Sprint through it: Using an Agile approach to run a swift, productive, and successful RFP

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Outline

- Introductions
- Definitions: Ensure we have common terminology for this jargon-fest
- Clarify your goals: Why are you here? What do you want out of this?
- Ohio University Summary: Using Agile and Scrum to run an RFP process
  - How collaboration supported our innovative process
  - What makes this different from other strategies?
- Revisit your goals: What is one takeaway you can apply to your own work?

Definitions

- **Agile**: An iterative approach to software development and project management.

- **Backlog**: Like a to do list. Used to organize sprints in Agile Scrum.

- **LMS**: Learning Management System

- **RFP**: Request for proposal. Formal announcement of intent to purchase a product, including requirements.

- **Scrum**: A project management framework that helps teams structure and manage their work.

- **Service team**: Cross-organizational team to collaborate across areas of expertise.

- **Sprint**: A time increment in which work is completed by an Agile Scrum team.

- **Stakeholder**: Various members of the organization and institution that are impacted by a product or service.

- **Waterfall:** Linear project management workflow that prioritizes releasing a complete final product.

What are your goals?

What interested you in this session?

- Learning management systems

- Requests for proposal

- Scrum/Agile processes

- Collaborative ideas

- Other?

Ohio University Snapshot

- Residential main campus in small town

- Multiple campuses and centers across the region with medical, graduate, and undergraduate programs

- LMS usage more than doubled during the COVID-19 pandemic

Presenter Snapshot: Why Us?

- Neither had ever led an RFP
- Challenge to effectively engage students and end users
- Our roles
  - Michelle: Subject Matter Expert, Technical Lead
  - Lindsey: Communications and Potpourri Organization tasks
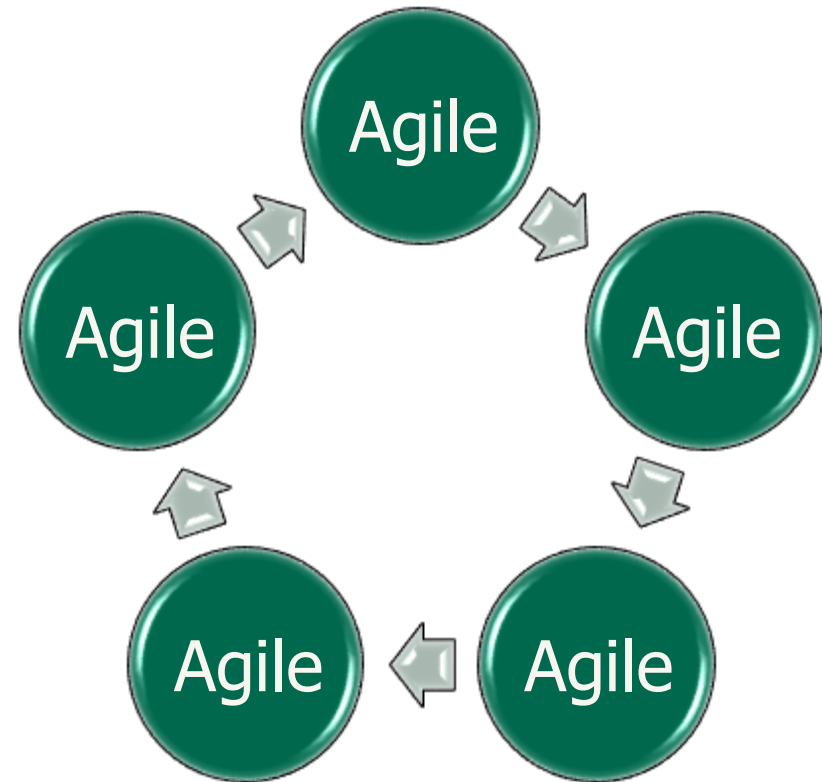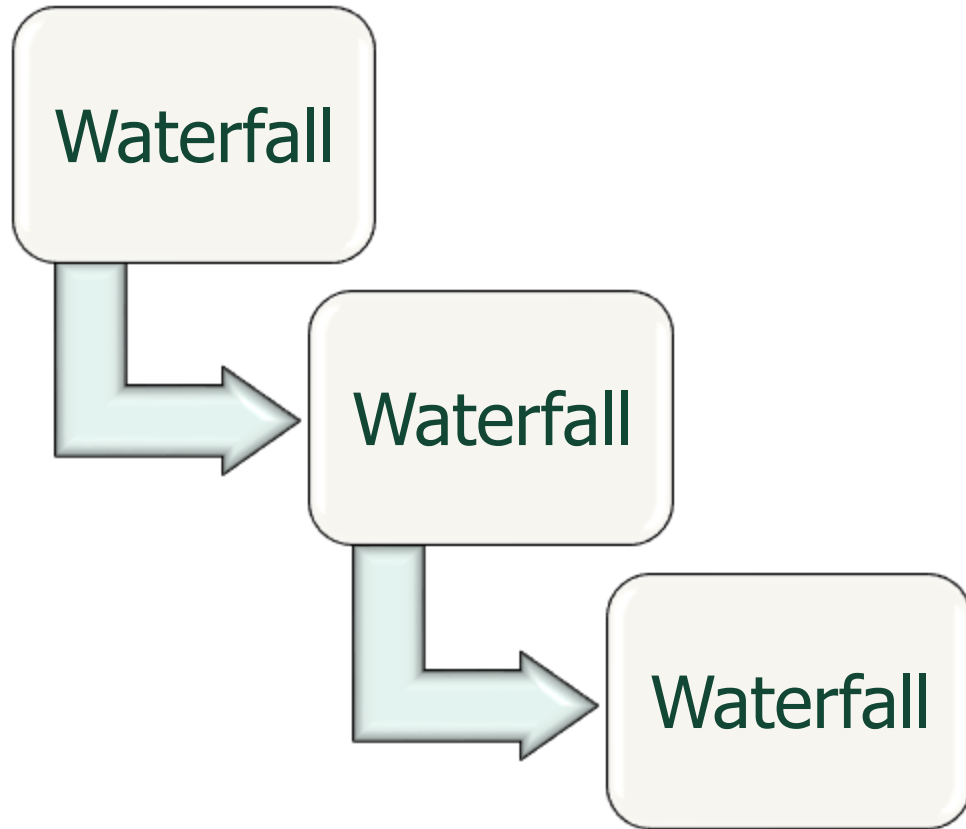- Necessary to leverage strengths of the team

Project Overview

- **Goal:** Identify an LMS that meets OHIO's future needs

- **History:** Current LMS, Blackboard, has been in place more than 20 years. OIT is currently operating 2 LMSs, Blackboard Original and Blackboard Ultra.

- **Expected outcome:** Upgrade all users to Blackboard Ultra or switch to new vendor

- **Timeline:**

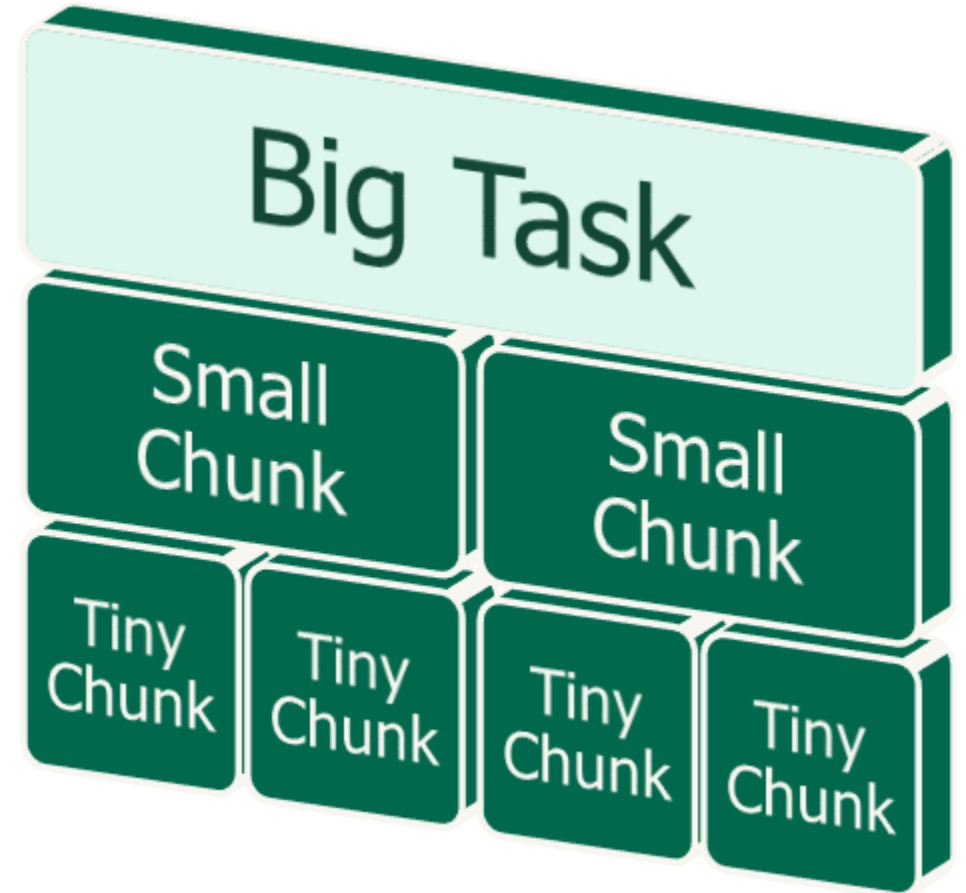| Collect feedback and launch RFP	Select vendor	Begin transition	Transition complete
Fall 2022	Spring 2023	Summer 2023	2026

Can Waterfall and Agile Work Together?

Customize to Needs

- Reverse engineering waterfall
  - Work backwards on big dates and requirements
  - Break up all other work into chunks
  - Determine dependencies of chunks

Example Task in Chunks

Big overwhelming task:

- Have to publish the RFP by mid-October.
- School starts in late August at OHIO.
- We have not done an RFP before (did we mention that?)

Example Sprintable Chunks

- Draft feedback survey
- Share survey with team for feedback
- Post survey on LMS homepage
- Analyze data from LMS survey
- Incorporate data from LMS survey into functional requirements list
- Share functional requirements draft list with team

Revisiting your goals

What will you take from this session back to your own work?

- Learning management systems

- Requests for proposal

- Scrum/Agile processes

- Collaborative ideas

- Other?

Thank You & Questions

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