Balancing
Act

Final Project Plan

INTE 5610 /Spring 2012

Final Project Plan/Compiled Group Deliverables
Ontario Cooperative Association: E-Learning Developer Project

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Michele Bennett – Jackie Flynt – David Mayorga – Ken Thomas
2/25/2012

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Jackie Flynt
David Mayorga
Ken Thomas

Team Agreement

January 22, 2012

In order to produce a "Team Management" product that meets all the required INTE 5160 course objectives, we have determined and agreed to the terms of the following Team Agreement document.

Team Members

Michele Bennett

- Email, michelenbennett@gmail.com
- Phone, no text, 303-651-1256

Jacqueline (Jackie) Flynt

- Email, jacquelineflynt@ucdenver.edu
- Phone, including text, 720-732-1990

David Mayorga

- Email, david@damgoodconsulting.com
- Phone, including text, 303-748-3395

Kenneth (Ken) Thomas

- Email, kenneththomas@ucdenver.edu
- Phone, no text, 303-297-8384

As described in the INTE 5160 Course Syllabus, "problems in the organization and administration of information learning and technology programs and projects" fall into topics that include:

- Project management,
- Personnel administration,
- Budget development,
- Resource planning, and
- Team collaboration.

Team Balancing Act brings the following collective knowledge base and skill sets to the project:

Michele Bennett

- Instructional and curriculum design experience at the secondary and adult education levels
- Understanding of International Organization for Standardization industry standards
- Technical, research, and academic writing—in line with APA and MLA standards
- BA in English with an emphasis in secondary education
- Entrepreneurial and non-profit project management background

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- Conflict management

- Real world experience working in both academic and corporate settings

Michele's relevant skills include: documentation, editing, research, basic theory, graphic and multi-media design, writing, front-end analysis, and assessment strategies.

Jackie Flynt

- Legal research and writing/editing, including contracts

- Compliance audits, including contract management

- Presentation and document design

- Professional experience in corporate, government and small business contexts

- BS in journalism (news editing)

Jackie's relevant skills include: scheduling, communication, research, word processing, desktop publishing, spreadsheets, bookkeeping, and data/document analysis.

David Mayorga

- BA in biology

- 30 years in the pharmaceutical/biotech industry

- Manufacturing, engineering, and quality assurance training

- Project management in the context of implementation of regulations/requirements

- Understanding of enterprise resource planning systems

David's relevant skills include: team player, documentation software i.e. Project, Adobe Suite products, good sense of humor, and real-world project management experience.

Ken Thomas

- Technology expert

- 25 years of instructional design experience

- Programmer

- Artist

- Writer

- Voice talent

Ken's relevant skills include: real-world management skills, leadership in designing projects, promoting fun in the work environment, and working independently as well as collaboratively.

Purpose

Our team provides support, facilitates a synergetic experience, and socializes learning for each member. In addition to the collective skills described above, our team offers 185.43 combined years of experience to our colleagues, clients, projects, and each other.

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Individual Learning Goals vs. Team Requirements

Michele Bennett has goals associated with understanding the theories, strategies, and elements used in the context of project management. She would also like to learn how to gain and apply professional interpersonal skills needed to successfully manage a team.

Jackie Flynt, through the completion of this course, intends to understand, with confidence, the basic elements of project management, how project management compares with instructional design processes, and how to employ the skills described in the Course Syllabus.

David Mayorga's goals are to get a better understanding of how to manage and resource an instructional design program.

Ken Thomas has no formal learning goals for this course beyond the stated objectives, and is looking forward to working with a team of his peers through the team projects.

In terms of team requirements, we embrace opportunities to learn the following skills which are described in the Course Syllabus:

* Describe the basic elements of project management
* Compare project management and instructional design processes
* Deconstruct a Request for Proposal document
* Develop an Initial Project Plan, including a Project Charter and Project Scope Statement
* Construct a Work Breakdown Structure with a cost analysis
* Plan for risks, changes, and quality control in projects
* Manage communications effectively with internal and external stakeholders
* Evaluate the organizational value of a project using a variety of methods
* Apply ethical principles to our professional work
* Manage a team on a task

Project Leadership

Leadership roles for the team projects/assignments rotate and are designated as listed below. Leaders recruit team members to fill in gaps if necessary. They are also responsible for sending reminders to team members as needed.

Independent and/or Collaborative Work

Team members communicate and negotiate their preferences for independent vs. collaborative work styles for contributing to products, depending on the natures of the projects or tasks. Decisions about form and style are discussed and agreed upon by all team members.

Communication Patterns and Format

Our team communicates both asynchronously and synchronously. We anticipate meeting synchronously at least once a week to debrief, plan, discuss, edit, and revise projects and tasks.

Communication is facilitated using UCD and personal email accounts, telephone, and online group-meeting forums. All relevant and updated communication information concerning each individual has been related to each team member. There is also a "Members" listing in Wiggio which contains each member's communication information. Idealistically, all

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members agree on the date and time of team meetings. Person or persons responsible for setting up group meetings provide notice of meetings at least 24 hours in advance and assess acknowledgement from each member.

Workload

With respect to our project workload, our team commits to maintaining open communication among members, sharing concerns with each other as they emerge, whether individually or collectively. Team members communicate and negotiate their preferences for workloads, depending on the natures of projects and tasks. Project managers are responsible for ensuring fair distribution of workload and resources.

Review and Feedback

Team members welcome each other's thoughtful and professional critiques of our individual and group work. When we feel each other's work needs to be revised, team members will provide direct feedback with solution-focused and constructive communication style. As we receive feedback, team members remain open to new ways of thinking and doing by reflecting on the team's purpose: to provide support, facilitates a synergetic experience, and socialize learning for each member, as well as to offer our combined experience to each other, our colleagues, our clients, and our projects. Team members remain open also by observing our individual egos and returning to presence without judgment—of ourselves or each other.

Addressing Problems

Our team communicates and respectfully listens to problems that emerge and develops solutions through a continual process of review and feedback, following the ADDIE model.

Quality

Team members commit to producing projects worthy of each other's portfolios and for use with future clients.

Evaluation Process

Our team evaluates our process/collaboration in terms of what works, what doesn't work, what needs adjustment, and so on through ongoing review and feedback, following the ADDIE model.

Mediation

The conditions under which our team will ask for mediation from the instructor are those in which the progress of the project has been impeded due to any reason and we agree we're not getting what we need to be successful.

Other Relevant Information or Agreements, as Required

None at this time

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Request for Proposal Analysis

Ontario Cooperative Association: E-Learning Developer Project

Introduction

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

This document provides an analysis of the RFP, focusing on the information provided and the information we believe is missing.

Balancing Act will submit a set of questions to the RFP's SPOC (Single Point of Contact) in effort to gather critical missing information.

Information Provided by the RFP

Organization information

Organization name

Ontario Co-operative Association (On Co-Op)

Mission

"Our mission is to lead, cultivate and connect the co-operative sector."
(http://www.ontario.coop/about_us/our_mission)

Vision

"Our vision is an Ontario where co-operatives contribute to the sustainability and growth of our economy and communities." (http://www.ontario.coop/about_us/our_mission)

Project information

Project name

E-Learning Developer

Work to date

Ten instructor-led modules have been created by contractors.

Current need

"The lack of current training and educational opportunities has created a demand for [a distance learning strategy]."

Target audience

Potential co-op:

- Members
- Leaders
- Workers

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Current and potential co-operative system:

- Staff

- Board of Directors

- Other interested individuals

Note: The training program is to include co-operative management and leadership topics and provide access to "case studies and documentation of best practices and innovation especially for Ontarians."

End product

Convert the 10 new modules into e-learning modules; web-based and computer-based training.

Client expectations

"We would love to see different types of learning approaches utilized such as audio, video, interactive exercises, games, and perhaps animation if costs are within the budget."

Financials

Budget

$125K, all inclusive (e.g., including all travel costs)

Invoicing

In alignment with milestones

Key dates

Event	Projected Date
Proposal submission	by February 14, 2008
Contract award	February 15, 2008
Anticipated start	February 19, 2008
Contract conclusion	August 9, 2008 (negotiable)
Program launch	September 15, 2008 (negotiable)

Technical specifications

Channel/Media

- Internet version (hosted on their server) – Hosting is specifically not in scope for this effort.

- Also available in CD ROM or DVD distribution

Standards

- SCORM or AICC compliant (compatible with unspecified LMS)

- Both channels (Internet/CD) must provide certification.

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Content

Modules

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

Module structure (current)

1. Outline/Introduction

2. Facilitator/Trainer Notes

3. Student Notes

4. Power Point Presentations

5. Readings/Case Studies

State of the content

Content already developed for all 10 modules

Ownership

The Ontario Co-operative Association will maintain ownership rights of materials created for the module development.

Maintenance

On Co-op will be responsible for evaluating and updating the content.

Tasks/deliverables

Task	Deliverable
Work with On Co-Op project manager to prioritize key areas of knowledge to transfer.	Key Learning Outcomes
Develop Design Plans for each module.	Design Plans (one per module)
Develop Alpha (screen and word content).	Alpha
Develop Beta (voice over, flash, graphics, etc.).	Beta

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Develop Final Version of the courseware.	Final Courseware:
Note: Technically, not addressed in the RFP.	• Internet files • CD/DVD versions

Note: All deliverables to be reviewed by the On Co-op "committee of experts that includes at a minimum: a university professor, an adult educator/practitioner, a co-op worker, and an e-learner/young member."

Communication requirements

Regular progress reports

Writer qualifications (Minimum qualifications)

- 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

Proposal requirements

Requirements

- No longer than three pages!
- An overview of the candidate's proposed work plan for the development of the project
- A cost breakdown with comparison options that will outline what level of development would be included at each level
- A proposed timeline
- A recounting of relevant experience, including contacts for three references
- Any other details or information that the candidate feels are relevant

Evaluation criteria

- Cost efficiency and work value
- Clarity of work plan and timeline
- Reference check
- Overall impression

Information Missing from the RFP

This section identifies the information missing from the RFP which we believe is needed in order to comprehensively respond to the RFP.

Note: Unless noted otherwise, we will request the answer in our Bidder's Questions (see below) which we will submit to the client.

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Proposal software

Document format for submission is not stated.

Note: Because the RFP is in PDF, we will submit our final proposal in PDF.

Impacts of working on a Canadian project

U.S. or Canadian funds

Is the $125K U.S. or Canadian funds?

Eligibility to respond

- Is this open for U.S. based companies to respond?

- Will we need any special licensing?

  Note: We will have our Legal Department investigate this – no need to include this in the bidder's questions.

- Will we need work permits or work visas to perform the work?

  Note: We will have our Legal Department investigate this. (There's no need to include this in the bidder's questions.)

  Note: We will identify who on our team would work on this project and verify/obtain their passports.

- Will the end product be English-only (text/audio) or is a French version also required?

Technical specifications

- Has an LMS been selected? If so, what version?

- What version of SCORM or AICC?

  Note: The answers to "Has an LMS been selected?" and "If so, what version?" will answer this question also. So there's no need to ask this question at this time.

- Is multi-browser support needed (e.g., Internet Explorer only, or multi-browsers)?

- Screen resolution minimums

  Note: We don't need this information for the bid, so we can capture it during the Technical Analysis.

- Plug-ins

  Note: We don't need this information for the bid, so we can capture it during the Technical Analysis.

- Are there any special specifications for the CD version?

  Note: We don't need this information for the bid, so we can capture it during the Technical Analysis.

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- An LCMS solution is recommended. Does On Co-op have a required LCMS in mind?

- Must the end product comply with the Canadians with Disabilities Act, the Ontario Disabilities Act, or any other similar requirements?

  Note: We don't need this information for the bid, so we can capture it during the Technical Analysis.

Travel

Travel expenses (meals, car, hotel, etc.) are included in the budget, but there's no statement of whether or not travel will be required or if so how much travel is required.

Content

Learner contact time

The modules are listed in outline form, but no time estimates are given.

Available content

- The client will provide the current content, but that remains vague (i.e., what content will be available, is it considered complete, and is it considered up to date?).

- Are supportive videos or other media available?

- Is there an expectation to develop and provide accompanying materials (e.g., manuals, workbooks, job aids) along with the program?

Standards

Are there existing standards and/or templates we must adhere to/follow?

Maintenance

The RFP states On Co-op will be responsible for maintenance. On Co-op recommended we use an LCMS, but how does On Co-op plan to perform maintenance if On Co-op does not use the same LCMS?

Project management – Review cycles

- How many review cycles are expected for each deliverable?

- How will feedback be provided (team meeting, consolidated by client, etc.)?

  Note: This can wait until Project Kickoff.

- Who will be the final approver?

- What's the process for change of scope?

Miscellaneous

Implementation

What level of support is need for implementation (e.g., IT, programming, testing, and maintenance)?

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Certification

There is a requirement for "certification." Is it possible to obtain clarification of certification requirements (e.g., is this an existing certification program or process, is there a defined assessment learners must pass, are there defined scoring requirements)?

Previous Contractors

Is there a reason the original contractors were not awarded this project as a direct sole source?

Note: We can ask around, but we will not include this in our bidder's questions.

Bidder's Questions

Before we finalize and submit the proposal, the following questions will be submitted to the client contact with a cover letter:

1. Is the RFP open for United States based companies to respond? *(If not, we will not require answers to any of the remaining questions. Should this requirement change or should On Co-op have future need for our services, we hope On Co-op will keep us in mind.)*

2. The RFP states the budget is $125,000. Is this U.S. or Canadian funds?

3. Will the end product be English-only (text/audio), or is a French version also required?

4. The RFP states the Internet version of the course will be accessed and delivered via an LMS. Has an LMS been selected? If so, what version?

5. Is multi-browser support needed (e.g., Internet Explorer only, or multi-browsers)?

6. The RFP includes a recommendation to use an LCMS:

    a. Does On Co-op have a specific LCMS in mind?

    b. Does On Co-op currently plan to use that LCMS to maintain the courseware?

7. The RFP states that travel expenses are included in the $125,000 budget. Does On Co-op anticipate travel will be required? If so, how much travel is anticipated?

8. The 10 modules are listed and outlined in the RFP. Does On Co-op have learner contact-time estimates for the planned modules? If not, is it possible for On Co-op to provide contact times for existing modules?

9. Please provide the following clarifications regarding the content:

    a. What content will be available?

    b. Does On Co-op believe this content is complete and up to date? If not, can On Co-op provide an estimate of how much effort is needed to complete and/or update the content?

    c. Are there supportive videos or other media available that may be leveraged on this project?

d. Is there an expectation to develop and provide accompanying materials (e.g., manuals, workbooks, job aids) along with the e-learning program?

10. Are there existing standards and/or templates the developer must adhere to/follow?

11. How many review cycles are expected for each deliverable?

12. The RFP mentions the Committee of Experts. Who will be the final approver?

13. Does On Co-op have a process in place to address/manage change of scope?

14. What level of support is needed for implementation (e.g., IT, programming, testing, and maintenance)?

15. There is a requirement for "certification." May we have further clarification of certification requirements (e.g., is there an existing certification program or process, is there a defined assessment learners must pass, are there defined scoring requirements)?

February 1, 2008

VIA EMAIL: dguy@ontario.coop

Denyse Guy, Executive Director
Ontario Co-operative Association

450 Speedvale Avenue West, Suite 101

Guelph, ON n1H 7Y6

Dear Ms. Guy,

Balancing Act, a leader in the e-learning industry, has received and reviewed the Request for Proposal for the On Co-op E-Learning Developer project. We appreciate your invitation to participate in the proposal process for this exciting initiative. We recognize the importance of introducing On Co-op to the prioritized sectors and are confident that we are the right team for the project.

As we prepare our response to your request, we have identified potential additional information toward ensuring we meet your needs. To serve you fully, we have attached a set of questions we would like answered at your earliest convenience.

Please feel free to respond via telephone or email, or with your plans to host a bidders' conference.

Sincerely,

Michele Bennett

Project Manager

303.555.1234

Michele.Bennett@BalancingAct.com

Attachment

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Questions for On Co-op

Request for Proposal: E-Learning Project Developer

16. Is the Request for Proposal (RFP) open for United States based companies to respond? *(If not, we will not require answers to any of the remaining questions. Should this requirement change or should On Co-op have future need for our services, we hope On Co-op will keep us in mind.)*

17. The RFP states the budget is $125,000. Is this U.S. or Canadian funds?

18. Will the end product be English-only (text/audio), or is a French version also required?

19. The RFP states the Internet version of the course will be accessed and delivered via an LMS. Has an LMS been selected? If so, what version?

20. Is multi-browser support needed (e.g., Internet Explorer only, or multi-browsers)?

21. The RFP includes a recommendation to use an LCMS:

    a. Does On Co-op have a specific LCMS in mind?

    b. Does On Co-op currently plan to use that LCMS to maintain the courseware?

22. The RFP states that travel expenses are included in the $125,000 budget. Does On Co-op anticipate travel will be required? If so, how much travel is anticipated?

23. The 10 modules are listed and outlined in the RFP. Does On Co-op have learner contact-time estimates for the planned modules? If not, is it possible for On Co-op to provide contact times for existing modules?

24. Please provide the following clarifications regarding the content:

    a. What content will be available?

    b. Does On Co-op believe this content is complete and up to date? If not, can On Co-op provide an estimate of how much effort is needed to complete and/or update the content?

    c. Are there supportive videos or other media available that may be leveraged on this project?

    d. Is there an expectation to develop and provide accompanying materials (e.g., manuals, workbooks, job aids) along with the e-learning program?

25. Are there existing standards and/or templates the developer must adhere to/follow?

26. How many review cycles are expected for each deliverable?

27. The RFP mentions the Committee of Experts. Who will be the final approver?

28. Does On Co-op have a process in place to address/manage change of scope?

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29. What level of support is needed for implementation (e.g., IT, programming, testing, and maintenance)?

30. There is a requirement for "certification." May we have further clarification of certification requirements (e.g., is there an existing certification program or process, is there a defined assessment learners must pass, are there defined scoring requirements)?

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Balancing Act
E-Learning Developer Project
Project Charter

January 2008

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Documentation Information

File Name	INTE5160_ProjectCharter_BalancingAct_v1

Date	January 2008
Project Title	E-Learning Developer Project – Ontario Co-Op
Charter Description	This charter is designed to create a clear overview of the E-Learning Developer 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
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		J. Flynt	Final Version

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Project Title: E-Learning Developer 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" (RFP 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.

- Build our e-learning development portfolio.

- Earn and generate profit.

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

Measurable Project Objectives

Balancing Act's Objectives

- Contribute to education, economic growth, and sustainability, in the U.S. and globally.

- Broaden our U.S. client base to international business, beginning with Canada.

- Provide services to/create a product for Ontario Co-Operative Association, an economic and sustainability leader in Ontario, Canada.

- Add a piece to our e-learning development portfolio.

- Earn $125K for the E-Learning Developer project and support On Co-op in meeting its project objectives.

On Co-op's Objectives

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

- Overcome challenges associated with teaching instructor-led courses.

- Increase availability of On Co-op training resources.

Learners' Objective

[x]% of learners will score at 80% or higher in assessments, by correctly answering at least 80% of assessment questions, for all 10 modules toward certificate award. (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 (pending answer at bidders' conference).

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 (RFP p. 4), and Balancing Act will provide regular progress reports (RFP 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 (RFP p. 4).

1. Outline/Introduction
2. Facilitator/Trainer Notes
3. Student Notes
4. Power Point Presentations

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5. Readings/Case Studies

According to the On Co-op bidders' conference representative, "We believe…the content could be delivered in about an hour in an online course."

No style guide, graphic design standards, and/or branding requirements 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 Accessibility for Ontarians with 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 (RFP 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 (RFP 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. (i.e., no travel needed). Training will be delivered by On Co-op via webcast.

- 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 10 modules into an e-learning

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format is $125K" (RFP 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 (RFP 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." (RFP p. 4)

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- 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." (RFP p. 3)

- Capabilities of the LCMS, which Balancing Act has not yet evaluated and may require 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 and lag time 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 development team members 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).

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- 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 four 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."

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Organizational Scope

Table 1

Name	Contact Information	Role	Responsibility
Balancing Act			
Balancing Act		Vendor's 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 Designers	• 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

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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

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			• Represent user
Provided by On Co-op		Review Committee (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		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 On Co-op internal communications systems
- Project follow-up costs
- Support staff

Out of Scope

The following are outside the E-Learning Developer project scope for work performed by 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)
- Content for any module structured other than as follows (RFP p. 4)

    1. Outline/Introduction
    2. Facilitator/Trainer Notes
    3. Student Notes

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4. Power Point Presentations
5. Readings/Case Studies

- 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 (RFP 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 (RFP p. 2)

- Facilitating migration of the solution to the On Co-op LMS (Bidders' conference)

- Development of e-learning solution for Internet connections other than high speed (Bidders' conference)

- Development of e-learning solution for multi-browser support or mobile devices (Bidders' conference)

Project Management

Communication and Reporting Plan (McVay Lynch & 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)	Project Team, Sponsor,	Project	Email

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	weeks or when a milestone has been reached	Customer	Manager	
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/lap tops
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 sessions	TBD	On Co-Op Stakeholders and Support Staff	Instructional Design Team	Conference room with access to eight (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.

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Stakeholders

On Co-Op stakeholders include the following:

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

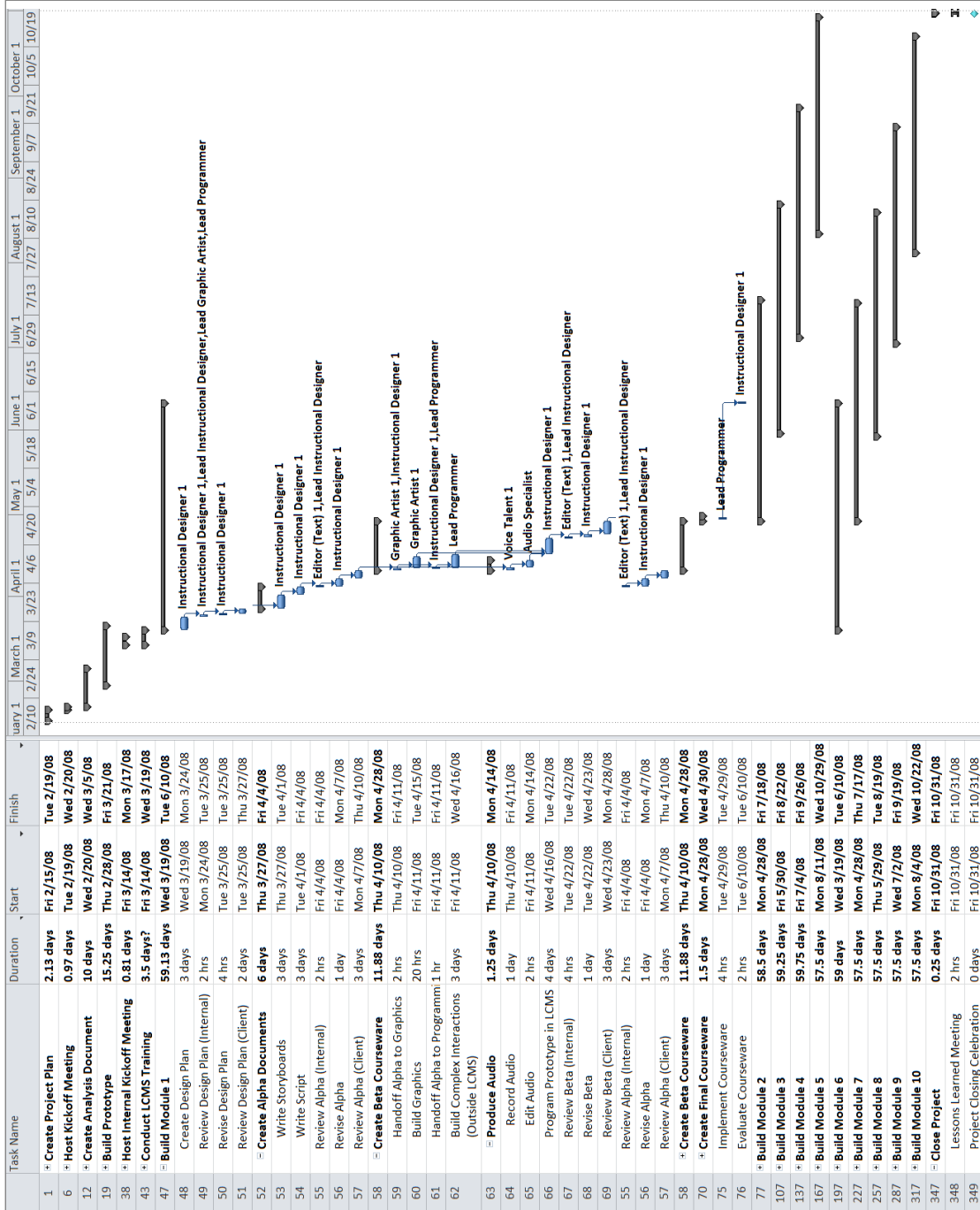## Charter Approval and Acceptance

_____

Sponsor Name   Date

_____

Project Manager   Date

Comments

_____

_____

_____

_____

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Work Breakdown Structure/Project Schedule:
On Co-op: E-Learning Developer Project

ID	Task Name	Duration	Start	Finish
1	Create Project Plan	2.13 days	Fri 2/15/08	Tue 2/19/08
6	Host Kickoff Meeting	0.97 days	Tue 2/19/08	Wed 2/20/08
12	Create Analysis Document	10 days	Wed 2/20/08	Wed 3/5/08
19	Build Prototype	15.25 days	Thu 2/28/08	Fri 3/21/08
38	Host Internal Kickoff Meeting	0.81 days	Fri 3/14/08	Mon 3/17/08
43	Conduct LCMS Training	3.5 days?	Wed 3/14/08	Wed 3/19/08
47	Build Module 1	59.13 days	Wed 3/19/08	Tue 6/10/08
48	Create Design Plan	3 days	Wed 3/19/08	Mon 3/24/08
49	Review Design Plan (Internal)	2 hrs	Mon 3/24/08	Tue 3/25/08
50	Revise Design Plan	4 hrs	Tue 3/25/08	Tue 3/25/08
51	Review Design Plan (Client)	2 days	Tue 3/25/08	Thu 3/27/08
52	Create Alpha Documents	6 days	Thu 3/27/08	Fri 4/4/08
53	Write Storyboards	3 days	Thu 3/27/08	Tue 4/1/08
54	Write Script	3 days	Tue 4/1/08	Fri 4/4/08
55	Review Alpha (Internal)	2 hrs	Fri 4/4/08	Fri 4/4/08
56	Revise Alpha	1 day	Fri 4/4/08	Mon 4/7/08
57	Review Alpha (Client)	3 days	Mon 4/7/08	Thu 4/10/08
58	Create Beta Courseware	11.88 days	Thu 4/10/08	Mon 4/28/08
59	Handoff Alpha to Graphics	2 hrs	Thu 4/10/08	Fri 4/11/08
60	Build Graphics	20 hrs	Fri 4/11/08	Tue 4/15/08
61	Handoff Alpha to Programmi	1 hr	Fri 4/11/08	Fri 4/11/08
62	Build Complex Interactions (Outside LCMS)	3 days	Fri 4/11/08	Wed 4/16/08
63	Produce Audio	1.25 days	Thu 4/10/08	Mon 4/14/08
64	Record Audio	1 day	Thu 4/10/08	Fri 4/11/08
65	Edit Audio	2 hrs	Fri 4/11/08	Mon 4/14/08
66	Program Prototype in LCMS	4 days	Wed 4/16/08	Tue 4/22/08
67	Review Beta (Internal)	4 hrs	Tue 4/22/08	Tue 4/22/08
68	Revise Beta	1 day	Tue 4/22/08	Wed 4/23/08
69	Review Beta (Client)	3 days	Wed 4/23/08	Mon 4/28/08
55	Review Alpha (Internal)	2 hrs	Fri 4/4/08	Fri 4/4/08
56	Revise Alpha	1 day	Fri 4/4/08	Mon 4/7/08
57	Review Alpha (Client)	3 days	Mon 4/7/08	Thu 4/10/08
58	Create Beta Courseware	11.88 days	Thu 4/10/08	Mon 4/28/08
70	Create Final Courseware	1.5 days	Mon 4/28/08	Wed 4/30/08
75	Implement Courseware	4 hrs	Tue 4/29/08	Tue 4/29/08
76	Evaluate Courseware	2 hrs	Tue 6/10/08	Tue 6/10/08
77	Build Module 2	58.5 days	Mon 4/28/08	Fri 7/18/08
107	Build Module 3	59.25 days	Fri 5/30/08	Fri 8/22/08
137	Build Module 4	59.75 days	Fri 7/4/08	Fri 9/26/08
167	Build Module 5	57.5 days	Mon 8/11/08	Wed 10/29/08
197	Build Module 6	59 days	Wed 3/19/08	Tue 6/10/08
227	Build Module 7	57.5 days	Mon 4/28/08	Thu 7/17/08
257	Build Module 8	57.5 days	Thu 5/29/08	Tue 8/19/08
287	Build Module 9	57.5 days	Wed 7/2/08	Fri 9/19/08
317	Build Module 10	57.5 days	Mon 8/4/08	Wed 10/22/08
347	Close Project	0.25 days	Fri 10/31/08	Fri 10/31/08
348	Lessons Learned Meeting	2 hrs	Fri 10/31/08	Fri 10/31/08
349	Project Closing Celebration	0 days	Fri 10/31/08	Fri 10/31/08

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Cost Analysis/Staffing and Budget Plan
Ontario Cooperative Association: E-Learning Developer Project

Introduction

Balancing Act has reviewed Ontario Co-operative Association's (On Co-Op) Request for Proposal (RFP) for their e-learning Developer project, which called for the conversion of 10 existing instructor-led modules into an e-learning format.

Balancing Act has been unable to create a plan that meets its requirements using On Co-op's budget and deadlines.

This internal document presents our current staffing approach and costs, as well as a high-level overview of our budgeting approach. After internal review of this document, Balancing Act plans to present to On Co-op our proposed options for:

- Lowering expectations for the e-learning modules,
- Lowering the number of modules converted to e-learning, OR
- Increasing the budget for conversion of all 10 modules.

Staffing

Internal resources

Resource	Annual Salary	Hourly "Pay"[1]	Load Factor[2]	Billable Rate[3]
Principals[4]	$120,000	$57.70	2.08	$120/hour
Leads[5]	$75,000	$36.06	2.08	$75/hour
Editors	$45,000	$21.64	2.08	$45/hour

[1] Hourly "pay" is calculated by dividing the annual salary by 2080 (the work hours in a year).

[2] The employee's pay must be multiplied by some factor to cover our overhead costs (e.g., non-billable employees, building lease, equipment costs, software costs, material fees, benefits, profit, etc.). Balancing Act's current internal load factor is 2.08.

[3] Billable rate is calculated by multiplying the employee's hourly pay by the load factor.

[4] Principals are not expected to be billable 100% of their time; the bulk of their time is spent developing the business.

[5] Leads are our front-line functional managers. Project Managers are included in the Leads category.

External resources

Resource	Hourly "Pay"[1]	Load Factor[2]	Billable Rate
Instructional Designers	$50.00	1.15	$57.50/hour
Graphic Artist	$45.00	1.15	$51.75/hour
Audio Specialist	$45.00	1.15	$51.75/hour

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[1] Hourly "pay" is the amount Balancing Act pays per hour of the contractor's time.

[2] Our loading is lower for contractors because we do not pay for their benefits, equipment, software, etc. We do want to recoup the minor costs for administration (invoicing and billing), as well as profit. Balancing Act's current external load factor is 1.15.

Narration

For our outsourced narration, we use Voices.com. They charge $1,500.00 for 45 to 60 minutes of finished audio (Business & Corporate Video category). Because invoicing is simplified (a one-time invoice), our load factor for audio is 1.10, so our billable rate is $1,650.00 per finished hour of audio.

Budget Breakdown

The following table illustrates our estimated costs per project phase:

Phase	Cost
Create Project Plan	$1,275.00
Kickoff Project (with Client)	$3,401.25
Build Prototype[1]	$9,723.75
Kickoff Project (Internal Team)	$1,247.50
LCMS Training	$4,400.00
Develop Module 1[2]	$14,236.00
Develop Module 2	$13,620.00
Develop Module 3	$13,620.00
Develop Module 4	$13,620.00
Develop Module 5[2]	$13,620.00
Develop Module 6	$14,236.00
Develop Module 7	$13,620.00
Develop Module 8	$13,620.00
Develop Module 9	$13,620.00
Develop Module 10	$13,620.00
Closeout Project	$1893.50
Total Project Cost:	*$159,373.00*

[1] The cost of the Prototype is unusually high because it includes 20 hours of LCMS training that our Lead Instructional Designer and Lead Programmer must complete.

[2] We currently have two instructional designers working the project:

- Instructional Designer 1 builds Modules 1 through 5
- Instructional Designer 2 builds Modules 6 through 10

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Modules 1 and 6 are the first round these Instructional Designers will be building, so these require additional internal review and coaching.

Pricing Justification

Baseline

The RFP calls for the development of 10 hours of e-learning. Their requirements (engagement, audio, Flash, etc.) led us to classify the end product as Level III courseware, which requires an average of 220 hours of development time per finished hour. This leads us to the following equation:

10 × 220 = 2200 hours of development time

Adjustments minus deductions

The following factors allow us to subtract various deductions from the baseline:

Deduction #1   Converting Existing Materials: Subtract 5%

Deduction #2   Using LCMS: Subtract 20%

Adjustments minus additions

The following factors allow us to make various additions to the baseline:

Addition #1   Heavy Project Management: Add 10%

Addition #2   Kickoff Meeting: Add Actuals ($3,401.25)

Addition #3   Create Prototype: Add Actuals ($9,723.75)

Addition #4   Audio Narration: Add Billable Costs for 10 Hours of Finished Narration ($16,500.00)

Addition #5   LCMS Training: Add Actuals ($6,800.00)

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Risk and Change Management Plan
On Co-op: E-Learning Developer Project

Potential Risks

Potential Risk	Impact to the Project	Possible Solutions
The budget amount of $125,000 is in Canadian rather than U.S. funds.	If the budget amount of $125,000 is in Canadian rather than U.S. funds, that amounts converts to $124,262.50 (as of February 9, 2012, at an exchange rate of 0.9941, using nominal rate per Bank of Canada), which is difference of $737.50.	Define in the contract the budget amount as U.S. funds.
Possible restrictions and timeline of grants/project funding awarded to On Co-op may affect its ability to pay in a timely manner.	If possible restrictions and timeline of grants/project funding awarded to On Co-op affect its ability to pay in a timely manner, payments may be delayed.	• Include in the contract late payment penalties. • Ensure we have financial reserves to pay our employees and vendors on time.
Instructional Content		
We have not yet reviewed the instructional content developed by On Co-op and have not yet verified the content is sufficient to support converting the modules to e-learning format.	If the instructional content is not sufficient to support converting the modules to e-learning format additional analysis will be required which will substantially impact the budget and schedule.	• Include in the contract a requirement for On Co-op's timely provision of instructional content. • Include in the contract a definition of sufficient instructional content and consequences for content not meeting this definition (e.g., if the instructional content is not sufficient to support converting the modules to e-learning format, all work will stop until On Co-op and Balancing Act agree on a strategy and cost to gather or create sufficient content).

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Potential Risk	Impact to the Project	Possible Solutions
The instructional content developed by On Co-op is insufficient for certification eligibility (RFP p. 4).	If the instructional content developed by On Co-op is insufficient for certification eligibility (RFP p. 4), additional analysis and development will be required with will substantially impact the budget and schedule.	Include in the contract a requirement for On Co-op's timely provision of certification eligible content, defining certification eligibility and emphasizing that requests for development of such content will be treated as out of scope.
Learner contact times provided by On Co-op may have been miscalculated.	If the estimated learner contact times are not defined more clearly—or are inaccurate—the project budget and schedule may be unrealistic and inadequate.	Include in the contract language limiting each module converted to e-learning to the projected one hour of learner contact time, clarifying that additional contact time will be scoped as needed.
	E-Learning Solution Development	
The e-learning solution/end-product, including text and audio, will be in French and English, rather than English only.	If the e-learning solution/end-product, including text and audio, will be in both French and English, rather than English only, additional development will be required, which will substantially impact the budget and schedule.	Include in the contract language clarifying the e-learning solution/end-product will be in English only, emphasizing that any requests for text or audio in a language other than English will be treated as out of scope.
The e-learning solution/end-product is required to comply with the Canadians with Disabilities Act, the Accessibility for Ontarians with Disabilities Act, or other similar requirements.	If the e-learning solution/end-product is required to comply with the Canadians with Disabilities Act, the Ontario Disabilities Act, or other similar requirements, additional analysis and development will be required which will substantially impact the budget and schedule.	Include in the contract language clarifying the e-learning solution/end-product's exemption from compliance with the Canadians with Disabilities Act, the Ontario Disabilities Act, or other similar requirements, emphasizing that requests for any such compliance will be treated as out of scope.

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Potential Risk	Impact to the Project	Possible Solutions
The e-learning solution/end-product will be group-paced rather than self-paced, or both group and self-faced rather than solely self-paced.	If the e-learning solution/end product will be group-paced rather than self-paced, or both group and self-faced rather than solely self-paced, additional analysis and development will be required which will substantially impact the budget and schedule.	Include in the contract language clarifying the e-learning solution/end-product will be solely self-paced, emphasizing that requests for group-paced strategies, treatments, or media will be treated as out of scope.
On Co-op's expectations for variety in/specific types of e-learning strategies, treatments, and media employed, "such as audio, video, interactive exercises, games, and perhaps animation" (RFP p. 4) may be outside our tight budget.	If On Co-op's expectations for variety in/specific types of e-learning strategies, treatments, and media employed are outside the scope, the project budget and schedule may be unrealistic and inadequate.	• Define in the contract the scope for variety in/specific types of e-learning strategies, treatments, and media employed. • Set realistic expectations for On Co-op through the development and sign-off on a prototype representing all key e-learning strategies, treatments, and media, emphasizing that any requests for strategies, treatments, or media not represented in the prototype will be treated as out of scope.

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Potential Risk	Impact to the Project	Possible Solutions
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" (RFP p. 3) may have difficulty reaching agreement on feedback.	• If the On Co-op review committee rejects or is unsatisfied with the e-learning solution/end product, the project may be killed or delayed, or the project budget and schedule may be unrealistic and inadequate. • If the On Co-op review committee provides disjointed or conflicting feedback, our incorporation of such feedback may be delayed.	• Include "gate reviews" or signoffs for all interim deliverables. • Include in the contract language clarifying that changes to a later stage which were approved in an earlier stage (e.g., approving language in the script, then requesting changes after the audio has been recorded) will be treated as out of scope. • Coach On Co-op's team/review committee members on reviewing drafts and providing us with solid, actionable feedback. • Include in the contract language clarifying that On Co-op is responsible for providing consolidated feedback for each deliverable. • Define in the contract criteria for the On Co-op review committee's rejection of or dissatisfaction with the e-learning solution/end-product (i.e., define the satisfactory solution/end-product).

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Potential Risk	Impact to the Project	Possible Solutions
We have not yet evaluated the capabilities of the On Co-op LCMS, which may require additional templates to support our e-learning strategies.	If the LCMS capabilities require additional templates to support our e-learning strategies, the project budget and schedule may be unrealistic and inadequate.	• Budget and plan for procuring/developing additional templates to support our e-learning strategies. • See prototyping process above: "Set realistic expectations for On Co-op through the development and sign-off on a prototype representing all key treatments and media, and emphasize that any requests for treatments or strategies not represented in the prototype will be treated as out of scope."
Technical Specifications		
On Co-op requests or expects us to facilitate production of CDs/DVDs for computer-based channel distribution.	If On Co-op requests or expects us to facilitate production of CDs/DVDs for computer-based channel distribution, the project plan and schedule may be unrealistic and inadequate.	Draft language in the contract clarifying that On Co-op is responsible for facilitating production of CDs/DVDs for computer-based channel distribution, emphasizing that requests for our facilitation of such production will be treated as out of scope.
Quality and estimated amount of LCMS training provided by On Co-op may insufficiently prepare our designers.	• If the quality of the LCMS training provided by On Co-op is insufficient, the project budget and schedule may be unrealistic and inadequate. • If the amount of LCMS training estimated by On Co-op is inaccurate, the project budget and schedule may be unrealistic and inadequate.	• Draft language in the contract requiring On Co-op to provide sufficient LCMS training, including a definition of sufficient training. • Draft language in the Change Management Plan addressing protocol to remedy insufficient On Co-op LCMS training. • Include our Lead Programmer and Lead Instructional Designer in the first iteration of the On Co-op LCMS training, to evaluate the training and adjust it for other developers as needed.

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Potential Risk	Impact to the Project	Possible Solutions
The On Co-op LCMS may be unavailable or suffer lag time.	If the On Co-op LCMS hosting is delayed, the project budget and schedule may be unrealistic and inadequate.	• Define in contract timely On Co-op LCMS hosting, clarifying impacts of delayed hosting. • Test access and performance of the On Co-op LCMS in prototype development.
The On Co-op LCMS support team's availability may be limited and may not provide our development teams with timely support.	If the On Co-op LCMS support team is unavailable when our development teams request support, the project budget and schedule may be unrealistic and inadequate.	• Define in the contract availability of On Co-op LCMS support team, clarifying impacts of support team unavailability. • Include our Lead Programmer in the first iteration of the On Co-op LCMS training, to enable back-up support by our Lead Programmer if needed.
Personnel		
The On Co-op SME may be unavailable during Design Plan and Alpha development.	If the On Co-op SME is unavailable when our development teams request feedback, the project budget and schedule may be unrealistic and inadequate.	• Create contact sheets and availability schedules in preparation of Kickoff. • Include language in the contract clarifying the impacts of On Co-op SME unavailability.
New templates to support our e-learning strategies, in the case of insufficient capabilities by the On Co-op LMS, may delay Instructional Designers' production and postpone deadlines, especially during initial rounds of development.	If new templates to support our e-learning strategies delay Instructional Designers or postpone deadlines, such delays will cascade throughout the project schedule.	• Define all templates and treatments during the internal kickoff, using the Prototype. • Create a project style guide listing approved treatments and templates. • Provide Instructional Designers with extra coaching time from the Lead Designer and the Lead Programmer during initial rounds of development (e.g., Modules 1, 2, and 3; 6, 7, and 8).

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Potential Risk	Impact to the Project	Possible Solutions
The newly formed On Co-op committee of experts (review committee) may not respond to requests by Instructional Designers or Project Managers in a timely manner.	If the newly formed On Co-op committee of experts (review committee) does not respond to requests by Instructional Designer or Project Manager in a timely manner, such delays will cascade throughout the project schedule.	• Include in the availability schedule data for the On Co-op review committee members. • Create a clear plan for communication with On Co-op review committee members (e.g., if a designer has a question about a review comment, the designer will ask the question via email copied to both the On Co-op and the Balancing Act Project Managers, clearly indicate when a response is required).

Potential Changes

Potential Change	Impact to the project	Possible Solutions
Changes Within Project Plan – v0-1		
BA requires additional time for training.	HIGH IMPACT - Without the extra time, the quality of the product might suffer. Additional time for training will have a rippling effect throughout the Time Scope of the project and ultimately lead to redefining the timeline and/or rescheduling deadlines.	• Request a contract change to adjust the project budget and schedule, as well as for On Co-op to provide additional funding, to accommodate additional training needed. • If On Co-op rejects such a contract change request, BA team members will address this issue internally and decide whether un-paid overtime might be required
Client wants LCMS training to take place using independent training program.	LEVEL OF IMPACT TBD - Changing how the LCMS training is delivered to BA could have both positive and negative impacts. It could allow BA designers to learn on an independent and asynchronous time schedule.	• On Co-op requests a contract change with funding to accommodate independent training. • BA team will review independent training program and negotiate terms with client.

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Potential Change	Impact to the project	Possible Solutions
In addition to English-language audio and/or text, client would like audio and/or text in French.	HIGH IMPACT - Although this might add value to the project (as it could be published in other French-speaking countries and communities), the time and cost needed to translate the audio scripts and text to French and record additional audio would be extensive. Additional resources would and funding would be required.	• BA will state in the contract that a French version of the project is not an option within the scope of this project. • On Co-op requests a scope/contract change with funding to accommodate French audio and/or text.
Learner certification requirements change.	LEVEL OF IMPACT TBD - This is out of the scope of the project plan. Depending on the depth of changes needed, additional content might be needed. Original content authors and SMEs will need to be contacted to discuss the value of the revised requirements. Review team will need to be advised of changes.	• Before beta release of Module 1, client will establish and publish final certification requirements based on objectives, outcomes, and assessment of review committee. • Process for learners to meet new certification requirements may be completed outside the LCMS, "manually." • Client requests a scope change with funding to accommodate changed certification requirements.
Client wants to change learner contact-time to accommodate internal needs.	LEVEL OF IMPACT TBD - Depending on the changes made, resources could be affected.	• BA will insert requirements for notification of project timeline changes into contract. • On Co-op requests a scope change with funding to accommodate changed learner contact-time.
Client decides to halt the production of audio due to cost constraints.	LEVEL OF IMPACT TBD - Contracts with outside media source would be affected. The value of the	• Depending on the wording in the contract, options may be limited. Worse case: Client has to pay for entire audio

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	product might go down. Audio might need to be replaced with other verbal learning strategies.	contract. Best case: "Audio Specialist" vendor prorates the work already done.
Client decides to increase/decrease number of modules.	IMPACT HIGH - All aspects of project scope would be affected. All original constraint values would become obsolete. Overall change in product value would depend on possible revised definition of learning outcomes.	• BA will evaluate the change with all stakeholders in order to renegotiate terms of contract. • Determine which, if any, changes can be implemented with current resources. • On Co-op requests a scope change with funding to accommodate changed modules.
Client redefines key learning outcomes after design plans have been created.	LEVEL OF IMPACT TBD - Depending on the depth of change, individual module content may need to be adjusted.	• If module content is affected, BA will renegotiate terms of contract with client. • On Co-op requests a scope change with funding to accommodate changed learning outcomes.
Script changes requested after Alpha has been signed off.	IMPACT HIGH - Depending on when the change occurs in the project cycle, this could have a large effect on the timeline of the entire project. If the change needs to occur in all modules or just a small section will be the determining factor in overall affect.	• BA will assure client signs off on script before creating audio version. Any changes thereafter will require renegotiation of contract terms.
Graphic changes requested after Alpha has been signed off.	IMPACT HIGH - Depending on when the change occurs in the project cycle, this could have a large effect on the timeline of the entire project. If the change needs to occur in all modules or just a small section will be the determining factor in overall affect.	• BA will assure client signs off on graphic selection before graphic installation. Any changes thereafter will require renegotiation of contract terms.

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Potential Change	Impact to the project	Possible Solutions
BA needs to develop the content to be sufficient to support converting the modules to e-learning format.	IMPACT HIGH – These changes will require additional time and resources.	• BA requests a scope/contract change to adjust the project budget and schedule, as well as for On Co-op to provide additional funding, to accommodate development of the content to be sufficient to support converting the modules to e-learning format.
Client wants custom video.	IMPACT HIGH - It will require additional time and resources.	• Client requests a scope change with funding to accommodate custom video.
Changes within Communication and Reporting Scope		
BA defines "regular progress reports" below client's expectations.	IMPACT LOW - In original RFP, On Co-op only requires "regular progress reports." BA wants to define when the progress reports will be due in order to keep all project participants on task.	• BA will create a sample project report for the kickoff and ask for signoff on that approach.
Client changes reporting schedule.	LEVEL OF IMPACT TBD - Depending on the types of changes made to reporting plan, project could be held back.	• On Co-op requests a contract change.
BA changes reporting schedule.	LEVEL OF IMPACT TBD - Depending on the types of changes made to reporting plan, project could be held back.	• BA requests a contract change.
Client updates internal communications CMS.	IMPACT LOW - Due to CMS software update or change, passwords and user logins may need to be changed.	• Prescribe in a communication plan that client will document and communicate any upgrades of CMS to at least one week in advance.
Client wants face-to-face interaction between SME and developer.	IMPACT HIGH - There are no funds available or designated for travel and expenses	• Suggest using free Web-based video conferencing services to limit travel time and expenses. • Client requests a scope change with funding to accommodate travel.

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Potential Change	Impact to the project	Possible Solutions
Organizational Scope		
Client adds or subtracts participants from review committee.	IMPACT HIGH – This change may impact the completed modules and disrupt the "agreed" upon content/format conducted by previous reviewer.	• Prescribe in a communication plan that On Co-op will include in a contact sheet and availability schedule data for alternate committee review members. • Prescribe in a communication plan that On Co-op will immediately document and communicate all changes to the review committee.
Client changes project manager.	IMPACT HIGH - High probability that new PM will have a different perspective on key objectives, which in turn increases the probability of changes to completed courses.	• Prescribe in a communication plan that On Co-op will include in a contact sheet and availability schedule data for an alternate On Co-op Project Manager. • Prescribe in a communication plan that On Co-op will immediately document and communicate a change of Project Manager.
BA changes project manager.	IMPACT LOW – We do our job correctly and have a backup ready to go.	• BA and client will discuss transitional effects and document any changes within the organization, communication, and project time-line. • There will be no changes to the project scope or work plan.
BA redefines team roles or participation of certain team members.	LEVEL OF IMPACT TBD – Sickness, emergencies, and unexpected personal and internal changes can cause loss of team members.	• All organizational changes will be discussed with BA team and client prior to transition, if possible. • Clear and constant communication between team members is a proactive solution.

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Potential Change	Impact to the project	Possible Solutions
Client changes amount of On Co-op LCMS support/participation.	LEVEL OF IMPACT TBD – Communication between BA and IT support could be compromised. This may have an effect of BA's ability to complete certain tasks in the case of technical problems or emergencies.	• On Co-op requests a contract change. • Prescribe in a communication plan that On Co-op will include in a contact sheet and availability schedule data for On Co-op LCMS support team. • Prescribe in a communication plan that On Co-op will immediately document and communicate changes to On Co-op LCMS support team.
Cost Scope		
BA changes pay-out schedule due to overhead costs.	IMPACT HIGH – Some BA expenses and material costs may need to be covered in a timelier manner.	• BA requests a contract change for modifying On Co-op's pay-out schedule.
LCMS Compatibility Changes		
A different LCMS is required due to incompatibility with client's expectations of project deliverables.	IMPACT HIGH – Requiring a different LCMS would disable the project for an undetermined amount of time.	• BA would evaluate needs with client and determine solution. • Client would be responsible for selecting new LCMS and renegotiate contract. • Contract language should include that migrating any work created in the original LCMS and learning a new LCMS are not in scope. • On Co-op requests contract/scope change.
Client needs BA assistance to facilitate migration of materials to LMS.	LEVEL OF IMPACT TBD – This would increase the scope of the project and introduce new expenses and escalate the time scope.	• On Co-op requests a scope change with funding to accommodate facilitating migration. • BA will negotiate added assistance with client to determine specific needs.
Technical Changes		

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Clients wants course to be mobile-ready for tablets, ipads, and smart-phone devices.	IMPACT HIGH – This change would be out of scope of original project plan. Additional technical research, design, and changes will be required to format mobile-ready site. This change might add significant value to the product.	• BA will evaluate this request and determine if they will apply the changes at a different time. • Client requests a scope change with funding to accommodate develop solution for mobile devices.
Client's LCMS has not had any updates, i.e. software version is the original and the current browsers are not compatible. The client wants to update the software and/or browsers at the same time the modules are being developed for Internet Explorer 7 and Flash 9 (as assumed per the bidders' conference).	IMPACT HIGH - The course modules can't be developed until all the software changes have been implemented. This would delay the start of the project, therefore, impacting the project timeline.	• Client requests a contract change to revise the project schedule to accommodate the delay.
Miscellaneous Out of Scope Changes		
Client wants BA to visit On Co-op site for clearer understanding of environment and better front-end analysis of project development.	IMPACT LOW – This is out of the scope of the agreement. Travel expenses will need to be negotiated. Meeting the client's request will probably result in BA acquiring more data and an increased awareness of the client's needs.	• Client requests a scope/contract change with funding to accommodate travel.
Client wants BA to work on On Co-op site as needed.	IMPACT HIGH – BA may have other customer responsibilities that need to be attended to from home office. This change may increase the value of the product but will certainly increase the overall cost.	• Client requests a scope/contract change with funding to accommodate travel. • BA will need to renegotiate contract with client. • BA will need to determine if other customer contracts will

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		be affected.
End-product must comply with the Canadians with Disabilities Act, the Accessibility for Ontarians with Disabilities Act, or other similar requirements.	IMPACT HIGH – Depending on the specific laws or standards the solution must comply with, we may need to write and include alternative text, include transcripts, and/or ensure code is compliant.	• Develop courses as planned; develop plan to incorporate compliance at a later date. • Client requests a scope change with funding to accommodate development for compliance with Canadians with Disabilities Act, the Accessibility for Ontarians with Disabilities Act, or other similar requirements.

Change Management Procedure

Following is the procedure for changing the current contract, including project scope:

1. Complete contract/scope change request (description of change, justification/supporting data, impact assessment).
2. Submit request form to On Co-op and/or Balancing Act for approval.
   a. If approved, implement the change.
   b. If not approved, Balancing Act Project Manager and On Co-op Project Manager meet to discuss the request. If agreement cannot be reached, the request is escalated to the On Co-op project sponsor and Balancing Act's principles to negotiate a solution.

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Quality Management Plan/Four Measures of Quality:
Methodology, Standards, Reviews, and Change Management

This quality management plan, or approach, highlights four of Balancing Act's measures of quality to be implemented across all phases of the On Co-op E-Learning Developer project life cycle (McVay Lynch & Roecker, 2007):

1. Methodology of quality management
2. Standards defined in a style guide
3. Reviews of interim deliverables
4. Change management system (pp. 120-122)

Methodology of Quality Management

Maggie McVay Lynch and John Roecker (2007) define *methodology*, in the context of "quality materials," as "a collection of processes, procedures, templates, and tools to guide a team through the project in a manner suitable for [On Co-op]" (pp. 120-121).

Balancing Act's quality management methodology is a holistic, integrated system for quality assurance which employs standards, reviews, and change management, as well as other materials or tools, guided by a master checklist. The methodology will be tailored to the On Co-op project contract and scope to ensure deliverables are "within the quality expectations of [On Co-op] and the project charter" (McVay Lynch & Roecker, p. 119). Together with On Co-op, Balancing Act will identify and customize the methodology according to project scope priorities, such as between deliverables, time, and cost.

Beyond quality assurance for project deliverables and quality-relevant data, Balancing Act's quality management methodology provides for continuous improvement (McVay Lynch & Roecker, pp. 120-127). This provision includes mechanisms for both On Co-op and Balancing Act to identify, track, and remedy any problems with quality measures which may surface, including with the methodology itself (McVay Lynch & Roecker, pp. 127-128).

The cornerstone of quality management methodology is communication. Balancing Act will involve On Co-op with the system for quality assurance and improvement in order to inform On Co-op about the various complexities of the project, empowering them while strengthening the vendor-client relationship (McVay Lynch & Roecker, p. 128).

Standards Defined in a Style Guide

Description

A style guide defines the standards used by instructional designers, graphic artists, and programmers in the development of all documents and learning products. Balancing Act's Style Guide defines its color palette, fonts, graphic standards (sizes, styles, drop shadows, backgrounds, etc.), available page layouts and interaction types (along with default prompts for each), common grammar rules (largely influenced by *The Chicago Manual of Style* and Strunk & White), and common words (e.g., e-mail vs. eMail). Prior to a project kickoff, Balancing Act's quality manager reviews the contract and technical constraints and meets with a client representative and internal leads to customize the style guide for the project (e.g., delete unavailable interactions and add new ones).

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Risks

If any individual team member in the development chain strays from the approved project style guide, the end product will lack cohesion and will not reflect the agreed upon commitment to quality.

Mitigation

The customized style guide is reviewed during the internal team kickoff, for specifically pointing out modifications to be aware of (e.g., unavailable or new interactions) and clarifying expectations that all team members will adhere to the guide. If deviations from the guide are discovered during internal reviews, the individual responsible will be directed to revise the product accordingly; any impacts to the schedule or budget will be assessed by the project manager and communicated to the client as needed. Changes to the approved project style guide must be requested according to the change management procedure.

Reviews of Interim Deliverables:
Interim Deliverable Sign-Off Process

Description

The Interim Deliverable Sign-off Process (IDSOP) is used to ensure every product meets Balancing Act's high quality standards and our client's requirements and expectations. Its implementation provides stability and keeps the project on track. We divide the development of each learning product into systematic and sequential phases (Analysis, Design, Development, Implementation, & Evaluation), and define a deliverable milestone for each phase. Balancing Act verifies that each phase has been successfully completed and complies with internal and external quality standards. Verification is documented and then handed-off to the identified client stakeholders for their review and approval.

Risks

The successful implementation of the IDSOP is dependent upon two factors: its participants' timely evaluations and responses and approval of deliverable milestone. If the IDSOP process is delayed or halted in any way, the project cost and time scope could be negatively affected. Because of unforeseen and extenuating circumstances, personnel emergencies, product changes, or lack of commitment, the level of risk is high and very probable.

Mitigation

The Balancing Act Project Manager will review the time-scope, organizational responsibilities, communication procedures, IDSOP standardized documentation, and action forms and forms with internal and external project team members. In order to provide alternatives and limit possible changes, a risk management assessment is performed by Balancing Act prior to the internal kick-off. Interim sign-off schedules are determined and agreed upon by all stakeholders, internal and external team members, and project managers. A list with relevant names, email addresses, and phone numbers will be

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provided for all IDSOP team members. The project manager will provide the forms necessary to mitigate any delays in the sign-off process.

Change Management System

Change management plays a critical role in any project by clearly defining a given change, identifying its impact on the process/product/project, controlling cost, and ensuring quality.

Description

In the context of quality, a change management system is an integral quality measure of a project in regulating and documenting change(s). An effective change management system helps project team members "understand" a proposed change, beyond simply making a change and "watching to see what happens"!

Change management in a project starts with a change request form that describes a proposed change and provides a reason/justification (i.e. cost), process improvement, and supporting data/information for the change. This information is evaluated by the client's review committee members who review the request, determine if it supports the project goals and is financially sound, and authorize its implementation. If the committee determines that the cost-to-benefit ratio is unsatisfactory, the change is rejected.

Risks

Change management may be an unpopular system because it is perceived to "slow down" progress and innovation, adding "too much" bureaucracy. The greatest project risk associated with change management is that change may circumvent the system and negatively impact the timeline and/or budget.

Mitigation

Implementing a simple and well understood change management system that is appropriately managed and facilitated will greatly reduce the risk of users circumventing the system.

Conclusion

Quality is a Balancing Act core value. It drives our processes and motivates our employees to always keep our clients' and business partners' needs at the top of our priorities. These measures demonstrate our commitment to meeting our clients' needs and expectations, as well as our belief that anything worth doing is worth doing well. Quality is built into our people and processes, and our products prove it.

Reference

McVay Lynch, M. & Roecker, J. (2007). *Project Managing E-Learning: A Handbook for Successful Design, Delivery and Management.* New York, NY: Routledge.

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Evaluation Plan

Ontario Cooperative Association: E-Learning Developer Project

Evaluating the Learning Product

The first component of Balancing Act's evaluation plan is to assess the learning products we create and implement. We will leverage Levels 1 and 2 of Kirkpatrick's Levels of Evaluation of Learning Interventions:

Level 1: Reaction (Did the learners like the intervention?)

- Balancing Act will tailor our standard Level 1 survey for eLearning products to include collection of opinions on access to the training, overall experience, and the certification process.

- Learners who previously experienced the Instructor Led Training (ILT) version of the courseware will answer questions comparing the ILT to the e-learning version.

Level 2: Learning (Did the learners achieve mastery of the objectives?)

The product is successful if 85% of the learners pass the certification test. If the product is unsuccessful, Balancing Act will evaluate the course materials (i.e. questions missed, number of attempts, etc.) to improve the course.

Note: Level 3 (Behavior) and Level 4 (Results) are not within scope for this project, however we will provide recommendations to On Co-op for collecting data, to help On Co-op determine the behavior/transfer (Are learners applying the training in the field?) and results (How has the training impacted On Co-op and the learners' businesses?).

Evaluating the Project

Additionally, we will evaluate project results to ensure both Balancing Act's goals and On Co-op's goals were met. The following tables list these goals and the measurements used to determine success:

Balancing Act's Goals

Goal	Measurement
Actively pursue our mission of contributing to education, economic growth, and sustainability, in the U.S. and globally.	On Co-op's mission is in alignment with ours, supporting education, economic growth, and sustainability in the co-op structure of Ontario and other parts of Canada. As such, our work on this project is in absolute alignment. This goal is well met and achieved.
Broaden our U.S. client base to international business.	This project marks Balancing Act's first international project. Recommendations and testimonials from On Co-op are the first step toward winning future work with this On Co-op, as well as other international clients.

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Goal	*Measurement*
Build a relationship with Ontario Co-Operative Association, an economic and sustainability leader in Ontario, Canada.	(See previous measurement regarding international business development.)
Build our e-learning development portfolio.	The successful implementation of this project is a valuable step toward building an impressive portfolio.
Earn and generate a 10% profit.	The profit margin is built into the project plan, so completing the project on time will meet the goal.

On Co-op's Goals

Goal	*Measurement*
Reach a distributed Ontarian audience for co-operative training.	All participating members of On Co-op successfully access the training via the Internet or DVD.
Overcome challenges associated with teaching instructor-led courses.	All participating members of On Co-op rate the e-learning course as at least equally effective as the instructor-led courses.
Increase availability of On Co-op training resources.	All participating members of On Co-op successfully access the training via the Internet or DVD.