Sample
Blackboard Outcomes Assessment

Knowledge and Skills Training Outline

Knowledge

1. Assessment Best Practices
2. The difference between program assessment and course assignments and grading
3. Using program assessment data to make program improvements
4. Understanding how an automated system ..... 

Knowledge/skills

1. How to write program outcomes
2. How to develop a curriculum map
3. How to design Program Outcome Assignments
4. How to create a rubric to assess the Program Outcome Assignments
5. How to complete the Outcomes Assessment Worksheet
6. How to run reports
7. How to develop your assessment team and process. How does a team addresses inter rater reliability and assesses program outcomes
8. How to use Program assessment data to make program improvements and improve student learning
9. How to evaluate, read, and review in an online environment
10. Definitions---(use your university and program language) create a common language

Training Needs Analysis

Developmental Steps that Inform Training Needs

Preparation and Readiness

1. Identify program outcomes
2. Complete a curriculum map that aligns Program Outcomes to graduate outcomes or undergraduate outcomes/University outcomes or Liberal Studies Outcomes. (see example)

Getting Started

1. Design the Program Outcome Assignments—write them and describe them (see example)
2. Decide which courses in your program will contain the Program Outcome Assignment that assesses each outcome
3. Create a rubric that will be used to assess each Program Outcome Assignment (Note that the assignment will continue to be graded by faculty in whatever way they choose to do so. The rubric will be used by a team to assess the submitted Program Outcomes Assignments at the end of the semester. This is assessment of program outcomes not individual course assignments! Program assessment tells you how students are benefiting from the program’s curriculum as a whole.)

4. Complete the Outcomes Assessment Worksheet for each course that contains a Program Outcome Assignment

**Implementation Steps that Inform Training needs**

1. Begin working with CETL to get Blackboard course shell ready
2. Add Program Outcomes Assignments to courses.
3. Link Assignments to Program Outcomes
4. Add the rubric
5. Link the rubric to the assignment
6. Identify your assessment team and begin to review the rubric to improve inter rater reliability
7. Decide how you will complete the assessments
8. Score the Program Outcomes Assignments using the rubrics
9. Run reports
10. Determine what process you will use to review the reports of program assessment data and make recommendations to improve the curriculum.

**Maintenance plan**

1. Repeat, refine, and improve as needed.
2. Consider opportunities for larger community activities
3. Choose activities that can help institutionalize the assessment culture
Blackboard Outcomes Implementation
Project Charter

Date: July 1, 2014
Modification Date: July 7, 2015

Project Manager: Catherine Datte, Ken McCurdy
Project Sponsor: Kathleen Kingston, Carolynn Masters

1. Project Description The project description defines the purpose and need for the project.

Fully implement the Blackboard Learning Management System (LMS) with the Outcomes module as the tool for automated program outcomes assessment, by the end of the Spring 2018 semester. Full implementation involves five phases.

1. Phase 1 – Secure a Blackboard Consultant by July 2014 to assist the University with implementing Outcomes Assessment and implementing a pilot program.
2. Phase 2 – Identify a team by September 2014 to work with the Provost Office, CETL, and a Blackboard consultant to implement a pilot utilizing Outcomes as the assessment tool.
   a. Work with LOAC to identify the candidates and provide training as needed.
   b. Hire an Assessment Coordinator by August 2015
   i. Identify the coordinator’s role and responsibility,
3. Phase 3 – Conduct a pilot by June 2015 that will use the LMS to collect evidence, assess it, and report its findings.
   a. Implement the consult’s training for pilot members, LOAC, CETL, and IT through June 2015.
      i. Training includes process, tools, program mapping, and rubric use and development.
   b. Enter goals and align assignments in the LMS for the pilot project.
   c. Run reports and review data for accuracy and assessment needs.
4. Phase 4 – Conduct ongoing training and workshops, by the end of December 2016, addressing curriculum mapping; aligning program outcomes with Liberal Studies, graduate, or university outcomes as appropriate; assignment grading versus program assessment; rubric development and usage, and any tools needed in the process. (see training outline)
5. Phase 5 – Develop a schedule for phasing-in all programs in the university to enable complete adoption by May 2018.

2. Business Objectives How does the project align with Gannon’s Strategic Plan, Operational Plan and/or Master Plan?

The project to implement LMS Outcomes assessment aligns with the University Strategic plan related to fostering innovation, capability and resources for teaching, and recommendations from a Middle States Review as stated by the following excerpts.

1. Foster innovation: Using the Blackboard environment will allow faculty and students to take advantage of innovations that will save time, create efficiencies, and allow access to course material from remote locations.
2. Respond to the Middle States recommendations and DOE requirements associated with Assessments
   a. Obtain and employ more direct measures of student learning outcomes—in addition to indirect measures—across the curriculum, including on-line offerings.
   b. Develop appropriate systems for accountability for assessment of student learning, clarifying precisely who is responsible and accountable for oversight of the quality and completion of outcomes assessment and for assuring that information on outcomes is provided in syllabi and annual reports.

3. Measures of Success/Success Criteria What the team must accomplish for the project to be considered successful. These should be tangible measures; be specific. Examples include: quality measures, assessments, outcomes, grant requirements (if a grant project), approvals (i.e., CETL, IRB), evaluation criteria/factors.
   1. Academic leadership has successfully conveyed, during the implementation process, the expectations and requirements to all programs to use the Blackboard Learn environment and Outcomes for assessment through the LMS environment.
      a. Through the use of a communication plan, messages and strategies should be identified and implemented to span the life of the project.
         i. Deans, program chairs and directors, and faculty should have a clear understanding of the expectations, deliverables, support, and cooperation needed to fully implement and institutionalize the assessment process.
   2. CETL and IT staff are trained to administer the Blackboard Learn Outcomes environment and support faculty and university needs by the end of Spring 2015.
   3. An Assessment coordinator is hired and trained by Fall 2015 to meet the duty requirements of the role.
   4. Identify and successfully train faculty over the Spring of 2015 through Fall of 2017 to use Blackboard Learn in their courses with Outcomes for automated assessment by the end of Fall 2017.
      a. Complete the training plan and topics by November 2015
      b. Implement the training through Fall 2017
      c. Through the use of pilots and phased-in implementation, all programs and appropriate courses will be set to retrieve evidence and use the Outcomes assessment system for program and University assessment by the end of Spring 2018.
      d. Conduct a pilot for Spring of 2015, collect data, assess the data, and report the results by Fall 2015.
      e. Develop an operational action plan to include communication, training, and implementation timeline that is approved by the Charter project managers and sponsors by the end of October 2015.
   5. Identify and successfully train all faculty involved in courses associated with Outcomes assessment to use the Outcomes tool and the LMS as needed by the end of Spring 2018.
   6. Identify and successfully train all programs to complete the Program Outcomes worksheet by Fall 2017.
   7. Training is provided related to rubrics, program assessment vs assignment grading, program mapping, and other topics requested by faculty and program chairs/directors as needed throughout the span of the Charter.
8. All courses that assess a program outcome will be using Blackboard Learn and the Outcomes tool by the end of Spring 2018.
9. Students are able to interact with the LMS environment to properly submit assignments for assessment purposes.

3. **Key Stakeholders** *Persons or organizations who are actively involved in the project or whose interest may be positively or negatively affected by the performance or completion of the project.*

<table>
<thead>
<tr>
<th>Key Stakeholder/ Groups</th>
<th>Role</th>
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</table>
| Administration                  | 1. Publicly acknowledge the expectations for LMS use with Outcomes moving forward.  
                                           2. Provide support and direction/expectations to be successful. |
| Administrative Computing         | 1. Clarify and support administrative function and interface from administrative systems (Datatel, colleague, ...)  
                                           2. Identify needs for seamless interface and data sharing  
| a. Registration                 |                                                                       |
| Assessment Coordinator          | 1. Work collaboratively with Associate Provost, LOAC, and CETL to drive the transition and lead program assessment.  
                                           2. The Assessment Coordinator is responsible for coordinating learning outcomes assessment activities on campus, for acting as a primary resource for program-level assessment, and for managing the Outcomes Assessment process, including training faculty, supporting faculty responsible for assessment within programs, working collaboratively with CETL instructional designers and Blackboard System Administrators to manage the operational aspects of the Blackboard Outcomes Assessment Tool. CETL will assume the primary role of managing the Outcomes Assessment Tool and supporting the coordinator with reporting and goal management. The Assessment Coordinator will serve as the Co-Chair of the Learning Outcomes Assessment |
<table>
<thead>
<tr>
<th>Committee</th>
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<tbody>
<tr>
<td><strong>Responsibilities</strong></td>
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<tr>
<td>1. Working with the LOAC:</td>
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<tr>
<td>a. University Outcomes: Manage the assessment of University Outcomes in coordination with Associate Provost.</td>
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<td>b. Learning Outcomes: Act as a resource for programs and Liberal Studies for development of program level learning outcomes.</td>
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<td>c. Rubrics: Act as a resource for faculty to develop rubrics to assess each program learning outcome.</td>
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<td>d. Curriculum Maps: Facilitate the development and maintenance of program curriculum maps that identify the course(s) in which each program learning outcome is taught and assessed.</td>
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<td>e. Assist programs in developing program-level curriculum maps and assessment plans.</td>
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<td>f. Collaborate with the Liberal Studies Director and Committee to facilitate Core outcomes assessment.</td>
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<td>g. Collect and organize program and Liberal Studies assessment plans.</td>
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<tr>
<th>Academic Program Chair/Director</th>
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<tr>
<td>1. Complete and manage the development of Curriculum Maps to use with the Outcomes environment</td>
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<td>2. Establish expectations for faculty usage and involvement in their program assessment</td>
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<td>3. Coordinate assessment activities with the University Assessment Coordinator</td>
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<td>4. Assure faculty are on target with the program’s assessment plan</td>
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<th>Blackboard</th>
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<tr>
<td>5. Provide training, guidance, and resources for a successful use of Outcomes.</td>
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<th>CETL</th>
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<tr>
<td>1. Serve as operational project leadership for the Outcomes implementation project</td>
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<td>2. Serve as the GUI administrator</td>
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<td>3. Provide course design guidance</td>
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<td>4. Manage goal entry</td>
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| Faculty | 1. Train and use the LMS to collect assessment evidence |
| Faculty Senate | 2. Share needs and recommendations |
| Graduate Council | 1. Serve as a venue to share updates |
| Graduate Council | 2. Serve as a source for feedback and support of the process |
| ITS | 1. Provide the technical support related to course enrollment |
| ITS | 2. Provide technical support for Outcomes functionality |
| ITS | 3. Facilitate loading classes |
| ITS | 4. Facilitate loading faculty |
| Liberal Studies Committee | 1. Complete assessment process, following typical
<table>
<thead>
<tr>
<th>Program Assessment Activities, for the Liberal Studies Program</th>
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<tbody>
<tr>
<td>2. Provide guidance, recommendations and support related Liberal Studies programs and successful automated assessment.</td>
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<tr>
<td>3. Complete the assessment review for the liberal studies program and report out.</td>
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<td>4. Use the assessment results for continuous program improvement.</td>
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<tr>
<th>LOAC</th>
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<tr>
<td>1. Coordinate the process of specifying university-wide program and course level student learning outcomes and measures of academic institutional effectiveness.</td>
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<tr>
<td>2. Coordinate the process of developing outcome assessment plans at the university-wide and programmatic levels. Each plan will include a statement of learning outcomes, associated measures of the outcomes, and performance levels expected.</td>
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<tr>
<td>3. Facilitate the development of assessment maps that link course learning objectives, program outcomes, Liberal Studies outcomes (as appropriate), and graduate or undergraduate University outcomes.</td>
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<tr>
<td>4. Assist the University in determining and communicating the procedures for utilizing results of the outcomes assessment process and reporting on the progress made.</td>
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<tr>
<td>5. Collaborate with the Liberal Studies Director and Committee to facilitate Core outcomes assessment.</td>
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<tr>
<td>6. Provide assistance to programs on developing their plans, designing measurements, and interpreting results. When requested, the Committee will design and implement training/workshops for faculty and staff to provide assistance at a program or college level.</td>
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<tr>
<td>7. Provide assistance to the Center for Excellence in Teaching and Learning to develop assessment mapping tools, processes, and reporting within the</td>
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5. Project Scope

The Project Scope outlines what is in the project, and what is out. It provides a list of deliverables and acceptance criteria.

The Outcomes assessment project will involve supporting the University, faculty, students, and staff to embrace the transition from paper based assessment to collecting assessment evidence in Blackboard Learn by the end of Spring of 2018 and be fully operational using all appropriate features of the Blackboard Learn and Outcomes environment.

Fully operational use of the Blackboard Learn’s Outcomes module includes use of appropriate instructional strategies associated with the tool, ability to conduct/post assignments, associate assignments to the Outcomes environment, report from the Outcomes module, and respond to request for user reports. All programs will be able to use the data to support continuous improvement of programs.

Fully operational Blackboard Learn with the Outcomes module will require that all University, Department, and Program Learning Outcomes, information be loaded into the LMS environment for tracking and reporting. All users responsible for pulling reports will be trained and capable of using the tool.

Governance of the Outcomes usage will be shared with Academic leadership, LOAC, Program Directors and Chairs, Liberal Studies Committee, Graduate Council, faculty, and CETL to foster optimal usage. Best practices of Blackboard Learn engagement will facilitate realizing University strategic goals and expectations of a fully functional automated Outcomes assessment plan.

The Project does not have a focus or direction to
• replace ground-based classes with online course deliver as compared to supporting ground-based classes with online capable tools and universal University Assessment capabilities;
• impose teaching methods on faculty or dictate what to teach as compared to providing the tool to deliver courses using the LMS; and
• impose learning outcomes for course content as compared to providing a tool to gather assessment data and provide a means for reporting.

6. Assumptions, Constraints and Dependencies

Assumptions are factors that are considered to be true, real or certain. A constraint is a restriction or limitation that will affect project performance, and a dependency is a logical relationship between two variables. Examples: Project funding availability may be an ASSUMPTION but funding limits are CONSTRAINTS; accreditation may be DEPENDENCY for implementation; governmental regulations may be CONSTRAINTS or DEPENDENCIES, depending upon the project.
Assumptions

- Academic leaders support the effort to move to Blackboard Learn Outcomes and will convey the sense of urgency to faculty for training, preparation, and usage
- Academic leaders, LOAC, and CETL will support the education of program assessment versus course assignment, appropriate use of rubrics, and overall program assessment strategies and support
- CETL is willing to assist and prioritize training needs to maximize success
- CETL is willing to support data entry and reporting
- LOAC is willing to support the automation of program assessment and learn appropriate tasks to empower their ability to facilitate automated assessment processes
- Many programs and faculty are interested and/or willing to use Blackboard Outcomes

Constraints

- Program director/chair’s and/or Faculty’s perceived or actual constraints for time needed to train on the new product
- Resistance to move to a new system
- Perceived belief that Outcomes assessment will encroach on faculty freedom
- Programs that do not have full operational assessment plans
- Some faculty do not use Blackboard LMS to facilitate course assignment submission
- Misunderstanding of the differences between course assignment, program accreditation assessment requirements, and program assessment

Dependencies

- Capability of CETL staff and trainers to learn the system to teach others
- Willingness and availability of faculty to learn the new environment in time for implementation
- Willingness and availability of students to learn the new environment in time for implementation
- Ability to provide effective face-to-face and online access to Blackboard Learn Outcomes training
- Willingness and ability of Program directors/chairs and managers to implement program mapping
- Willingness and ability of Program directors/chairs and managers to understand the difference between course assignment grades, program assessment, and disciplinary accreditation assessment
- Understanding of the security features for the LMS and Outcomes process related to grades and evidence
- Understanding best practice for unique review of evidence that will provide evaluation of program outcomes for continued improvement
7. Team Identification  *Identify all major roles on your team.*

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
<th>Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Sponsor</td>
<td>Provides leadership and direction to keep the project aligned with Gannon University's strategy and direction related to using the LMS to support strategic plan initiatives. Provide direction to academic leaders and their teams to engage stakeholders and support the project's success.</td>
<td>Dr. Carolynn Masters</td>
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<td>Dr. Kathleen Kingston</td>
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<tr>
<td>Co-Project Manager</td>
<td>Functions as the Assessment Coordinator to guide and support the success of the Outcomes implementation as part of the University Assessment plan.</td>
<td>Dr. Ken McCurdy</td>
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<tr>
<td>(Academic)</td>
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<tr>
<td>Co-Project Manager</td>
<td>Functions as the Operations lead to guide and support the success of the LMS Outcomes tool for the implementation of the University Assessment plan.</td>
<td>Ms. Catherine Datte</td>
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<tr>
<td>(Operational)</td>
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<tr>
<td>ITS Consultant</td>
<td>Functions as the ITS lead to guide and support the success of the Outcomes LMS Outcomes tool implementation.</td>
<td>Mr. Dan Giannelli</td>
</tr>
<tr>
<td>Server-side GUI Admin</td>
<td>Functions as the ITS lead supporting the Server-side to guide and support the success of the LMS Outcomes tool implementation.</td>
<td>Mr. Matthew Andrews</td>
</tr>
<tr>
<td>Bb GUI Admin</td>
<td>Functions as the LMS GUI Administrator supporting the Server-side to guide and support the success of the LMS Outcomes implementation.</td>
<td>Mr. Brian McIntyre</td>
</tr>
<tr>
<td>Blackboard Consultant</td>
<td>Provide project management guidance for the implementation process.</td>
<td>Dr. Ruth Newberry</td>
</tr>
<tr>
<td>CETL Senior ID and LMS Training</td>
<td>Functions as the Training Coordinator, serves to identify training needs and teams to guide and support the success of the LMS Outcomes implementation.</td>
<td>Dr. Tinukwa Boulder</td>
</tr>
<tr>
<td>Coordinator</td>
<td></td>
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<tr>
<td>CETL Assessment support</td>
<td>Serves as a support person for goal and rubric entry, reporting, and training related to the Outcomes tool.</td>
<td>Julie Ropelewski</td>
</tr>
</tbody>
</table>
### Instructional Designer and Student LMS Training Coordinator
Functions as an Instructional Designer supporting the use of the LMS Outcomes tool.

Mr. Nick Artman

### Faculty Representative
Functions as a faculty representative to serve as a champion to the faculty community, offer guidance, and support the success of the LMS Outcomes implementation.

LOAC faculty

### Student Representative
Serves as a voice for students, provides guidance related to student needs, and helps promote student access.

Mr. Zach Wolf

### Administrative Computing
Provides guidance related to administrative function and interface from the University's administrative systems (Ellucian, colleague, ...) to Blackboard. Identify needs for seamless interface and data sharing.

Ms. Marilyn Moore/Kara Morgan

### Institutional Research Coordinator
Provides guidance and requirements related to University reporting needs and data collection related to institutional reporting and Outcomes assessment.

Ms. Margie James or Mr. Zach Hopkins

### Distance Education
Provides guidance and needs for distance education as it related to evidence collection in Online courses.

Mr. Tex Brieger

### LOAC
Provide support for the Assessment Coordinator and completes activities listed in the stakeholder section.

Full Team

### Liberal Studies Coordinator
Provides guidance related to Liberal Studies program and its outcomes.

Dr. Penny Smith

### Graduate Council
Provides guidance related to Graduate Programs and their outcomes.

Dr. Kathleen Patterson

### 8. Major Milestones and Deliverables

*Milestones signify the completion of a major deliverable or related set of deliverables. A milestone is used to demonstrate how a project is progressing toward the goal.*
<table>
<thead>
<tr>
<th>Major Milestones or Deliverables</th>
<th>Target</th>
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<tbody>
<tr>
<td>Project pre-planning</td>
<td>Fall 2014</td>
</tr>
<tr>
<td>Provide training for the pilot project</td>
<td>Late Fall 2014 and early spring 2015</td>
</tr>
<tr>
<td>Host pilot</td>
<td>Spring 2015</td>
</tr>
<tr>
<td>Communicate with Academic Leadership for initial pilot</td>
<td>Fall 2014</td>
</tr>
<tr>
<td>Complete pilot collection</td>
<td>Spring 2015</td>
</tr>
<tr>
<td>Hire University Assessment Coordinator</td>
<td>Summer 2015</td>
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<tr>
<td>GUI administration training – In person</td>
<td>Spring 2015</td>
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<tr>
<td>Develop a training plan</td>
<td>August 2015</td>
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<tr>
<td>Develop a communication plan</td>
<td>October 2015</td>
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<tr>
<td>Host Program director and chair training for curriculum mapping, course grading versus assessment, rubrics, and the tool</td>
<td>In sequence with program phase-in timeline</td>
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<tr>
<td>Host training for faculty</td>
<td>In sequence with program phase-in timeline</td>
</tr>
<tr>
<td>Prepare courses to host the assessment assignment and align the goals</td>
<td>In sequence with program phase-in timeline</td>
</tr>
<tr>
<td>Complete a status check and provide a report of each phase</td>
<td>In sequence with program phase-in timeline</td>
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9. Business Risks

A risk is an uncertain even or condition that, if occurs, has a positive or negative effect on a project’s objective. Risks should be identified up front, and constantly monitoring and reviewed during the course of the project. The risks identified in the Charter are the basis of the Risk Management Plan. Risks may include funding, approvals, key stakeholder participation, change in political environment or regulations, liability.
The following represents a list of Risks associated with successfully implementing the blackboard Learn Project.

1. Lack of knowledge regarding the difference of assignment grading and program assessment
2. Loss of key staff
3. Change in Leadership
4. Lack of training staff
5. Fear of failure – slowing down forward movement
6. Resistance to change
7. Competing needs or projects for time from key staff
8. Perceived lack of time for training by users
9. Under estimating the sense of urgency and need for persistence
10. Inadequate communication – events, progress, expectations, opportunities, successes
11. Underestimating prioritizations or demands

10. Resources *Space, equipment, money, and personnel.*

The following resources should help support success with implementing the Blackboard Learn environment.

1. Assessment Coordinator
2. LOAC for support, guidance, and training
3. CETL space for training
4. CETL staff for training and design
5. ITS support
6. Stipends from CETL and or LOAC to foster support champions
7. University labs in the library to host student training and support
8. Labs in academic buildings to host faculty training
9. Blackboard team for guidance and resource identification
10. Academic and administrative Leadership promoting success and continued expectations

11. Approvals

*Every Charter must be signed by the Project Manager and the Sponsor(s) – there may be more than one Sponsor. If there is a Sponsor Team, all members must sign the Charter. A Charter is not complete without these signatures.*

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>Date</th>
<th>Project Manager</th>
<th>Date</th>
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<tbody>
<tr>
<td>Dr. Carolynn Masters, Provost</td>
<td></td>
<td>Catherine Datte, MEd, Director CETL</td>
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<tr>
<td>Dr. Kathleen Kingston, Associate Provost</td>
<td>Dr. Ken Mc Curdy, Assessment Coordinator</td>
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SWOCh for Automated Program Assessment

<table>
<thead>
<tr>
<th>Who are your stakeholders? What is their role?</th>
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<th>What is your vision?</th>
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<table>
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<tr>
<th>S – Strengths to implement automated assessment</th>
<th>W – Weakness to implement automated assessment</th>
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<tr>
<th>O – Opportunities to implement automated assessment</th>
<th>Ch – Challenges to implement automated assessment</th>
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- What is your sense of urgency?
- What is your time line?
- What strategies could you use to achieve university wide buy-in to process, training, and the application of their Outcomes assessment goals?
- What Strategies could you use to identify and implement a pilot program?
- What topics would you need to address in training at your institution to get started?

Presented by Catherine Datte, MEd., Gannon University

August 6, 2015
How To Manage A Project

By F. John Reh
Management & Leadership Expert

Congratulations. You've just been appointed to manage a project. How do you get started? What steps do you do next? How do you maximize your chances for success? The project management steps below guide you through the process of managing any project, step by step.

If you are new to Project Management you should also read Project Management 101

Difficulty: N/A
Time Required: Varies

Here’s How:

1. Define the Scope
   The first, and most important, step in any project is defining the scope of the project. What is it you are supposed to accomplish by managing this project? What is the project objective? Equally important is defining what is not included in the scope of your project. If you don't get enough definition from your boss, clarify the scope yourself and send it back upstairs for confirmation.

2. Determine Available Resources
   What people, equipment, and money will you have available to you to achieve the project objectives? As a project manager, you usually will not have direct control of these resources, but will have to manage them through matrix management. Find out how easy or difficult that will be to do.

3. Check the Timeline
   When does the project have to be completed? As you develop your project plan you may have some flexibility in how you use time during the project, but deadlines usually are fixed. If you decide to use overtime hours to meet the schedule, you must weigh that against the limitations of your budget.

4. Assemble Your Project Team
   Get the people on your team together and start a dialog. They are the technical
experts. That's why their functional supervisor assigned them to the project. Your job is to manage the team.

4. **List the Big Steps**
   What are the major pieces of the project? If you don’t know, start by asking your team. It is a good idea to list the steps in chronological order but don't obsess about it; you can always change the order later.

5. **List the Smaller Steps**
   List the smaller steps in each of the larger steps. Again, it usually helps you remember all the steps if you list them in chronological order. How many levels deep you go of more and more detailed steps depends on the size and complexity of your project.

1. **Develop a Preliminary Plan**
   Assemble all your steps into a plan. What happens first? What is the next step? Which steps can go on at the same time with different resources? Who is going to do each step? How long will it take? There are many excellent software packages available that can automate a lot of this detail for you. Ask others in similar positions what they use.

2. **Create Your Baseline Plan**
   Get feedback on your preliminary plan from your team and from any other stakeholders. Adjust your timelines and work schedules to fit the project into the available time. Make any necessary adjustments to the preliminary plan to produce a baseline plan.

3. **Request Project Adjustments**
   There is almost never enough time, money or talent assigned to a project. Your job is to do more with the limited resources than people expect. However, there are often limits placed on a project that are simply unrealistic. You need to make your case and present it to your boss and request these unrealistic limits be changed. Ask for the changes at the beginning of the project. Don't wait until it's in trouble to ask for the changes you need.

4. **Work Your Plan, But Don’t Die for It**
   Making the plan is important, but the plan can be changed. You have a plan for driving to work every morning. If one intersection is blocked by an accident, you change your plan and go a different way. Do the same with your project plans. Change them as needed, but always keep the scope and resources in mind.
5. **Monitor Your Team's Progress**
   You will make little progress at the beginning of the project, but start then to monitor what everyone is doing anyway. That will make it easier to catch issues before they become problems.

6. **Document Everything**
   Keep records. Every time you change from your baseline plan, write down what the change was and why it was necessary. Every time a new requirement is added to the project write down where the requirement came from and how the timeline or budget was adjusted because of it. You can't remember everything, so write them down so you'll be able to look them up at the end-of-project review and learn from them.

7. **Keep Everyone Informed**
   Keep all the project stakeholders informed of progress all along. Let them know of your success as you complete each milestone, but also inform them of problems as soon as they come up. Also keep your team informed. If changes are being considered, tell the team about them as far ahead as you can. Make sure everyone on the team is aware of what everyone else is doing.

Retrieved from [http://management.about.com/od/projectmanagement/ht/ProjMgtSteps.htm](http://management.about.com/od/projectmanagement/ht/ProjMgtSteps.htm)
The ultimate resource: Project Management

EXECUTIVE SUMMARY
1. Make sure your projects are driven by your strategy.
2. Ensure each project has a named sponsor.
3. Use a staged approach to manage your projects.
4. Place high emphasis on the early stages.
5. Engage your stakeholders.
6. Encourage teamwork and commitment.
7. Monitor against the plan.
8. Manage your risks and issues.
9. Control, but don't prevent, changes.
10. Formally close the project.

INTRODUCTION
All organizations have to change at some time: some more frequently than others. There is always something, somewhere, needing to be created or improved. Many leading organizations are now directing and managing business change by using business-led, project management techniques. As organizations have become more integrated through the use of complex systems and processes, the effectiveness of managing change through the traditional functional hierarchy has diminished.

Projects, in the modern sense, are now strategic management tools, ideally suited to the complex organizations of today, and business leaders ignore the newly reborn discipline of enterprise-wide project management at their peril. It is no longer the preserve of specialists in the engineering or IT sectors, but something for every director and manager to have in their “tool box.”

Well-directed and managed projects enable an organization to react and adapt speedily to meet the challenges of the competitive environment, ensuring the organisation drives towards attainable and visible corporate goals. Effective business-led project management will increase the likelihood of business success by ensuring visibility, accountability and control over business change activities. In particular by:

- linking business needs directly to visible actions plans;
- enabling you to manage across every department in your organisation;
- ensuring accountability can be assigned, safe in the knowledge any gaps are covered;
- providing a flexible and responsive method to respond to changing needs;
- focusing on priorities;
- enabling you to track progress toward your business objectives.

THE CHALLENGES TO BE FACED
All organizations have problems with the ways they tackle change within their businesses—these may be related to technology, people, processes, systems, or structure. During the late 20th century, there has
been a variety of techniques and offerings available to managers to enable them to do this, most notably CMMi, Six Sigma, total quality management and business process reengineering.

Unfortunately, not all organizations secure the enduring benefits initially promised by techniques. Many remain ineffective at managing and controlling change in order to achieve sustained benefits from their initiatives. Leaders must continually act to solve particular problems or achieve specific objectives, but many fail. The initiatives often fail because they cost too much, take too long, are inadequately thought out and specified, or simply don't realize the expected benefits.

This amounts to failure on a grand scale, costing billions every year, and results in the demise of some organizations. For two reasons. Organizations don't know how to tackle these initiatives: there's no company-wide way of organizing this. Also they don't know what projects they should be doing: there's no clear strategy driving decision making.

Project management gives you the environment to solve the first of these root causes, and by its proper implementation will prompt you to think about the second.

**PRINCIPLES OF PROJECT MANAGEMENT**

*Make Sure Your Projects Are Driven by Your Strategy*

You should be able to demonstrate explicitly how each project you undertake fits your business strategy. The screening out of unwanted projects as soon as possible is essential. The less clear the strategy, the more likely unsuitable projects are to pass the screening: hence there will be more projects competing for scarce resources, resulting in the company losing focus and risking its overall performance. If you cannot state why you are undertaking a project and how it supports your strategy, you should not be doing it.

*Ensure Each Project Has a Named Sponsor*

Each project should have a project sponsor who is accountable for directing the project and ensuring the expected benefits fit the strategy and are likely to be realized. The role of the project sponsor is to lead business change and direct projects with the benefits in mind, as opposed to managing projects with delivery in mind (which is the role of a project manager). As such a sponsor should be a business leaders, change agent and decision maker. The effectiveness of a project sponsor role is related to the maturity of the organization with respect to project management. In immature companies, run mostly on departmental lines, poor sponsorship is a prime cause of project failure. In other words, despite the best efforts of many project managers and their teams, projects have a tendency to fail "top-down." Good project management alone does not lead to a successful project.

*Use a Consistent Staged Approach*

Rarely is it possible to plan a project in its entirety. You should, however, be able to plan the next stage in detail and to the end of the project in outline. As you progress through the project you gather more information, reduce uncertainty, and increase confidence. The typical framework comprises the following progressive steps, or stages:

- proposal—identifying the idea or need;
• initial investigation—a brief overview of the possible requirements and solutions;
• “The chief executive ... like a juggler keeps a number of projects in the air: periodically one comes down, is given a new burst of energy, and is sent back into orbit.” Henry Mintzberg
• detailed investigation—undertaking a feasibility study of the options and defining the chosen solution;
• development and testing—building the solution;
• trial—piloting the solution with real people;
• operation and closure—putting it into practice and closing the project.

You should use the same generic stages for all types of project. This makes the use and understanding of the process familiar and easier, avoiding the need to learn different processes for various types of project. This generic framework should then be tailored to take into account the risk of each project, the level of activity, the nature of the activity, the resources required, and the stakeholders and decision makers needed. The gates are entry points to each stage, and are the key checkpoints for revalidating a project and committing resources and funding.

Placing high emphasis on the early stages of the project might mean that between 30% and 50% of the project's life cycle is devoted to investigative stages before any final deliverable is physically built. Research clearly demonstrates that placing heavy emphasis up front significantly decreases the time to market/completion. Good investigative work means clearer objectives and plans. Decisions taken at the early stages of a project have a far-reaching effect and set the tone for the remainder. In the early stages, creative solutions can slash delivery times in half or cut costs dramatically. Once development is underway changes can be very costly.

Engage Your Stakeholders
A stakeholder is any person involved in or affected by a project. The involvement of stakeholders such as users and customers adds considerable value at all stages of the project. Engaging them is a powerful mover for change; ignoring them can lead to failure. When viewed from a stakeholder perspective, your project may be just one more problem they have to cope with in addition to fulfilling their usual duties; it may appear irrelevant to them, or even regressive. If their consent is required to make things happen, it is unwise to ignore them.

Always Address All Aspects, Not Just Technology
Projects are not just about technology; they should cover every aspect required to achieve the expected benefits. These will include culture, systems, processes, and structures. Stakeholders should be identified to cover every base.

Encourage Teamwork and Commitment
Be sure to encourage teamwork and commitment at all times. The need for many projects to draw on people from a range of functions means an integrated team approach is essential. The more closely people from different disciplines work and the more open the management style, the better they perform. Although this is not always practical, closeness can be achieved by frequent meetings and good communication, often through using Web collaboration tools or telephone and videoconferencing.
The more functionally structured a company, the more difficult it is to implement effective project management: project management by its nature crosses functional boundaries. To make projects succeed, the balance of power usually needs to be tipped toward the project and away from line management in order to ensure that cross-functional teams perform.

**Monitor Against the Plan**

Good planning and control are prerequisites for effective project management. There must be guidance, training, and support for all staff related to projects, including senior managers who sponsor projects or make project-related decisions. Core control techniques include planning, managing risk, issues, scope change, schedule, cost, and reviews. Planning as a discipline is essential. If you have no definition of the project and no plan, you're unlikely to be successful. It will be virtually impossible to communicate your intentions to the project team and stakeholders. Furthermore, if there is no plan, terms such as "early," "late," and "within budget" have no real meaning.

**Manage Your Risks and Issues**

Risk management is key: using a staged approach is itself a risk management technique, with the gates acting as formal review points at which risk is put in the context of the business benefits and cost of delivery. Projects are risky. It is essential to analyze the project, determine which are the inherently risky parts, and take action to reduce, avoid, or, in some cases, insure against those risks while looking to exploit any opportunities that arise.

Despite all this foresight and care, things will not always go smoothly. Unforeseen issues do arise that, if not resolved, threaten the success of the project. Monitoring and forecasting against the agreed plan is a discipline that ensures that events do not take those involved in the project by surprise. This is best illustrated by the "project control cycle." The appropriate frequency for the cycle (daily, weekly, biweekly, monthly) depends on the project, its stage of development, and the inherent risk. Such monitoring should focus more on the future than on what has actually been completed. Completion of activities is evidence of progress, but is not sufficient to predict whether milestones will continue to be met. The project manager should continually check that the plan is still fit for the purpose and likely to realize the business benefits on time.

**Control, But Don't Prevent, Changes**

Many projects are late or never even get completed. One of the reasons for this is scope creep: more and more ideas are incorporated into the project, resulting in higher costs and late delivery. Changes, even beneficial ones, must be managed to guarantee that only those enabling the project benefits to be realized are accepted; you must communicate this to the team and stakeholders so they are absolutely clear what the current project comprises.

Ultimately some issues cannot be resolved without some redefinition of the project. It may require a scope change, an extension of time, additional funds, or an adjustment to deal with a revised forecast of the benefits and/or operational volumes. In such circumstances, change control comes in to play. Change control ensures only changes which are beneficial to the business are actually implemented and the project is not derailed by bright ideas or good intentions. When a project is no longer viable, the right
decision is to terminate the project. Changes are a fact of life and cannot be avoided, but preventing negative change is possible or a loss of focus is possible.

**Formally Close the Project**
Finally, every project must be closed, either because it has completed its work or because it has been terminated early. By explicitly closing a project you make sure that all work ceases, lessons are learned, and any remaining assets, funding, or resources can be released for other purposes.

**MINI-CASE**
One company that has a product leadership strategy terminated a new product before launch, because a competitor had just released a superior product. It was better to abort the launch and work on the next generation product than to continue with a new product that could be seen by the market as inferior. If they had done so, their strategy of product leadership would have been compromised.

“Responsibility without control is at the core of management.” Paul Corrigan

**MAKING IT HAPPEN**
Common mistakes include:

- having no active sponsorship—a lack of business leadership and direction is a recipe for failure;
- intrafunctional thinking—not taking the helicopter, or not having a company-wide view;
- having too many rules—the more project rules you make, the more people will break them;
- nonexistent or changing sponsors—without a sponsor there should be no project;
- ignoring the risks—risks don't go away, so acknowledge and manage them;
- rushing in prematurely to get something going; resist the temptation to confuse activity with progress;
- analysis paralysis—you need to investigate, but only enough to gain the confidence to move on;
- untested assumptions—all assumptions are risks, so treat them as such;
- executive's pet projects—make no exceptions. If an executive's idea is really so good, it should stand up to the scrutiny all the others go through.
- Your project will run much more smoothly if you focus on a few basics:
- define strategies clearly so you're better able to eliminate low-leverage, low-value projects;
- appoint a sponsor to look after the business interests;
- plan through progressive stages: proposal, initial investigation, detailed investigation, development and testing, trial, operation, and closure;
- concentrate on the early stages of the project, when the decisions taken have a far-reaching effect on the outcome;
- analyze the project, determine which are the intrinsically risky parts, and act to reduce, avoid, or, in some cases, insure against the risks;
- to make projects succeed, tip the balance of power toward the project and away from line management and the hierarchy;
- don't lose sight of the benefits you are aiming to realize;
focus progress monitoring more on the future than on completion of activities, which doesn't predict whether future milestones will be met.

CONCLUSION
The success of an organization rests on its ability to direct and manage projects effectively and efficiently. The interdisciplinary nature of project teams combined with the significance and sensitivity of their impact places considerable demands on management. Acquiring key skills will ensure that the process runs smoothly, minimizing costs and maximizing benefits, while securing stakeholder involvement and commitment. Responsiveness is an increasingly significant source of competitive advantage, and a fast, flexible, and focused project management capability is essential for every organization. Tomorrow's successful corporations will be founded on the efforts of those business leaders dedicated to the way they plan, and undertake projects.

Reference
Reading List – Project Management Approach for Change Leadership in Automating the Assessment Process

Change Support


This article is from 1995, the principles are in place today and still used by successful leaders fostering change in culture and process.


This book addresses strategies to work through accelerating change.


This book uses a fable to show and tell the story about the need for change and how to accomplish it.

Project Management


This article will help with general project management skills, success reminders, and strategies.

Assessment Guidelines


This book is a classic resource for a straightforward guide for program assessment.