**Project Charter**

**Project #** [assigned by Project Management Office]

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| **Project Name** | LMS Review | |
| **Project Sponsor** | David Hornsby, Associate Vice-President Teaching and Learning, OAVPTL  Tim Lott, Assistant Vice-President (ITS) & Chief Information Officer | |
| **Author(s)** | Patrick Lyons, Director, Teaching and Learning, OAVPTL | |
| **Date:** | 2018-12-07 | |
| **Presentation to Computing Committee**  *(minimum of one Committee)* | | |
| **Name of Committee** | | **Date of Presentation** |
| ☐ Administrative Computing Committee | | [yyyy-mm-dd] |
| ☒ Teaching and Learning Computing Committee | | [yyyy-mm-dd] |
| ☐ Research Computing Committee | | [yyyy-mm-dd] |

**☐Approval to Plan ☐Approval to Execute**

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**Project Description**

Carleton’s learning management system, branded cuLearn, is a Moodle platform adopted in 2012. cuLearn is a critical educational tool at Carleton that is a helpful and necessary technological tool that fosters interaction among students, teachers and content as well as enabling a range of pedagogical approaches to enhance learning.

Since 2012, LMS products have become increasingly more sophisticated and include integrations for tools like online classrooms, media management tools, portfolios and data analytics packages. Beyond the suite of tools, the LMS gives faculty the space and structure to design courses and organize content iteratively and practice continuous improvement in their classes. LMS products can also support institutional priorities like student engagement, community outreach, and support reporting of student and program outcomes.

This project will collect and develop requirements for our LMS, cuLearn through broad consultation with stakeholders, including students, faculty, contract instructors, staff and senior management. Based on these requirements, various platforms will be evaluated and recommendations made to the Provost and Vice-President Academic for Carleton’s future directions relating to Carleton’s most used platform for teaching and learning.

**Purpose**

It has been six years since Moodle was implemented as the platform that powers cuLearn. cuLearn use is extensive, with nearly all students accessing it multiple times daily, 83% of instructors using it and all staff required to interact with it for job training and development.

The landscape for LMS products have also evolved significantly in the last six years. It is important to ensure that the Carleton community have the most appropriate tool to support current and future teaching and learning requirements.

The project will review the LMS and will establish a comprehensive set of requirements for current and future use of cuLearn by the Carleton community. In addition, this review will examine and assess the LMS product landscape and solicit proposals that meet Carleton’s requirements for our LMS, cuLearn.

The following outcomes are expected from the review:

1. A comprehensive understanding of the requirements for Carleton’s LMS.
   1. Consultation with stakeholders
   2. Evaluation and testing of products in the LMS space
   3. Consultations with other institutions to learn about their experiences
2. A comprehensive understanding of technical requirements to operate and integrate platform into Carleton ecosystem
   1. Internally hosted and cloud hosting.
3. A Request for Information (RFI), will be issued to service providers
4. Report with recommendation made on the direction of the LMS based on the RFI, consultations, and evaluation of products.

The ultimate product and outcome will be a series of recommendations, supported by a report, regarding the direction of the LMS to the Provost and Vice-President Academic.

**Strategic Alignment**

A learning management system is the central platform for Carleton’s teaching and learning community. It fosters and supports student engagement, communication, teaching and learning. It is also the only secure way that formative grades are released to students, it helps to ensure copyright compliance, and provides a highly reliable and easy way for instructors to interact with students (undergrad and graduate).

The review directly supports the following strategic initiatives (Strategic Integrating Plan, SMA 2, and budget priorities 2019-20) of the University:

1. Budget Priorities 2019-20:
2. Support improvement in areas where we have key metrics in SMA2; in particular, improving student retention and graduation rate and increasing experiential learning and other high impact practices that enhance the student experience and foster success after graduation

The LMS already plays a critical role in supporting student engagement. It enables effective teaching practices, communication, and collaboration. Modern LMS increasingly are able to leverage data and analytics to allow both instructors, students and university administrators better understanding of retention and student performance. For example this can include reports to an instructor that certain students have not accessed or completed key components of a course. The instructor can then use the reports to nudge students to participate or to adjust the design of their course.

Aggregate data from student interactions in a LMS can also be used by an institution to

better understand patterns of engagement and student success. Given that the LMS is the most used student tool on campus, data from the LMS could provide the earliest warning that some students may be struggling.

1. Make Carleton more effective and efficient in achieving its mission including wholistic integration of digital technologies, development of optimal facilities, identification and fostering of talent, and other professional and administrative functions.

The LMS is the most used digital tool on campus. It is a central part of a students’ experience and core component of how instructors interact with learners. It acts as hub to a network of additional digital technologies at Carleton like, cuPortfolio (eportfolio), MediaSpace (media management), BigBlueButton (virtual classroom), ARES (course reserves) and Polleverywhere (classroom engagement tool). It also acts as a bridge to textbook publisher resources like Wiley+, Cengage, and the Mastering series. As the University’s hub it could additional act as a connector to other learning platforms like Lynda.com. It is critical that this core platform be strategically aligned to the university mission and the needs of its stakeholders.

1. Strategic Mandate Agreement 2

The LMS review aligns with a number of elements in SMA, particularly around supporting and improving Carleton’s institutional approach to student experience and innovation in teaching and learning excellence.

As the LMS acts as a core interface between students, content, and their instructor, it is important that the LMS directly supports and enhances Carleton’s strategic initiatives relating to student experience, experiential learning, and technology enhanced learning.

The LMS is used extensively to support First Year Seminars, skill and professional development for graduates students, and is a backbone for incorporating experiential learning in and outside of the classroom (via simulations and labs, simplifying administrative tasks, incorporating and connecting reflection to learning).

Currently the LMS supports much of the teaching innovation that takes place at Carleton, by providing a platform that can empower instructors to incorporate high impact practices, blended and online teaching.

The LMS is also part of Carleton’s initiatives around community engagement and collaboration, through a public facing version of cuLearn. The public face of the LMS supports and enables professional development, open courses and modules, online collaboration spaces, and even revenue generating activities that are accessible to anyone inside and outside of Carleton. Currently the public facing LMS hosts a number of open courses, Sprott Professional development programming, and the Internationally Educated Nursing program (for COU).

1. Strategic Integrated Plan (SIP) 2013-18.

The LMS review is supported by a number of elements and initiatives in the SIP beyond what is stated in SMA2 and the budget priorities for 2019-20. Specifically this includes:

Goal 1.2 To ensure the sustainability of Carleton University through a long-term enrolment model and effective and efficient management of resources.

This relates to the LMS review, as cuLearn is the key technological platform that enables online learning. Without a reliable and easy to use LMS platform, online learning is not possible. Having the appropriate technology will encourage and support Carleton’s elearning strategy. Beyond just supporting online and blended courses, cuLearn is a key component of Carleton’s on campus experience. It facilitates assessment and communications strategies which are linked to supporting student engagement and retention.

Goal 3-3: To consolidate and build on Carleton’s status as Canada’s most accessible university.

cuLearn can enhance Carleton’s reputation as a leader in providing accessible learning opportunities, by ensuring the platform exceeds standards and supports universal design practices.

Goal 4-1: To pursue organizational excellence by building leadership capacity and through the continuous improvement of our academic and administrative processes.

cuLearn supports a significant number of academic and administrative processes including calculating and releasing summative grades securely to students, integrating with ARES (library reserves), connected to Scantron (multiple choice processing), interfacing with the University’s final grade system (e-grades), and supporting employee training, learning in retirement, and communities of practice for leadership and research teams.

The review will establish the University’s requirements and can lead to improved processes.

**Customers**

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| **Customer Group** | **Description** | **Impact** |
| Current students | Undergrad and graduate students at the university. Logs indicate most students access cuLearn multiple times per day. | Better support for learning, communication, and access to materials. More responsive and reliable. An improved tool can potentially enhance engagement and retention. |
| Faculty and Contract Instructors | Instructors at Carleton. 83% of all faculty and CIs use cuLearn. | Better tool could increase adoption and make tasks easier encouraging more meaningful use. More responsive tool reduces frustration and dissatisfaction. Better tool could enhance support for retention and student performance. |
| Teaching Assistants | Nearly all TAs use cuLearn to support their TA responsibilities (grading, feedback, discussion). | Enhanced performance and reliability would permit more efficient use of TA time - particularly for grading workflows. |
| Staff | All staff complete mandatory training hosted in cuLearn. Teaching support staff use cuLearn to create training and support lab courses (science, language, and engineering).  TLS and ITS staff operate and support platform. | Easier to use tool and more reliable tracking of completion of courses.  An improved platform may require alternatives models of support. Depending on type of platform and approach this may enable reallocation of support resources, or the strategic increase of support resources. |
| Admin departments (HR, EHS) | Several depts use cuLearn to develop and deploy training courses for mandatory training for employees at Carleton. | Improved ease of use and reporting capabilities. |
| Public | Groups and individuals outside of Carleton can access a public facing version of cuLearn to access content and courses open to the public. | Improved ease of use, and pending understanding of bottlenecks, greater scalability and flexibility. |
| Research teams | Several research teams use cuLearn to host materials, training, and support collaboration. | Improved user experience that can enhance collaboration and increase team efficiency. |

**Stakeholders**

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| **Stakeholder Group** | **Impact** |
| Students | For the LMS review, minimal impact. Better understanding of their requirements |
| Faculty and Contract Instructors | For the LMS review, minimal impact. Better understanding of their requirements and needs. |
| Teaching Assistants | For the LMS review, minimal impact. Better understanding of their requirements and needs. |
| Staff | For the LMS review, minimal impact. Better understanding of their requirements and needs. |
| Information Technology Services (ITS) | For the LMS review, minimal impact. Better understanding of requirements and needs, as well as the current state of competing products and experiences of other institutions. |
| Teaching and Learning Services (TLS) | For the LMS review, minimal impact. Better understanding of requirements and needs, as well as the current state of competing products and experiences of other institutions. |
| Registrar and Student Services | For the LMS review, minimal impact. Better understanding of requirements and needs. |
| Library | For the LMS review, minimal impact. Better understanding of requirements and needs. |

**Project Budget**

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| **Item** | **Description** | **Fiscal Funding** (one-time) | **Annual Base Funding** (recurring) |
| Staffing | One level 9PE educational technology coordinator to backfill TLS during review (8 months). | $46,000 | N/A |
|  |  |  |  |
| ***TOTAL BUDGET (CDN$, including taxes)*** | | ***[$46,000]*** | ***[$ 0]*** |

**Scope**

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| **In Scope (Project Deliverables)** |
| Develop comprehensive list of requirements from stakeholders |
| Develop and issue Request for Information (RFI) |
| Compare platforms with up to date cuLearn platform |
| Assess and test competing products |
| Complete a cost/benefit analysis |
| Author report with recommendations for platform |

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| **Out of Scope** |
| Select or adopt a new LMS to power cuLearn |
| Negotiate with vendors for adoption |
| Operate and support multiple platforms with live courses, students and instructors as part of the review. |
| Implement a new LMS and migrate campus to new platform |

**Success Criteria**

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| **Metric or Value** | **Intended Outcome** | **Baseline Measure** |
| N/A | Identify CU community present and future needs | RFI released |
| N/A | Analyze the gaps between current configuration and future needs. | Report on the evaluation of alternative platforms |
| N/A | Report with recommendations for LMS |  |

**Alternatives**

1. Do not complete review. Maintain status quo; no change of the cuLearn platform beyond regular upgrades (as time and resourcing permits).
2. Do not complete review. Instead, enhance current LMS (for example upgrade and change how it is hosted (cloud or database hosting at Carleton).
3. Do not complete review process. Instead select a platform based on the internal expertise and knowledge at the University ensuring that the platform is aligned to the strategic directions of the University.

**Assumptions**

* Assumes review process will be completed (with recommendations by end of Fall 2019)
* Assumes that ITS is able to upgrade cuLearn to most current version of Moodle 3.6 to ensure fair comparison between products by May 2019.
* Assumes resourcing available from ITS academic computing team to support project management and the development of technical requirements
* Assumes resourcing available from Purchasing, Legal Counsel, and Privacy to assess contract and agreements.
* Assumes resourcing available from ITS and Privacy to perform security and privacy assessments.
* Assumes TLS educational technology staffing resources to support review.
* Assumes interest from the University in supporting potential increased costs and business impacts of adopting/implementing a different LMS (for example licensing costs, hosting costs, Internet bandwidth costs, etc).
* Assumes the performance issue root causes have been identified (System design, Archiecture, Network, etc.)

**Constraints**

* ITS resources are constrained due to multiple projects (Banner upgrade, CRM, etc).
* TLS resources educational technology support staff are constrained due to supporting current system and preparing for upgrade for cuLearn.
* Uncertainty relating to funding at the University

**Dependencies**

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| **Project Name or Change** | **Impact** |
| Upgrade to cuLearn (Moodle 3.6). | Delays in upgrading will impact the review and comparison of Moodle to competing products. However, elements of the review can proceed prior and concurrently the upgrade. |

**Operational Support**

N/A. The project is a review and not an implantation of a new system. In the event that recommendations from this project indicate that a new LMS is needed, it will be subject to a new project charter.

**Project Milestones**

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| **Milestone** | **Estimated Completion Date** |
| Project Charter approved | May, 2019 |
| Build and fill governance committees | January, 2019 |
| Hire Ed. tech coordinator to backfill | June 2019 |
| Complete consultations with stakeholders | Early May, 2019 |
| Complete Moodle upgrade to version 3.6 | May 2019 |
| Develop and release request for information (RFI) | June, 2019 |
| Evaluate RFI responses | August, 2019 |
| Test and compare alternative products | August-November, 2019 |
| Report with recommendations sent to Provost | December, 2019 |
| Project closed | December, 2019 |

**Resourcing**

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| **Role or Position** | **Responsibilities** | **Estimated Work [days]** |
| Business analyst | Help develops requirements | 15 |
| Project manager | Establishes and manages project plan | 15 |
| Educational Technology Coordinator | Supports review process, including conducting consultations, developing requirements, testing and evaluating systems, authors reports, develops testing cases, and rubrics | 160 |
| TLS Communications Officer | Develops and executes communication plan | 5 |
| Manager, eLearning | Guides evaluation process, develops materials, and rubrics, drafts requirements, participates in consultation, works with stakeholders. | 70 |
| Assistant Director, EDC | Manages evaluation process, develops materials, and rubrics, drafts requirements, participates in consultations, works with stakeholders | 35 |
| Director, TLS | Oversees and advises review, participates in evaluation and consultations, liaises and advises senior management, oversees report and recommendations. Chairs LMS working group. | 25 |
| Director, Enterprise Applications | Oversees ITS teams contributing to review. Participates in evaluation and consultations, liaises and advises senior management, oversees report and recommendations. | 25 |
| LMS System Administrator | Drafts technical requirements, participates in evaluation, assesses alternatives. | 80 |
| LMS Steering Committee | Chaired by AVPTL. Guides and advices review process. | 10 |
| LMS Working Group | Conducts review and writes report. |  |
| **TOTAL RESOURCES** | | **[440 days]** |

**Risks**

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| **Risk Name** | **Description** | **Impact** | **Severity (H, M, L)** | **Probability**  **(H, M, L)** |
| [e.g. MTCU Guidelines] | [Mid-project change in MTCU guidelines or rules] | [Schedule, Scope] | [H] | [M] |
| Incomplete understanding of requirements | A partial understanding of the requirements may lead to incomplete and inaccurate list of requirements and misalignment of recommendations | Scope | H | M |
| Inability to fill term ed. tech coordinator position to support the review | Finding qualified individuals to backfill an educational technology position could be problematic. | Schedule | M | H |
| Multiple priorities in TLS and ITS | There are many projects and initiatives taking place in ITS and TLS. | Schedule | M | M |
| Inability to upgrade cuLearn to newest version of moodle | A fair evaluation between alternative products requires Carleton to upgrade cuLearn to Moodle 3.6 by May 2018 | Schedule and Scope | H | L |

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| **Decision** | [Approval to Plan, Approval to Execute, On Hold, Rejected] |
| **Decision Body** | [ISSC or CIO] |
| **Decision Date** | [Date] |
| **Budget Approved** | [$ 0.00] |
| **Budget FOAPAL** | [FOAPAL] |
| **Computing Cmtee Review** | [Committee Name],[Date] |
| **CCS Managers Review** | [Date] |
| **Project Manager** | [Name], Computing & Communication Services |