



Project Charter

Academic Toolbox Renewal Project

Project Manager: Haniyeh Yousofpour

Division: CIO

Department: Project Management Office

Last Revision Date: June 9 2016 Draft
Document Revision

TABLE OF CONTENTS

Section 1: Project Overview	4
Section 2: Project Scope.....	5
Section 3: Project Approach, deliverables and Assumptions.....	6
Section 4: High Level Client Impact Summary	12
Section 5: Project Organization	14
Section 7: Resource Requirements and Budget	16
Section 8: Risk Management:.....	17
Section 9: Approvals	18
Section 10: Document Change Control	19

SECTION 1: PROJECT OVERVIEW

BACKGROUND

The University of Toronto's enterprise education technology ecosystem (our Academic Technology Toolbox) has grown organically over the past several years. At times services and solution have been added in an ad hoc way. At other points, the University has gone through a formal acquisition process.

What we haven't done yet, however, is take a holistic approach to the "Academic Technology Toolbox" in its entirety. As a result, under the Executive Sponsorship of the Vice-Provost, Innovations in Undergraduate Education and the Vice-President, University Operations, we have launched The University of Toronto Academic Toolbox Renewal Initiative.

The scope of the exercise is to look at enterprise-level educational technologies, recognizing that divisions and departments may continue to deploy local resources. However, in order to improve the possibility of integrating both enterprise and local applications into a common student experience, and to leverage the purchasing power of the University, the goal of the Renewal initiative is to implement a standards-based ecosystem that allows for the flexibility of integrating many tools and resources (so long as they too are standards-based).

BUSINESS OBJECTIVES

A key objective is to create a strong foundation upon which instructors, departments and divisions can make flexible, sound choices about educational technologies, while ensuring basic enterprise needs are met. The Academic and Collaborative Technologies (ACT) group is a partnership between the Centre for Teaching Support & Innovation and Information Technology Services at the University is well situated to meet the key objectives of the initiative. ACT proposes to make recommendations including options and plans for a phased implementation to manage budgets and risks. As in any undertaking of this scope and complexity, there are risks that need to be weighed against the benefits.

Key Stakeholder Objectives:

- *Document requirements (user needs) through stakeholder consultations*
- *Create common criteria to evaluate LME and tools*
- *Provide a core LME platform to accommodate tools for the University community*
- *Design and implement a process for accepting new tools*
- *Develop a commercially viable RFP*
- *Evaluate LME systems for shortlist*
- *Manage the community engagement and assessment of the shortlisted vendors*
- *Evaluate LME systems*
- *Create staged implementation plan for LME*
- *Actualize LME implementation plan*
- *Implement iterative feedback mechanism for ongoing measurement of success and problem resolution*

Objectives	Measure of Success	Measured By
1. <i>Document requirements (user needs) through stakeholder consultations</i>	<i>Review and consensus by the University community</i>	<i>Review by University stakeholders</i>
2. <i>Create criteria to evaluate LME and tools</i>	<i>Participants provide input to needs assessments</i>	<i>University Faculty, Staff, Students groups</i>
3. <i>Provide a core LME platform to accommodate tools for the University community</i>	<i>Stakeholder consensus</i>	<i>Successful reviews by stakeholder community</i>
4. <i>Design and implement a process for accepting new tools</i>	<i>Learn from community best practices</i>	<i>Project team review with stakeholder input</i>
5. <i>Develop a commercially viable RFP</i>	<i>Marketplace ready.</i>	<i>Procurement and project team reviews</i>
6. <i>Evaluate LME systems for the shortlist</i>	<i>Adjudication committee</i>	<i>Weighted acceptance criteria per procurement documents and executive sponsors</i>
7. <i>Manage the community engagement and assessment of the shortlisted vendors</i>	<i>High level of engagement and fair cross comparison of different vendor systems</i>	<i>U of T end users, faculty, students administrators. Evaluation committee and sponsors</i>
8. <i>Evaluate LME systems</i>	<i>Users</i>	<i>Acceptance Criteria</i>
9. <i>Create staged implementation plan for LME</i>	<i>Committee and professional staff acceptance</i>	<i>Advisory committees and executive sponsors</i>
10. <i>Actualize LME implementation plan</i>	<i>Community and professional staff acceptance</i>	<i>Professional staff</i>
11. <i>Implement iterative feedback mechanism for ongoing measurement of success and problem resolution</i>	<i>Community and professional staff acceptance</i>	<i>Professional staff</i>

SECTION 2: PROJECT SCOPE

IN SCOPE

*The following describes the end outcomes focusing on **what** is being delivered to the client, **not how**.*

Common Criteria:

- *Consulting with the community*
- *Publishing drafts*
- *Receiving feedback*
- *Publishing the final document with approved common criteria*

LME:

- *Preparing the RFP document*
- *Evaluation of the RFP responses*
- *Community engagement and assessment (“test drive”)*
- *Selection of the LME provider*
- *Deliver a core LME with the ability to intake standardized tools for University participants.*

Integration:

- *Understanding the existing process of integration*
- *Meeting with the stakeholders to assess and analyze current practices*
- *Propose improvement to the existing practices*
- *Document and publish a new integration request process*

OUT OF SCOPE

Out of Scope: Any deliverables, tasks and/or scope not specifically mentioned in this document in addition to those specified as set out below. Specific locations and functions deemed Out of Scope:

Non Identified

Note: Any additional scope can be added to the project as long as it is approved by the project sponsor.

SECTION 3: PROJECT APPROACH, DELIVERABLES AND ASSUMPTIONS

APPROACH AND DELIVERABLES

The Academic Toolbox Renewal initiative is managed as a project with multiple major phases.

Phase 1: Common criteria Development

Identification of stakeholders

Meeting and interviewing the stakeholders

Development and publish of a set of common criteria that can be used to determine the acceptability of services and solutions for the include in the Academic Toolbox at U of T

Phase 2: Learning Management Engine (LME)

Need assessment: collection and documentation of user requirements

Vendor Selection: Issue of RFP and final LME provider vendor selection

Implementation: Implementation of the new LME system

Phase 3: Integration Request Portal

Development of a new portal for submitting integration ideas

Implementing a process for assessment of integration requests

Systematic prioritization tool for implementing integrations requests

Aligned with the University’s process and future state for the Academic Toolbox managing the process as multiple major projects provide the University with the greatest degree of flexibility while managing risks, managing scope and providing the broader University governance and oversight that is necessary to achieve success for a project of this complexity and duration.

Project Phase – High Level Activities

Phase 1: Common Criteria

Stage	Activities	Deliverables
<i>Identify the major stakeholders for the Academic Toolbox</i>	Identifying the user groups	A list of all user groups at U of T community
	Identifying main contacts for each user group	A list of stakeholder representatives with contact information
	Reaching out to all stakeholder representatives	Booked appointment to meet with the stakeholders
<i>Gathering stakeholders needs and requirements</i>	Develop the questions for stakeholder	Interview guide document
	Meet with all stakeholders	Meetings
	Gathering the stakeholders needs and requirements	List of requirements and current challenges
	Follow up with representatives for other requirements from their group	List of requirements and current challenges

Stage	Activities	Deliverables
<i>Documenting and publishing the common criteria</i>	Reviewing all the interview notes	Organized information
	Analyze and group the requirements	Categorized requirements
	Develop an organized list of requirements	
	Share the requirement document with the stakeholders to review and comment	Signed off list of requirements
	Make the final list available to the community	Published the organized and approved list of common criteria
<i>Wrap up and complete the project.</i>	'Deliver' project to the client representative	-Final project sign-off
	Project close-out meeting	Lessons learned log
	Project Summary Report	Final Project Summary Report
	Archive Project file(s)	Project Files with Records

Phase 2: LME

Stage	Activities	Deliverables
<i>Define the need for the project, assess project feasibility and project approach, and obtain formal project approval.</i>	Stakeholder needs assessments	Stakeholder needs/requirements
	Project Sponsorship engagement	Sponsorship / Champion
	Build out ACT/ITS Project Team	Financial drivers/budgets
		Steering Committee
		Project Roles - Responsibilities
	Assess Feasibility of Project	Selection process timelines
	External assessment and consulting	Potential risk and mitigation
	Confirm RFP for solution and design	

Stage	Activities	Deliverables
	Develop Project Roadmap	Roadmap
	Develop Project Charter	Project Charter (This document) Seeking sponsor approval
<i>Managing the RFP and Vendor Evaluation process</i>	Review and organize user needs	Develop RFP requirement section
	Issue the RFP	Detailed LME requirements Evaluation process and timelines Community engagement plan
	Initial evaluation for shortlist	Identify evaluation committee Guideline for vendor evaluation
	Community Engagement and Evaluation	Live presentation for U of T community Demo set up Use cases for testers Town hall/focus group meetings Surveys
	Final evaluation and recommendation	Summary of community evaluation IRRM confirmation Evaluation committee final choice Sponsor's approval
<i>Execute and implement the new LME.</i>	Evaluate the level of effort required	Scope, deliverables and tasks of work streams
	Develop Project Plan - Phases	Work breakdown Deliverables Budgets for work streams Phased Schedules / Milestones Communication Plan Risk Management Plan

Stage	Activities	Deliverables
	High-level phases and activities sufficient to describe the project approach.	
	Execute on work packages per plans	Tasks and deliverables completed
	Execute phased roll-out	Tasks and deliverables completed
<i>Wrap up and complete the project.</i>	'Deliver' project to the client representative	-Final project sign-off
	Project close-out meeting	Lessons learned log
	Project Summary Report	Final Project Summary Report
	Archive Project file(s)	Project Files with Records

Phase 3: Integration

Phase	Activities	Deliverables
<i>Develop a new integration request portal</i>	Analyze the current portal request process	Current process and areas of improvement
	Design the future state of integration requests	New process requirements
	Develop a new integration request portal process	New process
	Design a new integration request portal tool	A new portal
<i>Integration process assessment tool</i>	Develop feasibility assessment criteria for new requests	A list of criteria
	Develop a process to assess the new requests in an organized and efficient manner	New process
	Design the necessary tool to support the new assessment process	Assessment tool
	Implement the new process and tool	Working site for integration
	Communicate the new process with the stakeholders	Communication plan and content

Phase	Activities	Deliverables
<i>Prioritization of the integration requests</i>	Develop a process to prioritize the new requests in an organized and efficient manner	New process
	Design the necessary tool to support the new process	New prioritization tool
	Implement the new process and tool	Working site
	Communicate the new process with the stakeholders	Communication plan and content
<i>Wrap up and complete the project.</i>	'Deliver' project to the client representative	Final project sign-off
	Project close-out meeting	Lessons learned log
	Project Summary Report	Final Project Summary Report
	Archive Project file(s)	Project Files with Records

Total approximate duration of project: 2-3 years

ASSUMPTIONS

- *Strong stakeholder support and feedback to ensure deliverables align with needs*
- *Providing a secure and scalable service that aligns with the University's core academic mission*
- *Timely communications to project stakeholders, and ITS participants*
- *Timely and ongoing communications with the user community*
- *Managing service transition with ongoing oversight on a build or leased basis*
- *Providing visibility with communication around project status and dashboards*
- *ITS team participants have clearly defined and obtainable tasks and deliverables*
- *Identify ITS team roles and responsibilities*

MILESTONES

Milestone	Target Date
Project Initiated Introduction and Proposal for Creation of the Academic Toolbox Reference Group (ATRG) adopted at the Teaching, Learning and Technology Advisory Committee.	05-16-14
Project Roadmap	
Research and Development of Renewal Materials and Standards Moves into High Gear	9-30-14
Official Public Launch of the Academic Toolbox Renewal	10-24-14

Milestone	Target Date
Imitative (ATRI) Project and Website	
ATRI PM 'Officially' Initiates Project. Clarifies Project Objective is a Result to delivering more value with less waste; as well as Exploration, Service and Needs Assessment	10-6-14
Develop ATRI Project Charter	10-09-14
Project Charter (this document)	02-30-16
Plan and Form "Academic Toolbox Reference Group" (ATRG) Committee and Inaugural Meeting Documents	10-24-14
Create ATRG Website With Feedback Forms	10-1-14
Track Remaining Content Pieces	12-2-14
Academic Toolbox Reference Group" (ATRG) Inaugural Meeting #1	10-29-14
Finalizing new integration request process and portal specs	05-30-15
Formal Invites Sent for Divisional Interviews for LME Functional Requirements	9-4-15
Formal Divisional Interviews for LME Functional Requirements (Faculty of Dentistry - 1st)	12-15-15
Publish mini-Delphi with collected LME trending themes (Frequent Updates). Facilitates deeper requirements gathering on subsequent community visits http://toolboxrenewal.act.utoronto.ca/core-learning-management-engine/	11-13-15
Publish of the new integration request process and portal	01-18-16
ATRI Project - Phase Three Imitated - LME Procurement - Additions / Improvements to Toolkit	6-20-16
RFP document completion	04-10-16
RFP Posted	04-15-16
RFP responses received	06-03-16
Vendor shortlist	06-30-16
First round of vendor demo	08-15-16
Online test drive	08-15-16
Second round of vendor demo	11-15-16
Community engagement analysis	11-30-16
Vendor selection	12-23-16
Procurement negotiation	01-09-17
Contract finalization	03-30-17
Early adopters	04-15-17
New system Roll out	09-01-17
Close ATRI Project - Phase Three	T.B.D.
Lessons Learned	T.B.D.
Project closure	T.B.D.

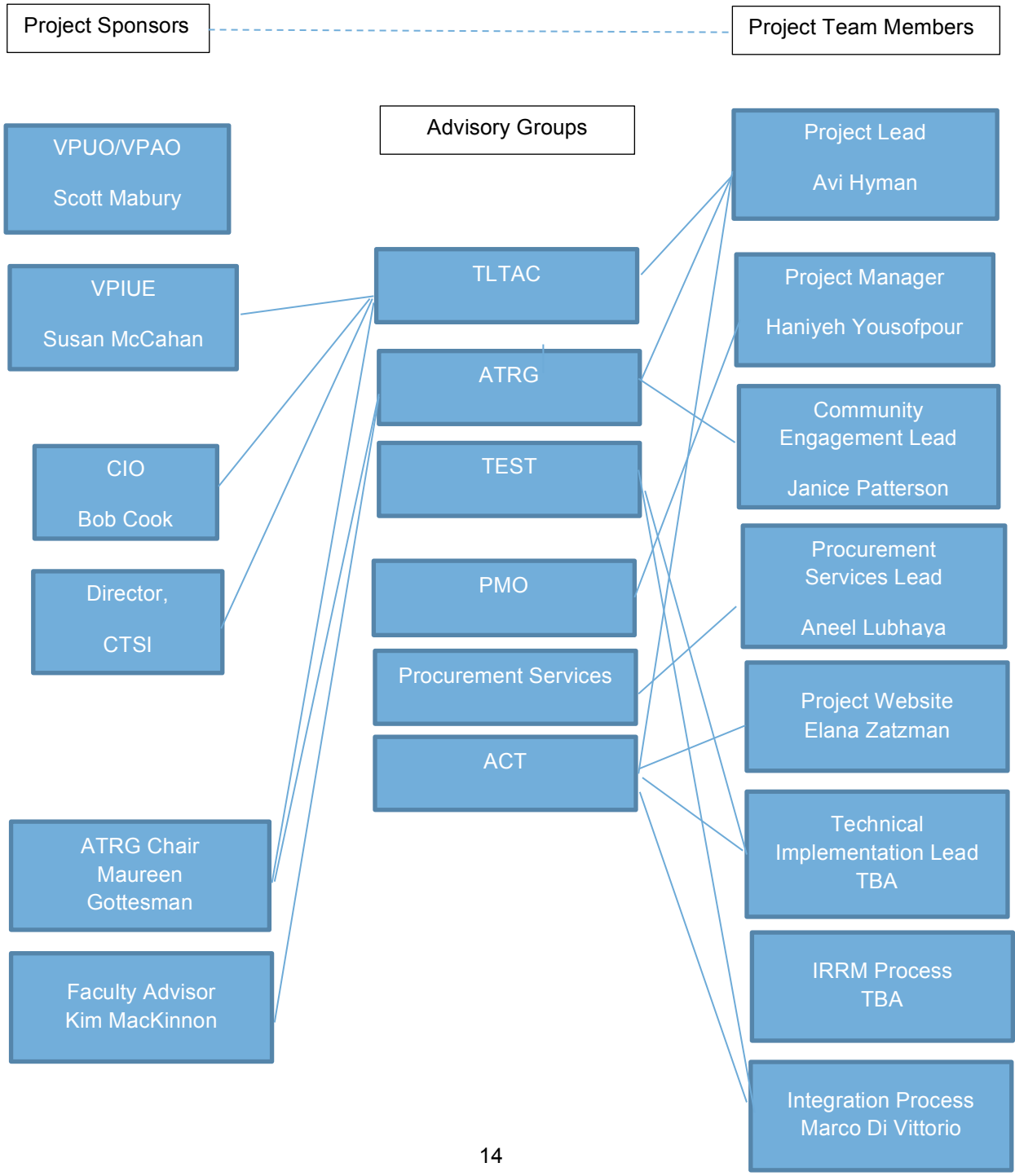
SECTION 4: HIGH LEVEL CLIENT IMPACT SUMMARY

Client Group	Client Impact	Degree of Impact	# of User Impacted
		High	13000

Faculty	Use of Academic Toolbox to deliver courses		
Students	Use of Academic Toolbox for learning	High	80000
Educational technologists	Assisting faculty with course management	High	150
IT specialists	Integration with other systems, system updates	Medium	500

SECTION 5: PROJECT ORGANIZATION

Academic Toolbox Renewal Project Team



ROLES AND RESPONSIBILITIES

Role & Responsibilities / Deliverable	Project Lead	Project Manager	Community Engagement Lead	Procurement Lead	Technical Implementation	Integration Lead	IRRM Lead	Executive Sponsors
Project Road Map	R,A	R			C	C	C	I
Create Project Charter	R,A	R						C
Fund Project	R,C	I						R,A
User needs assessment	R,A	R	R	I	I			I
Facilitation of Advisory committees	R	R						A
Facilitation of Technical committees	R, A	R			R	R	R	
RFP/RFI release	R	R	I	R,A	C	C	C	I
Timelines	R,A	R	I	R	R	R	R	C
Infrastructure / Security	R	R		R	R	R	R,A	
Schedule (tasks & milestones)	R,A	R	R	R	R	R		I
RFP/RFI evaluation	R	R		R,A				
Award business	R	C	C	R	C	C	C	R,A
Implementation & cutover plan	R,A	R		R	R,A	R,A	R	A
Lessons learned	R	R,A	R	R	R	R	R	R
Operations declaration	R,A				R,A	R,A	R	I
Project close	R,A	R	I	R	R	I	I	R,A

R - Responsible (the doer)

A – Accountable (the buck stops here)

C – Consult (In the loop – two way communication)

I – Inform (Keep in the picture – one way communication)

Client Group	Stakeholder Expectations of the Project	Project Expectations of the Stakeholder
Faculty	Ongoing communication about project and progress. Opportunity to voice their concerns and questions. Visibility of the process	Involvement in community evaluation, providing feedback
Students	Ongoing communication about project and progress. Opportunity to voice their concerns and questions. Visibility of the process	Involvement in community evaluation, providing feedback
Educational Tech	Ongoing communication about project and progress. Opportunity to voice their concerns and questions. Visibility of the process	Involvement in community evaluation, providing feedback
Tech Specialist	Being consulting about technical requirements of the project Ongoing communication about project and progress. Opportunity to voice their concerns and questions. Visibility of the process	Provide timely feedback Attend technical requirement meetings Involvement in community evaluation, providing feedback

SECTION 7: RESOURCE REQUIREMENTS

RESOURCE REQUIREMENTS

State the resource requirements or critical skill set as well as any major facility needs required to support the approach, schedule, and budget for the project. Use the table below for this information. Add/remove rows as required. Text shown is sample only and needs to be replaced with resource requirements specific to your project. You may indicate the name of any proposed human resources if desired.

Role	Proposed Person	Level of involvement
Sponsor	Prof. Scott Mabury	Regular updates
Sponsor	Prof. Susan McCahan	Regular updates

CIO	Robert Cook	Regular updates
Director of CTSI	Prof Carol Rolheiser	Regular updates
Director ACT	Dr. Avi Hyman	Daily
ATRG Committee Chair	Prof. Maureen Gottesman	Regular meetings
Senior Project Manager	Dr. Haniyeh Yousofpour	Daily
Community Engagement Lead	Janice Patterson	Daily during the community engagement phase
ACT Manager	Jeremy Graham	Daily for implementation phase
ACT Manager	Marco Di Vittorio	Daily for the integration phase
Senior Procurement Officer	Aneel Lubhaya	Daily during the RFP phase

SECTION 8: RISK MANAGEMENT:

INITIAL RISK ASSESSMENT

Risk No.	RISK DESCRIPTION	PROBABILITY		MITIGATION STRATEGIES	OWNERS
		H/M/L	H/M/L		
1	Scope	H	L	Document well defined scope with review and concurrence by stakeholders.	Project Lead
2	Schedule	H	M	Document task based schedule and milestones with concurrence by ITS resource managers.	Project Manager
3	Low community participation	M	M	Working closely with the communication team to ensure high level of community engagement	Community assessment lead

4	Loss of Data in transition	H	M	Keeping the legacy system during transition and have both systems operating simultaneously (without given users access)	Tech Implementation lead
5	Implementation cost overrun	H	M	Covering potential cost overruns penalties in the vendor contract to mitigate the risk	Project Lead

ONGOING RISK MANAGEMENT PROCESS

When a risk is identified, the project manager and project lead will discuss the risk and bring in the appropriate support to mitigate the risk. The sponsors will be notified within a reasonable time for high risk, high impact issues.

DISASTER RECOVERY PLAN (DRP)

As contracted with the provider

BUSINESS CONTINUITY PLAN

Best Effort

SECTION 9: APPROVALS

Project Role	Name	Approval Signature	Date
Director ACT	Avi Hyman		
Project Manager	Haniyeh Yousofpour		
Sponsor Signoff*	Name	Approval Signature	Date
Sponsor	Prof Scott Mabury		
Sponsor	Prof. Susan McCahan		

SECTION 10: DOCUMENT CHANGE CONTROL

Revision Number	Date of Issue	Author(s)	Brief Description of Change made
1	10-01-15	S. Kelly	Drafted the initial document
2	02-02-16	D. Morden	Initial first draft released to for review and comment.
3	04-05-16	H. Yousofpour	Updates based on Project Lead comments
4	06-09-16	H. Yousofpour	Further updates for each section
5	06-14-16	H. Yousofpour	Further updates to project phases
6	06-24	H. Yousofpour	Further updates to R&R

This section provides control for the development and distribution of major revisions to the Project Charter, up to the point of the project's implementation.