

MU Extension Canvas Courses-Project Management Considerations

Purpose of Project:

The purpose of this project is to create prototypes of three project management templates for discussion and consideration by the MU Extension Learning and Teaching Services staff:

- Course Administration Project Management Template (AdminPM) for tracking and reporting on administrative duties involved with the various lifecycles of a Canvas-Extension course.
- Design and Review Project Management Template (DRPM) for tracking and reporting on Extension services provided to designers and instructors that encourages accessible and *Quality Matters* certified content.
- Course Content Management Template for Subaccount Admins (SubPM) to track issues and changes that need addressing before the next iteration of the course.

Background:

University of Missouri-Extension is in the process of unifying and reorganizing its outreach efforts. The Nexus team oversees and coordinates efforts between various Extension departments, such as; software support, conferences, marketing, publications and online education. University of Missouri Extension embraced the Canvas Learning Management System platform in 2016. Canvas is also used by University of Missouri-System but the two platforms are different and do not directly integrate. These differences have a direct impact on the project management process. Dr. Jessica Gordon, the only full-time employee in this department, is a Curriculum Consultant and the Canvas-Extension Administrator that manages the online education course portion of this reorganization. She has been working with part-time, graduate student interns over the past two years.

During 2017, courses from the existing Moodle platform were migrated to the Canvas-Extension platform. The goal of that year was to ensure all current courses were available for instructors to update and edit as needed. During 2018, our department experienced expedient growth. With only 1.75 full-time employees, the primary focus was on two tasks: processing new course requests and troubleshooting functionality issues with existing courses. The process of creating Methods and Procedures (M&P) documents is ongoing, as well as, different methods of project management.

Challenges

Canvas LMS is a very popular platform that is designed as an academic course offering software. It works very well with courses designed for student learners, enrolling through an established registration process, and following a typical academic course term. Addressing the various challenges presented in the Extension vision requires additional methods of tracking process so reporting and billing processes are reliable.

Types of Customers

In general, Campus works with its own employees and their target audience is enrolled students familiar with online learning.

For Extension, our instructors, or initial customers, comprise University professors, Extension Specialists, and outside businesses interested in offering online education. Many of our instructors have not taken or taught an online course and the steps necessary to create their first quality course can be overwhelming to some. This leads to the need of providing additional instruction on how to use the software, how to make it accessible, how to create meaningful assessments, and how to adjust teaching methods to provide quality learning for adults in an online environment.

After the course is created and available for enrollment, the Extension target audience, or “students” as they are referenced in Canvas, are adult-learners, enrollees, or participants since they are non-traditional students from various backgrounds and educational levels.

Course Types

There are four types of courses offered on Campus: Cohort, Cohort-Blended, Self-Paced, and Resource.

Extension offers Cohort, Cohort-Blended, Self-paced, Resource, Webinar, Internal Training and Collaborative course types

Course Offering Times

Campus course participation cycles follow the academic year, with offerings during Spring and Fall (16 Weeks), and Summer (8 weeks) only.

Extension course participation cycles can run as follows:

- 4-week
- 8-week
- 16-week that follows Spring and Fall academic cycles
- 3-month
- 6-month
- 12-month Calendar Year
- Custom

Course registration

Campus course registration is only available to university students and everyone registers through one portal.

Extension allows participants to register through a public URL portal or through the Extension website sales portal.

Enrollment Options

Since all courses offered on Campus have distinctive beginning and ending dates, early enrollment is allowed on all their course offerings.

Options for Extension courses include

- early enrollment only for Cohort courses
- anytime enrollment for self-paced courses
- manual enrollment by Administrators for Internal Training courses.

Software Integrations

Canvas-Campus allows for many types of software integration and the University has established contracts and IT personnel to provide training and support for the various software offerings.

Canvas-Extension has a very limited number of LTI software integrations they can maintain and provide IT support.

- Zoom
- Kaltura
- VoiceThread
- CaptionSync

Assessment of Learning

Since the courses offered are for college credit, assessments and grades are high-priority items on the Canvas-Campus platform.

Extension offers courses for clock-hours, for CEU, for annual certifications and for general interest. Assessments for learning and access to completion certificates can vary greatly.

Course Content

Most Campus online courses follow standardized formats for a syllabus, modules, assignments, quizzes, discussions, and instructor announcements.

Content within Extension courses can be as simple or as complex as the instructor designs. Additionally, all content offered in Extension courses needs to be accessible; including closed-captioning on all videos, transcripts of audio, alternative text for images, to name a few. Because of this requirement, Learning and Teaching Support has agreed to provide video closed-captioning services.

Reporting

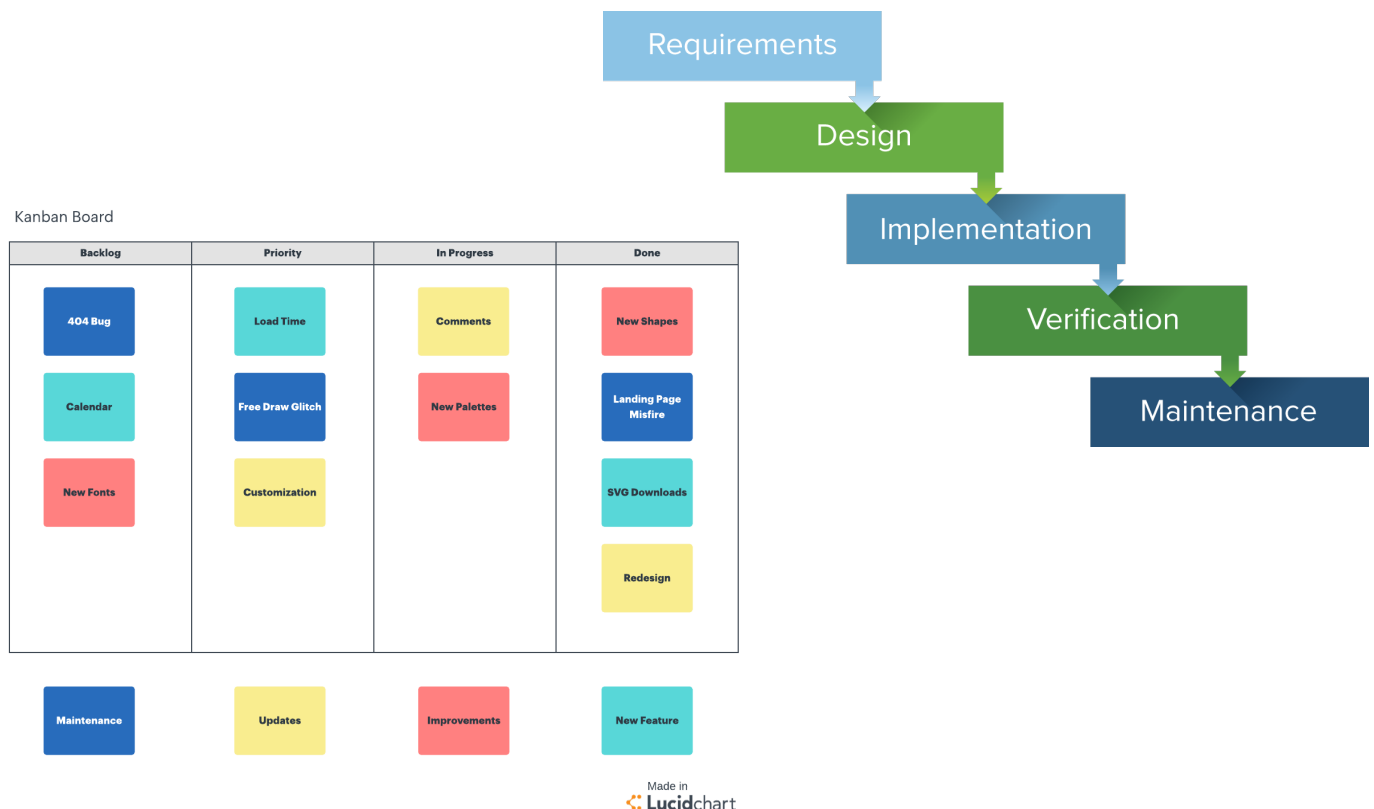
With the structured nature of courses offered on Campus, Canvas offers a number of reports for teachers and administrators.

With the flexibility offered by Extension to their customers, most reports generated from Canvas are downloaded and then adjusted to create requested reports.

Methodologies of Project Management

Elements of the Waterfall and the Kanban methodologies of Project Management will be incorporated into the process of creating these prototypes.

For this project, The Waterfall method is used as a starting point for planning the templates. It is a traditional method of planning a project, with all of the planning done upfront, and few iterations along the way.



Additionally, and mostly along the Design and Implementation phases of the Waterfall method, the agile Kanban methodology is introduced. It allows for focused task completions and for adjustments/interruptions during the process.

The entire project management process is designed to be iterative in nature. The three prototypes can stand alone or be integrated into a single project management process, as needed.

Descriptions and Required Steps for each Prototype

	AdminPM	DRPM	SubPM
	Course Administration Project Management Template	Design and Review Project Management Template	Course Content Management Template for Subaccount Admins
	tracking and reporting on administrative duties involved with the various lifecycles of a Canvas-Extension course	tracking and reporting on Extension services provided to designers and instructors that encourages accessible and Quality Matters certified content	track issues and changes that need addressing before the next iteration of the course.
Tasks involved in creating a new course for Extension-Canvas			
1. Wrike Folder Creation			
2. Box Folder Creation			
3. Process Meeting Scheduled			
4. Basic Online Course Creation Training Completion Certificates filed in Box			
5. Subaccount Admin Training Course Certificate filed in Box			
6. Course mapping completed			
7. Course request form filed in Box			
8. Course card image filed in Box			
9. Wrike Project added			
10. Canvas course shell created			
11. Template or Previous Course Content added			
12. Course Published			
13. Instructors Added			
14. Syllabus updated			
15. Catalog Integration completed			
16. Magento Integration completed			
17. Course Unpublished			
18. Current course content updated			
19. Course Editorial Review completed			
20. Student Pilot Testing completed			
21. Asset Permissions Spreadsheet completed			
22. Videos close-captioned			
23. Accessibility Testing Completed			
24. Quality Matters Review Completed			
25. Course Published			
26. Course Enrollment Opened			
27. Course Enrollment Closed			
28. Course Participation Opened			
29. Course Participation Closed			
30. Course view enabled on website			
31. Course view disabled on website			
32. Reminder for course copy sent to Instructor			
33. Course moved to archived folder in Canvas			
34. Course concluded in Canvas			
35. Reports created from Canvas			
36. Wrike project updated			
37. Wrike project archived			

New Public URL Course SelfPaced

AdminPM

DRPM

- 1 Wrike Folder Creation
- 2 Box Folder Creation
- 3 Process Meeting Scheduled
- 4 Basic Online Course Creation Training Completion Certificates filed in Box
- 5 Course mapping completed
- 6 Course Request form submitted
- 7 Course request form filed in Box
- 8 Course card image filed in Box
- 9 Wrike Project added
- 10 Canvas course shell created
- 11 Template Added
- 12 Course Published
- 13 Instructors Added
- 14 Syllabus updated
- 15 Catalog Integration completed
- 16 Catalog Enrollment Closed
- 17 Course Unpublished
- 18 Current course content updated
- 19 Course Editorial Review completed
- 20 Student Pilot Testing completed
- 21 Asset Permissions Spreadsheet completed
- 22 Videos close-captioned
- 23 Accessibility Testing Completed
- 24 Quality Matters Review Completed
- 25 Course Published
- 26 Catalog Enrollment Opened
- 27 Course Participation Opened
- 28 Course Enrollment Closed
- 29 Course Participation Closed
- 30 Reminder for course copy sent to Instructor
- 31 Course moved to archived folder in Canvas
- 32 Course concluded in Canvas
- 33 Reports created from Canvas
- 34 Wrike project updated
- 35 Wrike project archived

Cohort and Blended Courses

SubPM

AdminPM

DRPM

Quality Matters Review Completed
on previous course

- 1
- 2 Changes made in course to copy
- 3 Course Request form submitted
- 4 Wrike **Project** added
- 5 Course request form filed in Box
- 6 Course card image filed in Box
- 7 Canvas course shell created
- 8 Template or Previous Course Content added
- 9 Course Published
- 10 Instructors Added
- 11 Syllabus updated
- 12 Catalog Integration completed
- 13 Catalog Enrollment Opened
- 14 Course Card Image Requested
- 15 Course Certificate Duplicated
- 16 Magento Integration completed
- 17 Magento Course Enrollment Opened
- 18 Magento Course view disabled
- 19 Course Unpublished
- 20 Current course content updated
- 21 Course Editorial Review completed
- 22 Student Pilot Testing completed
- 23 Accessibility Testing Completed
- 24 Course Published
- 25 Magento Course view enabled
- 26 Catalog Enrollment Closed
- 27 Magento Course view disabled
- 28 Course Participation Opened
- 29 Course Participation Closed
- 30
- 31 Reminder for course copy sent to Instructor
- 32 Course moved to archived folder in Canvas
- 33 Course concluded in Canvas
- 34
- 35 Wrike project updated
- 36 Wrike project archived

Reports created from Canvas

Onboarding Process:

1. Client fills out my request/contact form
2. I send a rough estimate to the client, ask follow-up questions, and send them to my call scheduler so we can Skype
3. We have a Skype meeting where I get more info about the project, and turn it into an official quote
4. Client accepts the quote, makes a down-payment on the project and signs the contract
5. I send over a welcome packet that outlines my office hours, the project process and timeline, number of revisions, cancellation policy, etc.
6. Client sends me whatever I need for the project, and I get started
7. I add everything to a project management system so we're on the same page at all times
8. Client requests revisions to the project
9. Revisions are made, and project is launched
10. I send a goodbye packet with project info, instructions, and a thank you to the client

Initial Inquiry form:

Course Request form??

An intro packet does the following:

- Gives clients an rough overview of the project and what to expect throughout the project
- Lets clients know what you need from them and when
- Lets clients know when and how they can contact you
- Gives clients a rough timeline of the project—so they're not surprised when their website isn't ready the next day
- Reminds clients of your major policies (because you can never tell someone the big stuff too many times)
- Keeps you from having to answer the same questions over and over and over

Discovery Call:

Proposal:

- An overview of the goal of the project and how you'll help your client achieve this goal
- A rough timeline for the project
- A scope of work outlining roughly what you'll do
- An estimated price based on the scope of work

Contract

Payment

Welcome Packet

A welcome packet may include the following:

- How to use your project management system (like Basecamp)
- How to give feedback during the project
- How to schedule a call with you
- How to send text and image files
- A reminder about your office hours and response times
- Expected response times from them during the project

Project Management System:

Inside a PMS you can:

- Have threaded discussions
- Assign tasks with due dates
- Upload project files
- Track time
- Keep track of what is being worked on/whether things are on schedule
- And a lot more!

If you're not using one already, you need to! A few popular project management systems to check out are [Basecamp](#), [Freedcamp](#) (my favorite), and [Asana](#).

Client Homework:

- What is the main goal of this project?
- Create a Pinterest inspiration board with images that represent your brand and the feeling you want to create on your website
- What is the primary feeling you want visitors to have when they are on your website?
- Share 3-5 websites that you love, and explain what you like and what you don't like about each
- Who do you consider your biggest competition, and why?
- Who do you wish was your competition—who is at the level you want to be at?

Wrap-up