Balancing
Act

Balancing Act
E-Learning Development Project
Project Charter

January 2012

E-Learning Development Project
Prepared for

On Co·op™
Ontario Co-operative Association

Balancing
Act

Date	January 2008
Project Title	E-Learning Development Project – On Co-Op
Charter Description	This charter is designed to create a clear overview of the E-Learning Development project. This document includes components that will enable the customer and Balancing Act to work in a productive and proactive relationship throughout the project cycle.
Charter Objectives	This project charter outlines the following: • Project description • Deliverables • Comprehensive project scope • Basic organizational responsibilities • Available and required resource estimates and costs • Out of scope items

Documentation Information

File Name	INTE5160_ProjectCharter_BalancingAct_v1
Original Author(s)	Michele Bennett and Jackie Flynt

Revision History

Version	Date	Author(s)	Revision Notes
1.0	January 2008	M. Bennett, J. Flynt	Original Version
1.1			

Table of Contents

Project Title: E-Learning Development Project – On Co-Op

Project Manager: Michele Bennett

Project Description

Balancing Act has received an RFP from Ontario Co-operative Association (On Co-Op). The project is the conversion of 10 existing instructor-led modules into an e-learning format.

The content for these modules has been created by On Co-op contractors. At the bidders' conference an On Co-op representative stated:

> We would like people who complete the whole program to be awarded a certificate of completion. But we are not sure of the best way to do that. We are relying on the expertise of vendors to propose a solution.

The e-learning solution's target audience includes: potential co-op members, leaders, and workers; current and potential co-operative system staff and the Board of Directors; as well as "other interested individuals" (p. 2). The solution's end product will be a conversion of the 10 modules into an e-learning format for web-based and computer-based training, the latter for CD ROM or DVD distribution.

Project Start Date: February 19, 2008

Finish Date: August 9, 2008 (negotiable)

Total Project Time: Five months and one week

Initiation of RFP (RFP circulated)	January 30, 2008
Proposal deadline	February 14, 2008
Contract award	February 15, 2008
Anticipated start date	February 19, 2008
Contract conclusion	August 9, 2008 (negotiable)
E-learning solution/end-product launch	September 15, 2008

Business Case

Balancing Act seeks to:

- Actively pursue our mission of contributing to education, economic growth, and sustainability, in the U.S. and globally.

- Broaden our U.S. client base to international business.

- Build a relationship with Ontario Co-Operative Association, an economic and sustainability leader in Ontario, Canada.

The E-Learning Developer – On Co-op project will support Balancing Act in realizing these goals.
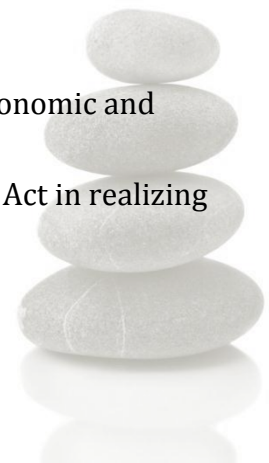
Measurable Project Objectives

Balancing Act's Objectives

- Actively pursue our mission of contributing to education, economic growth, and sustainability, in the U.S. and globally.

- Broaden our U.S. client base to international business.

- Build a relationship with Ontario Co-Operative Association, an economic and sustainability leader in Ontario, Canada.

- Build our e-learning development portfolio.

- Earn and generate profit.

On Co-op's Objectives

- Reach a distributed Ontarian audience for co-operative training.

- Overcoming challenges associated with teaching instructor-led courses.

- Increase availability of On Co-op training resources.

Learners' Objective

Score at 80% or higher in assessments, by correctly answering at least 80% of assessment questions, for all 10 modules toward certificate award, [x% of the time]. (Bidders' conference)

Assumptions, Constraints, and Risks

Assumptions

The RFP by On Co-op, a Canadian entity, is open to U.S. companies (pending answer at bidders' conference).

The budget amount of $125,000 is in U.S. funds.

Grant funding for the project has been secured by On Co-op so that adequate funds are available for payout upon receipt of Balancing Act invoices. Invoicing will occur in alignment with milestones (p. 4), and Balancing Act will provide regular progress reports (p. 3).

Instructional Content

According to the On Co-op RFP and Bidders' Conference representative, "solid" content is already developed for all 10 modules, which "should require limited SME review." In its current state, content for each module is structured as follows (p. 4).

1. Outline/Introduction
2. Facilitator/Trainer Notes
3. Student Notes
4. Power Point Presentations
5. Readings/Case Studies

According to the On Co-op bidders' conference representative, learner contact-time averages at "about 90 minutes each."

No standards and/or templates exist which the e-learning solution must adhere to/follow (pending answer at the continuing bidders' conference). The end product, including text and audio, will be English-only (pending answer at the continuing bidders' conference). The end product is not required to comply with the Canadians with Disabilities Act, the Ontario Disabilities Act, or any other similar requirements (pending answer at the continuing bidders' conference).

The RFP implies both channels for the e-learning solution (web-based and CD/DVD) will be certification eligible (p. 4). The assumptions related to instructional content imply the e-learning solution will be self-paced, rather than group-paced.

Technical Specifications

The web-based version of the e-learning solution will be hosted by On Co-op's server (p. 1). According to the On Co-op Bidders' Conference representative, the solution will be developed using On Co-op's homegrown LCMS, for which On Co-op will provide Balancing Act designers and programmers "about 20 hrs" of training, each. At kickoff, On Co-op will add these Balancing Act team members to the LCMS.

Additionally, according to the On Co-op bidders' conference representative:

- All work performed by Balancing Act, including team member training on the On Co-op LCMS, will occur remotely from the U.S.
- Solution development will occur in the form of online collaboration using on "role-based permissions."
- The solution will be supported by Internet Explorer 7 and Flash 9.
- On Co-op learning administrators will facilitate migration of the solution to the On Co-op LMS.
- On Co-op will facilitate production of CDs/DVDs for computer-based channel distribution (pending answer at bidders' conference)

Solution/End-Product

After successful completion of the project (i.e., client signoff on final materials), On Co-op will be responsible for evaluating and updating the content. According to the On Co-op bidders' conference representative, On Co-op will facilitate all face-to-face aspects of the higher-level "blended program." "However, if you have experience in this we are interested in hearing your ideas." (Bidders' conference)

The On Co-operative Association will maintain ownership rights of materials created for the module development. Because Balancing Act work will be performed remotely, special licensing, work permits or work visas are not required.

Constraints

The RFP states "the budget available for the developing ten modules into an e-learning format is $125K" (p. 3), all inclusive. This works out to an average of $12,500 per module.

According to the RFP, qualifications of Balancing Act's "writers" (instructional designers) will include the following (p. 3):

- Previous experience in developing educational resources in an adult education environment
- Understanding of the co-operative sector
- Awareness of the university/college community
- Relevant e-learning experience for similar industries

Instructional Content

As stated above (Assumptions), constraints related to instructional content include implications by the RFP that both channels for the e-learning solution (web-based and CD/DVD) will be certification eligible.

Technical Specifications

As stated above (Assumptions), constraints related to technical specifications include the following:

- The On Co-op homegrown LCMS requires an estimated 20 hours of training by Balancing Act team members.
- The solutions will be SCORM or AICC compliant (and compatible with the unspecified On Co-op LMS).

Additionally as stated above (Assumptions), according to the On Co-op bidders' conference representative the solution will be supported by Internet Explorer 7 and Flash 9.
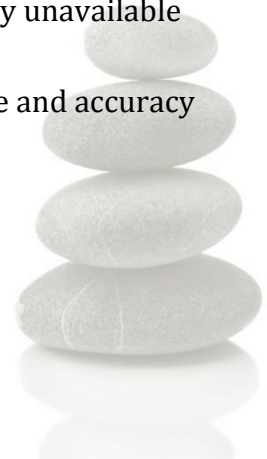
Risks

The broadest risk is eligibility of U.S. companies to respond to the RFP by On Co-op, a Canadian entity.

Risks related to invoice payment include restrictions and timeline of grants/project funding awarded to On Co-op.

Instructional Content

Risks related to the existing instructional content include its presently unavailable status. (Bidders' conference)

Risks related to learner contact-time for instruction include the range and accuracy of the estimate. (Bidders' conference)

Risks related to e-learning solution development include:

- On Co-op's expectations for variety in/specific types of learning strategies and media employed, "such as audio, video, interactive exercises, games, and perhaps animation." (p. 4)
- The e-learning solution/end product's subjectivity to review by the On Co-op "committee of experts [review committee] that includes at a minimum: an [sic] university professor, an adult educator/practitioner, a co-op worker, and an e-learner/young member." (p. 3)
- We have not yet evaluated the capabilities of the LCMS, and may need to design and build additional templates to support our strategies.

Technical Specifications

Risks related to technical aspects of the project include:

- Quality of training provided to Balancing Act team members and accuracy of the estimated amount of training.
- Timeliness of On Co-op LCMS hosting.
- Availability of On Co-op LCMS support team.
- Compatibility of solution media with the On Co-op LCMS.

Personnel

Risks related to personnel aspects of the project include:

- Availability of On Co-op SME.
- Availability of Balancing Act team members during progress reviews.
- Timeliness of responses by x during the course of the project.
- Responses by On Co-op review committee to project manager requests.

Project Scope

Deliverables

Ten e-learning modules will be delivered to the On Co-Op LCMS and On Co-op project manager (format to be determined), as listed in the RFP (pp. 6-7):

Module 1: "Nuts and bolts of co-operatives"

Module 2: "Renewable Energy Co-operatives"

Module 3: "Special Populations – New emerging social co-ops"

Module 4: "Health care and home care"

Module 5: "Child Care Co-operatives"

Module 6: "Worker Co-operatives"

Module 7: "Agricultural co-operative sector in Ontario"

Module 8: "Organics and Co-operatives"

Module 9: "New sector development and capitalization"

Module 10: "Development of niche co-operatives: Case studies"

Deliverables for each of these modules include:

- Key learning outcomes (i.e., Terminal Learning Objectives), as specified in the RFP.

- Design plan (assumed).

- Alpha version (screen and word content).

- Beta version (production-complete draft).

- Final version of all files for web-based and CD/DVD versions.

Time Scope

Major milestones for this project include the following:

Milestone	*Date*
Project kickoff	February 19, 2008
Project work-plan approved	TBD
Overall project design plan approved	TBD
Design plan for each e-learning module approved	10 dates TBD
Development of alpha and beta e-learning modules complete	10 dates TBD
Prototype e-learning modules tested and reviewed by On Co-op review committee and SME	10 dates TBD
E-learning modules completed and approved	10 dates TBD
Delivery of e-learning modules to On Co-Op stakeholders	August 1, 2008
Contract conclusion	August 9, 2008 (negotiable)
Solution/end product launch	September 15, 2008 (negotiable)
Quality assurance follow-up assessment performed by Balancing Act	1st, 3rd, and 6th months from solution/end product launch date

Cost Scope

According to the On Co-Op RFP, "The budget available for the developing ten modules into an e-learning format in $125,000 [in U.S. dollars, pending answer at bidders' conference], including all applicable taxes and disbursements (mileage, other travel and long distance). Additional funds have been reserved to pay for the costs associated with the operations of the review committee, the hosting of the modules and the LMS." (p. 3)

Included into the cost scope is compensation for 20 hrs of training on the On Co-op LCMS for each of [x] Balancing Act team members, per the On Co-Op bidders' conference representative's statement: "We have a home grown LCMS. We will train the winning vendor on its use at no cost. Our in-house training program takes about 20 hrs. to complete."

Organizational Scope

Table 1

Name	Contact Information	Role	Responsibility
Balancing Act			
Balancing Act		Vendor Project Manager	• Plan and execute project in an efficient and timely manner • Ensure that communication is clearly established • Manage day-to-day operations of the project • Manage resources • Draft charter and work-plan • Analyze prototype data results
TBD by Balancing Act		Instructional Designer	• Procure key deliverables • Ensure quality of learning materials • Ensure design and development standards • Publish LMS
TBD by Balancing Act		Content Developer	• Assure style consistency and coherence throughout design and layout • Assure architectural and navigational functionality
TBD by Balancing Act		Media Specialist	• Provide expertise in designing and implementing media (e.g.,

			graphics, Flash content, audio) into course content • Ensure compatibility of media with LMS and user browsers
TBD by Balancing Act		Editor/Quality Assurance	• Assure all grammatical, mechanical, and spelling errors are eliminated, through a thorough examination of text and media • Review all content (media and text) to ensure proper placement of information within instructional modules
TBD by Balancing Act		Programmer	• Assist with LCMS development • Troubleshoot LCMS issues • Build any needed externally developed interactions for import into the LCMS
On Co-op			
Denyse Guy	dguy@ontario.coop	Client's Project Sponsor	• Fund the project • Provide final sign off on any major scope variations
TBD		Client's Project Manager	• Monitor project • Establish organizational support • Distribute resources • Review and provide final signoff on all deliverables • Analyze and assess prototype and ongoing LMS data routinely
TBD		Committee of Experts	• Provide input during course design and development • Ensure learning outcomes are being met • Review Alpha and Beta courseware
Provided by On Co-Op		SME	• Provide subject matter expertise • Review-learning development milestones • Provide feedback in a timely manner

			• Represent user
Provided by On Co-op		Review Committee	• Work with developer providing input on course design and content • Ensure learning outcomes are being met • Ensure both alpha and beta reviews are complete
Provided by On Co-Op		IT Support	• Provide technical solutions to hardware/software compatibility issues
Provided by On Co-Op		LMS Support	• Host e-learning modules • Provide initial training for e-learning developers

Resources

- Work space for development team
- Audio studio
- Multi-media software access, preferably Adobe Suite
- Audio software access
- Support texts
- LMS help desk support information
- IT personnel access
- Training on internal communications systems
- Project follow-up costs
- Support staff

Out of Scope

The following are outside the E-Learning Development project scope of Balancing Act:

- Travel to On Co-op site for training or work

- Manufacture of CDs/DVDs for computer-based channel distribution (pending answer at bidders' conference)

Instructional Content

- Development of instructional content (Bidders' conference)

- Standards and/or templates which the e-learning solution must adhere to/follow (pending answer at the continuing bidders' conference)

- Evaluation of or updating e-learning solution/end-product, including content (p. 4)

- Face-to-face aspects of the higher-level blended learning program (Bidders' conference)

Technical Specifications
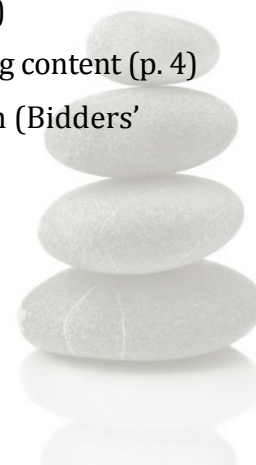
- Hosting of web-based version of the e-learning solution (p. 2)
- Development of e-learning solution for Internet connections other than high speed or mobile devices (Bidders' conference)
- Development of e-learning solution for multi-browser support (Bidders' conference)

Project Management

Communication and Reporting Plan (McVay Lynch and Roecker, 2007)

Table 2

Item	When	To Whom	Coordinator	Where
Project team meetings	Every Monday at 8 a.m.	Instructional Designer, Multimedia Developer, QA	Project Manager	Conference room
Review course content and design	Throughout the design of each module Meetings to take place every Friday at 8 a.m. or as needed to move forward	Review Committee, SME, Instructional Designer, Content Developer, QA, Content Developer, Media Developer	Project Manager	Conference room with access to eight (8) computers/laptops
Team meeting minutes	After each Project team meeting and when needed	Project Team and all Stakeholders	Instructional Designer	Email
Status reports	Every two (2) weeks or when a milestone has been reached	Project Team, Sponsor, Customer	Project Manager	Email
Project review	Every other week or when requested	Sponsor, Project Team, Review Committee, QA	Instructional Design Team	Conference room
Prototype testing	When needed, with 48 hour notice	Review Committee	Instructional Design Team, Content Developer	Conference room with access to eight (8) computers/laptops
Prototype testing data and assessment report	Within 48 hours of Review Committee testing	PM, Sponsor, Content Management, SME,		Microsoft Excel spreadsheet attachment to email
Instructor-led Training	TBD	On Co-Op Stakeholders and Support Staff	Instructional Design Team	Conference room with access to eight

sessions				(8) computers
Team building and debriefing activities	Every Friday at 3 p.m.	Balancing Act and On Co-Op Project Development Team and Support Staff	Project Manager	TBD

Risk Management

Project development plans will be continuously reviewed and revised as needed, with the input and consent of all stakeholders and project development teams. The project manager will assure delivery and acceptance of all communications involving project development. All meeting minutes will be delivered in a timely manner. All documentation will be housed in specific project-related repository.

Stakeholders

On Co-Op stakeholders include the following:

- Learners
- Members
- Leaders
- Workers
- Managers
- Board of Directors

Charter Approval and Acceptance

_____

Sponsor Name   Date

_____

Project Manager   Date

Comments

_____

_____

_____

_____

_____

_____