

April 11th, 2011

TO: Ian Dolphin, Sakai Executive Director
Anthony Whyte, Sakai Community/Technical Liaison
Kim Thanos, Sakai Communications Lead

CC: Josh Baron, Sakai Board Chair; Maggie Lynch – Sakai Board Vice Chair; Nate Angell, Sakai Board Member; Ian Boston, Sakai Board Member; Michael Feldstein, Sakai Board Member; Stephen Marquard, Sakai Board Member; John Norman, Sakai Board Member; Chuck Severence, Sakai Board Member

Dear Ian,

I am writing to draw your attention to three important barriers that pose significant obstacles in the evaluation and enthusiastic adoption of Sakai as the learning management system of choice among institutions of higher education, including ours at UMassOnline. Your appreciation of these barriers, and a modest level of support and advocacy for at least one of the solutions we are contemplating at the University of Massachusetts, would do much to accelerate the adoption of Sakai generally, while also supporting any and every other educational institution's efforts to identify an online learning environment to meet their institutional needs. The three barriers to evaluation—and thus adoption—are:

1. The LMS evaluation process is evolving for college and university campuses from focusing on features (tools and technologies such as grade books and discussion forums) to assessing affordances (functionality enabling teaching and learning).
2. For obvious reasons, not the least of which is monetary incentive, commercial vendors of LMS solutions readily respond to Request for Proposals which includes product descriptions in line with the institution's requirements. The Sakai Foundation, without a product for sale, or 'sales and marketing' infrastructure, simply cannot respond. This, we believe, disadvantages the Sakai platform from the evaluation stage among institutions without Sakai-specific knowledge.
3. While support services for Sakai from third party providers are readily available, these providers are not chiefly interested in a university's evaluation stage. As they specialize in support and hosting services, there is little incentive for these hosting and support providers to engage with an institution until the LMS they support has been selected.

In an effort to overcome these barriers to evaluation, adoption and ultimately participation, UMassOnline is volunteering to create, manage, and fund a web space at which functional requirements (descriptions of teaching and learning objectives) can be collected and featured: think, "next-generation EduTools." To do this, we at UMassOnline propose developing '[user stories](#)' that describe what a system can do, not merely what it has. This represents a radically

different, but immensely valuable and reliable approach to evaluating and selecting LMS options. Through the development of open dialogue among campus adopters (faculty and staff), commercial affiliates, and developers a reference library of user stories describing activities will emerge along with '[testing scripts](#)' (i.e. user instructions) to assess if the desired outcomes can be achieved (i.e. the functional affordances of Sakai). The Sakai Foundation could be instrumental in the success of this site by simply endorsing the concept and encouraging participation. This would likely result in contributions from scores of experienced Sakai users and developers who could address the user stories with authority and within a short period of time. This, then, would establish a reference resource, much like the former EduTools website, that could be reused by other institutions facing the three barriers outlined above. In addition, because new user stories can continually be contributed as well as testing scripts, the site would remain relevant, reflecting the current teaching and learning functionality of the day, rather than legacy feature sets of deprecated systems.

The development of this community of collaborative users and developers, with a special focus on LMS functionality versus feature-to-feature comparisons, speaks in my opinion to the essence of Sakai Foundation, the community and to the core values of contemporary open source advocates everywhere. While we understand that the efforts of the Sakai community have generally focused on the development and maintenance of the Sakai technologies, we understand as well that the Sakai Foundation, and those within the Sakai community, also works hard to support other "development" activities beyond coding. Indeed we feel strongly that the same model employed for development and support applies to awareness, evaluation and adoption. As expressed by Brad Wheeler in his [2007 EDUCAUSE Review article](#), "...there are also many ways to contribute to great software other than by programming." We believe we have developed an approach that would raise awareness regarding open source options and provide a framework for systems evaluation and decision-making, for not only UMassOnline, but all of education. Please find attached below, specific details regarding the approach, our objectives and some of the key benefits we foresee.

UMassOnline is hopeful the Sakai Foundation and its community will advocate for participation in this effort. As Sakai states so well, "While we acknowledge that it is sometimes difficult to find the right engagement point to enter the community, please reach out. Each new participant brings knowledge and perspective that benefit us all."

Thank you for your consideration,

A handwritten signature in black ink, appearing to read "Patrick Masson". The signature is fluid and cursive, with a long horizontal stroke at the end.

Patrick Masson
Chief Technology Officer, UMassOnline
Office of the President, University of Massachusetts

Approach, Opportunities & Benefits

UMassOnline has recently initiated a [Learning Platform Review](#). In order to ensure the teaching and learning needs of UMassOnline's 15 private and public colleges and universities can be met, our campuses developed user stories defining activities done within a learning environment, rather than a list of features or specific tools. For example, rather than specify "a discussion forum" which can be checked-off a list within an RFP, UMassOnline and our hosted campuses, constructed user stories, such as, "As a faculty member, I want to create small groups so that students can do peer to peer assessments." From these user stories, "testing scripts" can be developed for each system under review describing how a user (a faculty member) can perform these tasks (create small groups) to achieve some outcome (peer to peer assessment). One can think of this as how a Help Desk Analyst might assist a faculty member who asks: "How do I create a private group of my students who can work on a peer writing assignment together?" A Help Desk Analyst would walk the faculty member through the processes for creating groups and assigning tasks: these step by step instructions are analogous to a testing script.

This approach, i.e. identifying functional requirements rather than a feature list provides several opportunities:

- enables potential adopters to understand functionality (what the system can do) rather than features (what tools the system has);
- avoids the never-ending list of sub-features (A discussion forum... that can be sorted by author, date, subject, priority; can be searched; can be exported as a pdf, text, .doc, docx,; can have assessments; has permissions, private, private between author and instructor, private within a group, public to the class, public outside of class, etc. etc. etc. ad nauseum);
- separates tools from techniques (maybe the best approach to achieve a desired outcome is not through a discussion forum, but through a wiki or blog);
- extensible across systems and versions ("As a faculty member, I want to create small groups so that students can do peer to peer assessments," will be a teaching and learning practice longer than any technology, e.g. a bulletin board, track changes, discussion forums, wikis, blogs, etc.);
- addresses multiple teaching and learning styles (there may be various approaches to accomplish a learning activity or objective, that is, one outcome may be achieved using various tools);
- contributes to training (the same instructions that help evaluators assess the functionality--creating small groups and setting them up to assess each other's work--can be used to train new users and support the help desk as a knowledge base);
- provides end-user documentation for use (comprehensive knowledge base for the platform- a timely opportunity considering the upcoming release of Sakai 3.0);

- comprehensiveness (as new teaching and learning scenarios are described and contributed as user stories, they can be used as functional requirements gathering, to not only assess current LMS functionality, but help define future development);
- creates community (non-technical development session can be offered at conferences to both create user stories and develop and then contribute testing scripts);
- extends ways to contribute (provide opportunities for current adopters and commercial partners to contribute outside of code development, extending opportunities to campuses and non-technical contributors on those campuses (instructional designers, faculty, even students)).

UMassOnline has already engaged with four commercial providers of Learning Management Systems (Blackboard, Desire2Learn, eCollege and Instructure) who have created testing scripts against our user stories. UMassOnline will be posting both our user stories developed through our RFP process, as well as the testing scripts provided in response for each system. The entire catalog will be contributed to the public domain so that other colleges and universities can reference our work as they undertake their own LMS assessments. In addition, we hope to extend the user stories by inviting other campuses to contribute their own unique needs ensuring the catalog continually reflects the current needs in teaching and learning functionality required to deliver online education.