



Sakai Project Charter

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Introduction

This Project Charter serves as a high level guide to the key components of the Sakai Learning Management System (LMS) Project: the Executive Steering Committee, the Project Management Team, the Functional and Technical Project Teams and the staff who serve on the teams. It defines the entire Sakai project as a single team focused collaboratively on a common goal. And it provides a framework designed to insure the success of the project participants as they execute the Project Plan.

Project Genesis

The decision to move to Sakai was driven by Blackboard's announced intent to discontinue full support of WebCT4.1. Other critical factors were the age of the WebCT software, the lack of function and the purchase of WebCT by Blackboard, which led to a reduced and unacceptable level of support for WebCT.

Vision Statement

The University of Delaware wishes to create an integrated, functionally rich learning management system that is robust and responsive to the teaching and learning environment and that provides students, faculty and staff with excellent course management tools and assessment capability.

General Objectives

- Implement the system to meet or exceed the standards and expectations of the University of Delaware user community wherever possible.
- Implement the system in a way that preserves University 'best practices' and seek opportunities to adopt others, particularly those delivered with the new system.
- Proactively engage with the open source community to enhance the product and influence its future directions.
- Provide assessment capability.
- Provide extensive and intensive training and support for all levels of Sakai users to insure that they are prepared to use the new course management and learning system by the fall semester, 2009.

Scope

The scope of the project includes replacing the current learning management system by defining and implementing an appropriate toolset for the University of Delaware. The University has chosen Sakai, the open source learning management system, as the toolset and framework. The integration of data from the Library and UDSIS systems into the new Sakai are important technical components of the project. A faculty migration path, requirements analysis, toolset development, extensive training, communications and ongoing support are also included.

Library Integration

Initially Library integration will provide context-specific, library-hosted content within Sakai and will deliver course reserves lists and links to library technical resources to course worksites. In later phases of the project, the placement of Sakai on a user's MyWorkspace site will render the

user's current library resource checkout list. Access to library catalog search and various read/write services from within Sakai may be added in subsequent phases.

UDSIS Integration

UDSIS course and roster data will be delivered to Sakai via implementation of a software layer which will transform UDSIS data feeds into entities defined by the Sakai API (Application Program Interface).

A second phase of UDSIS integration will include the ability to deliver grades from the Sakai gradebook directly to UDSIS.

Project Implementation Strategy

Sakai provides a framework in which to assemble a group of learning tools that have been created by the Sakai open source community. The community works collaboratively to deliver new functionality and new tools to the community. The status of tools ranges from "core" to "contributed" tools as follows:

- **Core Tools** - Core/Supported components of Sakai that are in use by almost every single Sakai implementation, and with which the community has extensive experience and expertise.
- **Provisional Tools** - Components that are in use at multiple Sakai partners, and with which the community has a moderate level of experience and expertise.
- **Contributed Tools** - Contributed components are early in development, deployed at a limited number of sites, and with which the community is still becoming familiar.

The implementation strategy for this project is to apply the learning management system software in a way that provides as much parity as possible with MyCourses (WebCT 4.1) using "core" tools while offering new and enhanced functionality from the core tools portfolio. For functionality that is required, but not available through the offered toolset, Sakai project teams will develop and propose alternative methods, subject to the approval of the Sakai Project Management Team.

There are several implementation initiatives that will be undertaken:

- Select the best core tools from the Sakai community (this work is already done but could be reviewed for buy-in and possible tweaking)
- Prepare a gap analysis to specify any additional requirements for parity with WebCT 4.1
- Prepare a list of enhancements over WebCT 4.1
- Specify the requirements for best practices in teaching and learning using a course management system.
- Investigate whether additional needed functionality is in provisional or contributed tools and adopt as necessary.
- Identify Sakai requirements, develop associated costs/effort and establish functional priorities.
- Define how the University of Delaware will participate with the Sakai user group to collaboratively develop tools and fixes that meet University requirements.

Sakai Project Initiation and Planning

The purpose of the project initiation and planning effort is to develop the project timeline, to define the management structure under which this project will operate and to put forth the expectations of project management, project team leaders and all project team members. The following represent the specific planning goals:

- Definition of project scope
- Validation of project strategy
- Confirmation of roles and responsibilities of the project team members and consultants
- Evaluation and recommendation of project resources
- The high-level project plan
- The Project Charter
- A project timeline with milestones and estimates of time required for each step

Requirements Analysis

The Requirements Analysis and Migration Team (membership shown in this document under Sakai Technical and Functional Project Teams) will focus on the following areas for requirements analysis:

1. Review the UD course type for permissions, roles, and configurations
2. Participate in gap analysis sessions where each of the six areas (collaboration, communication, testing and quizzing, gradebook and roster, assignments, delivering content, page layout, multimedia, and assessment) will be demonstrated.
3. Create a list of requirements to reach parity.
4. Participate in evaluating current Sakai functionality against best practices and creating a requirements list for development within the Sakai community.
5. Develop the costs/effort associated with implementing Sakai requirements.

Results of requirements analysis will be presented to the full Learning Management System (LMS) Committee to set implementation priorities.

The proposed implementation priorities are subject to the final approval of the Project Steering Committee.

Migration Plan

The Requirements Analysis and Migration team will address faculty migration to Sakai as follows:

- Develop timelines sequencing and dependencies for migration and adoption.
- Identify migrating faculty by tool usage or other criteria.
- Categorize as to level of assistance needed such as self-help and need for assistance. Identify tool needed and time to migrate.
- Build templates.
- Build sample course for faculty to experiment.
- Build sample course for conversion testing.
- Identify programming scripts and tweaking needed. (glossary, quizzes, content modules)
- Perform gap analysis

Campus Communications Plan

The overall objective of the communications plan is to provide appropriate information in a meaningful, timely and accurate fashion to all levels of the University community regarding the status, capabilities and impact of the new learning management system project. In particular, the recommended communications plan will:

- Create an identity for the project that will continually affirm the commitment of the Executive Sponsors, generate confidence from the University community regarding its successful implementation, and provide continual encouragement to project team members.
- Generate interest throughout the University at notable points in the development and implementation of the new learning management system. This will help to keep the project in the forefront of University activities and provide recognition to project team members as milestones are met.
- Ensure the Campus community understands that this is a long-term, complex project, and that the University remains committed to its high level of customer service to our faculty and students.
- Stress the need for everyone's participation and provide a means of communication that encourages feedback and input from all members of the University.
- Ensure the participation/involvement of the end users—faculty and students—who will actually be using the systems throughout all of the design and implementation phases.
- Stress the overall benefits of the new learning management system for the entire University community and, as appropriate, any particular benefits or new functionality that will enhance teaching and learning and feedback mechanisms.
- Help to disseminate information regarding all necessary preparations for implementation at the departmental level, including training, disruptions, etc.
- Create a “UD look and feel” and select a name.

Campus Communications Methods

- Articles in UDaily will be utilized regularly to supplement and reinforce the dissemination of information. This is especially important for the reinforcement of announcements relating to the completion of milestones and upcoming implementation dates and will help to keep the project in the forefront of University activities.
- A series of presentations will be made to various groups of constituents over the course of this project to familiarize the University Community with the project and to keep them informed.
- A campus website <http://www.udel.edu/udlms> has been developed for communication and training particularly targeted to faculty
- This campus web site will be advertised for short periods on the University's home page. The web site address will be included in all notices and advertisements relating to the project.

Internal Project Communications Methods

A web site will be maintained and updated regularly with relevant project information:

- The Sakai project collaborative web site is for the project team to share files, record team minutes, issues, decisions, etc. It will provide for easy feedback to the project team and serve as an archive for project documents. (This site already exists and is in use.)

Training Objectives

In order to provide appropriate training for our diverse faculty on the new software, we will develop and implement training targeted to the variety of faculty needs based on their departments, tool usage, and preferred learning methods. We will identify support staff such as CITA's and graduate students, and develop a "train the trainer" methodology for them. Moving to a new learning management system also provides an opportunity to help faculty redesign their courses to make them more effective, and we will develop a strategy that provides this component.

This strategy:

- Survey faculty to identify their tool usage, preferred learning methods, and departments.
- Identify available support staff.
- Build a group of knowledgeable staff and faculty on campus that can leverage IT support efforts.
- Provide extra training for the LMS committee to prepare them to be ambassadors for the migration.
- Present departmental-level training to engage whole departments in a way that can lead to peer support.
- Maximize the number of faculty engaged.
- Model effective teaching strategies both online and in person.
- Provide individual consultations for faculty who request them.

Training Methods

Training will be offered to the project team, faculty, department graduate students, other end-users, and support staff. It will be both online and face-to-face. Training will be offered to targeted departments, to groups identified by tool usage, and publicly through the User Education Calendar.

Project Team:

- Project team members will attend Sakai training classes where appropriate and test the online training.
- Faculty and graduate students will be included where appropriate in analysis as part of their initial training.
- Faculty will also be encouraged to help other faculty adopt new teaching and learning tools.

Faculty and Graduate Students:

- Several on-line demo training courses will be made: at least one for hands-on training, one for self-paced, as well as practice courses (no real students) upon request.

- The documentation and training team will analyze training needs and current delivery mechanism and will provide job aids, online movies, podcasts, and self-quizzes where appropriate.
- Include faculty, graduate students and other staff in project teams and training where appropriate to assist with campus acceptance of Sakai.
- The project's training team will be responsible for developing curriculum and training materials for end users, and will be providing training to faculty for the new learning management system.
- The project's documentation team will be responsible for updating and creating Help pages, aids and scripts where necessary.

Front Line Support

IT User Services will train both the IT Help Desk and PRESENT graduate students so that they can act as the front line in handling routine questions about access and using basic features. The students and Help Desk will route non-basic questions to the Sakai experts in User Services. User Services will provide FAQ's and online training to assist in this effort.

Sakai Project Organization

The project uses a team approach, with a steering committee providing oversight. Teams include a representative group of stakeholders. The teams are committed to working collaboratively to successfully complete this project on time and on budget.

Sakai Project Steering Committee

- Dan Rich, Provost
- Havidan Rodriguez, Associate Provost
- Scott Douglass, Executive Vice President and Treasurer
- Susan Foster, Vice President, Information Technologies
- Bobby Gempesaw, Dean, Lerner College of Business and Economics
- James Broomall, Assistant Provost, Professional and Continuing Studies

Steering committee responsibilities include:

- Ensure institutional commitment
- Make or approve all decisions that may change the project scope, timeline, cost or complexity, including system customizations, modifications, and a new tool development
- Remove any obstacles to meeting critical success factors
- Address other recommendations from the Sakai Project Management Team as needed.
- Make policy decisions
- Ensure that the project has appropriate resources

Sakai Project Management Team

- Carl Jacobson, Director, IT-Management Information Services, Project Co-Director
- Leila Lyons, Director, IT-User Services, Project Co-Director
- Dan Grim, Director IT-Network and System Services, Project Co-Director

The project management team is responsible for project timeline, deliverables, budget, and spending, as well as day-to-day operations and overall implementation of the project. The project management team ensures that critical issues are identified and resolved, that components of the project are delivered in accordance with the project budget and schedule, and that all aspects of the project are appropriately coordinated. The project management reports to the Steering Committee.

Responsibilities:

- Maintain accountability for quality and timelines of deliverables across all project teams.
- Ensure that the project teams are staffed and organized appropriately.
- Document work plan and approach.
- Obtain equipment, office space and meeting facilities.
- Manage project scope, budget and staffing.
- Serve as first level of escalation for issues that cannot be resolved at the project team level.
- Escalate appropriate matters to the Steering Committee.
- Report on a regular basis to the Steering Committee.

Sakai Functional Project Teams

Responsibilities of these teams include:

- Participate in product review process where required
- Identify reporting requirements and participate in development
- Insure accessibility of data by participating in the development of security schema
- Participate in the development, testing and delivery of training material
- Participate in documentation efforts
- Ensure user satisfaction through implementation of feedback mechanisms
- Participate in providing timely feedback within the agreed upon mechanisms.
- Ensure that staff have the appropriate skill level and level of engagement with the Sakai community to resolve issues.

Training Team

- Janet de Vry – Lead
- Karen Kral
- Ann Amsler
- Nancy O’Laughlin
- Matt Plourde
- Kathy Beardsley

Documentation Team

- Janet de Vry - Lead
- Ann Amsler
- John Hall
- Karen Kral
- Matt Plourde
- Nancy O'Laughlin

Requirements Analysis and Migration Team

- Janet de Vry – Team Lead
- Nancy O'Laughlin
- Matt Plourde
- John Hall
- Karen Kral
- Becky Kinney

Campus Communications Team

- Janet de Vry – Team Lead
- Richard Gordon
- Matt Plourde
- Jeff Chase

Sakai Technical Team

The responsibilities of the technical team include:

- Install and configure hardware and software
- Perform required capacity planning
- Integrate Sakai with UDEL ERP systems
- Manage and maintain the production environment
- Install updates as they are needed

Technical Team

- Jason Cash – Team Lead
- Dave Costrini
- John Hall, Sakai Administrator
- MIS DBA
- Other MIS and NSS staff as assigned

Learning Management System Committee (LMS)

Chaired by Havidan Rodriguez, Associate Provost

The LMS Committee will engage with the Sakai project and provide feedback to the Requirements Team and other teams as necessary regarding functionality needed to achieve parity with WebCT 4.1 and in addition they will advise on functionality that is desired to achieve a premier learning management system for the University. They will also serve as ambassadors to their departments and colleagues during the migration. (See the [LMS Committee Member's list](#).)

Sakai Project Team Leaders

Project team leaders manage all aspects of the project for their areas of responsibility, including:

- Establish and document how units will organize to meet the project schedule
- Responsibility for quality and timeliness of deliverables identified for each team.
- Manage cross-functional communication and ensure issue resolution.
- Provide input to the project plan.
- Communicate and coordinate with Project Management Team.
- Assist in transition planning.
- Communicate with external constituents.

Sakai Project Team Members

Project team members report to the appropriate Sakai Project Team Leader. Team leaders may call upon subject matter experts or other appropriate individuals to serve while certain functions are being reviewed and analyzed.

Responsibilities:

- Deliberate issues and identify solutions that will facilitate the implementation of the new learning management system.
- Assist in the toolset review process to identify issues that may require policy changes, process changes, or modifications to the software.

Critical Success Factors

Key issues have been identified as critical to the success of this project. They are:

Project Team Commitment

Team leaders and members have been assigned to work on the project based on their knowledge of current systems and expertise in their respective fields. Their commitment and dedication to the project is essential to its success and they are expected to focus on project assignments for sustained periods of time. To enable this, plans must be in place to divert normal day-to-day responsibilities of these participants to others.

Executive Sponsorship and Support

The Steering Committee is a vital participant in this endeavor. It is the source of authority by which the project was initiated, appointed the project management team, enabled the formation of implementation teams. Sponsorship, however, must extend beyond this Committee to the directors of the units involved who will release their staff to work on the project teams and manage their units in their absence. Unit directors will evaluate and identify temporary staffing requirements created by these absences. Recommendations for short term, temporary staffing will be reviewed by the Steering Committee.

Continuity of Service Delivery

During the process of implementing a new learning management system, it is imperative that current services are not diminished.

Communication

Communication at all levels is a key factor in the success of any project. For this project in particular, communication among project teams and project team members must be open, consistent, comprehensive and documented. Communication with the University of Delaware user community is crucial to building acceptance and understanding of the new system and the ways in which current processes and operations may be improved or changed.

Training

A comprehensive training plan will be put in place to insure that University users know how to use the new learning management system so that the delivery of these services is well understood. The plan will include a training strategy for faculty in University colleges and departments, as well as those who provide academic support for these users. The plan identifies the groups who will be trained from Summer 2008 through to Fall 2009 to ensure full adoption by October 2009. A strategy for highly customized classes that cannot meet this deadline will be devised.

Assessment

Assessment is key to both formative and summative learning within the context of a course. There are a number of tools that are included in the UD course type that can be used for assessment.

- The assignment tool provides for formative assessment by allowing the faculty member to make comments and have students resubmit their work thus allowing them to learn from feedback.
- The quizzing tool allow for self-tests and feedback so that students can self-assess their own learning.
- The testing tools allow for both formative and summative assessment.
- There are also several tools that could gather student self-reflective data and faculty feedback.
- Sakai also provides logs which could enable faculty to get data on how long students spend on tasks or which resources they access.

All experts in teaching and learning agree that we need multiple measures of student learning and would like to move beyond testing and term papers to more authentic evidence of student

learning such as reflective journals, original stories or group projects that can be prepared in a variety of media, and portfolios that showcase student work over time. Tools exist within Sakai that could be used in this manner.

Institutional assessment will be addressed in a subsequent phase of implementation.

Project Management

Effective project management will depend on the synthesis of University resources into a single, coherent project management team. The team will work collaboratively to:

- Devise a project plan, communicate it to the project teams and calibrate it throughout the duration of the project.
- Organize the project to insure that project teams will succeed.
- Staff the project bringing together appropriate resources within the University and authorize the acquisition of consulting services, if needed.
- Provide leadership and direction to the teams on a day-to-day basis.
- Exercise control over the project to insure that it is completed on time and on budget

Learning Management System Committee Members

Stakeholder

Foster, Susan Vice-President, Information Technologies

Committee Chairs

Lyons, Leila Director, IT User Services
Rodriguez, Havidan Vice-Provost, Academic Affairs & International Programs

College of Agriculture and Natural Resources

Saylor, William Animal and Food Science

College of Arts and Science

Caplan, Scott Communication
Reedy, Chandra Museum Studies
Simons, Robert Psychology

College of Business & Economics

Davidson, Spring B&E Accounting and MIS
Wright, Diane B&E Accounting and MIS

College of Engineering

Mike Keefe Mechanical Engineering

College of Health Science

Avino, Karen School of Nursing
Cannon, Christine School of Nursing
Lehman, Donald Medical Technology
Obrusnikova, Iva Health, Nutrition & Exercise Science

College of Human Services, Education and Public Policy

Hofstetter, Fred School of Education
Lennon, Sharron Fashion and Apparel Design

College of Marine and Earth Studies

Dexter, Stephen Materials Science
Newton, Frank Marine and Earth Studies

University-Wide Units

Christine, Cook Research & Graduate Studies
Harvey, Holli Judicial Affairs, Student Life
Lightcap, Jann Professional and Continuing Studies
Silvis, Gregg Morris Library
Tweedy, James Residence Life, Student Life
John Bartley UD Academic Center

Information Technologies

Amsler, Ann User Services
de Vry, Janet User Services
Cash, Jason Network & System Services
Grim, Dan Network & System Services
Hall, John User Services
Kral, Karen User Services
O'Laughlin, Nancy User Services
Plourde, Matt User Services