



Migration to Canvas (Project # 408239)

Revision History

Change Initiated By	Date	Reason for Changes	Version
Wendy Bentley	12/9/21	Project Charter Created	1.0
Wendy Bentley	02/16/22	Updates to Work Break Down Structure, Timeline, Problem Statement, Risks, Scope	2.0
Wendy Bentley	03/9/22	Edits based on Sponsor Feedback	3.0
Wendy Bentley	03/15/22	Updated comm plan and risks	4.0
Wendy Bentley	04/4/22	Updated Phase 0 due dates	5.0
Wendy Bentley	04/12/22	Updated all other phase dates, modified communications section, updated links	6.0
Wendy Bentley	04/13/22	Updated Phase timelines	7.0
Wendy Bentley	4/28/22	Added Follett to the integration list and moved up Google and Microsoft integrations to priority 2	8.0
Wendy Bentley	5/20/22	Updates to the Phase 0 milestones table and the third-party integrations	9.0
Wendy Bentley	6/2/22	Updates to the list of third-party integrations	10.0
Wendy Bentley	6/16/22	Update list of third-party integrations and milestone statuses	11.0
Alisha Johns	6/22/22	Updates to the third-party applications integration list	12.0
Wendy Bentley	7/7/22	Updates to Phase 0 tasks and third-party integrations list	13.0
Wendy Bentley	7/14/22	Updates to Phase 0 tasks and third-party integrations list	14.0
Wendy Bentley	7/20/22	Updated SIS Integration Diagram for Canvas	15.0
Wendy Bentley	8/4/22	Updated Milestones and third-party integrations list	16.0

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1 Project Introduction

1.1 Problem Statement

The Governor’s 2021-2022 budget provided \$2M in new ongoing funding to the CSU, contingent on all campuses moving to an “intersegmental LMS”. 16 CSUs already use Canvas, and an intersegmental LMS is tantamount to the seven remaining campuses migrating to Canvas. The Chancellor’s Office asked the 7 remaining campuses to declare their intent in November 2021; Based on the CSU, direction, Chico has committed to the migration along with six other campuses. The deadline for completing the LMS migration itself is the end of the 2023-2024 academic year; we interpret this to mean that Canvas would be the official campus LMS beginning in spring 2024 semester (ie., Bb Learn would no longer be used for course instruction after spring 2024).

1.2 Benefits/Value

Our Bb Learn system is over 10 years old and it feels clunky to students and faculty. It is believed that migrating to Canvas will provide the following benefits/value to our campus:

- Canvas provides a better user interface/experience for faculty and students
- Canvas reduces the time required for students to transfer/transition from a California Community College (i.e., they don’t need to learn a brand-new LMS)
- Canvas’ data, reporting, and integration are reportedly much better than our current system
- Canvas Outcomes can provide data for program assessments
- Canvas’ support cost-options could free-up some staff of common questions

1.3 Project Objectives

In Spring 22 Chico State is beginning to plan the migration from Blackboard Learn to Canvas. There will be three phases migrating courses to Canvas with the culmination of the decommission of Blackboard learn by June 2024. To successfully make the transition, the following objectives must be met:

- Configure development and production Canvas environments
 - Update Canvas branding to comply with university standards
- Configure SSO in both development and production instances of Canvas
- Develop and deploy a new data integration with the Student Information System
 - Terms
 - Sections
 - Courses/classes
 - Enrollments
 - Instructors
- Utilize Account Center to develop and deploy user provisioning and deprovisioning with Canvas
- Configure course shell templates
- Develop and publish training and support materials utilizing existing Chico State support structures
- Identify and deploy critical third-party application integrations
- Configure program assessment tools
- Develop a plan and process for course content migrations
- Migrate faculty course content into Canvas
- Decommission Blackboard Learn
- Archive course content per university retention guidelines

1.4 Out of Scope

Part of the funds secured by the legislature include migration of some content from Bb Learn to Canvas. Where possible, Chico State will utilize standard delivered tools and modules provide by Canvas and other approved third-party vendors.

2 Project Resources and Costs

2.1 Costs

- The CSU received \$2M in new funding will cover the overlap in license costs up until the end of FY 2023 -24.
- After FY 2023-24, assume an annual cost increase of \$50K. Canvas is more expensive than Bb Learn, but we don't know if we'll be liable for the entire delta, or if the CO will use some of the ongoing \$2M budget to cover it.

2.2 Resources and Stakeholders

Please include both technical (internal or external) and functional resources required. Estimated commitment:

- Minimal
- Moderate
- Substantial

Name	Role	Project Responsibility	Est. Commitment
Daniel Grassian, Vice Provost for Academic Affairs	Co-Sponsor	<ul style="list-style-type: none"> • Provides strategic direction for the campus migration to canvas • Communicates strategic direction to key campus stakeholders and internal resources 	Moderate
Andy Miller, Associate Vice Provost for Information Resources	Co-Sponsor	<ul style="list-style-type: none"> • Provides strategic direction for the campus migration to canvas • Communicates strategic direction to key campus stakeholders and internal resources 	Moderate
Kathy Fernandes, Academic Technology Officer	Project Manager/Project Champion	<ul style="list-style-type: none"> • Project management oversight of the Canvas migration • Provides lead/direction for named resources tied to the migration to Canvas project • Solicit faculty input to ensure Canvas adoption and optimal usage • Coordinate project efforts between ITSS, FDEV, & online programs • Lead TLP instructional designers & student staff • Lead efforts to design and deliver faculty training and support • Primary contact between Canvas, Chico State, the CO, and the other 6 campuses migrating to Canvas • Communicates strategic direction to key campus stakeholders and internal resources. 	Substantial
Miroslav Lulic, Information Technology Consultant	Lead, Learning Technologies technical support	<ul style="list-style-type: none"> • Primary responsibility for the configuration of Canvas development and production instances • Assist with the SIS integration • Coordination of Chancellor's Office resources to assist with SIS data integration • Conduct vendor consultations for academic technology integrations that will need to be moved to Canvas • Development of a priority list for academic technology integrations within Canvas • Configure and deploy identified academic technology integrations • System administration integration with support structure • Technical testing of the system and other integrations 	Substantial

Name	Role	Project Responsibility	Est. Commitment
Robert Utter, Information Technology Consultant	Lead, PeopleSoft	<ul style="list-style-type: none"> • Development of the API endpoints from PeopleSoft to Dell Boomi • Coordination of Chancellor's Office resources to assist with SIS data integration • Build SIS data integration requirements 	Substantial
Brad Spittle, Information Technology Consultant	Learning Technologies technical support	<ul style="list-style-type: none"> • Assist in the configuration of Canvas development and production instances • Configure and deploy identified academic technology integrations • Develop system administration documentation and training materials • Technical support 	Substantial
Ross Rashkov	Learning Technologies technical support	<ul style="list-style-type: none"> • Backup LMS Admin 	Minimal
Greg Coates, Lead Identity and Access Management	Analyst/Programmer	<ul style="list-style-type: none"> • Configure Canvas connector in Account Center to provision and deprovision users in the LMS 	Moderate
Ryan Richter, and/or Joe Linn-Galan, Information Security	Analyst/Programmer	<ul style="list-style-type: none"> • Configure Single Sign-on for Canvas 	Minimal
Francie Divine, Information Technology Consultant	Web Designer/Branding	<ul style="list-style-type: none"> • Provide branding assets and recommendations • Potentially provide CSS styling support • Project web page(s) structure recommendations 	Minimal
Marjorie Shepard, Instructional Technology Consultant		<ul style="list-style-type: none"> • Front-facing faculty support related to course development, instructional design, accessibility, faculty training/consultation, and problem assessment resolution for Bb Learn and Canvas • Development of training resources for faculty, including Knowledge base articles, videos, business process guides, and in-person training courses for Canvas • Assist faculty with course content migration and Canvas setup • Provides input and feedback on course shell design • Develops Impact campaigns for Canvas to support student and faculty success 	Substantial

Name	Role	Project Responsibility	Est. Commitment
Christine Sharrio, Instructional Technology Consultant		<ul style="list-style-type: none"> • Front-facing faculty support related to course development, instructional design, accessibility, faculty training/consultation, and problem assessment resolution for Bb Learn and Canvas • Development of training resources for faculty, including knowledge base articles, videos, business process guides, and in-person training courses for Canvas • Assist faculty with course content migration • Investigate program assessment functionality within Canvas • Assist with the migration of online degree programs in Canvas 	Substantial
Claudine Franquet, Instructional Technology Consultant		<ul style="list-style-type: none"> • Front-facing faculty support related to course development, instructional design, accessibility, faculty training/consultation, and problem assessment resolution for Bb Learn and Canvas • Development of training resources for faculty, including knowledge base articles, videos, business process guides, and in-person training courses for Canvas • Assist faculty with course content migration • Assist with the migration and testing of third-party integrations 	Substantial
James Aird, Instructional Technology Consultant		<ul style="list-style-type: none"> • Front-facing faculty support related to course development, instructional design, accessibility, faculty training/consultation, and problem assessment resolution for Bb Learn and Canvas • Development of training resources for faculty, including knowledge base articles, videos, business process guides, and in-person training courses for Canvas • Assist faculty with course content migration • Assist with the migration and testing of Ally and other accessibility features embedded in Canvas 	Substantial

Name	Role	Project Responsibility	Est. Commitment
Joshua Whittinghill, Instructional Technology Consultant		<ul style="list-style-type: none"> • Front-facing faculty support related to course development, instructional design, accessibility, faculty training/consultation, and problem assessment resolution for Bb Learn and Canvas • Development of training resources for faculty, including knowledge base articles, videos, business process guides, and in-person training courses for Canvas • Assist faculty with course content migration • Development and delivery of training for Wildcat Computing Services student staff • Monitor support issues and provide feedback to the Learning Technologies and Canvas support teams • Collaborate with and develop student centered training and support resources 	Substantial
Daniel Cavanaugh, Chancellor's Office	SIS Data Integration Liaison	<ul style="list-style-type: none"> • Development of a standardized data feed from PeopleSoft to Canvas utilizing Dell Boomi 	Substantial
Chiara Ferrari	Faculty development	<ul style="list-style-type: none"> • Collaborate with TLP on faculty training, support, and communication • Provides feedback on Canvas configuration and course shells templates 	Minimal
Scott Kodai, Director, IT Support Services	Front-line support Liaison	<ul style="list-style-type: none"> • Liaison between the project team and IT Support Services front line support 	Minimal
Wendy Bentley, IT	Communications/Change management	<ul style="list-style-type: none"> • Develop communications plans • Create communications content • Regular assessment of campus readiness to help inform continued communication and training 	Substantial
Jeremy Olguin	Accessibility	<ul style="list-style-type: none"> • Accessibility review and support 	Minimal

3 Project Milestones and Timeline

3.1 Phase O: Planning, System Configuration, and Support Staff Training

Link to the Asana project plan developed by Instructure (vendor for Canvas)
<https://app.asana.com/0/1201845828976679/overview>

Below are the milestones required for the implementation and roll out of campus.

Name	Date Due	Status
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Campus strategic planning session with implementation teams	02/04/22	Done
Project kick-off with Canvas	03/04/22	Done
Canvas beta and prod environments provisioned	03/09/22	Done
Identify Bb Learn processes and project requests that can be deferred or cancelled	03/15/22	Done
Phase timelines approved	03/25/22	Done
Communication plans developed	03/25/22	Done
Inventory third party integrations along with priority order for implementation	03/25/22	Done
ITPR completed	04/08/22	Done
Phase 1 limited faculty call for participants	04/15/22	Done
Branding elements configured in Canvas production instance	04/22/22	Done
Course content migration guidelines developed and approved	04/22/22	In Process
Vanity URL and SSL certifications completed and development instance	04/29/22	Done
Technical training completed for campus Canvas support staff	04/29/22	Done
Phase 1 limited faculty participant selection	05/02/22	Done
Canvas Day in May	05/11/22	Done
Canvas custom course templates created	05/16/22	In Process
Authentication configured	05/16/22	Done
Course content migration tested and timeline developed	06/02/22	In Process
Firewall exceptions configured	07/13/22	Completed
Canvas user provisioning configured in AccountCenter	07/14/22	In Process
Priority 1, third party integrations (LTI) completed	07/15/22	Completed
Roles and permissions configured to support faculty in fall 22 cohort	7/15/22	Completed
Training resources developed and published to limited faculty	08/01/22	Completed
Limited faculty group provisioned access to Fall 22 courses	08/01/22	In Process
SIS initial data integration completed	08/01/22	In Process
Canvas procedures and guidelines developed	08/01/22	In Process
Canvas Assessment structure analysis	08/01/22	In Process
Terms, sections, courses, enrollments, instructors, loaded for Fall 22	08/01/22	In Process
Course shell access for limited faculty in Canvas	08/1/22	Completed
Limited faculty group training completed	08/15/22	In Process
Course content migrated for limited faculty group completed	08/15/22	In Process
User Acceptance Testing completed	08/15/22	In Process
Phase O Completed	08/15/22	Not Started

3.2 Phase 1: Limited Number of Faculty Teaching in Canvas

Name	Date Due	Status
Project Kick-off Meeting (LMS Advisory Meeting)	(08/31/22)	
Expanded group training completed	01/23/23	

Phase 1 Project Closure	01/23/23	
Support documentation, trainings updated	08/15/22	
Campus readiness survey (change management)	09/12/22	
Expanded faculty group #2 identified	10/1/22	
Priority 2, third party integrations completed	10/1/22	In Process
Expanded roles and permissions completed to support all use cases	10/15/22	
Terms, sections, courses, enrollments, instructors, loaded for Spring 23	11/1/22	
Expanded group provisioned access to Spring 23 courses	11/1/22	
Course content migrated into Canvas for expanded faculty group	11/1/22	
Priority 3, third party integrations completed	12/1/22	

3.3 Phase 2: Expanded Group of Faculty Teaching in Canvas

Name	Date Due	Status
Project Kick-off Meeting	(01/23/23)	
Campus readiness survey to remaining faculty (change management)	04/1/23	
Faculty teaching in summer 23 trained in Canvas	05/29/23	
Terms, sections, courses, enrollments, instructors, loaded for Summer 23	04/1/23	
Terms, sections, courses, enrollments, instructors, loaded for Fall 23	05/29/23	
Project Closure (Semester ends)	06/1/23	

3.4 Phase 3: All Faculty and Students in Canvas

Name	Date Due	Status
Project Kick-off Meeting	(06/1/23)	
Project Closure (Semester ends)	01/24/24	
Notify Blackboard Learn Chico State will not renew the contract	07/1/23	
Remaining faculty trained	08/15/23	
Course content migrated into Canvas for remaining faculty	08/15/23	

3.5 Phase 4: Decommission planning and completion of exceptions

Name	Date Due	Status
Project Kick-off Meeting	01/24/24	
Decommission planning completed	03/15/24	
Course content retention and archive	04/1/24	
Phase 4 Project Closure	05/29/24	

3.6 Phase 5: Decommission of Bb Learn and other applications no longer used

Name	Date Due	Status
Project Kick-off Meeting	(01/31/24)	
Deactivate third party integrations	06/31/24	
Confirm removal of all institutional data from third party servers	06/31/24	
Remove software applications from the asset catalog	06/31/24	
Remove all support documentation	06/31/24	
Project Closure (Semester ends)	06/31/24	

4 Risks/Concerns/Assumptions

4.1 The transition will be tough on students

Over the next 18 months, many students will have courses hosted in both Learning Management Systems. This will increase the learning curve for students. Once the migration is complete, it is anticipated that Canvas will provide an improved student experience.

4.2 SIS data integration is time consuming, complex, and technical resources are in short supply

A new data integration will need to be developed between our SIS system (PeopleSoft) and Canvas. Unfortunately, resources on our campus and at the Chancellor's Office are in short supply. Ultimately, the campus would like to have the Chancellor's office develop an integration that can be used by the 7 CSU campuses but our timeline may necessitate the development of an interim solution. In either case, resource availability is very likely to impact the University's desired timeline.

Furthermore, the integration with our SIS system is complex and will require input from key data owners to ensure the data feed is pulling the right information into Canvas. Resource constraints will likely impact the data validation required to complete the data integration.

4.2.1 Risk mitigation options/strategies

- Work with the Chancellor's office to get commitment to develop a CSU wide solution
- Work with the Chancellor's office to raise the priority level of the development work for a systemwide solution.
- Work with Chico State campus stakeholders to shift projects to free up resources to develop an onsite solution.

4.3 Utilizing API tools to configure the SIS data integration with Canvas

Most Canvas customers use other data transfer methods. Additional time will be required to work through the API integration between Dell Boomi and Canvas.

4.4 Ongoing Blackboard Learn 3rd party integration support

There are several 3rd party integrations in Blackboard Learn that are on versions that are no longer supported by the vendor. Instead of spending valuable resource time to update the Blackboard Learn integrations, the team will defer some maintenance updates and focus valuable resource time migrating over to Canvas.

Foregoing the maintenance could pose a potential risk to the timeline of the Canvas migration if resources need to be pulled away to fix an issue on the legacy system if the service become inoperable.

4.5 Requiring the move to one campus email before migrating to Canvas

Chico State utilizes two email systems; O365 for employees and gmail for students. Some systems use email as the primary key and when a user has dual roles, logic has to be developed to determine the right email type to use, system by system. Moving to one email would reduce the amount of technical overhead to support systems down the road but the process to get there will be very time consuming and will cause additional confusion for campus stakeholders during the transition.

Canvas only allows one email in the system. It is the current belief that the MS email account would be populated in Canvas for students instead of the gmail email account. During the multi-phased transition from Bb Learn to Canvas, this would mean that students would have gmail as their email account in Bb Learn and the MS email account in Canvas.

Changing both the campus email and transitioning to a new Learning Management System introduces a significant amount of change for students, faculty, and staff. Issues surrounding the email migration could adversely impact attitudes about the Canvas migration, hurting adoption efforts.

4.5.1 Risk mitigation options/strategies

- Utilize the same email type used in Bb Learn until the transition to Canvas is complete to reduce confusion for students, faculty, and staff.
- Plan to convert the email type as a follow-up project after Canvas goes live.
- Put in significant outreach efforts to ensure students, faculty, and staff know how to forward their gmail messages to their MS email account if the campus intends to do the migration in parallel with the LMS migration.

4.6 Ensuring campus is aware of training and support resources

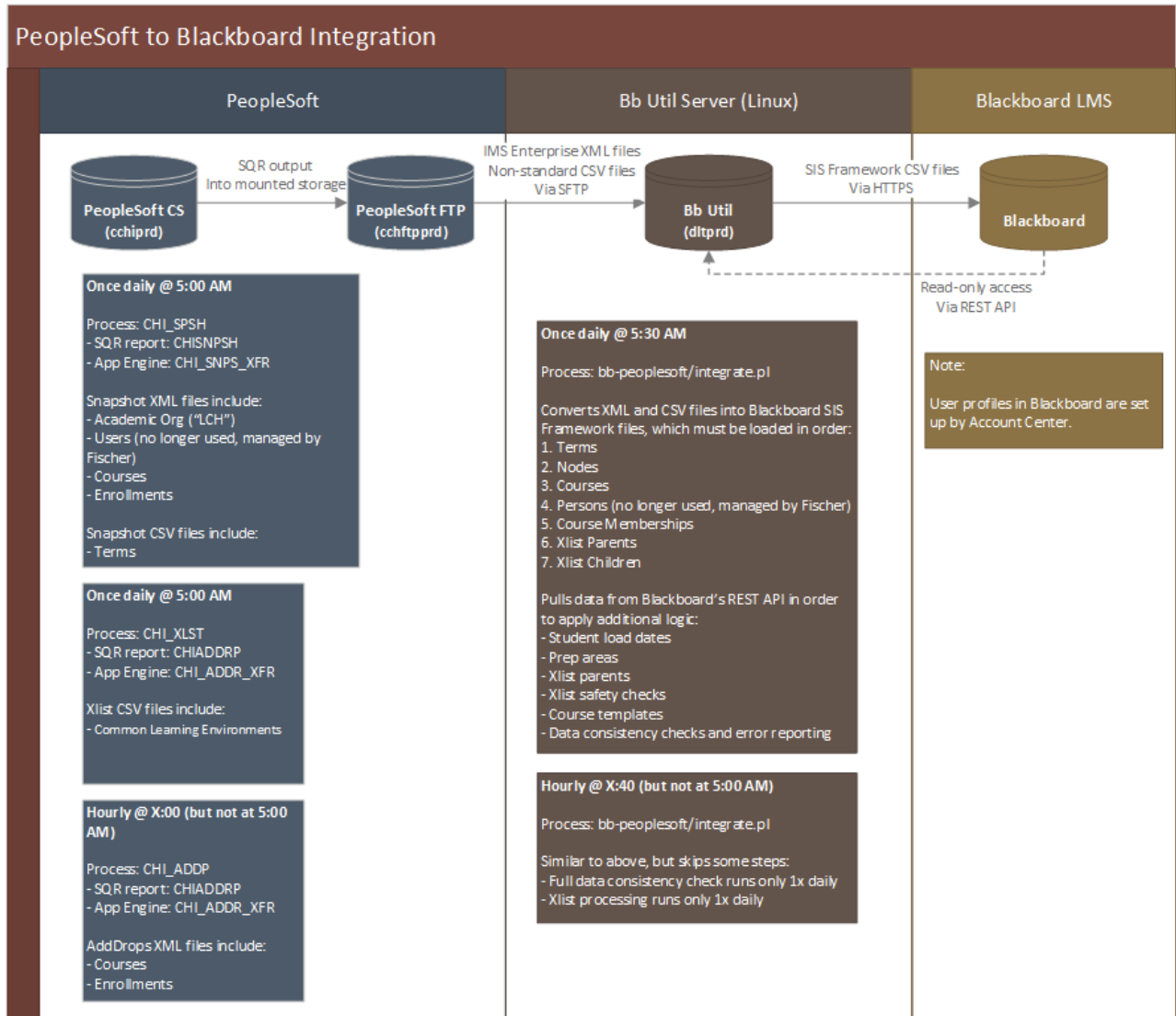
Special care will need to be taken to ensure that faculty and staff are aware of where to find new LMS resources.

4.6.1 Risk mitigation options/strategies

- Develop communications to promote the new resources
- Periodic surveys to determine if there are any knowledge gaps

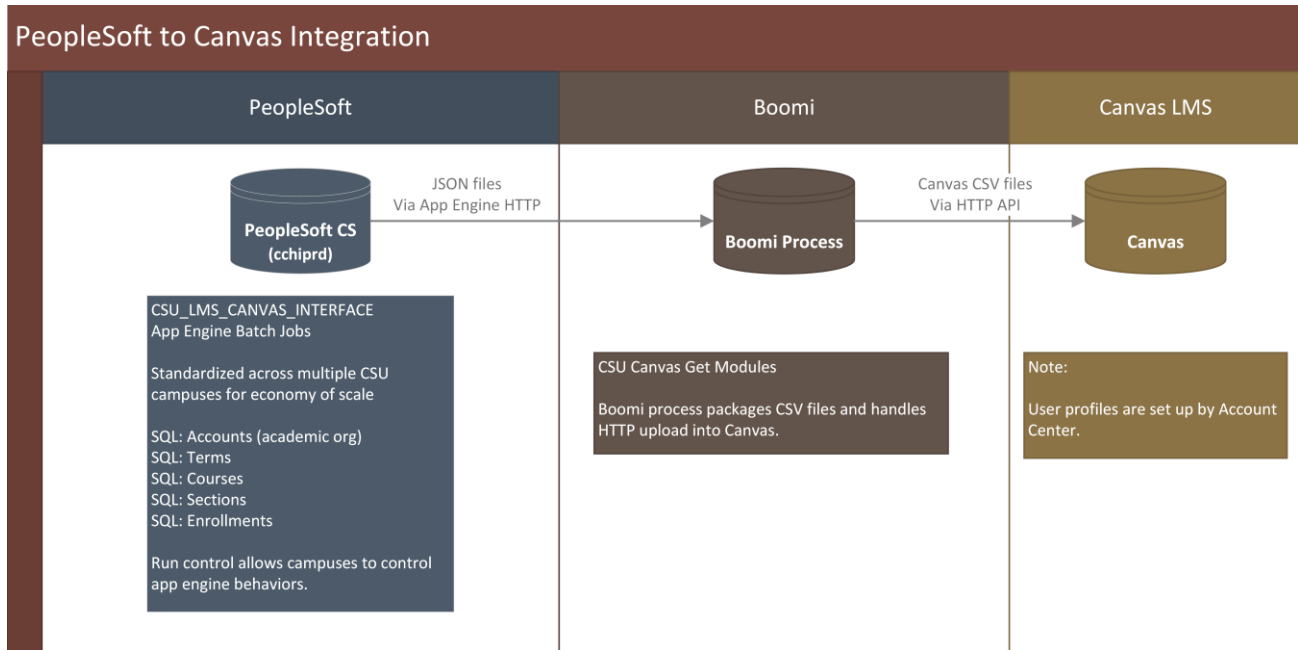
5 Student Information System Data Integration

5.1 Current data diagram



5.2 Future state data diagram

Work is currently in progress with the Chancellor's Office and several other CSUs to develop a streamlined data integration between PeopleSoft and Canvas. The goal of this collaborative effort is to produce an integration that can be utilized by multiple CSUs once completed.



6 User provisioning

User provisioning is managed by the Identity and Access Management system, Account Center and our campus plans to continue to use AccountCenter to provision users in Canvas.

7 Third-party application Integration List

The Learning Management team is developing a list of strategic third-party applications that are commonly used by campus stakeholders. The list will include the priority order in which the third-party applications will be configured with Canvas.

Name	Vendor	Config Priority	Status
Ally	Blackboard	Priority 1	Completed
Impact (formerly EesySoft)	Impact	Priority 1	In Process
Kaltura KAF Canvas	Kaltura	Priority 1	In Process
Pronto	Hit Labs aka Pronto	Priority 1	Completed
Respondus Test Builder Configuration	Respondus	Priority 1	In Process
TurnItIn	Turnitin (IParadigms)	Priority 1	Completed
Zoom	Zoom	Priority 1	Completed
Class Climate	Scantron	Priority 2	In Process
Follett	Follett Corporation	Priority 2	Completed
Google/Canvas Integration	Google	Priority 2	In Process
Microsoft/Canvas Integration	Microsoft	Priority 2	In Process
LinkedIn	LinkedIn	Priority 2	Completed
Perusall	Perusall	Priority 2	Completed
Poll Everywhere	Poll Everywhere	Priority 2	Completed
Proctorio	Proctorio	Priority 2	Completed
McGraw-Hill Connect	McGraw Hill	Priority 2	Completed

Pearson's MyLab & Mastering	Pearson	Priority 2	Completed
Zybooks	ZyBooks	Priority 2	Completed
Qualtrics	Qualtrics	Priority 3	Not Started
Access WebAssign	None	Priority 3	Not Started
MATLAB	Mathworks	Priority 3	Not Started
TimelyMD	Timely Telehealth LLC	Priority 3	Not Started
Aleks	McGraw Hill	Priority 3	Not Started
Google Classroom	Google	Priority 3	Not Started
GoReact	GoReact	Priority 3	Not Started
Labster	Labster	Priority 3	Not Started
Edfinity Publisher	Edfinity	Priority 3	Not Started
Elsevier Evolve	Elsevier Evolve	Priority 3	Not Started
Hawkes System	Hawkes System Learning	Priority 3	Not Started
Lumen Learning LTI Integration	None	Priority 3	Not Started
Macmillan Late Nite Labs	MacMillen	Priority 3	Not Started
Rising Software Auralia and Musition	Rising Software	Priority 3	Not Started
Sage Vantage LTI Publisher	Sage Vantage	Priority 3	Not Started
Sapling Learning MacMillan	MacMillen	Priority 3	Not Started
Signing Naturally	DawnSignPress	Priority 3	Not Started
thePoint	None	Priority 3	Not Started
MindTab	Cengage	Priority 3	Not Started

8 Communication Plan

8.1 Communication Calendar and Target Audiences

The communication calendar will continue to evolve as Canvas is rolled out to campus.

https://docs.google.com/spreadsheets/d/1Q8t3XAz_svzDMbKCruZ6sZsNmjIAFnQuNpfUQdLwi0/edit?usp=sharing

9 Training Plans

9.1 Faculty Training

9.2 Fall 22 Faculty Training

9.3 Student

9.4 Staff

10 Engagement Plan

11 Documents/Assets

Document/Asset Title	Description	Location	Owner
Canvas Migration Folder	TLP Google Drive Folder Communications	Google Drive	Kathy Fernandes
Canvas Migration Project Folder	Project charter, project score sheet	Box	Enterprise Applications
TLP website	TLP web pages where Canvas migration information and documentation is stored	https://www.csuchico.edu/tlp/canvas/index.shtml	Marjorie Shepard
Enterprise Applications Website	EAPP web pages where Canvas project updates and technical information is stored	https://www.csuchico.edu/eapp/learning-tech/index.shtml	Enterprise Applications
Chico State Asana Project	Instructure is using Asana as the project management tool for our migration	Asana	Instructure