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TO: Provost Bruce Carney
Chair, Information Technology Executive Steering Committee

FROM: Dean Jan Johnson Yopp
Chair, Instructional Technology Governance Committee

DATE: October 13, 2010

RE: Recommendation for University-wide Learning Management System

The Instructional Technology Governance Committee recommends that UNC-Chapel Hill migrate from Blackboard to Sakai as the learning management system (LMS) with community members representing every type of institution profile and size. Sakai is a known, community-source LMS with about 10 years of development history. More than one-third of the top 100 universities in the world participate in Sakai, providing a system in use at more than 350 universities, colleges and schools. Such a move should be considered and accomplished with an administration commitment to adequate ITS support for the transition, to maintenance of both Blackboard and Sakai during the transition, and to thorough communication with stakeholders about the benefits and process of such a change. The committee recommends the migration be done over a three-year period with the first year focused on educating the campus community about the change and creating any new programs in Sakai; in the second year migrating existing courses from Blackboard into Sakai; and in the third year completing migration of programs, such as certificate programs, etc.

Rationale

In making this recommendation, the committee considered the findings of a campus-wide Sakai Pilot Study that included the experience of faculty members using Sakai; financial considerations in operating an open source LMS; the benefits of an open source system in accomplishing desired learning outcome and administrative tasks; and the experience of other institutions which have adopted Sakai as an LMS.

The Sakai Pilot Study began with 18 courses in fall 2008 and in fall 2010 had 81 courses with 120 sections. About one-fifth of the campus already hosts courses in Sakai. Responses from faculty members using Sakai have been positive; students have

responded that both systems are acceptable, but they want the campus to settle on one LMS.

The current cost to support Blackboard on campus is approaching \$620,000 a year. That figure does not include failover and disaster recovery capabilities, which are needed, but would require an additional one-time cost of about \$250,000 to implement as well as a recurring maintenance cost of \$100,000 annually. If UNC-CH remains with Blackboard, it will need to complete a major Blackboard upgrade in summer 2011. The interface changes included in this upgrade will require significant training for users because of the differences between Blackboard 8 and 9. While some campuses like the new Blackboard version, many others that have completed this upgrade have reported dissatisfaction with the software and its features.

In contrast, the cost to support Sakai as an LMS for our campus is estimated at \$332,000 per year. Unlike Blackboard, Sakai carries no licensing costs, resulting in about \$80,000 per year savings in software licensing. The \$332,000 cost includes hosting Sakai with a third-party provider, which offers some advantages over our current support model. First, it allows reallocation of personnel and equipment resources used to support Blackboard-related systems and databases. Second, the hosted solution would include failover and disaster recovery solutions. UNC-Chapel Hill has established a relationship with a vendor that provided excellent support through the pilot phase and would be able to help through a migration. Based on these factors, the committee felt that while UNC-Chapel Hill might not realize substantial cost savings immediately because of the expense of managing two systems during a migration, the potential for savings is there. The funds spent will ultimately give the campus an LMS system with greater flexibility, functionality and the ability to customize to individual user or program needs.

In making this recommendation, the committee also considered the advantages and disadvantages of a community-source LMS versus a proprietary LMS. The committee sees two primary advantages with the community-source LMS. First is functionality: When there is interest in new functionality for an established open source project, subcommunities tend to arise to develop it. UNC-Chapel Hill can take a leadership role in this development and not be beholden to a proprietary vendor's development schedule. Second is flexibility: With proprietary software, institutions are locked into schedules and service contracts dictated by vendors. With open source software, it is possible for institutions to dictate their own terms to a much greater degree with a wider range of service providers. The committee also had concerns about whether Blackboard could support UNC-Chapel Hill's online learning needs now and into the future.

As noted earlier, many universities have adopted Sakai, among them Arizona State University, Columbia University, Georgia Institute of Technology, Indiana University, Northwestern University, Stanford University, University of Michigan, University of Missouri, University of Notre Dame, University of California (Davis, Merced, Berkeley and Santa Barbara campuses), University of Virginia and Yale University. A more complete list of U.S. universities can be found at <http://sakaiproject.org/whos-using-sakai>.

Concerns

*With budget cuts, it could be difficult to find funds needed to manage two systems during the transition period. Without adequate support, ITS, which will bear the brunt of the changeover, cannot maintain its current duties and take on the responsibilities of implementing a new system.

*The campus is in the midst of several technology changes, including a migration to Outlook for email and calendar plus the conversion to PeopleSoft. Faculty and staff might be reluctant to buy into another immediate technology switch that will require time and training while they are still adapting to new systems unless they have clear articulation as to its benefits.

Recommendations for Transition

To accomplish a seamless and smooth transition, the committee recommends that that any decision regarding a move must include:

*Support. Adequate funding must be made available to hire temporary support staff for training during the transition time and to assist decentralized IT staff who can accomplish the transition within their units. Funding would also cover, if necessary, ITS Help staff to develop self-service documentation.

*Education via communication. A logical plan that clearly lays out the timetable, including an information phase, transition phase and completion phase is essential. This plan would include a communication section noting how users would be informed as well as the specific means for reaching them (e.g., email, website, handouts and face-to-face meetings).