Balancing Act
E-Learning Developer Project
Project Charter

January 2008

E-Learning Developer Project
Prepared for

On Co-op
Ontario Co-operative Association
<table>
<thead>
<tr>
<th><strong>Date</strong></th>
<th>January 2008</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Title</strong></td>
<td>E-Learning Developer Project – On Co-Op</td>
</tr>
<tr>
<td><strong>Charter Description</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>
| **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

<table>
<thead>
<tr>
<th><strong>File Name</strong></th>
<th>INTE5160_ProjectCharter_BalancingAct_v1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Original Author(s)</strong></td>
<td>Michele Bennett and Jackie Flynt</td>
</tr>
</tbody>
</table>

### Revision History

<table>
<thead>
<tr>
<th><strong>Version</strong></th>
<th><strong>Date</strong></th>
<th><strong>Author(s)</strong></th>
<th><strong>Revision Notes</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>January 2008</td>
<td>M. Bennett, J. Flynt</td>
<td>Original Version</td>
</tr>
<tr>
<td>1.1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Table of Contents

Project Description ................................................................................................................. 4  
Business Case ........................................................................................................................ 4  
Measurable Project Objectives ............................................................................................... 5  
  - Balancing Act’s Objectives .............................................................................................. 5  
  - On Co-op’s Objectives .................................................................................................... 5  
  - Learners’ Objectives ....................................................................................................... 5  
Assumptions, Constraints, and Risks ..................................................................................... 5  
  - Assumptions .................................................................................................................. 5  
  - Constraints ..................................................................................................................... 6  
  - Risks ................................................................................................................................. 7  
Project Scope .......................................................................................................................... 8  
  - Deliverables .................................................................................................................. 8  
  - Time Scope ................................................................................................................... 9  
Cost Scope ............................................................................................................................. 9  
  - Organizational Scope ..................................................................................................... 9  
  - Resources ...................................................................................................................... 11  
Out of Scope .......................................................................................................................... 12  
Project Management ............................................................................................................. 12  
  - Communication and Reporting Plan ............................................................................. 12  
  - Risk Management ......................................................................................................... 13  
Stakeholders .......................................................................................................................... 13  
Charter Approval and Acceptance ......................................................................................... 14  
Comments ............................................................................................................................... 14
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

<table>
<thead>
<tr>
<th>Initiative of RFP (RFP circulated)</th>
<th>January 30, 2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal deadline</td>
<td>February 14, 2008</td>
</tr>
<tr>
<td>Contract award</td>
<td>February 15, 2008</td>
</tr>
<tr>
<td>Anticipated start date</td>
<td>February 19, 2008</td>
</tr>
<tr>
<td>Contract conclusion</td>
<td>August 9, 2008 (negotiable)</td>
</tr>
<tr>
<td>E-learning solution/end-product launch</td>
<td>September 15, 2008</td>
</tr>
</tbody>
</table>

**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.

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
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 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)
- 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).
- 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:

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

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.”

Organizational Scope

Table 1

<table>
<thead>
<tr>
<th>Name</th>
<th>Contact Information</th>
<th>Role</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balancing Act</td>
<td></td>
<td>Vendor’s Project Manager</td>
<td>• Plan and execute project in an efficient and timely manner</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Ensure that communication is clearly established</td>
</tr>
<tr>
<td>Role</td>
<td>Responsibilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Manager</td>
<td>Manage day-to-day operations of the project, Manage resources, Draft charter and work-plan, Analyze prototype data results</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructional Designers</td>
<td>Procure key deliverables, Ensure quality of learning materials, Ensure design and development standards, Publish LMS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Content Developer</td>
<td>Assure style consistency and coherence throughout design and layout, Assure architectural and navigational functionality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Media Specialist</td>
<td>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</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Editor/Quality Assurance</td>
<td>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</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Programmer</td>
<td>Assist with LCMS development, Troubleshoot LCMS issues, Build any needed externally developed interactions for import into the LCMS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**On Co-op**

<table>
<thead>
<tr>
<th>Denyse Guy</th>
<th><a href="mailto:dguy@ontario.coop">dguy@ontario.coop</a></th>
<th>Client’s Project Sponsor</th>
<th>Fund the project, Provide final sign off on any major scope variations</th>
</tr>
</thead>
<tbody>
<tr>
<td>TBD</td>
<td>Client’s Project</td>
<td>Monitor project</td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>Responsibilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Manager                            | 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 (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
  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>
<thead>
<tr>
<th>Item</th>
<th>When</th>
<th>To Whom</th>
<th>Coordinator</th>
<th>Where</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project team meetings</td>
<td>Every Monday at 8 a.m.</td>
<td>Instructional Designer, Multimedia Developer, QA</td>
<td>Project Manager</td>
<td>Conference room</td>
</tr>
<tr>
<td>Review course</td>
<td>Throughout</td>
<td>Review Committee, SME,</td>
<td>Project</td>
<td>Conference</td>
</tr>
<tr>
<td>Activity</td>
<td>Frequency and Details</td>
<td>Team/Signatories</td>
<td>Room/Equipment</td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
<td>----------------------------------------</td>
<td>----------------------------------------</td>
<td></td>
</tr>
<tr>
<td>content and design</td>
<td>the design of each module Meetings to take place every Friday at 8 a.m. or as needed to move forward</td>
<td>Instructional Designer, Content Developer, QA, Content Developer, Media Developer</td>
<td>Manager room with access to eight (8) computers/laptops</td>
<td></td>
</tr>
<tr>
<td>Team meeting minutes</td>
<td>After each Project team meeting and when needed</td>
<td>Project Team and all Stakeholders</td>
<td>Instructional Designer</td>
<td></td>
</tr>
<tr>
<td>Status reports</td>
<td>Every two (2) weeks or when a milestone has been reached</td>
<td>Project Team, Sponsor, Customer</td>
<td>Project Manager</td>
<td></td>
</tr>
<tr>
<td>Project review</td>
<td>Every other week or when requested</td>
<td>Sponsor, Project Team, Review Committee, QA</td>
<td>Instructional Design Team</td>
<td></td>
</tr>
<tr>
<td>Prototype testing</td>
<td>When needed, with 48 hour notice</td>
<td>Review Committee</td>
<td>Conference room</td>
<td></td>
</tr>
<tr>
<td>Prototype testing data and assessment report</td>
<td>Within 48 hours of Review Committee testing</td>
<td>PM, Sponsor, Content Management, SME,</td>
<td>Conference room with access to eight (8) computers/laptops</td>
<td></td>
</tr>
<tr>
<td>Instructor-led training sessions</td>
<td>TBD</td>
<td>On Co-Op Stakeholders and Support Staff</td>
<td>Instructional Design Team</td>
<td></td>
</tr>
<tr>
<td>Team building and debriefing activities</td>
<td>Every Friday at 3 p.m.</td>
<td>Balancing Act and On Co-Op Project Development Team and Support Staff</td>
<td>Project Manager</td>
<td></td>
</tr>
</tbody>
</table>

**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**

<table>
<thead>
<tr>
<th>Sponsor Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project Manager</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Comments**

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________