

Project Charter

Single Instance of Blackboard Learn

Contents

- Project Summary3
- Scope3
 - In Scope3
 - Out of Scope4
 - Goals and Objectives4
 - Deliverables and Milestones5
- Cost / Resources6
 - Project Leadership6
 - Project Team- Ongoing Use and Maintenance Roles6
 - Budget8
- Quality9
 - Flexibility Matrix9
 - Risks, Constraints, Assumptions9
 - RACI Matrix for Project Success10
- Schedule- SIBL Timeline.....11
- Communication Matrix.....12
- Support Matrix Rights & Access13

Project Summary

The University of Alaska System (UA) is embarking on an initiative to combine four Learning Management Systems (LMS) into a single, consolidated instance. Once consolidated, the new, single instance will be accessible via one URL so that UA students and faculty throughout the system have one place to login with their UA credentials. The technical consolidation of each instance is the first step in bringing about future, system-wide improvements to the student and faculty experience as well as saving money on licensing, hardware and the consolidation of processes throughout UA.

Primary drivers for this project are twofold; reduction of annual license fees and consolidation of UA technical and business processes. Currently, UA pays an annual license fee for three separate LMS, but after consolidation, UA will pay for one license annually. UA also employs three separate support processes and operational procedures. Initial, significant, up-front costs will be offset because the University of Alaska will be technically set up to streamline processes and procedures in the future, improving Blackboard, system-wide, for students and faculty. Additional operational efficiencies are based on an expectation of fewer ongoing support costs. The benefit to students outweighs the investment.

Scope

In Scope

The single instance of Blackboard Learn project will introduce both technical and process changes to the LMS at each campus. This project will require each campus to work together when a decision impacts another school, making process changes, for one or multiple schools inevitable. Technical changes will also be necessary to consolidate three separate instances into one LMS. Examples of both process and technical changes that are in scope consist of:

- There will be a single URL for students and faculty to login at with their UA credentials. Once logged in, multiple campus tabs, depending on a faculty or student's affiliation, will be available for campus notifications. Access for non-UA members will also be provided.
- A single set of hardware will be required to support the single instance instead of three.
- The single instance must be able to handle the increased level of traffic because UA students and faculty will now work on one system, instead of three. Load testing will need to be performed.
- Each campus will reconfigure their portion of the consolidated instance to function in the way that works best for them.
- When applicable, consolidation of campus building block vendor licenses will be required in a single instance.
- An expanded, system-wide data feed is necessary to condense three campus feeds into one. New data fields will also determine primary and secondary campus affiliation.
- Currently, the University of Alaska Fairbanks (UAF) and the University of Alaska Southeast (UAS) each maintain one LMS instance. The University of Alaska Anchorage (UAA) however, maintains two instances, one for production and one as an archive LMS environment. Due to the complexities surrounding UAA's environment, prior to go-live on 1/9/17, they will transfer content from spring and summer semester 2016, only. Whether or not to transfer content from UAA's archive environment will be decided on at some point after go-live.
- Each campus is responsible for their student and faculty communication. The Office of Information Technology (OIT) is responsible for maintaining a project website sharing critical project documents, FAQs and weekly updates.
- Changes to Blackboard Collaborate are not anticipated because the Blackboard Collaborate Ultra provides functionality for each campus to use either the classic or new Ultra experience. Impacts to each campus will be minimized and a decision regarding the architecture of Blackboard Collaborate is in scope.

- A new tool called, Community, will allow each campus the ability to keep their portion of the LMS separate from another campus. Training on the use of the tool, Community, will be provided to those trainers throughout the system providing user support at the campus level.
- Each campus will identify and involve their own campus focused, pre-selected testing group.
- Governance of required access and associated policies will need to be developed.
- Governance of administrative functions, such as roles, hierarchy, institutional identification, branding and user involvement will need to be developed.
- Installation and configuration of a single mobile account will be used for the UA system instead of three separate mobile accounts.
- Due to the time available over winter break, otherwise known as the live migration window, yearlong eLearning courses, non-term based courses and incomplete courses are likely the only courses that there will be enough time to transfer during this time period.
- The single instance will be production ready by 1/9/16, when the UAA nursing program begins spring semester 2017.

Out of Scope

Due to the fact that change can only happen so fast, additional tasks, processes and agreements will need to be worked out in future phases of this project. If time permits, the below changes may be addressed but this is unlikely, at this time. Changes that are not intended to be introduced as part of the Single Instance of Blackboard Learn project are below:

- Cost sharing and/or cost distribution is out of scope for this project charter. CIOs and other UA leaders will make a decision about this at a later time, yet to be determined.
- Changes to the way each campus handles training is out of scope for this project.
- Changes to course retention policies will not occur prior to go-live and are out of scope for this project.
- Changes to the way each campus handles their Change Management process is out of scope for this project.
- Changes to the way each campus provides support to their users via their Support Center is out of scope for this project.
- Changes to current campus governance structures are out of scope for this project.
- Changes to the way community campuses are supported are out of scope for this project.
- Campus user interfaces will be preserved, when technically feasible, making unified changes to the user interface out of scope for this project, unless agreed to by each campus or necessary due to technical constraints.
- Streamlining the student and/or faculty experience, without a user governance process or a system-wide training process incorporating faculty's feedback, is out of scope for this project.
- UAS will continue to access the single instance through their portal or from UAS campus websites. No changes will be made to this process as a result of this project.

Goals and Objectives

The goal of the Single Instance of Blackboard Learn project is to technically consolidate UA's three separate LMS onto one instance. Additional goals and how they will be achieved are below:

- Goal # 1- Consolidate disparate, campus LMS instances into one, single LMS instance.
 - Objective # 1- Implement infrastructure, software and process changes across the system.
- Goal # 2- Simplify the user experience by providing one place for students and faculty to login.
 - Objective # 2- One URL will be configured for login.
- Goal # 3- Improve the student and faculty experience.

- Objective # 3- Consolidate the back-end infrastructure so that improvements made by one campus are easily shared with another campus bringing about system-wide improvements for students and faculty.
- Goal # 4- Process Improvements.
 - Objective # 4- Leverage the combined system to identify a more streamlined approach to service provision.
- Goal # 5- Reduce annual licensing costs for Blackboard.
 - Objective # 5- One license fee will be paid annually, instead of three.
 - Objective #5.1- Archive licenses for UAS and UAF will be paid for one year beyond go-live and no more. Archive licensing for UAA will be either minimized, if the need to maintain a separate archive environment persists, or historical data will be transferred before June of 2017.
- Goal # 6- Reduce 3rd party vendor licenses required for building blocks through economies of scale.
 - Objective # 6- In situations where multiple campuses use the same, billable, third party building block, one license will need to be paid for annually.
- Goal # 7- Reduce hardware costs.
 - Objective # 7- Consolidate onto one set of hardware.
- Goal # 8- Leverage personnel time and effort.
 - Objective # 8- Staff at UAA and UAS will not be required to provide database administration and system administration, resulting in a decrease of Blackboard Learn technical administrative staff, overall. OIT currently provides these services for UAF so the same OIT departments will now provide database and system admin support, but for each campus instead of UAF only.

Deliverables and Milestones

Technical deliverables and/or milestones resulting from consolidation onto one LMS instance:

- Infrastructure build
- Single URL
- Load testing
- System configuration
- Data migration of historical content
- SIS integration, to include expanded system-wide data feed necessary to define primary and secondary campus affiliation
- Campus configuration
- Defined architecture for use of Blackboard Collaborate
- Training for campus support representatives, as needed
- Testing performed by pre-selected user groups at each campus
- Release of the single instance for spring 2017 course design
- Building block cutovers during live migration window
- Live Migration Window of yearlong eLearning courses, non-term based courses and incompletes over winter break
- Single mobile account
- Production ready system by 1/9/17

Process deliverables resulting from consolidation onto one LMS instance:

- Design of a building block governance process to make decisions about vendor licenses and global setting, both initially and ongoing
- Internal marketing and communication targeting administrators, faculty and students to ensure they are kept up to date.

- Process defined for governance of system access, to include notification to campus Change Advisory Boards.
- Agreement of the architecture for Collaborate (single login or multiple) to include licensing, reporting, transitioning to Ultra on a course by course basis, how recording will be addressed and the approach for combined training opportunities.
- Process defined for governance of administrative decisions such as roles, hierarchy, institutional identification, branding, primary institution, and others as needed.

Cost / Resources

Project Leadership

Role <i>(See Appx. A for role definitions.)</i>	Names and titles	Interest
Project Sponsor(s)	<ol style="list-style-type: none"> 1. Martha Mason, UAF CIO / Executive Director for OIT User Services 2. Michael Ciri, UAS CIO / Vice Chancellor for Administration 3. Pat Shier, UAA CIO / Associate Vice Chancellor 4. Dave Dannenberg, Director of Academic Innovations & eLearning 	<ol style="list-style-type: none"> 1. Accountable for UAF's LMS 2. Accountable for UAS' LMS 3. Accountable for UAA's LMS
Project Champion(s)	Karl Kowalski, Chief Information Technology Officer	Represents the project to senior management and is accountable for consolidation of campus LMS's into a single LMS
Functional Project Owner(s)	<ol style="list-style-type: none"> 1. Dave Dannenberg, Director of Academic Innovations & eLearning 2. Mona Mametsuka, UAS Information Systems Manager 3. Tom Langdon, UAF Customer Support Services Manager 	<ol style="list-style-type: none"> 1. Responsible for the functionality of UAA's end product 2. Responsible for the functionality of UAS's end product 3. Responsible for the functionality of UAF's end product
Project Manager	Toni Abbey	Leads the team responsible for achieving the project's objectives

Project Team- Ongoing Use and Maintenance Roles

Role <i>(See Appx. A for role definitions.)</i>	Name and title	Purpose
--	-----------------------	----------------

System Level Application Administrators	OIT System Engineering	Maintains the LMS application at the system level
System Administrators	OIT Technical Service Operating Systems	Maintains the hardware supporting the LMS application
Database Administrators from OIT Technical Service Database Administration	OIT Technical Service Database Administration	Maintains the LMS database
Campus Administrators / Functional Owners	<p>UAA-</p> <ol style="list-style-type: none"> 1. Adam Paulick, Director for Infrastructure Services 2. Brandon Wood, Lead Web / Applications Engineer 3. Dave Dannenberg, Director of Academic Innovations & eLearning 4. Amy Ross, Academic Technologist <p>UAF-</p> <ol style="list-style-type: none"> 5. Travis Payton, System's Engineer 6. Naomi Hagelund, Technology Trainer & Instructional Program Consultant 7. Jo Knox, System's Engineer 8. Walker Wheeler, OIT System's Engineer 9. Phil Jacobs, OIT System's Engineer <p>UAS-</p> <ol style="list-style-type: none"> 10. Mona Mametsuka, Information Systems Manager 11. Mark Hopson, Programmer / Analyst 12. Michael Ciri, CIO / Vice Chancellor for Administration 13. Keoki Nardin, Systems Analyst 	<p>UAA 1-4. Configures, tests and maintains UAA's portion of the single instance LMS</p> <p>UAF 5-9. Configures, tests and maintains UAF's portion of the single instance LMS</p> <p>UAS 10-13. Configures, tests and maintains UAS's portion of the single instance LMS</p>

Budget

Cost Comparison of Three Instances Verses One					
	FY16	FY17	FY18	FY19	FY17 – FY19 Total
Cost of 3 Instances Overtime	\$383,166.85	\$399,909.00	\$419,904.00	\$440,900.00	\$1,260,713.00
Cost of a Single Instance Overtime Including Archive Environments for FY18	X	\$371,227.00	\$205,000.00	\$263,932	\$840,159.00
Savings	X	\$28,682	\$214,904.00	\$176,968.00	\$420,554.00

Cost Breakdown of the Single Instance for FY17 (Year 1)		
License costs to run 3 separate instances for fall semester 2016	7/1/16 - 12/31/16	\$99,977.00
License cost of the single instance (1 st year of use)	7/1/16 - 6/30/17	\$121,250.00
Professional services provided by Blackboard to guide UA in the consolidation project	6/7/16 – 12/29/16	\$150,000.00
Total cost of the project for the first year	6/7/16 – 6/30/17	\$371,227.00

Professional Services:

- OIT paid for the \$150,000.00 in professional services provided by Blackboard to complete the consolidation project.
- OIT historically pays \$90,000.00 per year towards UA’s LMS and this contribution will continue into the future. For FY17, however, OIT is contributing \$99,977.00 to cover the cost of the three separate licenses that are required to maintain while building the single instance.

Quality

Flexibility Matrix

	Least Adjustable	Moderately Adjustable	Most Adjustable	Discussion
Scope		√	√	As long as each campus consolidates to a single instance, scope based deliverables are moderately adjustable
Schedule	√			The team must make the go-live date of 1/9/17 because this date has already been pushed back from 8/29/16
Budget			√	Should unforeseen, unavoidable expenses arise blocking the success of the project, these expenses will be addressed

Risks, Constraints, Assumptions

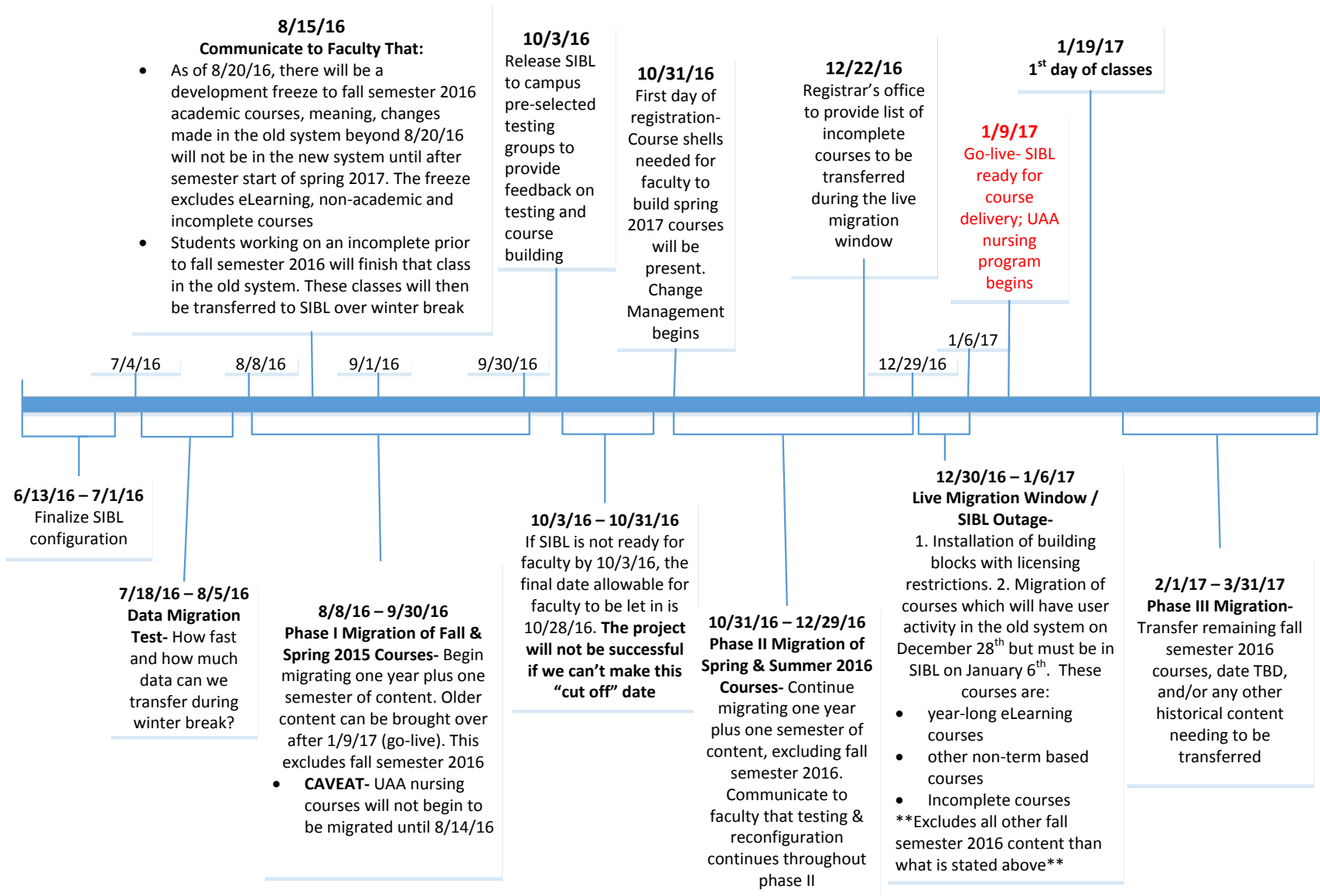
<u>Risk/Constraint/ Assumption</u>	<u>Item</u>
Constraint	The team is constrained by the project's timeline, requiring consolidation onto a single instance to occur by go-live, 1/9/17.
Assumption	The team will come to agreement in a timely manner when decisions need to be made. If escalation is necessary, the CMT will make the decision for the team in a timely manner.
Assumption	Those in charge of communicating to students and faculty will draft necessary communication and execute it at appropriate times throughout the project, based on the timeline within this document.
Assumption	Campus pre-selected testing groups will provide feedback on testing and course building during the time allotted to do so, between 10/3/16 and 10/31/16.
Constraint	The single instance must be ready for faculty and students to begin accessing spring classes no later than 10/31/16, the first day of registration.
Assumption	Campus Registrar offices are able to provide an accurate list of active, incomplete courses by 12/22/16, so they can be transferred to the single instance over winter break.
Constraint	Phase II of the data migration will be constrained by an active change management process because faculty will now be in the single instance preparing for spring semester 2017.
Assumption	Winter break, or the live migration window, from 12/29/16 – 1/6/17, is enough time to migrate yearlong eLearning courses, non-term based courses and active incomplete courses.

Assumption	Technical staff required to migrate content over winter break will not be on vacation, be approved for working over the hard closure and all necessary resources will be available to complete the live migration window, successfully.
Risk	Content will be migrated with minimal impact to production LMS services.
Risk	Other than UAA's archive environment, all historical content will be able to be migrated by 6/30/17 to the single instance, to avoid paying additional fees to license archive environments.

RACI Matrix for Project Success

Roles	Responsible	Accountable	Consulted	Informed
Project Sponsors			√	√
Project Champion		√		
Functional Project Owners	√			

Schedule- SIBL Timeline



Communication Matrix

SIBL Communication RACI Matrix																
Type of Communication & Frequency		UAA				UAF				UAS			System		Project	
Communication	Frequency	UAA CIO	UAA ITS	UAA eLearning	UAA Support Center	UAF CIO	UAF User Support	UAF eLearning	UAF Support Center	UAS CIO	UAS IT	UAS Support Center	CMT	CITO	Project Manager	Project Team
Administrator / Faculty / Student Updates	Weekly or As Needed	C	C	A/R	I	A	C	C/I	R	A/R	C	C	x	x	R	C/I
Presidential Updates (by COB Thursday or Friday)	Weekly	I	I	I	x	I	I	I	x	I	I	x	C	A/R	R	C/I
Provost Updates (by COB Thursday or Friday)	Weekly	C/R	I	A/R	x	A/R	I	I	x	A/R	I	x	I	C/I	R	C/I
Chancellor Updates (by COB Thursday or Friday)	Weekly	C/R	I	A/R	x	A/R	I	I	x	A/R	I	x	I	C/I	R	C/I
Weekly Project Team Updates (by COB Thursday or Friday)	Weekly	x	x	x	x	x	x	x	x	A	R	I	x	A	R	C/I
Campus Social Media Announcements	As Needed	x	x	A/C/R	R/I	x	C	C	A/R	x	C	A/R	x	x	x	x

Support Matrix Rights & Access

UA LMS Rights / Access by Technology Group						
	Rights/Permission	UAF	UAA	UAS	OIT	Notes
1	Read only database	X	X	X	X	
2	Read/Write database	LMS Admin Team	LMS Admin Team	LMS Admin Team	X	The change management process will define how a Change Implementer writes to the DB for 1. Blackboard suggested changes. 2. Make changes retroactively to courses or for the deployment of something new
3	Server admin			LMS Admin Team	X	The change management process will define how a select few at UAS and OIT will be provided read/write access to the server. UAF and UAA will initially rely on OIT and if a bottleneck is created, UAF and UAA will also be provided read/write access.
4	Behind the Blackboard	X	X	X	X	Ticket logging is able to be done at the campus level
5	BB administrator - overall	LMS Admin Team	LMS Admin Team	LMS Admin Team	X	Users that have full GUI admin privileges at each campus as well as those who possess read/write access to the DB
6	BB Course / User Admin - overall	Regular Support Staff	Regular Support Staff	Regular Support Staff		Regular support staff (ITS, Service Desk)
7	BB administrator - within community	Departmental Support Staff	Departmental Support Staff	Departmental Support Staff		Other regular support staff (eLearning) have limited rights. Tab administration etc.
8	Banner Sync			X	X	SIS Integration- OIT will support this process with input from UAA and UAS via the change management process
						**LMS Admin Team- This is a select few from each campus that has system administrator rights and access. The LMS Admin team will develop and adhere to the system governance process put in place as part of this project.