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| Project Name: | Learning Management System (LMS) Phase 1 Rollout: Regulatory Employee Training |
| Business Stakeholders: | Office of OSU Human Resources: Representative Donna Chastain Office of OSU Finance & Administration: Representative Mike Green |
| Business Owners: | Erin Frost (HR); Linda Sather (HR IT); Gabe Merrell (Equal Opportunity & Access); Chris Viggiani (Compliance) |
| Project Lead: | Angela Ridge (PACE) |
| Project Description: | Develop (build online learning modules from existing content) and deploy regulatory employee training on mandated topics. Courses will include: <ul style="list-style-type: none"> • Ethics • Mandatory Reporter • Sexual Harassment, Discrimination, Title IX and ADA • FMLA/OFLA / Leave • IT Security (Part of communication strategy and integration to Bridge only) |

Introduction

This project charter outlines deliverables, scope, project and resource requirements, project organization, communication strategy, metrics, potential risks and implementation overview. For detailed descriptions of each see the project plan.

The LMS Phase 1 Regulatory Employee Training project is a segment of a larger initiative. The Office of OSU HR has charged an LMS committee with evaluating a long-term Talent Management System for the broader professional development needs of university employees. The LMS committee has completed the evaluation of potential vendors; however, a decision will not be made until the end of the year.

The recommendation made, and catalyst for this charter, is to setup a short-term solution to meet the regulatory training requirement by the end of 2017 while continuing to review the long-term TMS solution. Additionally, PACE and the Office of HR, Compliance and F&A have an arrangement (MOU) for PACE to coordinate this effort. Section 'Project Organization' has specific individuals needed to execute as well as a summary of each group's role.

Project Deliverables and Scope

Deliverables

1. Leverage internal regulatory training content to build online employee trainings through a single platform.
2. OSU employees have access to regulatory trainings by January 1, 2018.
3. OSU stakeholders and leaders have easy accessible reporting for regulatory employee training.

Scope

In Scope: Regulatory compliance training content; Set up of Learning Management System; Phase one communication strategies and delivery plans; HR division set up in LMS; and compliance training reporting.

In Scope Phase 1.2: Establish a method for OSU employees, volunteers, and other associates who do not have OSU (ONID) accounts to log into Bridge using accounts from social media identity providers; establish a way to enroll social media accounts in training courses; ensure that all OSU associates complete mandatory regulatory employee training; ensure that training status reporting requirements are met for all OSU employees.

Out of Scope: OSU Professional Development training; On-the-job manager training; all administrative divisions and colleges outside of Human Resources and Compliance offices.

Scope / Schedule/ Resource Priority: Meeting the rollout schedule is the priority with no flexibility to modify. Based on a hard rollout date, the scope needs to remain minimal and has limited flexibility to modify. Resources need to be flexible through initial implementation with developed infrastructure addressed for ongoing support.

Requirements Review

Project Requirements

Below is a compilation of business requirements by categories and functions of OSU. Requirements noted are critical to a successful deployment.

| Project Requirements | Requirement Summary –See Detailed Project | Division Lead | | | | | | | | | | | | | | | | |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|------|----------------------|-----------------------|--------------------------------------|-----------------------|-------------------------------|------------------------|----------------------------------------|-------------------------|------------------|------------------------|------|------------------------|--------|----------|-----------------|
| Business Requirements | Provide online compliance training for all employees, student employees and volunteers. Content should be focused on awareness not direction by specific roles. Address accommodation requirements and provide live session forums for populations with no systems access. Communication strategy and rollout to include: content review and approval; stakeholder approval; timeline and talking points for leaders and managers. | Erin Frost Chris Viggiani Gabe Merrell | | | | | | | | | | | | | | | | |
| System Requirements | Employee access with SSO. System linked from My OSU for initial rollout; Compliance and HR websites with limited access through Oregonstate.edu/Faculty & staff home page. | Erica Lomax | | | | | | | | | | | | | | | | |
| Design Requirements | <p>Maximum learning module of 30 minutes or combined time commitment of 3-4 hours total for anticipated courses. Focus of learning on awareness; where to go and OSU policy. Build projected timeline:</p> <table border="1"> <thead> <tr> <th>Action</th> <th>Date</th> </tr> </thead> <tbody> <tr> <td>SMEs Develop Content</td> <td>8/11/2017 - 9/13/2017</td> </tr> <tr> <td>SME Team Content Review And Feedback</td> <td>9/13/2017 - 9/15/2017</td> </tr> <tr> <td>ID Build With Revised Content</td> <td>9/18/2017 - 11/10/2017</td> </tr> <tr> <td>SMEs/ Stakeholders Review And Feedback</td> <td>11/13/2017 - 11/17/2017</td> </tr> <tr> <td>ID Revise Course</td> <td>11/20/2017 - 12/1/2017</td> </tr> <tr> <td>Test</td> <td>12/4/2017 - 12/29/2017</td> </tr> <tr> <td>Launch</td> <td>1/1/2018</td> </tr> </tbody> </table> <p>Include approvals in timeline for stakeholder, Donna Chastain and legal review at 9/15/17 and 11/13/17.</p> | Action | Date | SMEs Develop Content | 8/11/2017 - 9/13/2017 | SME Team Content Review And Feedback | 9/13/2017 - 9/15/2017 | ID Build With Revised Content | 9/18/2017 - 11/10/2017 | SMEs/ Stakeholders Review And Feedback | 11/13/2017 - 11/17/2017 | ID Revise Course | 11/20/2017 - 12/1/2017 | Test | 12/4/2017 - 12/29/2017 | Launch | 1/1/2018 | Tamara Mitchell |
| Action | Date | | | | | | | | | | | | | | | | | |
| SMEs Develop Content | 8/11/2017 - 9/13/2017 | | | | | | | | | | | | | | | | | |
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| SMEs/ Stakeholders Review And Feedback | 11/13/2017 - 11/17/2017 | | | | | | | | | | | | | | | | | |
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| Launch | 1/1/2018 | | | | | | | | | | | | | | | | | |

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| Reporting Requirements | Reporting to produce a list of all OSU employees and volunteers completion of required training related to relationship hierarchy in people management system. | Linda Sather |
| Data Requirements | Data will be required from Banner based on required fields (attributes) needed to populate Bridge training users and access data according to reporting and business requirements for administering Bridge. | Linda Sather |
| Security Requirements | Levels of access to be organized based on reporting relationship. Viewing only lines of direct reports with full view access by designated HR staff and admins. | Joe Chambers |
| Authentication Requirements | OSU employees to access system with SSO. | Andy Morgan |

| Resource Requirements | Name | Role | Organization |
|-----------------------|----------------------------------------|----------------------------------------------------------------------|-------------------------------------------|
| | Joe Chambers Linda Sather | Data Integration from Banner to Bridge and from Bridge to Banner/ODS | ECS –Enterprise Computing Services |
| | Andy Morgan | SSO authentication / access by sub account | IAM –Identity and Access Management |
| | Linda Sather | Data specification system to system | HRIS –Human Resources Information Systems |
| | Bridge | Application Configuration plus 1 st tier tech support | Bridge PACE |
| | *New Resource | Role Management | Academic Technology |
| | Lynn Greenough | Application Mngt. platform updates (feature update testing) | Academic Technology |
| | Patti Snopkowski | Ethics Training Content | Compliance |
| | Vicki Dimick Jackson Roshni Sabedra | Mandatory Reporter Training Content | Compliance |
| | Kim Kirkland | Harassment, Title IX, ADA, Discrimination Training Content | Human Resources |
| | Whitney Brown | FMLA/OFLA / Leave Training Content | Human Resources |

Project Organization

The roles identified and assigned responsibilities as described in the following table.

| Role | Name & Position | Responsibility |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Project Sponsors: | Donna Chastain (HR) Mike Green (Finance) Melanie Mitchell (PACE) Clay Simmons (Compliance) | Own the MOU agreement, project budget, timeline and outcomes of the project. Sponsors will provide resources, direction and address roadblocks throughout the project. Sponsors will approve workflows and infrastructure as dependent on the deployment of the project. Sponsors should expect routine updates from the Project Lead and make themselves accessible through the course of the project. Sponsors determine how decisions are made and who makes decisions to keep the project moving to meet deadlines. |
| Project Lead: | Angie Ridge (PACE) | Manage the project according to the direction set forward by the project sponsors. Responsible to build project plan; coordinate resources; plan and schedule people, tools and systems to meet the project deadline and outcomes. |
| Project Team: | Erin Frost (HR) Gabe Merrell (AAP /Access) Chris Viggiani (Compliance) Lynn Greenough (Sys Admin) Linda Sather (HR IT) Tamara Mitchell (PACE) John Buzzard (PACE) Joe Chambers (IT) | Subject matter experts and stakeholders invested in and responsible for delivering solutions to meet the direction of the project charter. The project team is the primary group of individuals with a vested interest in outcomes and a personal charge in delivering against project goals and expectations |
| Project marketing / Communications: | John Buzzard (Marketing) Erin Frost (HR) Steve Clark (Marketing) | Project Manager collaborate and manage internal communications for charter with direction from internal marketing and communications resources across OSU / PACE. HR prepared to deliver key talking points as outlined in schedule |
| Project Support | Clay Simmons (Compliance) Andy Morgan (IT) Erica Lomax (IT) Kent Kuo (IT) Lindy Foster (product SME) John Buzzard (PACE) Amy Leeds (PACE) | Support teams are brought into activities on an as-needed basis for their specialized expertise as it relates to the project. The project lead and core project team will engage as needed. |
| Subject Matter Experts (SME) | Patti Snopkowski Vicki Dimick Jackson Roshni Sabedra Kim Kirkland | SMEs are critical to the timely and accurate delivery of regulatory trainings identified in this charter. SMEs will work with the project lead and be accessible to collect, review and approve final training courses. |

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| | Whitney Brown | |
| Instructional Design Expert (Project design lead) | Tamara Mitchell | The instructional designer will work directly with the SMEs to provide process and direction in the collection of content, build, and testing. |
| Legal | Rebecca Gose | Provide legal counsel and direction to project team. Validate requirements and alignment to overall mission of OSU. |
| Project Governance: | TBD | Ongoing team that creates a 360 view of the goals, risks and future developments related to the Regulatory Training Charter. |

Project Communication

Internal Communications

Project Updates: The stakeholders will be updated weekly with the current status of the overall project; informed of potential risks and the recommended solutions. Dashboard below:

| August (Current 30 Days) | LMS Regulatory Employee Training (Phase 1) Project | | | Project Implementation Updated: Aug 17, 2017 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| <ul style="list-style-type: none"> Build out business Requirements; decision m Meet with IT -systems integration rvw Finalize IT roadmap w/bus. Rqmts Identify project SMEs Determine content authors Determine content approvers Begin collection of existing content Determine approval path for content | Status at a Glance August-September 2017 Project Sponsors: Donna Chastain, Mike Green, Clay Simmons & Melanie Mitchell Project Team: Amy Leeds, Tamara Mitchell, Erin Frost, Gabe Merrell, Chris Viggiani, Lindy Foster, Linda Sather, Joe Chambers, John Buzzard Project Manager: Angie Ridge Systems Owner: Lynn Greenbough | | | % Complete (Project): Increase Over Last Report <table border="1" style="width: 100%;"> <tr> <th>% Complete</th> <th>Status</th> <th>% Increase</th> </tr> <tr> <td>0%</td> <td style="background-color: green;"></td> <td>0%</td> </tr> </table> | | | % Complete | Status | % Increase | 0% | | 0% | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| % Complete | Status | % Increase | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 0% | | 0% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Milestone Targets <table border="1" style="width: 100%;"> <thead> <tr> <th>% of Project</th> <th>Action</th> <th>Status</th> <th>Month</th> <th>Requirements</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>10%</td> <td>Design goals, strategy and outcomes for Phase 1</td> <td style="background-color: yellow;"></td> <td>August</td> <td>Content authors committed to 15 hours of time for August</td> <td></td> </tr> <tr> <td>20%</td> <td>Completion of Systems Integrations (IT Roadmap)</td> <td></td> <td>August</td> <td>HR BPs have required training policy 30% complete</td> <td></td> </tr> <tr> <td>40%</td> <td>Completion of Required Compliance Content Development</td> <td></td> <td>Sept</td> <td>20% of Critical trainings content finalized</td> <td></td> </tr> <tr> <td>15%</td> <td>Deployment of Required Compliance Training (Managers)</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>20%</td> <td>Deployment of Required Compliance Training (All staff)</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> | | | % of Project | Action | Status | Month | Requirements | Status | 10% | Design goals, strategy and outcomes for Phase 1 | | August | Content authors committed to 15 hours of time for August | | 20% | Completion of Systems Integrations (IT Roadmap) | | August | HR BPs have required training policy 30% complete | | 40% | Completion of Required Compliance Content Development | | Sept | 20% of Critical trainings content finalized | | 15% | Deployment of Required Compliance Training (Managers) | | | | | 20% | Deployment of Required Compliance Training (All staff) | | | | |
| % of Project | Action | Status | Month | Requirements | Status | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| <ul style="list-style-type: none"> September (Next 30 Days) HR Business processes & policy defined Outline mgr communication strategy Schedule HR Liaisons for Bridge admin | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Process rollout Communications: Charter project team to partner with marketing team to develop internal communication strategy that encourages buy-in of managers and employees and provides information to assist in a successful rollout.

Leadership kickoff Meetings: Priority in communication strategy to involve and inform leaders across campus. See Communication plan for specific messaging and timeline. Identified groups and individuals include:

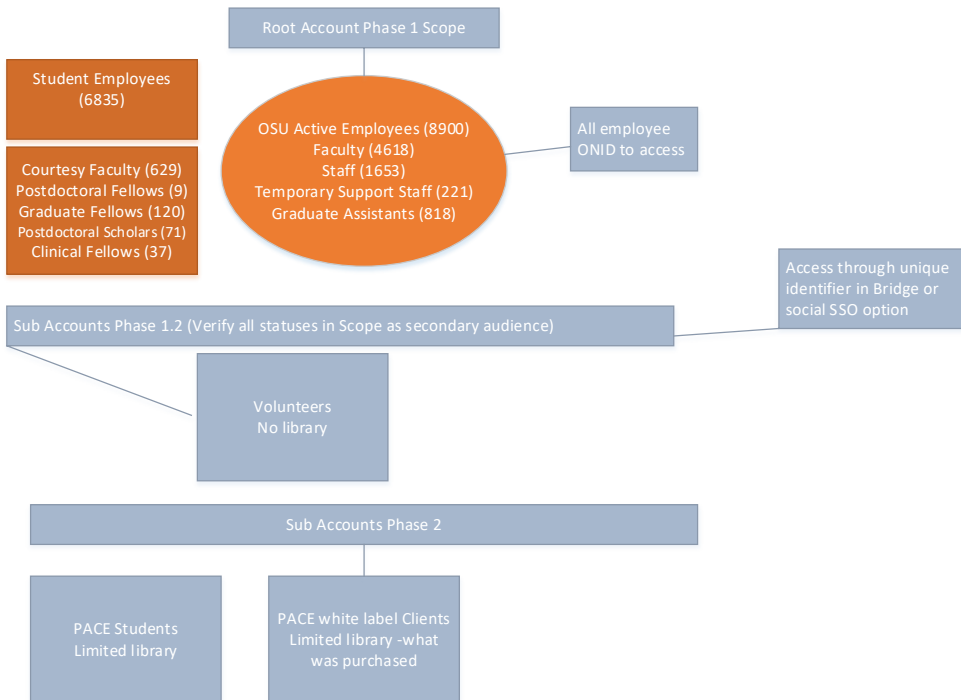
- HR Leadership Team
- Executive Committee
- Faculty Senate
- President Cabinet
- Provost Council
- Becca Gose (Counsel)
- Steve Clark (Marketing)

Project Risks

| # | Risk - Description | Severity | Date Raised | Key Contacts: | Resolution Notes |
|----|--------------------------------------------------------------------------------|-------------|-------------|---------------------------------------------|---------------------------------------------------------------------------|
| 1 | Authentication Methods (Internal) | 4-Low | 8/8/2017 | Erica (OSU) Scott (Bridge) | |
| 2 | Authentication Methods (External) for Multiple Groups | 1-Very High | 8/8/2017 | Erica (OSU) Scott (Bridge) | |
| 3 | Adoption & Engagement (Cultural Shift) -- Solid Communication Plan | 4-Low | 8/8/2017 | Angie (OSU) | |
| 4 | Learner Access/Workflow (Cultural Shift) | 3-Medium | 8/8/2017 | Angie (OSU) Linda (OSU) Joe (OSU) | |
| 7 | Long-Term SME Authoring for Real-Time Training (keeping quality high but open) | 2-High | 8/8/2017 | Melanie (OSU) | Lynn -Consider an advisory board oversight team around content authoring. |
| 8 | IT Technical Support Resource Availability | 2-High | 8/8/2017 | Kent (OSU) Erica (OSU) Scott (Bridge) | |
| 9 | HR Content Resource Availability | 5-Very Low | 8/8/2017 | Erin (OSU) | Melanie -Identify owners of system maintenance |
| 10 | Identifying Correct Structure in Bridge (short / long-term) | 3-Medium | 8/8/2017 | OSU /BRIDGE | |
| 11 | Data Imports from Banner (Org Structure, Roles, Reports) | 2-High | 8/8/2017 | Linda (OSU) | |
| 12 | Canvas + Bridge Integrations (confusion) | 5-Very Low | 8/8/2017 | | |
| 13 | Unknown Bugs, Load Capacity, and Bridge performance for the Full Launch. | 2-High | | Joe (OSU) | Joe -Mitigate this through testing. |
| 14 | Customization/Integration Functionality (LTI's) | 3-Medium | | OSU /BRIDGE | |
| 15 | HR business availability and access for deployment & communication strategies | 3-Medium | 8/24/2017 | | |
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Implementation Plan (Bridge Structure for Target Audiences)

This graph shows the way employees are categorized within the Bridge platform. This structure affects authentication requirements and how content is built and shared through this construct. Additionally, the graph depicts the employees and others timing for access to critical training.



Implementation consideration to include a full scope of technological requirements for initial phase (This project charter scope) for implementation and ongoing support of the platform. Additionally, project team will address 'Gateway Criteria' for Phase 1 with clearly established requirements prior to deployment, taking into account next phases of the LMS rollout and associated complexity along with business owner expectations and role introductions (admin rights, oversight to development, permissions, etc.).

Change History

| Date | Changed By | Requested By | Change | Page/Section |
|---------|------------|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| 8/18/17 | Angela R. | Angela R. | Added deliverable to track and record live regulatory trainings manually through Bridge through end of 2017 | Pg 1 / Deliverables |
| 8/18/17 | Angela R. | Donna C. | Identified training rolled out to 'sub account' roles by March 30, 2018 | Pg 7 / Implementation |
| 8/24/17 | Angela R. | Lynn G. | Added Risk #15 - HR business availability | Pg 6 / Risks |
| 8/24/17 | Angela R. | Kent K. | Additional resources for Academic Technology | Pg 3/ Resources |
| 8/24/17 | Angela R. | Joe C. | Application configuration and Tech 1 support to be Bridge and PACE | Pg 3/ Resources |
| 8/25/17 | Angela R. | Tamara M. | Added legal advisor approval in timeline for stakeholder (Donna Chastain) and legal at 9/13/17 and 11/13/17 | Pg 2 / Design |
| 8/25/17 | Angela R. | John B. | HR prepared to deliver key talking points as outlined in communication schedule | Pg 4 / Communications |
| 8/25/17 | Angela R. | Lynn / Kent | Added implementation considerations and gateway criteria pre-deployment | Pg 7 / Implementation |
| 9/13/17 | Angela R. | Angela R. | Added Clay Simmons to project support | Pg 4 / Project Organization |
| 9/13/17 | Angela R. | Donna C. | All trainees (OSU employees / ONID) will be in root account and receive the same training. Only sub account is volunteers | Pg 7 / Implementation |
| 9/30/17 | Angela R. | Amy L. | Removed goal: Identify live training sessions schedule to track and record manually. There is not a way to account for and accurately capture attendance. | Pg 1 / Goals & Objectives |