p>	<p>This module provides instruction on state and federal employment law issues, including non-competition and non-disclosure agreements, the protection of trade secrets, the Family Medical Leave Act, anti-discrimination laws and protected classes of employees, the Equal Employment Opportunity Commission, exempt vs. non-exempt classifications of employees, the legal definition and treatment of contractors vs. employees, at-will employment and its limits, separation agreements and severances.</p>	<p>The student will be able to discuss:</p> <ul style="list-style-type: none"> <li>• Non-compete agreements, including state law issues regarding the geographical scope and duration of enforceable agreements.</li> <li>• Non-disclosure agreements, including scope and enforceability.</li> <li>• Trade secret, including its definition and protections available.</li> <li>• Protections for employees, including the FMLA, anti-discrimination laws, protected classes of employees, benefits, additional burdens on companies of larger sizes, and EEOC claims</li> <li>• Categories of employees, including how to define exempt and non-exempt workers, and how to define contract workers and employees</li> <li>• Fair Labor Standards Act, including Department of Labor audits and overtime pay</li> <li>• Separation from employment, including typical terms of separation agreements and severances.</li> </ul>	<p>In-class participation</p>

### Grading Policy

Your course grade is determined by scores received on the following assignments and may be adjusted downward at the discretion of the faculty for inadequate class attendance/participation.

Assignments	Module	Percentage	Type	Due Date
Case preparation and class discussion	Executing Projects in a Global Environment (Katz)	2.5%	Team	Oct. 17
Project Selection Case	Project Selection Criteria (Turner)	2.5%	Individual	Oct. 17
Project Management Professional Quiz/Research Approval	Course (Szot)	10%	Individual	Nov. 8
Requirements Difficulty Presentation	Requirements Overview (Hefley)	2.5%	Team	Nov. 12
Thorny Requirements Presentation	Requirements Specification and Validation	2.5%	Team	Nov. 13
Requirements Comprehensive Quiz (in-class)	Requirements Overview, Elicitation, Analysis, Specification, Validation, Management (Hefley)	10%	Individual	Nov. 14
Stakeholder Analysis and Communications Plan	Stakeholder Management and Project Communications (Hefley)	5%	Individual	Nov. 20
Requirements Case Study	Requirements Overview, Elicitation, Analysis (Hefley)	10%	Individual	Nov. 21
In-class participation	Legal Considerations in Project Management (LeBoeuf)	5%	Individual and Team	Dec. 5
Project Initiation Assignment	Course	50%	Individual	Dec. 9

Possible course grades are A, A-, B+, B, B-, C+, C, and F. The anticipated grading scale based on past experience is shown below. This scale is subject to revision based on analysis of class performance by, and at the sole discretion, of the grading instructor of record.

Percentage Score	Grade	Percentage Score	Grade	Percentage Score	Grade
95-100	A	80 < 85	B	65 < 70	C
90 < 95	A-	75 < 80	B-	< 65	F
85 < 90	B+	70 < 75	C+		

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### Course & Instructor Policies

Graded assignments should be posted to eLearning by the deadlines specified in this syllabus. Assignment links disappear after the deadline. If you cannot complete an assignment by the due date, it is your responsibility to contact the instructor associated with that assignment and to inform the grading instructor of record of this communication before the assignment becomes overdue. Note that faculty members have no obligation to accept late assignments or to discuss the possibility of extensions or extra-credit work, but may do so if you have a compelling reason and discuss it with them before the assignment is due.

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### Technical Support

For assistance with **eLearning**, **Collaborate**, and other Project Management Program technology issues, e-mail Wei Wang [[weiwang@utdallas.edu](mailto:weiwang@utdallas.edu)] and Debbie Samac [[debbie@utdallas.edu](mailto:debbie@utdallas.edu)]. Note that Wei and Debbie cannot help you with your UTD account, including email access issues.

If you experience any problems with your **UTD account**, send an email to [assist@utdallas.edu](mailto:assist@utdallas.edu) or call the UTD Computer Helpdesk at 972-883-2911. **Do not contact the UTD Computer Helpdesk for questions about or problems with eLearning or Collaborate setups.** They cannot help you – these products are supported by the Project Management Program.

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### **Comet Creed**

*This creed was voted on by the UT Dallas student body in 2014. It is a standard that Comets choose to live by and encourage others to do the same:*

“As a Comet, I pledge honesty, integrity, and service in all that I do.”

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### **UT Dallas Syllabus Policies and Procedures**

The information contained in the following link constitutes the University’s policies and procedures segment of the course syllabus.

Please go to <http://go.utdallas.edu/syllabus-policies> for these policies.

***The descriptions and timelines contained in this syllabus are subject to change at the discretion of the Professor.***