

# University of Alaska System

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## Onsite Meeting

*June 7-8, 2016*

The purpose of this meeting was to understand the context and complexity associated with the move to a single instance of Blackboard Learn, identify issues and gaps, compile a comprehensive timeline with institutional milestones, and establish an action plan of next steps.

## Executive Summary

The University of Alaska System is embarking on an initiative to combine 4 instances of Blackboard Learn (3 active and 1 historical system). The goals of the overall initiative were identified as:

- Streamlining the Faculty experience
- Streamlining the Student experience
- Leveraging the combined system for process improvement
- Reducing Licensing costs for Blackboard and other 3<sup>rd</sup> Party Vendors
- Reducing Hardware costs through consolidation
- Leveraging personnel time and effort through process improvements and streamlined experiences

It was stated that the new combine system (Single Instance of Blackboard Learn or SIBL) was now expected to go live for instructional purposes in January 2017. A specific date for first live instruction of January 9<sup>th</sup> was identified for the UAA.

The gathered team felt that the system was well positioned for success with a highly technical, experienced, and effective project team lead by a strong project manager. The team saw many opportunities that could be leveraged to provide a more unified experience for faculty and students including the opportunity for sharing of best practices, unified support, and increased ease of support arising from a unified experience. Each institution should evaluate where there is variance in business process, with the goal of a unified experience in mind, and avoid variation for the sake of variation.

However, the team expresses concerns about how those opportunities could be realized in a system in which each institution has their own business practices and cultures and have not had the experience of working together like this successfully in the past. (i.e. with independent BB systems, it has not been necessary to reconcile subtle configuration differences between our BB environments.) The lack of involvement of constituencies outside of technology, particularly faculty and students was raised as a concern.

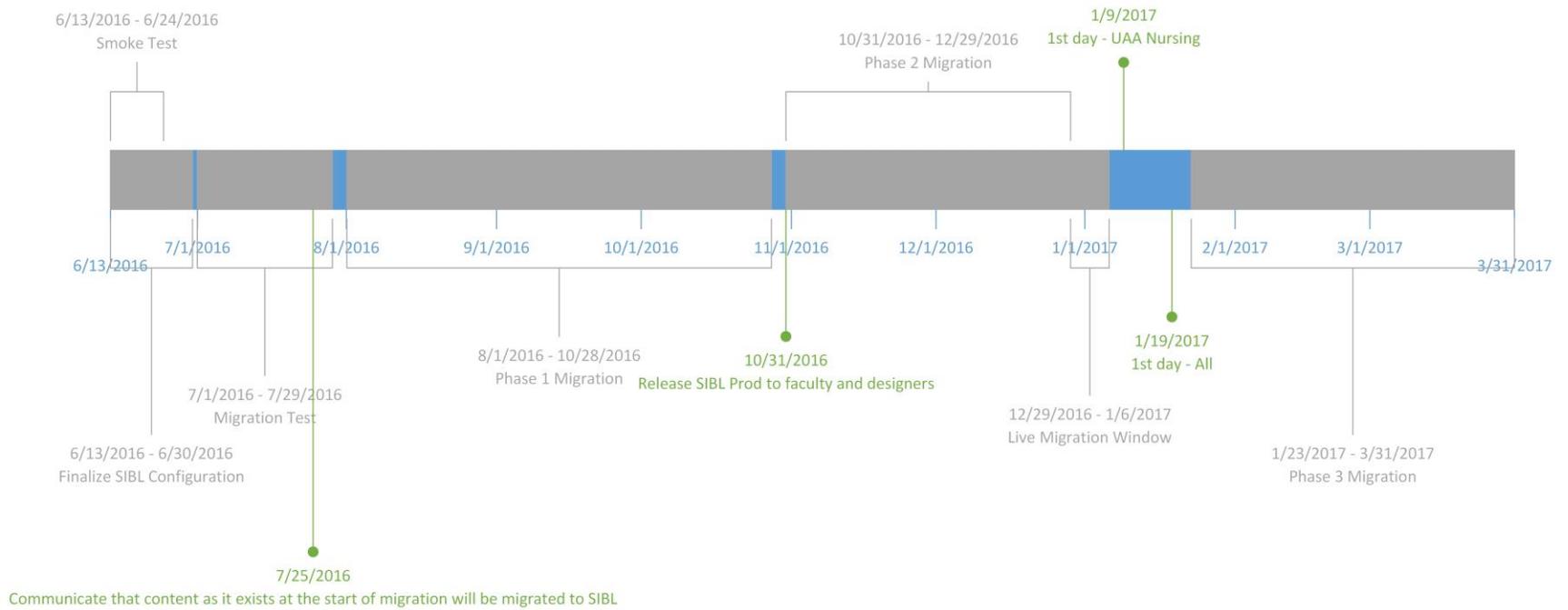
During the two day meeting, the group was very divided on how, or even if, such opportunities could be realized as part of this project. The school were divided on the process that should be used to explore achieving a unified experience for faculty and students and if any attempts at process improvement relating to faculty and student experience should be undertaken as part of this project. This is, in part, due to the time it would add onto the overall project to include retraining students / faculty. In addition, there is a separate IT governance project occurring, simultaneously, that will impact how and when a unified user experience is achieved.

At a high level, the business practices of the institutions, with regard to Blackboard Learn and support of faculty and students are more similar than not, yet ideas for modifying practice to create a unified experience for faculty and students were either not voiced, or actively rejected. Each campus makes use of some type of custom developed solution with UAS having unique uses for Blackboard that must be considered in a shared governance model.

Examples of custom developed solutions for UAS:

- [Early Alerts/Intervention](#)
- [Student End of Course Surveys](#)
- [SIS Integration](#)
- [Course Creation](#)

A tentative timeline and process for migration to SIBL was identified with courses necessary for creation of Spring 2017 course migrated from each of the existing Learn instances to allow faculty to access SIBL beginning not later than October 31<sup>st</sup>, 2016, however the team will target having courses migrated by September 30<sup>th</sup>, 2016. This is the timeframe when courses for January 2017 would normally be made available for faculty to begin building out content.



# SWOT Analysis

A SWOT (Strengths, Weaknesses, Opportunities, and Threats) activity was conducted and the results captured:

## Strengths

- High level of technical currency in the system and on the team
- Executive support exists for this project from the President's level
- A project team with a diversity of experience and an outstanding project manager
- A strong partnership with Blackboard and available services to support the transition

## Weaknesses

- Don't have unlimited time/aggressive timeline
- The UA IT Governance structures which would support this effort, produce consensus and ensure stakeholder input have not yet been established.
- Limited experience at all working together in an endeavor that will require compromise with institutions with diverse business practices, competing priorities, and strong personalities
- Most of team is technical and focus to date has been on technology rather than policy and shared governance. Failure to see how opportunities will be realized if focus is on the technology component of consolidation
- Lack of involvement of Users as stakeholders, including faculty and students in the process and in achieving the goal which are focused on the faculty and student experience.
- The level of complexity of this project is high. Only UAA has attempted a full migration of all course between Learn systems and that effort failed.
- The sheer volume of change going on in all areas in the System (not just with Learn and this project) and the capacity for change.
- Uncertainty in process, timelines, and how goals will be achieved.

## Opportunities

- Opportunity for unification of
- Support
- Communications
- Messaging
- Policies
- Best Practices
- Building Blocks
- Opportunity to improve support
- Ability to leverage Blackboard's Community functionality across all schools
- Ability to view LMS as a strategic asset – use LMS as a competitive differentiator and rethink digital learning footprint
- Opportunity to produce something better than what schools have separately
- Opportunity to add value to the student experience
- Opportunity to drive adoption

- Ability to use Blackboard Community capability to drive buy in
- Opportunity to have uniform Bi-directional integration with SIS
- Opportunity for teams to work together
- Ability to leverage combined system for analytics for:
  - student support
  - retention
  - intervention
  - early warning

### **Threats**

- Amount of change
- Conflicting priorities
- Running clock on project
- Culture of competition between campuses
- User Buy-in (Due to lack of involvement)
- Differences between perception and reality

# Institutional Policy and Procedure Comparison

INSTITUTION	UAS	UAF	UAA	COMMENT
SIS INTEGRATION	<ul style="list-style-type: none"> <li>• Custom integration process:               <ul style="list-style-type: none"> <li>○ Runs nightly to create courses and users.</li> <li>○ Sends notifications to faculty that course shell is available.</li> <li>○ Near real time processing of student enrollments.</li> </ul> </li> <li>• All course created as Available.</li> <li>• Have course created outside the SIS integration.</li> <li>• Have non-term based courses.</li> </ul>	<ul style="list-style-type: none"> <li>• Use Snapshot to create courses, users (nightly) and enrollments (hourly). Planning to move to Framework</li> <li>• All courses created as unavailable - faculty determine when to make available.</li> <li>• Have courses created outside snapshot - shells for non-academic uses of Collaborate, shells for use by groups.</li> <li>• eLearning has yearlong courses.</li> </ul>	<ul style="list-style-type: none"> <li>• Use Framework to nightly create courses, users, and enrollments. Process creates shells from a template.</li> <li>• All courses created as unavailable - faculty determine when to make available.</li> <li>• Have courses created outside the Framework - development shells, non-official courses, shells for programs/cohorts</li> </ul>	System should consider a common process based on the Integration Framework
TEMPLATE USE	<ul style="list-style-type: none"> <li>• Common menu with mandatory items.</li> <li>• Custom process to restore deleted mandatory items.</li> <li>• Student End of Course Surveys available through Custom B2.</li> <li>• Reviewed by Blackboard Working</li> </ul>	<ul style="list-style-type: none"> <li>• Common menu.</li> <li>• Links to Help.</li> <li>• Links to Support.</li> <li>• Some departments have their own templates as part of the Community pilot.</li> <li>• eLearning has its own templates which include navigation and content.</li> </ul>	<ul style="list-style-type: none"> <li>• Common menu.</li> <li>• Syllabus.</li> <li>• Help content and links (but intention to migrate this resource to Community).</li> <li>• Designed and reviewed by a group made up of</li> </ul>	There is significant opportunity for cross institutional collaboration and greater consistency in templates which could

	Group with representation from faculty, instructional designers, and support staff.	<ul style="list-style-type: none"> <li>Reviewed by Faculty Senate.</li> </ul>	faculty, students, and instructional designers.	lead to a more unified student experience and more streamlined support.
<b>USAGE POLICY</b>	Have some usage policy - Syllabus and a variety of content including student rating and results, library resources, class roster information and links to institutional resources are required to be posted in Blackboard	No minimal use policy	No minimal use policy	System should consider if a common minimal use policy supports the stated desire for a consistent student experience.
<b>CONTENT ROLLOVER</b>	Faculty course copy.	Faculty course copy.	Faculty course copy - except for the transition between the old and new instances in 2015, content from old system needed to be brought over manually by faculty.	UAA had a significant 'course bloat' issue arising from the practice of course copies to bring content in to new course shells. This was a significant contributor to the failure of the earlier environment

				migration which resulted in UAA maintaining two environments.
<b>COURSE CREATION (NON-ACADEMIC, DEV SHELLS, ETC.)</b>	<ul style="list-style-type: none"> <li>• Use a custom B2 that automates creation of course sites on demand.</li> <li>• Access through the portal – Users can create a maximum of 5 and they can remove them.</li> </ul>	<ul style="list-style-type: none"> <li>• Designers and admins can create courses on their own.</li> <li>• Faculty can request courses.</li> <li>• Faculty also have access to Sandbox course that faculty can play in.</li> </ul>	<ul style="list-style-type: none"> <li>• Designers can create (majority created in this way).</li> <li>• Faculty can request.</li> </ul>	
<b>PORTFOLIOS</b>	Home grown portfolio system.	Bb Portfolios available but not pushed for use. Some usage is possible.	Use Digication.	Portfolios cannot be migrated from one Learn system to another.
<b>GOALS AND RUBRICS</b>	Usage not known.	In use - Instructor created.	In use - Instructor created.	System should consider if a common approach supports the stated desire for a consistent student experience.

**CHANGE  
REVIEW -  
ENVIRONMENT  
LIFECYCLE**

- Environments: Dev, Test, Prod.
- All changes tested in Dev.
- If approved promoted to Test for User Acceptance Testing by Bb Working Group
- If approved, promoted to Prod

- Environments: Dev, Test, Prod.
- All changes tested in Dev by Bb Functional Group and Bb Technical Group.
- If approved, promoted to Test for User Acceptance Testing.
- Goes to Change Advisory Board for approval.
- If approved, scheduled for promotion to Prod during regular maintenance window.

- Environments: Dev, Prod. Pre-Spring 2016 Prod
- B2 Updates:
  - Testing in Dev environment.
  - Goes to Change Advisory Board for approval.
  - If approved, scheduled for promotion to Prod during regular maintenance window.
- New B2s:
  - Request (including business justification) submitted through Call Center.
  - Bb Learn Advisory Committee review in Dev.

Institutions will need to revise their processes as appropriate based on the number of environments supported for SIBL. Currently SIBL has only Prod and Test A new combined approval process and workflow will need to be developed.

- If approved, promoted to Prod as above.

**MAINTENANCE WINDOWS**

- No regular scheduled maintenance but on Sunday if needed.
- APB system in Portal.
- Email subscription based alerts.
- Posts on Facebook page.
- Maintenance also posted to automated telephone attendant.

- No regular scheduled maintenance but could be midnight to noon on Sunday.
- Information posted to login page, including the published maintenance calendar.
- Automatic redirect to a maintenance page if the system is down.
- Announcement through Twitter feed.
- Maintenance also posted to automated telephone attendant.

- Regularly scheduled window on Sunday, but only used when necessary.
- Similar processes to UAF, also post on Facebook, send notifications to community campuses and publish the maintenance calendar in the Green and Gold newsletter.

The schools have different maintenance windows and processes. A unified maintenance window will need to be developed and communicated. System could consider the impact on user expectation when a regularly scheduled maintenance window is inconsistently applied. If the

maintenance window is not used more often than not, this creates an expectation in users that the system is likely to be available during the window and could increase the likelihood of user dissatisfaction and support contacts during actual maintenance.

## DATA - REPORTING

- Ad hoc reporting against Blackboard and Portal.
  - Custom built Early Alert System which sends algorithmic of faculty initiated notifications to advisors.
  - Reports are run against Prod to get live data.
  - Ad hoc reporting with some regularly scheduled jobs such as mobile and web login, disc usage, etc. The data is placed into spreadsheets for use.
  - A semester usage report is run 180 days after the start of each semester.
  - Reports are run against Prod to get live data.
  - Google Analytics are used against all three environments.
  - An EasySoft pilot is underway.
  - Instructors may use course reporting.
  - Retention Center is available if faculty choose to use it.
  - Ad hoc reports on:
    - Usage.
    - At the request of specific programs such as eLearning.
    - B2 usage.
    - Mobile usage.
  - Reports are run against Prod for live data.
  - Google Analytics are used against Prod (logins per day, concurrent users, etc.).
  - There is a great deal of interest in Data in the academic community.
  - UAA has Title 3 Grant which will require the implementation of an Academic Analytics program by 2018.
  - No scheduled reporting, but SQL from prior ad hoc requests saved for reuse.
- There is significant opportunity for shared reporting but also a risk based on the common practice of executing against Prod and the need in SIBL to construct queries to access only the relevant instructions' data. A common methodology for development, testing, and deployment of queries should be developed as part of the shared governance of SIBL.

## FACULTY SUPPORT

- Faculty receive an email when course shells are created which contains links to support materials and the faculty development website.
- Faculty contact Help Desk or Instructional designers directly for support.
- Faculty are enrolled in an Instructor Orientation Course in Learn.
- Have a Center for Excellence in Learning and Technology

- Faculty use Call center to request support.
- Training is conducted both as scheduled workshops and on a walk-in basis. Monthly how to and tools usage workshops.
- UAF used to have a faculty training course with recorded workshops and other asynchronous materials.

- Faculty use Call Center for technical support.
- Instructional support:
  - Offer Workshops (typically at the start of the semester) focused on tool usage.
  - Have embedded instructional designers in departments.
  - Have centrally staff instructional designers.
  - Central and Embedded instructional designers have regular meetings but there is still both duplication of effort and

Instructional Designers from across the system used to have joint meetings but this has not happened in at least a year. There is significant opportunity for cross institutional collaboration and greater consistency in how faculty are supported and in the course design process.

	<p style="text-align: right;">divergent practices.</p> <ul style="list-style-type: none"> <li>• UAA has a Title 3 Grant for redesign of high capacity core courses, but otherwise central instructional designers work first come-first served on course review and redesign,</li> <li>• Have a Center Advancing Faculty Excellence</li> </ul>			
<p><b>STUDENT SUPPORT</b></p>	<ul style="list-style-type: none"> <li>• Some webpages for student support.</li> <li>• Individual departments are taking a larger role in student support.</li> </ul>	<ul style="list-style-type: none"> <li>• eLearning group works directly with eLearning students and has a module in all eLearning classes.</li> <li>• Faculty are responsible for ensuring students know how to use their courses.</li> <li>• Support materials are provided on login page.</li> <li>• Blackboard support personnel may attend graduate and undergraduate orientations.</li> </ul>	<ul style="list-style-type: none"> <li>• ELearning group has a 'how to' course for its students.</li> <li>• For all other courses, there are support links in courses and resources available from the login page.</li> <li>• UAA uses Atomic Learning tutorials.</li> <li>• UAA has a non-mandatory New Student Orientation during which there is occasionally a</li> </ul>	<p>There is significant opportunity for cross institutional collaboration and greater consistency in student support which could lead to a more unified student experience.</p>

small window of  
time scheduled to  
cover all  
technology, not just  
Blackboard.

**CALL CENTER  
HOURS**

8-8 M-F  
Some weekend hours

7-9 M-F (during semester)  
10-6 Weekends (during semester)

7-7 M-Sat  
7-7 M-F (Summer Hours)

There is a parallel project to unify the service management tool used by the schools as well as to provide coverage between schools and hot swapping on calls. The impacts of this project on the Blackboard consolidation project should be monitored.

**DATA  
RETENTION**

- Course never removed from system or made unavailable. Business practices, such as Student End of Term Evaluations require access to past terms.
- Courses are retained for 3 years then purged.
- Manual exception process removes course from purge lists as faculty request.
- No review process once a course is placed on the exception list.
- Courses (historically only academic courses but plan to expand to include all courses by creation date) are retained for 3 years then purged.
- Manual exception process removes course from purge lists as faculty request.
- No review process once a course is placed on the exception list.

The system should explore a single process that can support exceptions as needed.

**ACCESS**

- Access is through portal, MuUAS ribbon. that deep links to specific courses for students. As well as direct conventional access.
- Have a custom B2 deployed that allows students at other institutions to access courses in the UAS instance and conversely, allows UAS students to access courses at other institutions.

System should consider if a common approach supports the stated desire for a consistent student experience.

<b>COMMUNITY</b>		<p>Piloted.          Have a Support tab.          Pilot groups could create their own modules.</p>	<p>Plan to provide Help through Community.</p>	<p>System should consider if a common approach supports the stated desire for a consistent student experience.</p>
<b>COURSE LOAD</b>	<p>800 courses per term.          11,000 courses total on system.</p>	<p>3200 course each in Fall and Spring.          45,093 courses total on system</p>	<p>11,000 courses per year (4,000 each in Fall, Spring).          50,000 courses total on system.</p>	

# Consolidation Timeline

## Approach

The approach discussed calls for a course based migration from each of the existing 4 production instances of Learn to SIBL

- [System Preparation and Content Migration Phase – Now through October 31, 2016](#)
- [Spring 2017 Course Building – October 31, 2016 through January 9, 2017](#)
- [Live Course Migration – December 29, 2016 through January 6, 2017](#)
- [Production Phase – January 9, 2017 onward.](#)

## Key Dates

August 29, 2016 – First day of Fall classes.

October 31, 2016 – Course schedule published for students to view at UAS.

October 31, 2016 – Content needs to be available for building courses for Spring 2017 courses.

November 14, 2016 – Spring registration begins.

December 10, 2016 – Last day of Fall classes.

December 12, 2016 – Exam session.

December 21, 2016 – Faculty have access to courses until this date for Fall grading.

January 9, 2017 UAA Nursing Spring semester starts.

January 17, 2017 - First day of Spring classes (other than UAA Nursing).

## Details

- **System Preparation and Content Migration Phase – Now through October 31, 2016**

During this phase they setup and configuration of SIBL, including all integrations, needs to be completed, all Shared Governance rules and processes need to be finalized, the migration process needs to be tested and finalized, communications and support plans need to be finalized, and all content needed for Spring 2017 courses to be created must be migrated successfully to SIBL

- [SIS framework review \(Joe, Brandon, Mark, Tim Grady \(Bb\)\).](#)
- [Grades Journey review and potential development and testing.](#)
- [Sizing and Load Testing.](#)
- [Test of basic system functionality by institutions \('Smoke Test'\):](#)
  - [Develop Procedures and Expectations for those doing the testing](#)
  - [Perform Smoke Test](#)
  - [Review results](#)
  - [React to findings](#)
- [B2 Testing and Licensing Resolution.](#)
- [Determine which courses will be migrated prior to October 31, which courses can be migrated between November 1 and December 29, and which courses can be migrated after go live. The goal is to have the smallest possible number of courses to migrate during the 'live' migration:](#)

- Prior to October 31 – courses and course shells required to be in place in SIBL in order for Spring 2017 courses to be built beginning October 31. High-end estimated to be 110,000 courses (assumes all courses in the system prior to Fall 2016 will be needed in SIBL on October 31).
- November 1 through December 29 – any courses or course shells which are not required to be in SIBL by October 31, but which will be required at time of Go Live in January 2017. These could be organizations or other non-academic courses. A development freeze would need to be imposed while these courses are being migrated.
- December 29 through January 6 – courses which must be migrated 'live', that is, course which will have user activity in the target systems on December 28<sup>th</sup> which must be reflected in SIBL on January 6<sup>th</sup>. This would include yearlong eLearning course and any other non-term based courses. High-end estimated to be 2,000 courses.
- Post January 2017 – courses from Fall 2016 which need to be migrated to SIBL for archival purposes. High-end estimated to be about 8,500 courses.
- Test migration to establish timing for full migration:
  - Four Aspects to be tested for timing:
    - Backup of courses in 4 source systems.
    - Movement of backups to SIBL for restoration. (Either over WAN or shipment of physical media.
    - Restoration of courses in SIBL.
  - Determine courses for migration test.
  - Determine Procedures and expectations for migration test.
  - Conduct Migration test.
  - React to migration test results.
- Migration of Content including Course ID standardization:
  - Branding is based on Course ID
  - Different course ID naming convention for each school
  - Going forward course IDs are unified
  - Process for updating Course IDs has already been developed
- Testing of representative migrated courses:
  - Determine courses for final migration test.
  - Determine Procedures and expectations for final migration test.
  - Conduct final migration test.
  - React to final migration test results.
- Development of all aspects of Shared Governance.
- Resolution of Collaborate links and recordings for migrated courses.
- Institutional Hierarchy finalization.
- Primary Institution Indicator finalization.

## **Spring 2017 Course Building – October 3, 2016 through January 9, 2017**

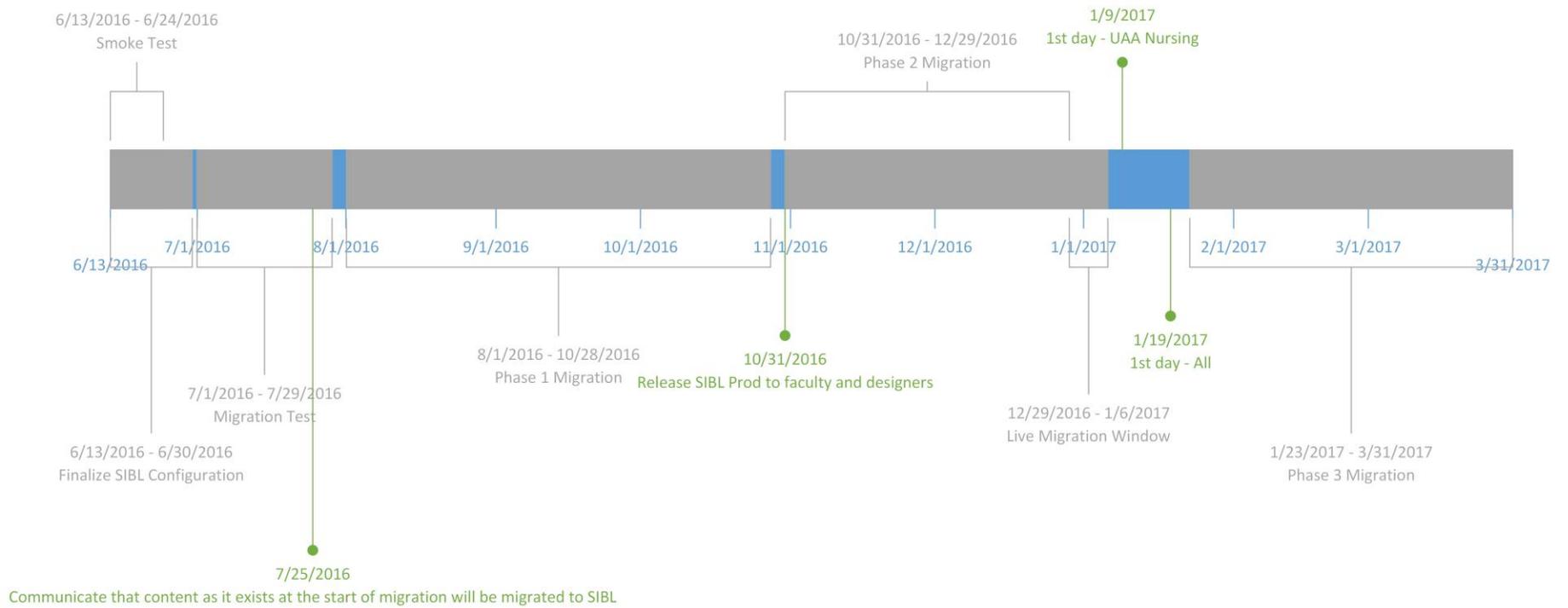
During this phase, students, faculty and instructional designers will build out Spring 2017 courses in SIBL, student support materials and protocols should be finalized, and go live communications carried out.

## **Live Course Migration – December 30, 2016 through January 6, 2017**

During this phase, non-term based courses which could not be migrated earlier or later will be migrated to SIBL.

## **Production – January 9, 2017 onward.**

During this phase, any remaining courses, including Fall 2016 courses and any other course which did not have to be migrated prior to go live will be migrated and source systems will be decommissioned.



## Work streams and activities identified:

### System and Integrations

- SIS framework review (Joe, Brandon, Mark, Tim Grady (Bb))
- Grades Journey.
- Sizing and Load testing
- Service Levels
- Maintenance schedule
- Bring all system to the same release of Learn

### Internal marketing (communication) (Dave, Martha, Pat Michael, Karl)

- What to communicate, to whom, when and how
- Process, timing change, expectations, marketing

### Shared Governance (Tom, Adam, Mona)

- Settings Governance
- Roles Governance
- Hierarchy Governance
- Primary Institutional identification
- Communities/Branding
- Retention policy and processes
- B2 Governance (Dave, Karl, Tom):
  - Collaborate (Kyle (Bb), Amy, Naomi, Mona):
    - System is licensed for a single instance of Collaborate.
    - Collaborate will need to be configured with each institution as a separate Admin Group and B2 configured in accordance with the finalized institutional hierarchy.
  - License resolution where necessary
  - Testing
  - Add/change/delete approval process
  - System Access Governance (Joe, Adam, Mona)

### External Influences

- Report out progress of concurrent project with potential impacts on this effort to team including the email project and the helpdesk consolidation project.

### Test migration

- Four Aspects to be tested for timing:
  - Backup of courses in 4 source systems.
  - Movement of backups to SIBL for restoration. (Either over WAN or shipment of physical media.
  - Restoration of courses in SIBL.
- Determine courses for migration test.
- Determine Procedures and expectations for migration test.
- Conduct Migration test.
- React to migration test results.

## Risks and Mitigation

## **Risk: Sufficient content not able to be migrated by October 31<sup>st</sup>**

### Mitigation strategies:

- Conduct robust timing test as soon as possible.
- Prioritize courses to be migrated – 110,000 courses should not be required to perform course copies for 8,500 Spring courses:
  - Processes currently do not exist to get faculty to pre-identify what content they intend to use when the build out their course and the belief expressed by members of the team was that there would not be a significant response to any attempts to garner this information.
  - If no consolidation were occurring, UAA faculty would only be able to perform course copies from the Post Spring 2016 system; content from older courses would have to be manually brought over. This could justify only migrating the courses on the Post Spring 2016 system to SIBL by October 21. This would theoretically reduce the number of course to be migrated by approximately 40,000 (based on the stated value of approximately 4000 course in Spring term).
  - Migrate only 1 year of courses to SIBL prior to October 31<sup>st</sup> based on the speculation that most course copies are drawn from courses taught within the previous 3 terms.
- Other concerns expressed (UAS):
  1. Production system not ready for user login on time:
    - a. Discussed as part of this was the desire of UAS to have users accessing SIBL as early as August despite the official go live date not being until January 2017.
  2. Primary Affiliations not correct
  3. Unable to implement UAS policies reliably
  4. Institutional data attributes not correct in SIBL
  5. Need to retain UAS courses indefinitely

## **Suggested Services**

1. Technical consulting with Blackboard and OIT team (ongoing)
2. Performance testing on new system (scheduled with OIT team)
3. Collaborate Ultra Training Series (to be scheduled with Toni for support staff)
4. Grades Journey (discussion with Bb Sales at the request of OIT staff)
5. Technical assistance/mentoring (with OIT staff during migrations)
6. Blackboard Predict (given interest in predictive analytics for the system schools) – Licensing Required
7. Post Implementation consulting at each school (onsite or remote)