

Planning the MOOC project

12

Introduction

This chapter draws upon the experience gained by those institutions that contributed to the case studies and provides guidance on the main steps involved in devising and implementing a MOOC strategy. It draws upon established good practice for program and project management, using the terminology that is common to the PRINCE2 and Managing Successful Programmes (MSP) methodologies. It may be argued that a large-scale MOOC development is better viewed as a program made up of a number of separate projects and other activities, rather than as project; in this case, the MSP methodology may be of greater value. For the sake of simplicity we refer to the MOOC “project” rather than the MOOC “program” through this book; this should be read as shorthand for either project or program, depending upon the local context.

Following this chapter, separate chapters provide more detailed analysis of two crucial aspects of the MOOC planning: costings and business models. The following three chapters then look at three areas that should inform the future MOOC strategy development: understanding the market—the learner as consumer, data and analytics, and the developing MOOC market.

Based on the experience of the university case studies, this section briefly describes a recommended set of processes to follow in setting up the MOOC project or program. These are suggestions and not a proscribed methodology; each institution will need to design the process that fits their local situation, constraints and existing strategies, as well as projects and initiatives.

For simplicity, this is described as a linear process. The reality will be a series of recurring processes in some cases, in particular for stakeholder engagement, evaluation, and quality assurance. It is recommended that the MOOC management team maps out the processes and relationships between them as part of the overall planning process.

Stage 1: initial planning (project initiation)

There are four significant steps that need to be undertaken during the initial planning or project initiation process. These are to review the landscape for the MOOC development, to plan alignment with other strategies, to conduct market research, and to explore partnerships and competitors.

- **Review the landscape: strategies and activities**

MOOC development cannot take place within a vacuum of organizational strategies, plans, and activities. As part of the initial planning process, you should review the organizational landscape and identify those existing strategies, plans, and activities that are most relevant. This will depend upon your organizational context but is likely to include the university strategy, for guidance on institutional priorities, such as internationalization, student engagement, and expansion; the learning and teaching strategy (which may or may not include a technology-enhanced learning strategy); and the open and distance learning strategy, where this exists.

You will also want to ensure that you have a clear and up-to-date picture of the current learning technology landscape within the institution, to understand where expertise lies, where activities are already taking place, and who the institutional leaders and influencers are in this area. This may include expertise in university management structures, academic departments, technology or educational departments or services, and library services. If you have time, it is useful to try to build up a local picture of significant information technology (IT) initiatives that are current or have run recently, and try to get a sense from key informants (perhaps through interviews or informal conversations) of what has worked well and what has not. This is a very useful exercise that can help you to avoid some of the more obvious pitfalls, and also to begin to build up a sense of key stakeholders.

- **Plan alignment with other strategies**

The next step is to plan how the MOOC project will align with the existing strategies. This activity will help you to make the case for the MOOC project, by making it clear how the MOOC is helping the delivery of that strategy, for example, by providing an opportunity for the university to develop its international marketing. It will also help you to identify ownership for the most relevant existing activities and resources, including the key stakeholders with whom you will need to engage in order to develop your MOOC plan. For example, which of the Pro-Vice Chancellors, Deans, or other stakeholders (e.g., Head of Marketing) you will need to include in the initial planning process.

- **Market research**

This is an essential step and one that is discussed in more detail in the next chapter, when we consider resourcing for the project. Some of the criticism of MOOCs (and online learning more generally) is that they may sometimes be a “solution looking for a problem” rather than being led by the needs of users. MOOC development is not a cheap activity and is likely to be costly in terms of risk and human capital, as well as financial investment. It is crucial that you and your team have done as much as you can to identify your target group of potential students before you start planning, and to prioritize the subject areas and modes of teaching that you wish to propose. As described in the following chapter, you may wish to work with and through your local communications and marketing team in order to do this research, and/or to buy in additional expertise. You are likely to need a mixed team of expertise in order to carry out this exercise thoroughly, including educational and academic experts with the market research professionals.

- **Partnerships and competitors**

This activity relates to the market research activity, and will probably follow on from it, although you may be able to start some initial analysis that runs in parallel to the market research. The aim of this activity is to get a clear picture of the most relevant possible partners with whom you may wish to work in order to successfully deliver your MOOC. This may include a wide range of types of partners: the large MOOC providers; other smaller possibly local platforms; software companies; publishers; other “third-leg” industries such as charities, local public organizations, and cultural institutions; as well as other

universities and private educational providers. It is worthwhile to explore the existing university partners in the first instance, as many institutions work with a wide range of different organizations who may be interested in developing a new dimension to the partnership such as co-development of a MOOC.

During this process, you will also be able to analyze your current and potential future competitors. This will be important for the future planning process, as it may provide useful material that you can use not only to benchmark against (e.g., to identify whether you are making better progress than your main competitor) but also to understand new competitors who you may not have really considered before, such as other universities which are geographically remote from you but developing MOOCs in similar subject areas. You will want to draw up a mapping of your competitors and revise it over time, as your MOOC strategy and implementation develops, particularly as a current competitor may be a potential partner in the future.

Stage 2: planning

- **Developing your MOOC plan**

Once you have completed Stage 1, you will have gathered a sense of the landscape in which you are operating, and be ready to begin planning in earnest. The four activities outlined below need to be carried out in parallel rather than sequentially, as far as possible.

- Stakeholder engagement

There is a potentially long list of stakeholders whom you may wish to engage in the development of your MOOC plan. You will want to be realistic about this process, particularly if you are planning a small-scale experiment in the first instance. It may be useful to split your list of stakeholders into two groups: key stakeholders (those who are essential to the successful delivery of the project) and other stakeholders (those whom you wish to engage but who are not essential to the process).

As a minimum, the key stakeholders are those whose input you will need in order to develop a suitable MOOC strategy, including those who direct essential resources, and those who own and champion key, related plans and strategies. You will also want to engage with any owners of resources that will be essential to the development and delivery of the MOOC; however, it may not be clear exactly whom this will involve until you have made some progress on strategy development. This may include heads of particular academic departments.

The initial stakeholder engagement will focus upon those stakeholders who are needed to develop the MOOC strategy. You will also need to consider how you will engage with your stakeholders during the development and delivery of the MOOC, and be aware that the key participants are likely to change over time. For example, you may want to engage local students in helping to test MOOCs once you have an initial prototype of the course in place, rather than discuss the concept of MOOCs with them, as the target audience is not likely to be local students in the first place (although it may be, depending upon your MOOC design).

- **Development of strategy and business case (costings and business models)**

Your institutional decision-making processes are likely to guide the documentation that you need to produce in order to achieve approval for your MOOC project. Regardless of your institutional processes, experience with MOOC development indicates that it is essential to create as a minimum a strategic document to describe what you hope to achieve from your MOOC project, in terms of vision and objectives. This is important in order to achieve

a shared sense of understanding about what the MOOC project will involve and why it is important, and also to provide objectives against which you can measure the success or otherwise of the project.

It is likely that a business case of some kind will be needed before the project is approved for funding by institutional decision makers. Chapters 12 and 13 provide detailed guidance on the main resources that are needed for MOOC development and delivery, and possible business models to sustain the MOOC, that you may either wish to put in place immediately or, perhaps more likely at this early stage in MOOC maturity, to test out during the MOOC project.

You may have in place local processes for business case development that you will need to follow. If not, we refer you to PRINCE(2) and MSP that include templates and other guidance on the development of a business case ([MSP, 2014](#)).

- **Governance and management**

Your stakeholder engagement will involve working out the key influencers and other actors who need to be involved in order to run a successful project. You need to formally determine the governance arrangements for your project, and think carefully about who will be involved in decision making (where you are at liberty to make these decisions). It is sensible to develop a draft plan for governance at this stage in the project, so that you can begin to plan key events, such as steering group meetings, well in advance of the project start date. Experience shows that a project timetable can easily be derailed by problems with getting stakeholders together in order to make decisions.

At this stage, the team should develop a draft plan for the management of the project. As the case studies show, there are numerous different approaches for how the MOOC will be developed, depending upon the local context and also whether you plan to engage with partners as part of the development and/or deliver (such as working through a MOOC platform). If the team does not have experience of managing complex IT projects, it is recommended that there is consultation with local experts, or specialist advice sought, to draft a plan. Bear in mind that you are likely to need to bring in expertise from the legal departments and library, as well as academic departments and IT. More guidance on planning resources is given in the next chapter.

- **Development plan**

By the end of Stage 2, the project will have received sign-off and approval to go ahead. Assuming that it is likely to be approved, you will want to preempt the decision point by starting planning the MOOC development and creating the Development Plan. There may be guidance in place locally to recommend or mandate a specific project management methodology, perhaps through the Planning Office. If not, we recommend that you use another local planning approach that has been tried and tested, or adopt a well-respected approach that is appropriate for your situation. This may include project management approaches such as PRINCE(2). If you are putting in place a large-scale and complex MOOC project, which will involve considerable stakeholder engagement and change management, you may consider that you are running a program rather than a single project, and should consider a benefits-driven methodology such as the MSP methodology. “Programme Management may be defined as the co-ordinated organization, direction and implementation of a portfolio of projects and activities that together achieve outcomes and realise benefits that are of strategic importance” ([MSP, 2014](#)).

Whatever approach you chose, you need to ensure that the intended benefits of the project are articulated clearly in the strategy and explored in the business case (discussed in more detail in the next section).

Stage 3: running the MOOC project

Implementation of the MOOC project will follow approval of the project definition; this is now the time to put in place the MOOC project plan. The precise contents of the MOOC project plan will depend upon which project management approach you are following. It is recommended that you include the following sections in your project plan as a minimum, bearing in mind that the level of detail and complexity of your plan should be commensurate with the scale of enterprise that you are planning, whether you are development just one or two MOOCs or a more significant enterprise.

- **MOOC project plan**

The heart of the MOOC development plan is what might be described as the project plan: the set of activities undertaken to create the MOOC or MOOCs. This plan should follow a standard project development approach, with a set of activities or work packages that are sequenced against a timeline. Whatever tools or techniques you use, the aim is to clearly articulate the key activities to be undertaken, by whom and when, so that the project manager and management group are able to monitor the project's progress

The plan should include details of the planned development and testing model for how the MOOC(s) will be created, tested, updated, and launched.

- **Benefits identification (benefits statement)**

Most up-to-date project management approaches advocate a benefits-driven approach; that is, where you initially identify and record the benefits that you wish to achieve by completion of the project. In the language of the PRINCE(2) project management methodology, benefits are recorded in a benefits statement. Benefits identification is useful and important because it makes it easier to ensure that the project remains aligned to the initial strategic objectives. The plan should describe benefits as precisely as possible so that their achievement can be clearly monitored and measured. As was revealed through the case studies, universities may identify a range of different drivers for involvement with MOOCs. One example would be for the university to have an increased international profile in Asia. When described as an intended benefit, this might perhaps be worded as something like "10% increase in applications from Asian countries for postgraduate courses in business studies." On the other hand, your goal may be to achieve some more general benefits, such as "to inform the university's strategy for online learning," but even in this case, you still need to articulate the benefits clearly so that you can get formal agreement from your key sponsors that they describe the purpose of the project.

The definition of benefits is not easy and it can be fairly challenging to try to envisage the change that may occur from a specific project, particularly in an organizational culture where projects may often be focused more upon "what" rather than "why" and driven by new products or solutions rather than a clearly articulated benefit or business case. It is however, in the interest of the lead project advocate to define benefits, as otherwise it can be difficult to prove that a project has achieved what was intended.

- **Stakeholder engagement, including engagement in partnerships**

The stakeholder engagement plan is a key part of the project plan. As described above, it is essential to engage the right stakeholders in order to deliver the MOOC project to time and to date. Identification of the most important stakeholders will depend upon the local context but is likely to include those who will be involved in sponsorship of the project, in the development of content, in management of the project, and in marketing and promotion. It should include management of partnerships, as an essential part of many MOOC projects, where partners may include a wide range of stakeholders such as the MOOC platform, providers of a technical solution, commercial partners, or other institutions.

- **Human resources**

The development plan or project should include details of who is responsible for which activity within the project plan. It is recommended that you also formally define the roles in the project, in order to achieve complete clarity about who has responsibility for which activity. This should include reporting activities such as writing project reports as well as the delivery of each work package. It is recommended that you take a team-based approach to the development of MOOCs as bringing in the expertise of a group of people with different strengths is likely to lead to a better quality output and, when managed well, will be more efficient. “A great deal of coordination and collaboration among researchers, instructional designers, and programmers will be necessary to result in meaningful improvements to teaching and learning” (Hollands & Terthali, 2014).

- **Budget**

Budget is one of the most important aspects of your project plan. We have included a template to help you to estimate costings in the following chapter; this can be used for an initial analysis of costs, but you will want to prepare a more detailed and refined version for approval by the appropriate part of the governance process, the steering group, or equivalent.

- **Evaluation and quality assurance**

Evaluation and quality assurance are essential for even a small project, although they should, of course, be proportionate with the level of resource and the size of project. As a minimum, evaluation and quality assurance should be articulated in the project definition.

- **Technology options**

This is an optional section; for some projects, where the intention is to work with an established MOOC platform, there may not be any choices to make about technology options. For others, there may need to be a detailed and costed analysis of technical solutions which follows good practice.

References

- Hollands, F. M., & Terthali, D. (2014). *MOOCs: Expectations and reality*. *Educause*. Online at <http://www.educause.edu/library/resources/moocs-expectations-and-reality>.
- MSP. (2014). *Welcome to the official MSP website*. *MSP*. Online at <http://www.msp-officialsite.com>.