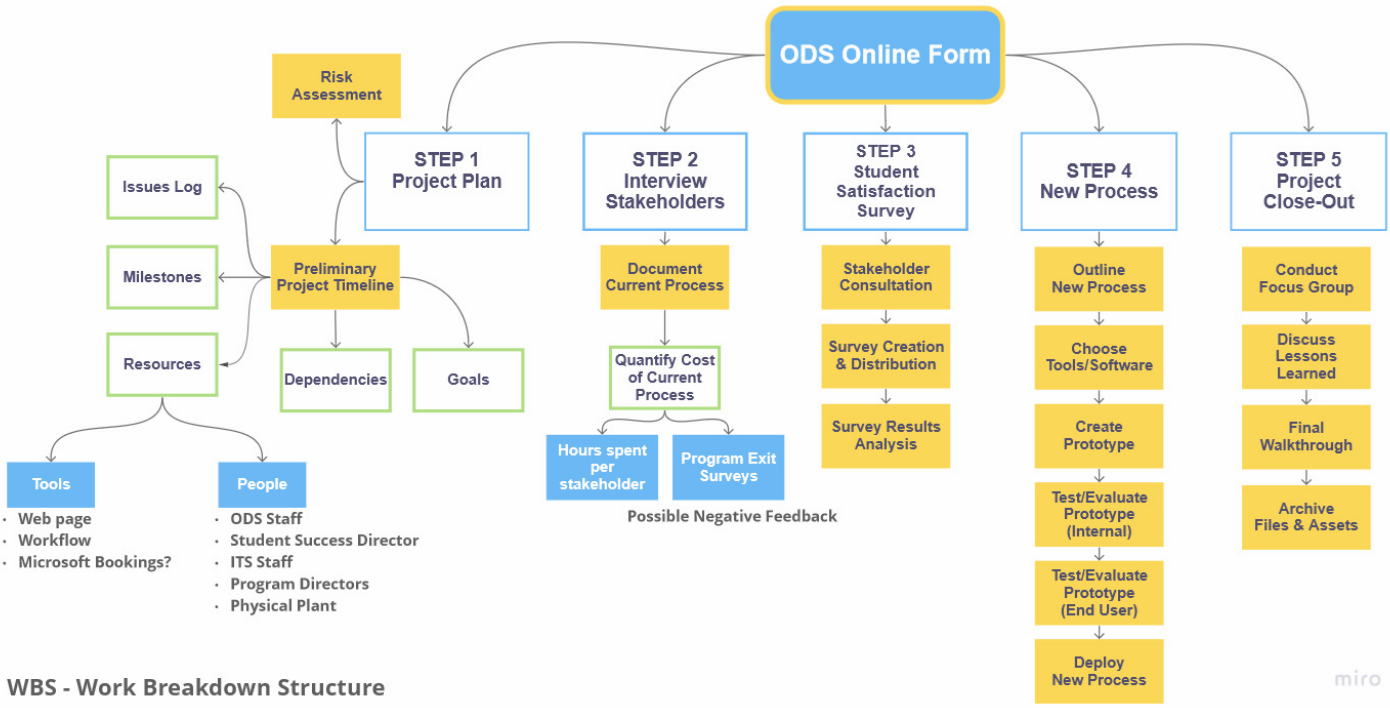


ODS Online Form

Project Plan for Transforming a Paper Form into an Online Form for a University's Office of Disability Services (ODS)

Annette Robinson

Fall 2021

EME 6235

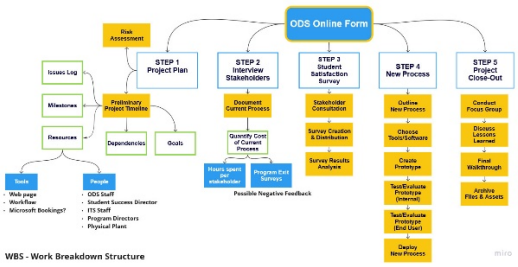
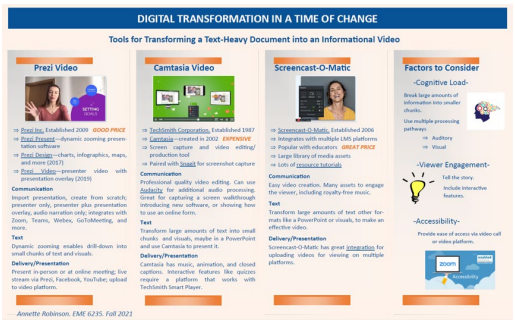
CONTENTS

SECTION 1: TRANSFORMATION CHART & IMPACT STATEMENT

IMPACT STATEMENT

This project is all about transforming a clunky, paper-based exam accommodations request form into a streamlined digital process. I am privileged to work at a new campus of an established university. Though we strive to maintain a family atmosphere, hand-carrying an exam accommodations request to the Office of Disability Services (ODS) facilitator makes less sense now, with our growing student population. The ODS Online Form project is happening in real life. My mission in this class was to take it and run with it, hypothetically, creating all the building blocks of a fully fleshed, waterfall-style project. Having expanded a simple project to meet the class requirements, I now have the tools and insights to work with stakeholders and push the project forward in the new year, picking up and adapting the elements we need to make it work for us.

TRANSFORMATION CHART

	FROM: Text	TO: Graphic	Click thumbnail below to see the result
Transformation 1	Used SMART framework to define my final project	Used WiseMapping tool to transform the text into a mind map	
Transformation 2	Digging into the step-by-step details of the project	Used Miro to transform the text into a graphical Work Breakdown Structure (WBS)	
Transformation 3	Midterm: A paper analyzing tools for transforming a text-heavy document into an informational video	Used Microsoft Publisher and Adobe PDF to transform the 5-page paper into a 2-page presentation	

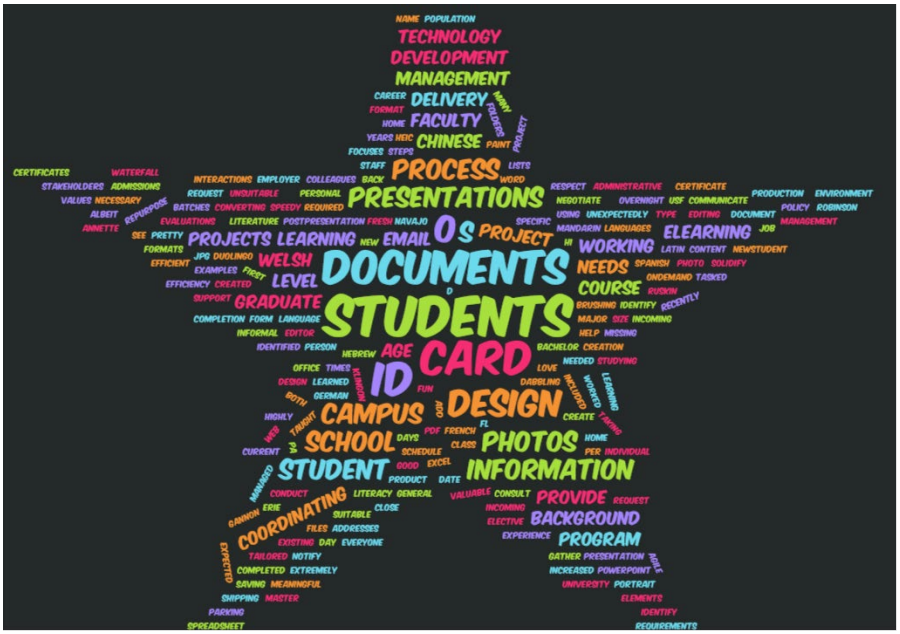
SECTION 1 RESOURCES (CLICK TO NAVIGATE)

SECTION 2: INTRODUCTION & BACKGROUND

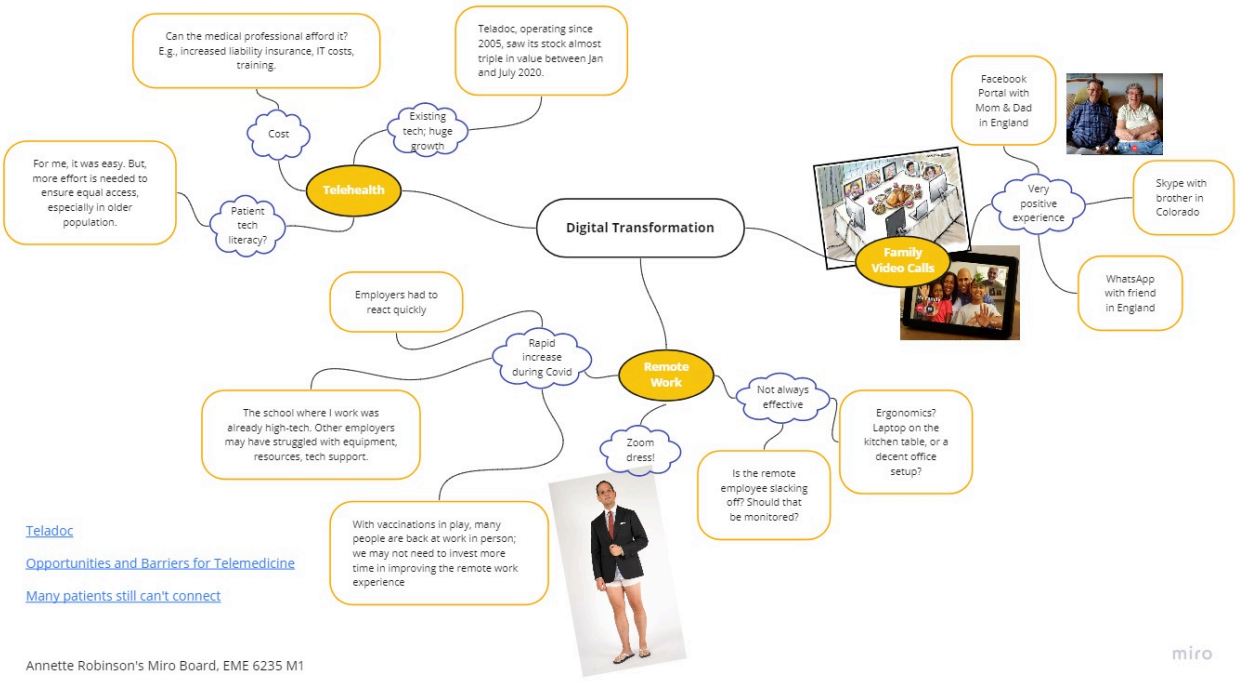
The goal and challenge for Dr. Anderson's EME6235 Technology Project Management class was to plan out a real or hypothetical project, building out the elements of the final project scheme week by week in the course assignments.

An early building block was the creation of a word cloud illustrating we students as individuals and (nascent) project managers, highlighting early interests and thoughts of the project we planned to build.

ABCya.com early attempt: Fun, wordy, and a little chaotic!



We were also asked to consider how our ways of living and working have undergone digital transformation, in recent months and years; to consider the level of effort going into these transformations; and to look to the future in terms of whether these transformations are worth investing more time into. I used a Miro mind map, as shown below.



Next, we used the **SMART** framework to begin to define our projects. Here is how my project began to take shape.

Specific

- **What / Subject**: Creation and implementation of an online exam accommodations request form for the local campus of the school where I work.

  Title: ODS Online Exam Accommodations Request Form

  Tools/Software: An online form created on the school's website using the same web technology as the existing/main campus form; a workflow that progresses the request to the relevant parties; a room reservation system that could be as basic as Microsoft Bookings or could tie into the school's existing proprietary room reservation system.

- **Why / Purpose**: The school campus where I work has a larger than usual number of students approved for testing accommodations this semester, through the school's Office of Disability Services (ODS). The school's main campus already has an online form in place where students can request accommodations for a specific exam through the ODS website. Adding an online form for the local campus will make the currently clunky process more efficient for students, faculty, and staff. The online form will trigger a workflow that will move the student's exam accommodations request through the instructor, to the staff facilitating the exam, and will potentially include creation of an online room and services booking system.

  Importance to me: I am the staff member responsible for facilitating the clunky exam accommodations system at a small, local campus that does not have an ODS office on site and lacks a dedicated testing

space. Everything is manual and the accommodations request process lacks consistency from program to program.

- **Who / Stakeholders**: Main campus: ODS; ITS. Local campus: Director who oversees student success; me, as facilitator; ITS; program directors and faculty; possibly physical plant.
- **Where**: Joint project between main campus and local campus where I work, electronic implementation for use at the local campus.
- **When**: ODS desired target date is Summer 2022.

Measurable – By the end of this course, I want to have a project plan with a realistic timeline that is already moving forward (steps taken in real life). Most important measurable outcome for the project is: A functioning online form that is routed from student to instructor to exam facilitator. Secondary outcome: Connecting the form/exam request to a simple online room reservation system.

Achievable – Focus areas related to developing skills in PM that will help me support this idea:

- Get real input from the stakeholders, listening and developing empathy. What solutions work best and most realistically for everyone, even if they would not be my first choice? Achievable – I have access to all stakeholders.
- Get data to quantify cost savings that will result from this project. Achievable – I am involved in the work put into the current process by multiple parties.

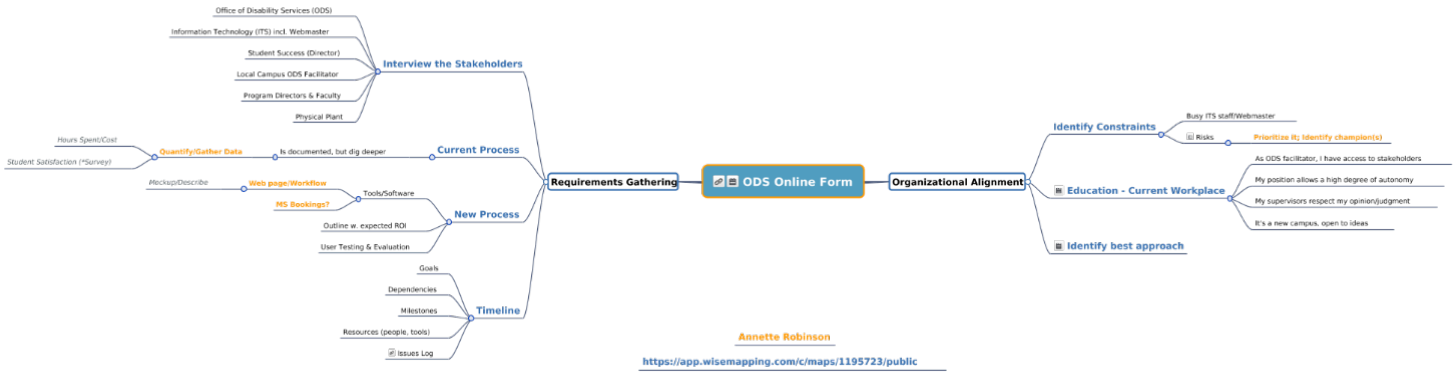
Realistic – relevant right now – This project will address a current process that is time-consuming and inefficient. My work day this semester is crowded with trying to keep up with exam accommodations requests on top of many other tasks and projects. Showing willingness to take the lead on this project will enhance my profile with management; work done and progress made can be reported on my annual evaluation. There is openness around my position and reporting hierarchy for me to feel confident in moving this project forward.

Timely – The need for this project is already part of a conversation that is going on right now, as a larger number of students have been approved for ODS accommodations. The starting date is now; the target date is Summer 2022 (ODS desired date).

SECTION 2 RESOURCES (CLICK TO NAVIGATE)

SECTION 3: ORGANIZATIONAL CONSIDERATIONS / PROJECT SETTING

I used the Wisemapping tool to illustrate how the project criteria identified so far would be mapped to my organization (academic setting). Please visit https://app.wisemapping.com/c/maps/1195723/public to view a larger image and to access additional text on mouse rollover.



SECTION 3 RESOURCES (CLICK TO NAVIGATE)

SECTION 4: COMMUNICATION PLAN

A. COMMUNICATION GOALS

The organization is located at two campuses, over a thousand miles apart. The Office of Disability Services (ODS) is located at the main campus; functions of the ODS are performed at the daughter campus. Given the distance, and the resulting infrequency of in-person communications between the two locations, it is crucially important to have a well-defined communication strategy that will keep all team members engaged and motivated. A major goal will be to encourage video meetings and phone calls.

B. COMMUNICATION TYPES AND FLOW

The diagram under **G. Communication Flows** shows communication lines between campuses and between roles. Position hierarchies are not well delineated in this organization. For the most part, the stakeholders have an 'open door' policy; that helps with flexibility and ease of communication.

C. ANTICIPATED COMMUNICATION CHALLENGES

Team members being at a distance in two locations leads to the possibility of misunderstandings and miscommunications, especially as a lot of campus-to-campus communication takes place via email.

The Program Directors (PDs) are busy and it may be a challenge to pin them down for meetings.

ITS staff are busy and may delegate tasks to student employees with a high turnover rate. Continuity of communication will need to be monitored.

D. COMMUNICATION TOOLS

- Microsoft Outlook for emails
- Microsoft Teams for chat/messaging, working collaboratively, video calls
    - The PM, the ODS team on both campuses, and the Student Success Director (SSD) are on a Microsoft team.
- Zoom, in some cases, for video calls; more likely for the PDs who are in the habit of using Zoom for teaching and meetings.
- TeamDynamix for projects and work flow (ITS side)
- Phone calls

Video calls will be recorded; messaging on MS Teams can be accessed at any time; notes on phone calls can be kept in Microsoft Planner/To Do that can be attached to the team in MS Teams.

E. COMMUNICATION FREQUENCY

The PM will hold a once-weekly video meeting with ODS staff and the SSD, as these are the key stakeholders in the project. Communication will be ongoing via MS Teams as well.

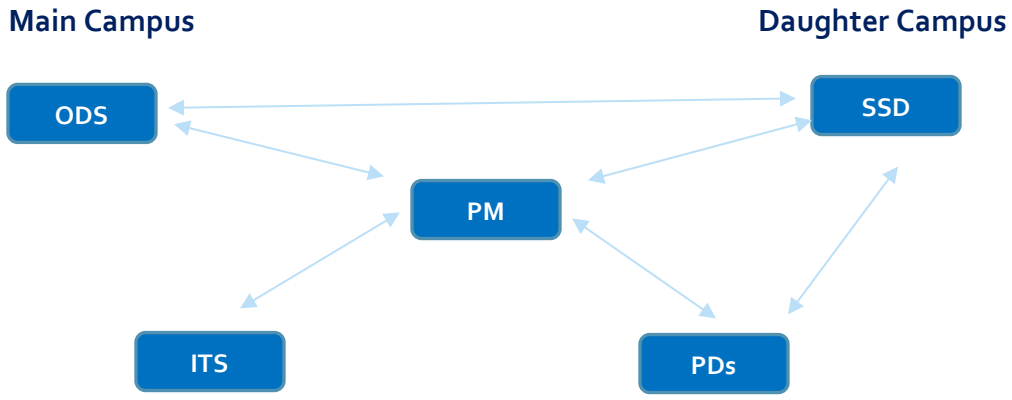
Meetings with other stakeholders will be as needed, depending on who is involved at each phase of the project.

At the daughter campus level, stand-up meetings will take place between PM and SSD (where both are located), at least twice a week.

F. IMPORTANT MESSAGES

The PM will send a weekly project update email to all stakeholders. This will include a link to a project dashboard giving full disclosure on tasks and status. Transparency is key.

G. COMMUNICATION FLOWS



SECTION 5: RESOURCE PLANNING

DESCRIPTION OF HUMAN AND NON-HUMAN RESOURCES

Click image to see a larger view in Appendix A.

Resources - Human

Department	Job Title	Role	Level/Skill
Office of Disability Services (ODS)	**Office of Disability Services Director**	Ultimately accountable for this project	As ODS director, dictates the need for this form and approves it/final sign-off. The go-to person for expertise on student disability needs
	Administrative Assistant, ODS	Testing and giving input to how this form works for students	Has experience and insight into how the existing online form works for students and staff at the main campus
Student Success	**Student Success Director**	Responsible for implementing solutions at the local campus	Many years of experience at the school; an invaluable resource for connecting people, especially between campuses
Information Technology Services (ITS)	**Instructional Technology Support Supervi**	Will be accountable for creation and testing of the new form and workflow	Instructional technology expertise. Can't do this without them.
	Webmaster	Will be responsible for creating the new form	HTML, CSS, Javascript. This will be a web-based form.
	Systems Analyst	Will be hands-on testing the new form and workflow	Works under direction of the instructional technology support supervisor. Could be either of two individuals.
Academic Affairs	**Program Directors**	Local campus program directors will test and sign off on the new form.	Have experience in how things work in their program on campus. While they will not sign off on the new form, getting their buy-in will ensure the testing and implementation run smoothly.

Resources - Tools - Existing

Resource	Purpose	Specifics (If Applicable)
Zoom	Communication, Interviews	
Microsoft Teams	Communication, Interviews	
Microsoft Office Suite	Communication, Planning/documents	Outlook, Word, Excel, PowerPoint
Microsoft Bookings	Ties in to the new form	
OneDrive	Data/Cloud Storage	
Ellucian	Website/Database Software	
TeamDynamix	ITS Project Management Tool	

RACI CHART – CLARIFY STAKEHOLDER ROLES

Created using a template from Stanford University (link in resources list)

RACI role definitions:

R = Responsible	Responsible for performing the task (ie. the actual person doing the work to complete the task).
A = Accountable	Ultimately accountable for the task being done in a satisfactory manner. The accountable person must sign-off the work that the Responsible person produces.
C = Consulted	Team members whose input is used to complete the task. Communication with these members will be 2-way in nature.
I = Informed	Team members who are informed as to the status of the task. Communication with these members will be 1-way in nature.

	Project: ODS Online Form	Roles				
	Critical Activity	Project Manager	ODS	Student Success Director	ITS	PDs
Vision	Project Plan	R	C	A	C	C
	Preliminary Project Timeline	R+A	I	I	C	C
	Risk Assessment	R	C	C+A	C	C
Action	Meet with stakeholders	R+A	C	C	C	C
	Current process: Document it	R	C	C+A	C	C
	Current process: Quantify cost (man-hours)	R	C	A	C	C
	Current process: Conduct student satisfaction survey	R	C+A	C+A	I	I
	New process: Outline it, w. expected ROI	R	C	C+A	C	C
	New process: Choose tools/software	C	C+A	C+A	R	C
	Refine the project timeline	R+A	I	I	C	C
	Create prototype	I	C	A	R	I
	Test & evaluate prototype (internal)	C	C	C+A	R+A	C
	Test & evaluate prototype (end user)	I	C	C+A	R+A	I
	New process: Deployment	R	R	C+A	R+A	C
Close-Out	Focus Group, Other Feedback	R	C	C+A	I	C
	Lessons Learned Meeting	R+A	C	C	C	C
	Final Walkthrough of all Project Elements	R	C	C+A	C	I
	Archive Files & Assets	R	C	C+A	R	C

SECTION 5 RESOURCES (CLICK TO NAVIGATE)

SECTION 6: PROJECT PLAN

SCOPE OF WORK [CREATED USING TRACKTIME24]

A. GOALS

- **Meet with stakeholders.** Clarify goals, needs, expectations.
- **Document the current process.** PM is the on-ground facilitator of the process but some knowledge may also come from other stakeholders.
- **Quantify the cost of the current process**. $ cost will be mostly in person-hours, but there is a potential less tangible cost in student satisfaction with the process. Student frustration with a clunky or difficult process might lead to negative feedback for the educational program.
    - ❖ Investigate the program exit surveys to identify any actual negative feedback related to the exam accommodations process. Loss of student enrollment revenue due to poor program/school reviews is a possibility.
- **Conduct a student satisfaction survey.**
- **Outline the proposed new process.**
- **Identify tools and software** to be used in the new process.
- **Create prototype** of the new online form.
- **Create prototype** of a room reservation system that the form feeds into.
    - ❖ The current testing room reservations process is one of the most time-consuming pieces of this overall process. Creation of an online room reservations system might be stretching the scope of this "ODS Online Form" project but will be well worth it, if it can be incorporated.
- **Test and evaluate the prototype** (internal – at ITS and ODS facilitator level).
- **Refine the prototype as needed.**
- **Test and evaluate the prototype** (end user – students and instructors).
- **Refine the prototype as needed.**
- **Deploy the new online ODS exam accommodations request form, with accompanying online testing room reservation system.**
- **Conduct a post-deployment focus group.**
- **Hold a 'Lessons Learned' meeting with the project team.**
- **Archive project files and assets in a secure repository**

B. BUDGET

- Projected to be measured mostly by hours that will be spent by:
    - ❖ Project Manager
    - ❖ ITS
- Possible refreshments if there are in-person planning meetings. This is less likely.
- Tools/services already in use/paid for include: Qualtrics for the survey; Zoom for most meetings.

C. DEADLINE

Summer 2022

D. REQUIREMENTS

- WHAT:
    - ❖ An online exam accommodations request form already exists for the main university campus. This project will recreate a similar form for the local campus.

- ❖ The form will be housed on the same web page as the existing form.
  - Student fills form; 'Submit' notifies instructor to fill.
  - Instructor fills form; 'Submit' notifies the local ODS facilitator, and opens the exam room reservation system. *new, specific to the local campus
  - Instructor chooses exam room. 'Submit' reserves the room and notifies the local ODS facilitator.
  - Microsoft Bookings is a possible option for the local campus room reservation system.
- CONSIDERATIONS:
  - ❖ Get real input from the stakeholders, listening and developing empathy. What solutions work best and most realistically for everyone?
  - ❖ RESPECT is a key tenet of the organization.
  - ❖ Workplace environment: This is a new campus open to ideas; without a strict hierarchy, a looser project plan should work. Constraints include a busy webmaster and ITS staff. A solution may be to connect with an individual in the ITS office who can champion the project.

E. PEOPLE / STAKEHOLDERS

- Office of Disability Services (ODS)
- Information Technology (ITS), including Webmaster
- Student Success Director
- Program Directors
- Students
- Project Manager

F. SPECIAL PROJECT REQUIREMENTS

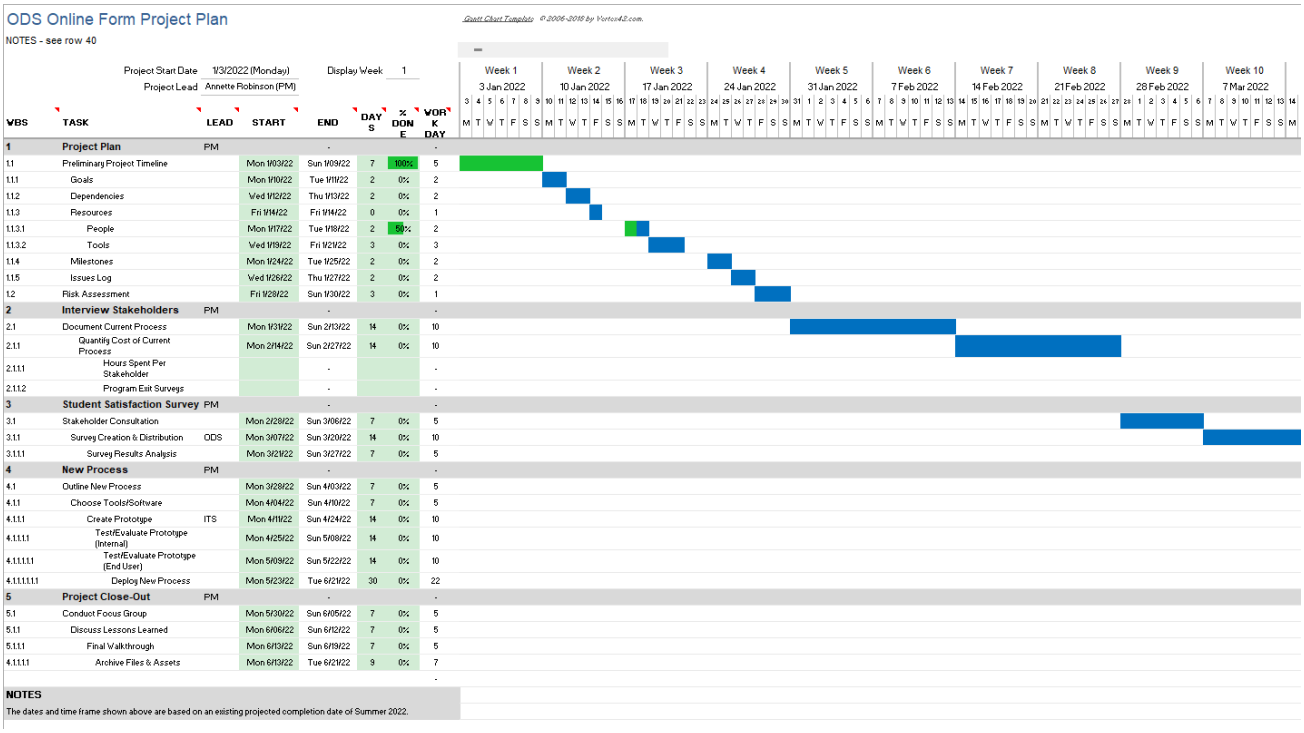
- Accessibility is key; already built into the existing online form; will be a consideration for the room reservation system.

G. OUT OF SCOPE

- Steer clear of expanding the project to cover local campus ITS needs, e.g. updating camera systems for remote proctoring;
- or discussions of local campus staff responsible for proctoring and facilitating.

PROJECT PLAN [CREATED USING A VERTEX42 TEMPLATE]

Click image to see a larger view in Appendix B.



ODS Online Form Project Plan

NOTES - see row 40

Project Start Date 1/3/2022 (Monday) Display Week 1

Project Lead Annette Robinson (PM)

WBS	TASK	LEAD	START	END	DAYS	% DONE	WORK DAY
1	**Project Plan**	PM		-			-
1.1	Preliminary Project Timeline		Mon 1/03/22	Sun 1/09/22	7	100%	5
1.1.1	Goals		Mon 1/10/22	Tue 1/11/22	2	0%	2
1.1.2	Dependencies		Wed 1/12/22	Thu 1/13/22	2	0%	2
1.1.3	Resources		Fri 1/14/22	Fri 1/14/22	0	0%	1
1.1.3.1	People		Mon 1/17/22	Tue 1/18/22	2	50%	2
1.1.3.2	Tools		Wed 1/19/22	Fri 1/21/22	3	0%	3
1.1.4	Milestones		Mon 1/24/22	Tue 1/25/22	2	0%	2
1.1.5	Issues Log		Wed 1/26/22	Thu 1/27/22	2	0%	2
1.2	Risk Assessment		Fri 1/28/22	Sun 1/30/22	3	0%	1
2	**Interview Stakeholders**	PM		-			-
2.1	Document Current Process		Mon 1/31/22	Sun 2/13/22	14	0%	10
2.1.1	Quantify Cost of Current Process		Mon 2/14/22	Sun 2/27/22	14	0%	10
2.1.1.1	Hours Spent Per Stakeholder			-			-
2.1.1.2	Program Exit Surveys			-			-
3	**Student Satisfaction Survey**	PM		-			-
3.1	Stakeholder Consultation		Mon 2/28/22	Sun 3/06/22	7	0%	5
3.1.1	Survey Creation & Distribution	ODS	Mon 3/07/22	Sun 3/20/22	14	0%	10
3.1.1.1	Survey Results Analysis		Mon 3/21/22	Sun 3/27/22	7	0%	5
4	**New Process**	PM		-			-
4.1	Outline New Process		Mon 3/28/22	Sun 4/03/22	7	0%	5
4.1.1	Choose Tools/Software		Mon 4/04/22	Sun 4/10/22	7	0%	5
4.1.1.1	Create Prototype	ITS	Mon 4/11/22	Sun 4/24/22	14	0%	10
4.1.1.1.1	Test/Evaluate Prototype (Internal)		Mon 4/25/22	Sun 5/08/22	14	0%	10
4.1.1.1.1.1	Test/Evaluate Prototype (End User)		Mon 5/09/22	Sun 5/22/22	14	0%	10
4.1.1.1.1.1.1	Deploy New Process		Mon 5/23/22	Tue 6/21/22	30	0%	22
5	**Project Close-Out**	PM		-			-
5.1	Conduct Focus Group		Mon 5/30/22	Sun 6/05/22	7	0%	5
5.1.1	Discuss Lessons Learned		Mon 6/06/22	Sun 6/12/22	7	0%	5
5.1.1.1	Final Walkthrough		Mon 6/13/22	Sun 6/19/22	7	0%	5
4.1.1.1.1	Archive Files & Assets		Mon 6/13/22	Tue 6/21/22	9	0%	7

NOTES

The dates and time frame shown above are based on an existing projected completion date of Summer 2022.

KPIS [ADAPTED FROM FORBES MAGAZINE, 2020]

KPIs for Digital Transformation of an Exam Accommodations Request Form

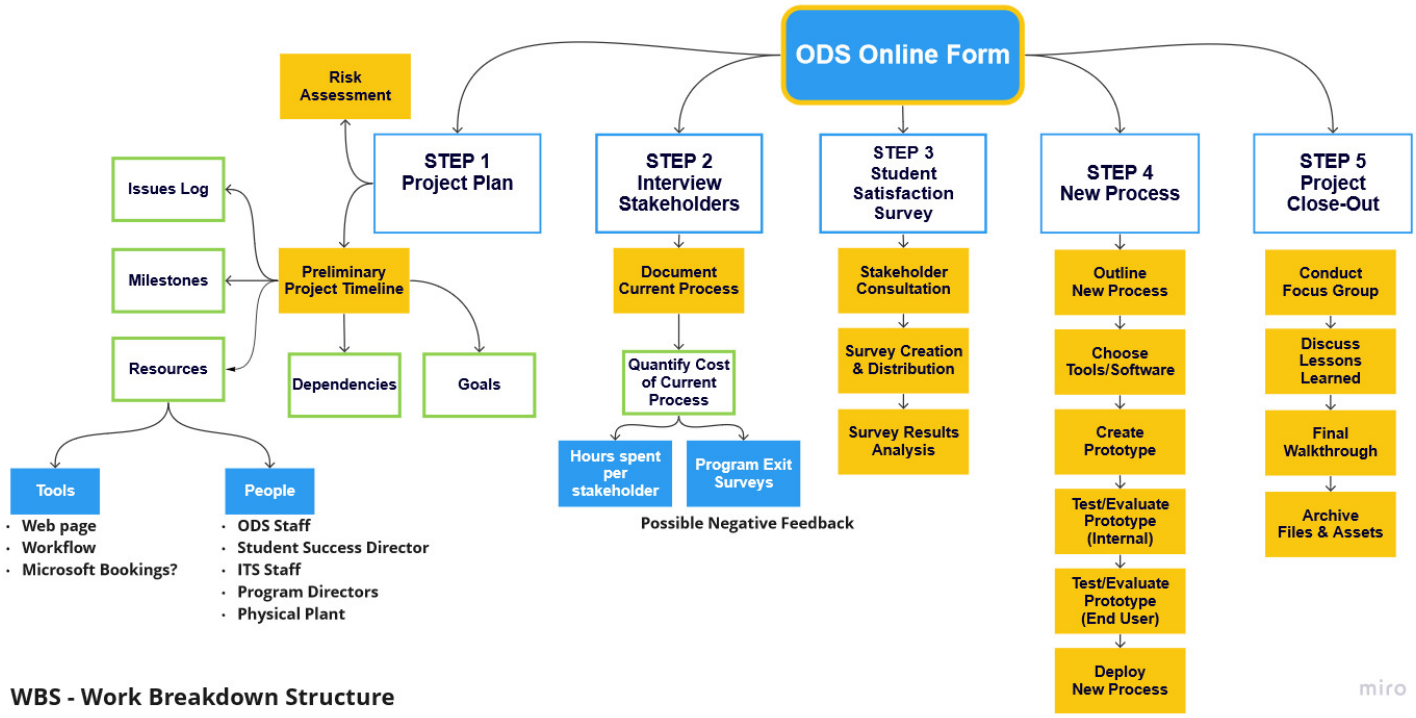
KPI - Key Performance Indicator	KPI Measurement Method	KPI Tracking
1. Hours saved	Self-tracking of hours worked by all individuals involved in the ODS exam accommodations request process	Measure hours worked under: • Current process • Testing prototype • New process in place and users trained
2. Operational improvement	Measure time gap between these workflow stages by self-reporting (current process) and workflow tracking (prototype and new process): 1. Student submits request form to instructor 2. Instructor submits form to ODS facilitator 3. ODS facilitator reserves a room and notifies instructor and student	Measure time gap under: • Current process • Testing prototype • New process in place and users trained
3. Customer experience (student)	Qualtrics student satisfaction survey	Survey the students under: • Current process • New process in place and users trained
4. Team morale (staff & instructors)	Qualtrics team morale survey	Survey staff & instructors under: • Current process • New process in place and users trained
5. Institution core value: Seamless process	Measure this value in the student satisfaction survey and the team morale survey	Students, staff & instructors will be surveyed under: • Current process • New process in place and users trained

SECTION 6 RESOURCES (CLICK TO NAVIGATE)

SECTION 7: BUDGET & ESTIMATE

WORK BREAKDOWN STRUCTURE (WBS)

The WBS (this one created using Miro) breaks the project into steps and sub-steps. Note the waterfall-style flow from one step to the next.



WBS - Work Breakdown Structure

FACTORS CONTRIBUTING TO BUDGET ESTIMATE

I used guidelines from TechRepublic (Mochal, 2008) to help define the level of effort and time required at each stage of the project.

1. Accuracy of the estimate: High level of accuracy and detail are not needed, as the project is already approved and will be going ahead with resources already in place.
2. Initial estimate of effort hours: Basing this on my Work Breakdown Structure (WBS) below:
    - **Step 1, Project Plan** = PM hours = rough estimate 12 hours
    - **Step 2, Interview Stakeholders** = hours for PM and all stakeholders participating in interviews to document the current process = estimate 11 hours; PM to consolidate interview information, document current process, and quantify cost of current process = rough estimate 10 hours

- **Step 3, Student Satisfaction Survey** = hours for PM and ODS staff and Student Success Director for consultation, survey creation/distribution, and results analysis = rough estimate 5 hours
- **Step 4, New Process** = rough estimate 33 hours (all stakeholders involved at points along the way)
- **Step 5, Project Close-Out** = rough estimate 32 hours (all stakeholders involved)
  - **Total initial estimate = 103 hours**

3. Specialist resource hours: None anticipated
4. Factoring in potential 'rework' hours if needed = add 20 hours.
   - **New estimate: 123 hours**
5. Project management time @ 15% of the effort hours = 19 hours
6. Add contingency hours = 10.5 hours (10% of effort hours, as the work is fairly well defined)
7. **Total effort hours, all included = 152.5 hours**
   - Quite rough $$ estimate, partially dependent on disclosure of staff salaries in a hypothetical environment: If PM is $40/hr and other staff involved range from $10/hr to $45/hr, **estimate of total project cost = $4,763**
8. Review and adjust: Not necessary at this time
9. Document all assumptions: All existing stakeholders will be in place for duration of project (any change in staffing could cost more hours in interviews and getting the new person up to speed); Projected tools and resources will all be suitable for the project and will perform satisfactorily.

$$ ESTIMATE

Staff	Rate	Step 1 Hours	Step 2 Hours	Step 3 Hours	Step 4 Hours	Step 5 Hours	PM Hours	Total Hours	Cost
PM	$ 40	12	16	4	7	15	19	73	$ 2,920
ODS Director	$ 45		1	0.5	3	4		4.5	$ 203
Student Success Director	$ 45		1	0.5	3	4		4.5	$ 203
PDs	$ 40		1		3	2		4	$ 160
ITS Manager	$ 35				3	3		3	$ 105
ODS Staff	$ 17		1		4	3		5	$ 85
ITS Student	$ 10		1		10	1		11	$ 110

	Rate	Rework	Contingency					Total Hours	Cost
Average of all pay rates	$ 33	20	9.5					29.5	$ 978

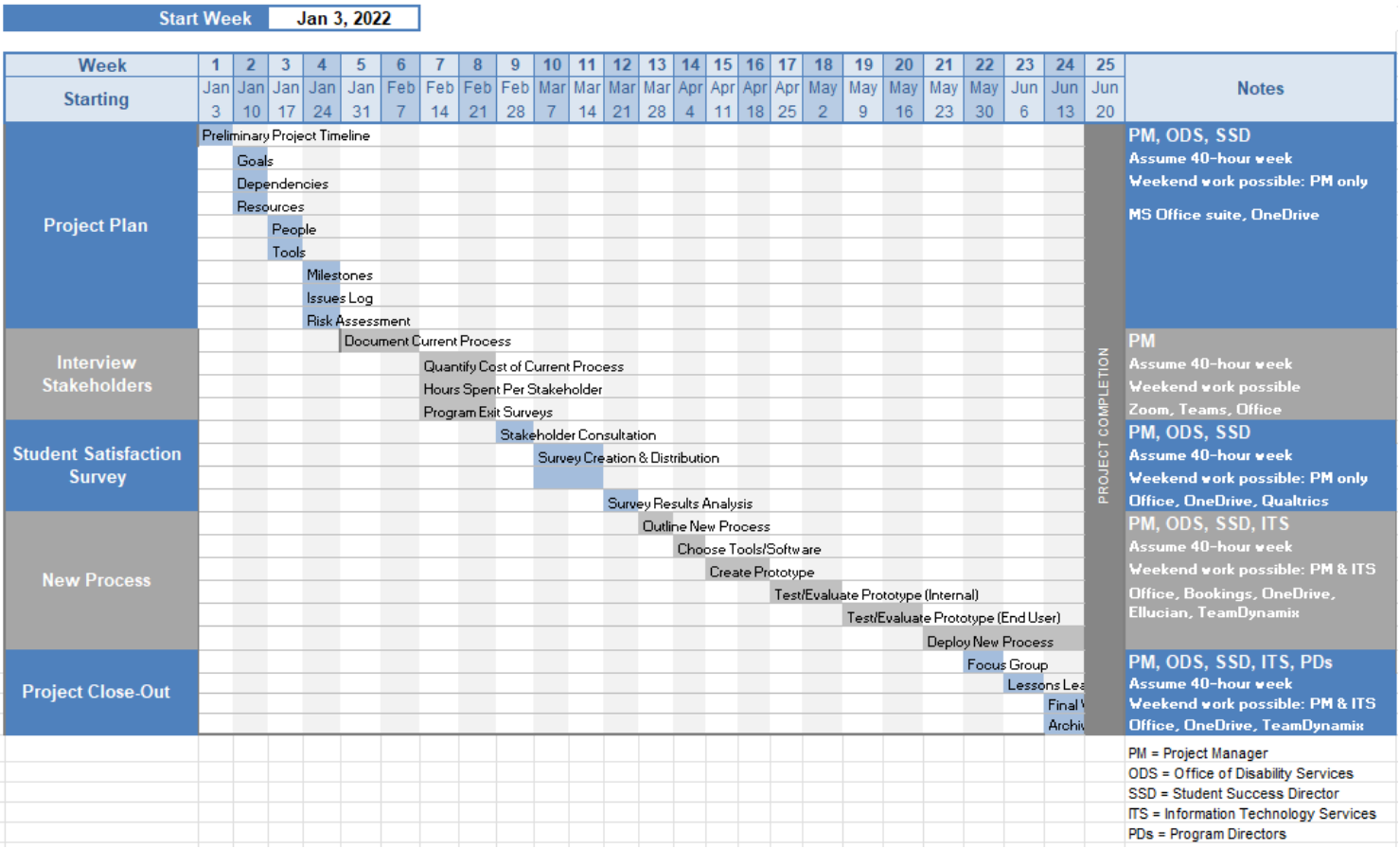
								Total Project Cost	$ 4,763

SECTION 7 RESOURCES (CLICK TO NAVIGATE)

SECTION 8: PROJECT SCHEDULE

PROJECT SCHEDULE [CREATED USING A VERTEX42 TEMPLATE]

Click image to see a larger view in Appendix C.



SECTION 8 RESOURCES (CLICK TO NAVIGATE)

SECTION 9: SCOPE CREEP & CHANGE MANAGEMENT

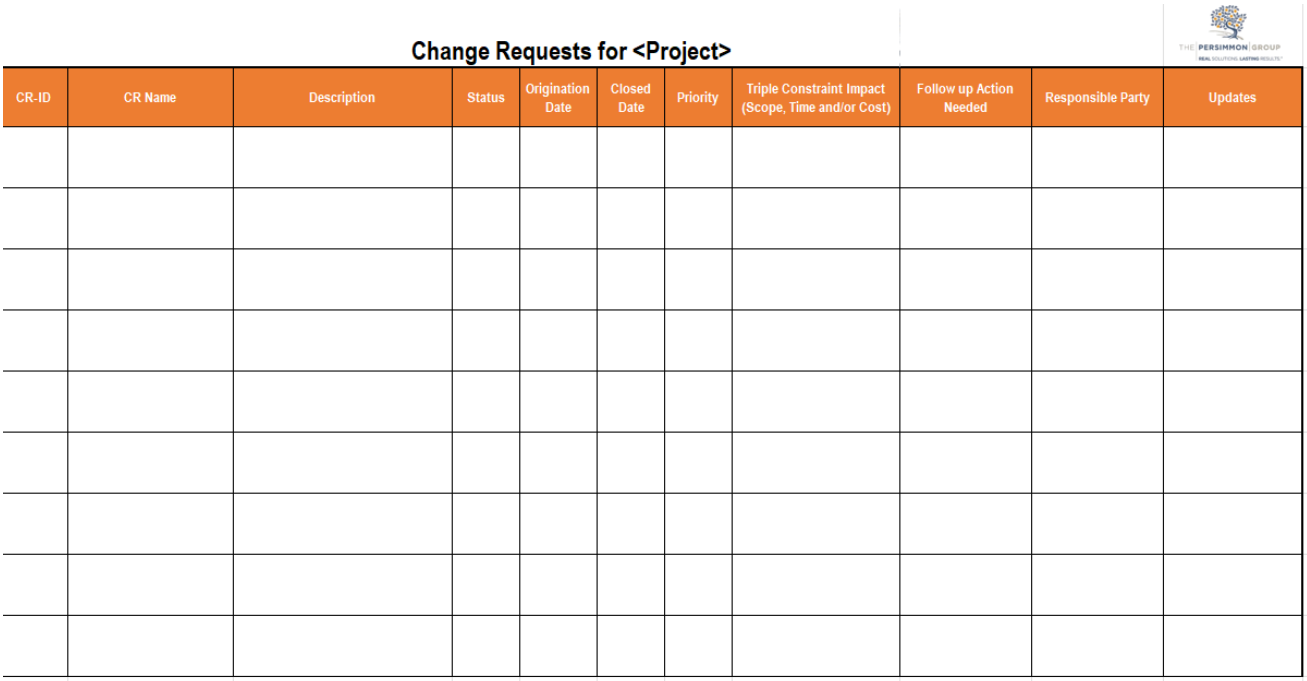
I found a simple change request log template at The Persimmon Group's website; along with a master project log template that includes other useful logs, including for issues, risks, and assumptions (both links are in the references below). The change request log includes a 'triple constraint impact' column to identify impacts of the change on project scope, time, or cost.

The change order log will be kept with other project documents in an online dashboard or repository that all stakeholders will have access to (Harned, 2017, p. 172). A link to this repository, and information on change requests, will be included in regular project status reports. Each change request (once agreed on) will also trigger an update to the project plan, with notes on changes made (Harned, p. 173).

Disruptive technologies: This project is fairly simple and focused, and the technology used is an online workflow using a pattern already existing in the organization. As such, I do not anticipate any impact by disruptive technologies over the life of the project, but will make a point of researching and watching out for potential impact. One related factor to consider early in the project planning is ensuring the end product is mobile-friendly. (Project Management Institute, 2017, p. 3)

EXAMPLE CHANGE REQUEST LOG [PERSIMMON GROUP TEMPLATE]

Click image to see a larger view in Appendix D.

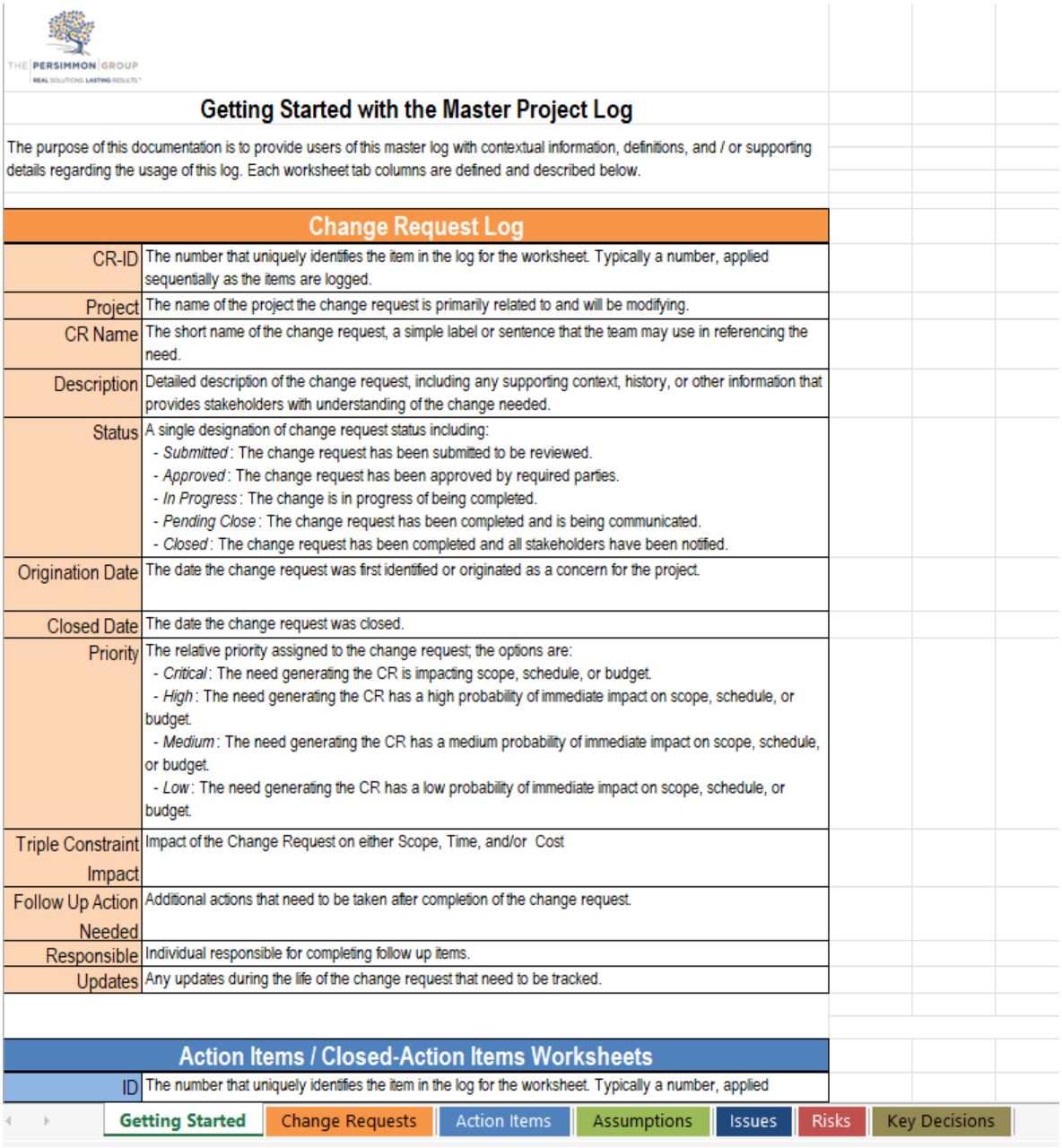


Change Requests for <Project>

CR-ID	CR Name	Description	Status	Origination Date	Closed Date	Priority	Triple Constraint Impact (Scope, Time and/or Cost)	Follow up Action Needed	Responsible Party	Updates

EXAMPLE MASTER PROJECT LOG [PERSIMMON GROUP TEMPLATE]

Click image to see a larger view in Appendix E.



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Getting Started with the Master Project Log

The purpose of this documentation is to provide users of this master log with contextual information, definitions, and / or supporting details regarding the usage of this log. Each worksheet tab columns are defined and described below.

Change Request Log	
CR-ID	The number that uniquely identifies the item in the log for the worksheet. Typically a number, applied sequentially as the items are logged.
Project	The name of the project the change request is primarily related to and will be modifying.
CR Name	The short name of the change request, a simple label or sentence that the team may use in referencing the need.
Description	Detailed description of the change request, including any supporting context, history, or other information that provides stakeholders with understanding of the change needed.
Status	A single designation of change request status including: - *Submitted*: The change request has been submitted to be reviewed. - *Approved*: The change request has been approved by required parties. - *In Progress*: The change is in progress of being completed. - *Pending Close*: The change request has been completed and is being communicated. - *Closed*: The change request has been completed and all stakeholders have been notified.
Origination Date	The date the change request was first identified or originated as a concern for the project.
Closed Date	The date the change request was closed.
Priority	The relative priority assigned to the change request; the options are: - *Critical*: The need generating the CR is impacting scope, schedule, or budget. - *High*: The need generating the CR has a high probability of immediate impact on scope, schedule, or budget. - *Medium*: The need generating the CR has a medium probability of immediate impact on scope, schedule, or budget. - *Low*: The need generating the CR has a low probability of immediate impact on scope, schedule, or budget.
Triple Constraint Impact	Impact of the Change Request on either Scope, Time, and/or Cost
Follow Up Action Needed	Additional actions that need to be taken after completion of the change request.
Responsible	Individual responsible for completing follow up items.
Updates	Any updates during the life of the change request that need to be tracked.

Action Items / Closed-Action Items Worksheets	
ID	The number that uniquely identifies the item in the log for the worksheet. Typically a number, applied

Getting Started | Change Requests | Action Items | Assumptions | Issues | Risks | Key Decisions

SECTION 9 RESOURCES (CLICK TO NAVIGATE)

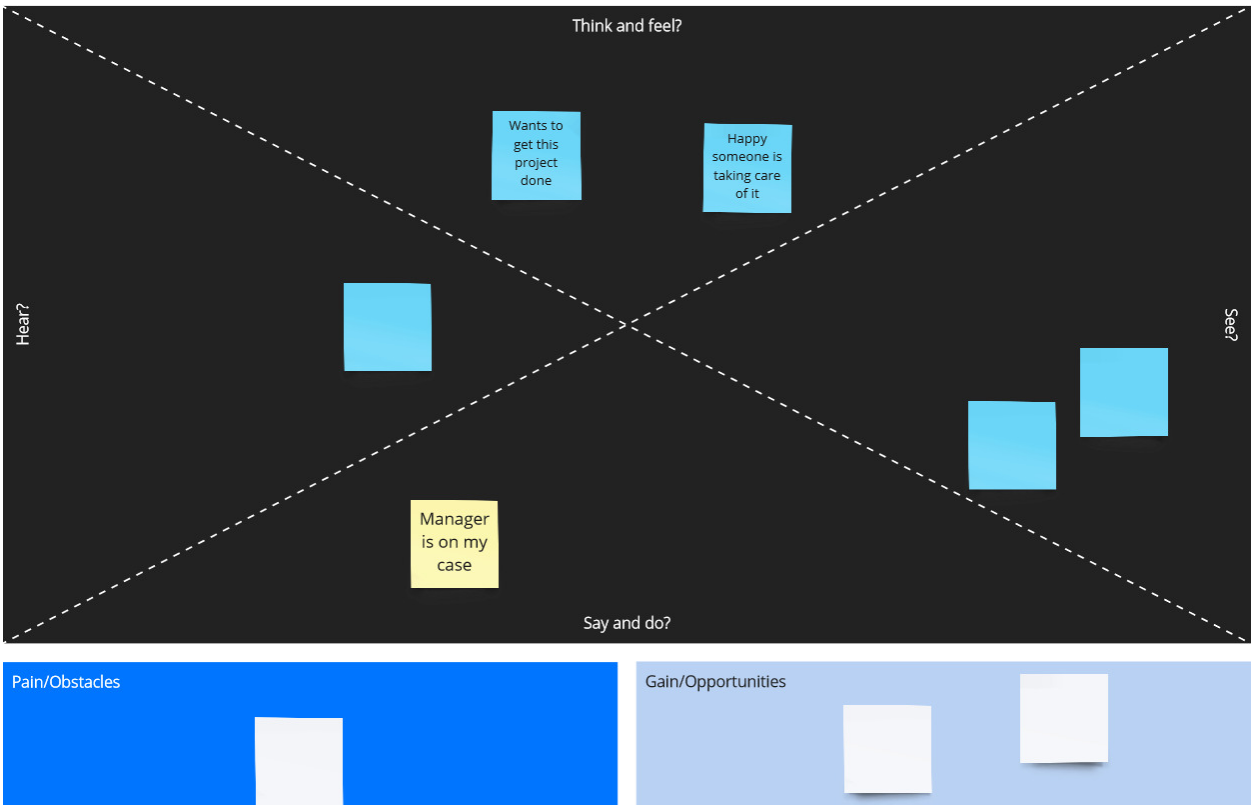
SECTION 10: MANAGING CHALLENGES & FACILITATION

Key for a facilitation plan will be understanding the stakeholders.

Tool: Create an empathy map for each stakeholder. I found several helpful resources, listed in the references; the simple list found at https://playbook.miottawa.org/empathy-map/ includes:

- What does the stakeholder THINK and FEEL?
- What does the stakeholder SEE?
- What does the stakeholder HEAR?
- What does the stakeholder SAY or DO?
- What are the OPPORTUNITIES this stakeholder is seeking?
- What OBSTACLES are getting in the stakeholder's way?

EMPATHY MAP [TEMPLATE ADAPTED FROM MIRO.COM]



Key in preparing for and facilitating objective conversations, especially in conflict scenarios:

Edward de Bono's Six Thinking Hats (Harned, 2017, p. 133). I found details in the Mindtools article *Six Thinking Hats: Looking at a Decision in Different Ways*. This article is also what directed me to the concept of empathy mapping described above.

MEETING FACILITATION PLAN

Meeting Facilitation Plan	
Logistics	
Meeting date/time	
Meeting format/location (Online? In-person? In-person with remote option?)	
Meeting Setup: If not online, standing? Furniture? Refreshments?	
Meeting Tools: White board? Flip chart/stickies/markers? Online file collaboration?	
Note-taker	
Content	
Desired outcome (agenda needed?)	
Stakeholders needed	
Review stakeholder empathy maps ahead of meeting	
Set expectations	
Prepare for too-quiet or too-loud participants	
Reminder of project goals	
In-meeting Tools (potential)	
In-person? Whiteboard, flip chart, stickies, markers • Brainstorming • Clustering • Pros & Cons	

Online? Whiteboard tool like: • Miro's workspace with sticky notes • OneNote Or simple file collaboration like in Microsoft Teams	
De Bono's Six Thinking Hats	

SECTION 10 RESOURCES (CLICK TO NAVIGATE)

SECTION 11: PROJECT CLOSE-OUT

FILE LOCATION, CLOSE-OUT TIPS, LESSONS LEARNED

Updated versions of files will have been backed up throughout the project, and will be saved at project close-out, in the school's central administrative drive. This is a secure repository used on a regular basis by the school's administrative staff and accessible also to ITS staff and administrators. Team members all work on school-owned laptops, so any files that are not properly provided to the PM by a team member who leaves before project's end can be retrieved by ITS staff.

The Digital Project Manager's article on best practices for project closure (Embry, 2021) helped me identify some great additional tips, including:

- factoring a project closure step into the project plan and budget;
- walking through all project logs, checklists, and financials, to make sure nothing has been left undone;
- making sure to document proof of the final project deliverables, working as designed;
- holding a 'lessons learned' meeting with the team.
    - The ProjectManager video *How to Capture Lessons Learned at the End of a Project* includes a link to their Lessons Learned template that I will incorporate into my toolbox of project logs. It is advised to track and address lessons learned as they arise throughout the project. (ProjectManager, 2013)

TESTING AND DEPLOYMENT (REVISITED)

Testing and evaluation of the prototype are included in the Work Breakdown Structure and addressed also in the Key Performance Indicators. Deployment will be implemented by ITS and communicated to users by ODS and the Student Success Director. The Embry article also talks about checking the live product post-launch to make sure it is functioning as designed.

END OF PROJECT FOCUS GROUP

The ProjectManager video includes tips on monitoring feedback on social media as well as surveys and focus groups. Surveys of student users are already built into the plan for this project. The Eliot & Associates article *Guidelines for Conducting a Focus Group* has a helpful checklist, though in-person focus groups in this smaller school environment will be more informal than suggested, and participants will know each other. I believe authentic discussion will still be possible, due to the honesty and openness encouraged by the organization. A discussion

amongst students and faculty within specific class cohorts will be the most likely way to go, as the student users' privacy must be considered, given the nature of disability services in this project.

LESSONS LEARNED TEMPLATE FROM PROJECTMANAGER.COM

Click image to see a larger view in Appendix F.

Lessons Learned Template

Today's Date: 1/2/2023
Project Name: ODS Online Form
Project Manager: Annette Robinson
Notes:

Examples provided by: PROJECTMANAGER.com

WIN or ISSUE	Describe What Happened	What Was the Impact?	How Does This Change Future Project	Action Items
WIN	We implemented a new time tracking system with the team to test whether or not productivity would improve	We saved 200 hours of time and delivered the work 2 weeks early	We will roll out time tracking to all teams in the company	1. Purchase software licenses for all employees 2. Send email explaining why time tracking is necessary
ISSUE	Our IT manager for the project was out sick for 2 weeks and there was no available replacement, so we had to wait for her return	The project was delayed 4 weeks and the client was upset. A $25,000 credit was issued to the client	We need to have redundancy in the IT department to ensure there is always someone available	Chat with CEO and HR about hiring additional IT help
WIN	The client was so happy with the final presentation that she offered us a 2 year exclusive contract!	This contract is going to double our revenue growth over the next 2 years	The new style of in-person client presentation should be used on more projects, when possible.	Share the new client presentation format with other teams

Annette's notes:
See video https://www.youtube.com/watch?v=DBUqW_ek4hI for an illustration
Impacts may be on: Cost; Time; Scope; Quality; Process; Morale

SECTION 11 RESOURCES (CLICK TO NAVIGATE)

SECTION 12: SUMMARY

The ODS Online Form is a real project in my organization, with a desired completion date of Summer 2022. I have used it in this class as the structure for a hypothetical, full-fledged project. I plan to use what I have learned to push the project forward, starting in the new year, utilizing those tools and methods that are appropriate for working on a smaller scale.

I identified a traditional Waterfall methodology as being the best fit for the project and organization. While I still believe this to be true, and while I have gained insights into Agile methodology too, I feel I would have benefited as a student by making some adaptations to explore more of the Agile side. On a very positive note, the wealth of resources and encouragement received in the course and by working through the project building blocks has been invaluable for my project management toolbox.

Shelf life of the project is likely to be medium to long term, given the stable and fairly traditional nature of the organization. Also, the end result – the online form – exists and has been in use at the school's main campus though with a slightly different format and process. Adapting the process to the newer, local campus will leave it still mostly integrated into the main campus and ITS structure. Updates may be made as the new campus navigates possible changes to its ODS accommodations process; being a graduate campus, there is talk of moving to lighter proctoring, especially with most exams taking place online and some remote.

In terms of project planning materials, it is possible that the repository location (the organization's central administrative drive) may be transitioned to OneDrive or a similar cloud-based system. This would in theory be a seamless transition, but files and assets would need to be verified in the new repository. Some of the tools and platforms used may change or disappear. It may be wise to build a trigger into the administrative staff's processes to have them, or other responsible individuals, revisit this and other past projects at set times.

RESOURCES USED

Course textbooks were referred to throughout the project. Specific information used is cited in the appropriate section(s).

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SECTION 12

N/A

APPENDIX A: RESOURCES

Resources - Human

Department	Job Title	Role	Level/Skill
Office of Disability Services (ODS)	**Office of Disability Services Director**	Ultimately accountable for this project	As ODS director, dictates the need for this form and approves it/final sign-off. The go-to person for expertise on student disability needs
	Administrative Assistant, ODS	Testing and giving input to how this form works for students	Has experience and insight into how the existing online form works for students and staff at the main campus
Student Success	**Student Success Director**	Responsible for implementing solutions at the local campus	Many years of experience at the school; an invaluable resource for connecting people, especially between campuses
Information Technology Services (ITS)	**Instructional Technology Support Supervi**	Will be accountable for creation and testing of the new form and workflow	Instructional technology expertise. Can't do this without them.
	Webmaster	Will be responsible for creating the new form	HTML, CSS, Javascript. This will be a web-based form.
	Systems Analyst	Will be hands-on testing the new form and workflow	Works under direction of the instructional technology support supervisor. Could be either of two individuals.
Academic Affairs	**Program Directors**	Local campus program directors will test and sign off on the new form.	Have experience in how things work in their program on campus. While they will not sign off on the new form, getting their buy-in will ensure the testing and implementation run smoothly.

Resources - Tools - Existing

Resource	Purpose	Specifics (If Applicable)
Zoom	Communication, Interviews	
Microsoft Teams	Communication, Interviews	
Microsoft Office Suite	Communication, Planning/documents	Outlook, Word, Excel, PowerPoint
Microsoft Bookings	Ties in to the new form	
OneDrive	Data/Cloud Storage	
Ellucian	Website/Database Software	
TeamDynamix	ITS Project Management Tool	

APPENDIX B: PROJECT PLAN

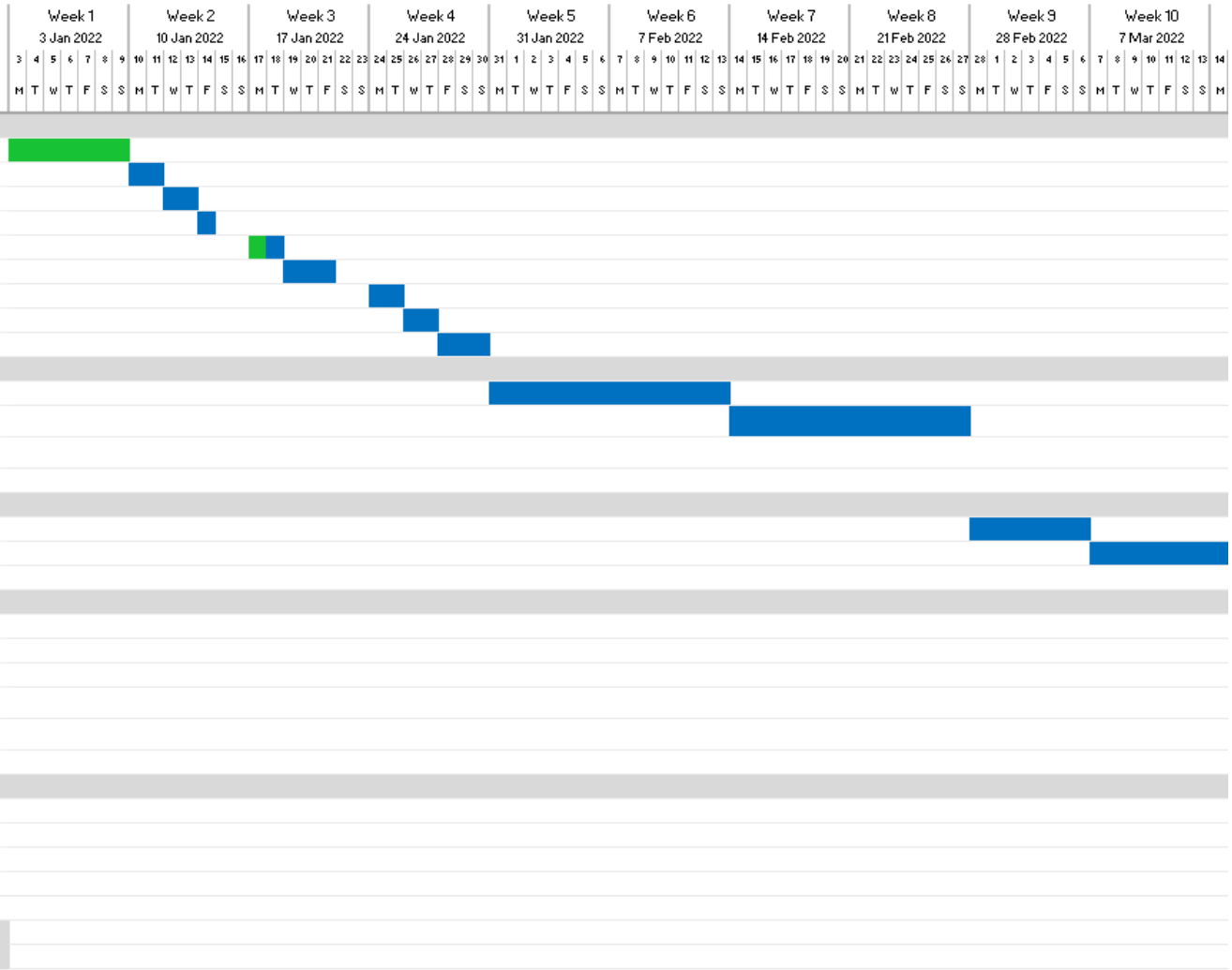
ODS Online Form Project Plan

NOTES - see row 40

Gantt Chart Template © 2008-2018 by Vertex42.com.

Project Start Date: 1/3/2022 (Monday) | Display Week: 1
Project Lead: Annette Robinson (PM)

WBS	TASK	LEAD	START	END	DAYS	% DONE	WORK DAY
1	**Project Plan**	PM		-			-
1.1	Preliminary Project Timeline		Mon 1/03/22	Sun 1/09/22	7	100%	5
1.1.1	Goals		Mon 1/10/22	Tue 1/11/22	2	0%	2
1.1.2	Dependencies		Wed 1/12/22	Thu 1/13/22	2	0%	2
1.1.3	Resources		Fri 1/14/22	Fri 1/14/22	0	0%	1
1.1.3.1	People		Mon 1/17/22	Tue 1/18/22	2	50%	2
1.1.3.2	Tools		Wed 1/19/22	Fri 1/21/22	3	0%	3
1.1.4	Milestones		Mon 1/24/22	Tue 1/25/22	2	0%	2
1.1.5	Issues Log		Wed 1/26/22	Thu 1/27/22	2	0%	2
1.2	Risk Assessment		Fri 1/28/22	Sun 1/30/22	3	0%	1
2	**Interview Stakeholders**	PM		-			-
2.1	Document Current Process		Mon 1/31/22	Sun 2/13/22	14	0%	10
2.1.1	Quantify Cost of Current Process		Mon 2/14/22	Sun 2/27/22	14	0%	10
2.1.1.1	Hours Spent Per Stakeholder			-			-
2.1.1.2	Program Exit Surveys			-			-
3	**Student Satisfaction Sur**	PM		-			-
3.1	Stakeholder Consultation		Mon 2/28/22	Sun 3/06/22	7	0%	5
3.1.1	Survey Creation & Distribution	ODS	Mon 3/07/22	Sun 3/20/22	14	0%	10
3.1.1.1	Survey Results Analysis		Mon 3/21/22	Sun 3/27/22	7	0%	5
4	**New Process**	PM		-			-
4.1	Outline New Process		Mon 3/28/22	Sun 4/03/22	7	0%	5
4.1.1	Choose Tools/Software		Mon 4/04/22	Sun 4/10/22	7	0%	5
4.1.1.1	Create Prototype	ITS	Mon 4/11/22	Sun 4/24/22	14	0%	10
4.1.1.1.1	Test/Evaluate Prototype (Internal)		Mon 4/25/22	Sun 5/08/22	14	0%	10
4.1.1.1.1.1	Test/Evaluate Prototype (End User)		Mon 5/09/22	Sun 5/22/22	14	0%	10
4.1.1.1.1.1.1	Deploy New Process		Mon 5/23/22	Tue 6/21/22	30	0%	22
5	**Project Close-Out**	PM		-			-
5.1	Conduct Focus Group		Mon 5/30/22	Sun 6/05/22	7	0%	5
5.1.1	Discuss Lessons Learned		Mon 6/06/22	Sun 6/12/22	7	0%	5
5.1.1.1	Final Walkthrough		Mon 6/13/22	Sun 6/19/22	7	0%	5
5.1.1.1.1	Archive Files & Assets		Mon 6/13/22	Tue 6/21/22	9	0%	7
							-

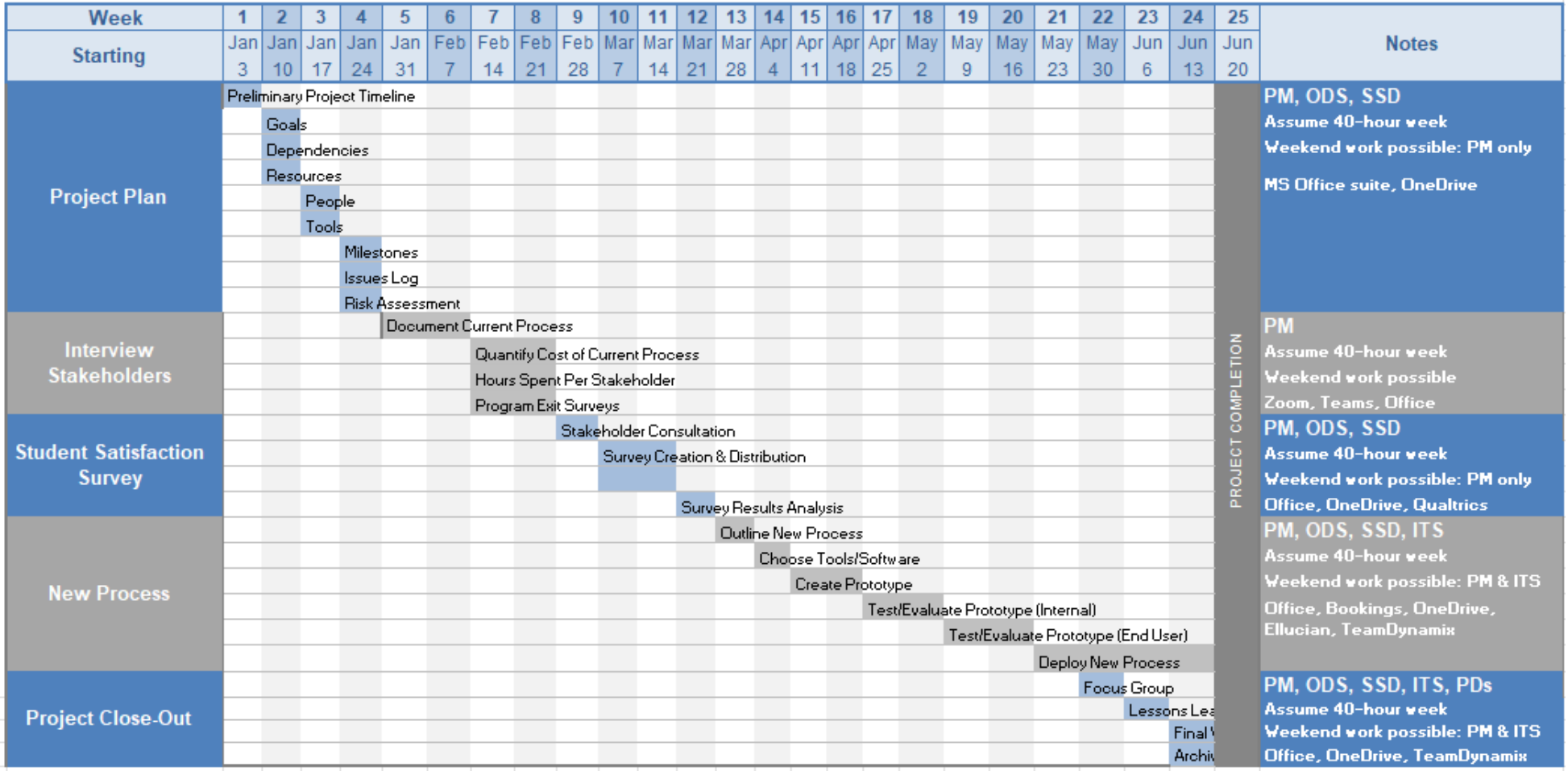


NOTES

The dates and time frame shown above are based on an existing projected completion date of Summer 2022.

APPENDIX C: PROJECT SCHEDULE

Start Week	Jan 3, 2022



PM = Project Manager
ODS = Office of Disability Services
SSD = Student Success Director
ITS = Information Technology Services
PDs = Program Directors

APPENDIX D: CHANGE REQUEST LOG

Change Requests for <Project>

CR-ID	CR Name	Description	Status	Origination Date	Closed Date	Priority	Triple Constraint Impact (Scope, Time and/or Cost)	Follow up Action Needed	Responsible Party	Updates

APPENDIX E: MASTER PROJECT LOG

THE PERSIMMON GROUP
REAL SOLUTIONS. LASTING RESULTS.

Getting Started with the Master Project Log

The purpose of this documentation is to provide users of this master log with contextual information, definitions, and / or supporting details regarding the usage of this log. Each worksheet tab columns are defined and described below.

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CR Name	The short name of the change request, a simple label or sentence that the team may use in referencing the need.
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ID	The number that uniquely identifies the item in the log for the worksheet. Typically a number, applied

Getting Started | Change Requests | Action Items | Assumptions | Issues | Risks | Key Decisions

APPENDIX F: LESSONS LEARNED LOG

Lessons Learned Template

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Project Manager: Annette Robinson
Notes:

Examples provided by: PROJECTMANAGER.com

WIN or ISSUE	Describe What Happened	What Was the Impact?	How Does This Change Future Project	Action Items
WIN	We implemented a new time tracking system with the team to test whether or not productivity would improve	We saved 200 hours of time and delivered the work 2 weeks early	We will roll out time tracking to all teams in the company	1. Purchase software licenses for all employees 2. Send email explaining why time tracking is necessary
ISSUE	Our IT manager for the project was out sick for 2 weeks and there was no available replacement, so we had to wait for her return	The project was delayed 4 weeks and the client was upset. A $25,000 credit was issued to the client	We need to have redundancy in the IT department to ensure there is always someone available	Chat with CEO and HR about hiring additional IT help
WIN	The client was so happy with the final presentation that she offered us a 2 year exclusive contract!	This contract is going to double our revenue growth over the next 2 years	The new style of in-person client presentation should be used on more projects, when possible.	Share the new client presentation format with other teams

Annette's notes:

See video https://www.youtube.com/watch?v=DBUqW_ek4hI for an illustration

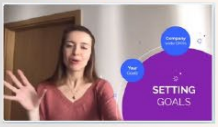
Impacts may be on: Cost; Time; Scope; Quality; Process; Morale

APPENDIX G: MIDTERM PRESENTATION

DIGITAL TRANSFORMATION IN A TIME OF CHANGE

Tools for Transforming a Text-Heavy Document into an Informational Video

Prezi Video



⇒ Prezi Inc. Established 2009 ***GOOD PRICE***
⇒ Prezi Present—dynamic zooming presentation software
⇒ Prezi Design—charts, infographics, maps, and more (2017)
⇒ Prezi Video—presenter video with presentation overlay (2019)

Communication

Import presentation, create from scratch; presenter only, presenter plus presentation overlay, audio narration only; integrates with Zoom, Teams, Webex, GoToMeeting, and more.

Text

Dynamic zooming enables drill-down into small chunks of text and visuals.

Delivery/Presentation

Present in-person or at online meeting; live stream via Prezi, Facebook, YouTube; upload to video platform.

Camtasia Video

⇒ TechSmith Corporation. Established 1987
⇒ Camtasia—created in 2002 ***EXPENSIVE***
⇒ Screen capture and video editing/production tool
⇒ Paired with Snagit for screenshot capture

Communication

Professional quality video editing. Can use Audacity for additional audio processing. Great for capturing a screen walkthrough introducing new software, or showing how to use an online form.

Text

Transform large amounts of text into small chunks and visuals, maybe in a PowerPoint and use Camtasia to present it.

Delivery/Presentation

Camtasia has music, animation, and closed captions. Interactive features like quizzes require a platform that works with TechSmith Smart Player.

Screencast-O-Matic

⇒ Screencast-O-Matic. Established 2006
⇒ Integrates with multiple LMS platforms
⇒ Popular with educators ***GREAT PRICE***
⇒ Large library of media assets
⇒ Lots of resource tutorials

Communication

Easy video creation. Many assets to engage the viewer, including royalty-free music.

Text

Transform large amounts of text other formats like a PowerPoint or visuals, to make an effective video.

Delivery/Presentation

Screencast-O-Matic has great integration for uploading videos for viewing on multiple platforms.

Factors to Consider

-Cognitive Load-

Break large amounts of information into smaller chunks.

Use multiple processing pathways

⇒ Auditory
⇒ Visual

-Viewer Engagement-

Tell the story.

Include interactive features.

-Accessibility-

Provide ease of access via video call or video platform.

Annette Robinson. EME 6235. Fall 2021

DIGITAL TRANSFORMATION IN A TIME OF CHANGE

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