Resources for Procuring the "Right"
Learning Management System

A Learning Management System (LMS) provides the platform for an organization's learning environment by enabling the management, delivery and tracking of blended learning (i.e., online and traditional classroom) for employees.

Many factors are involved in choosing an LMS that best fits your agency's needs. For some, identifying criteria can be complicated. Shrinking resources, decreased funding, and rising expenses have required agencies to make very prudent decisions when purchasing such a major technology. Also, at a time when technology is so readily available and the marketplace is saturated with various vendors all making similar claims, selecting the "right" solution can be a daunting task. In addition, the Governmentwide training reporting requirement in 5 CFR 410 (*http://www.opm.gov/cfr/fedregis/2006/71-051006-28547-a.pdf*) adds a mandatory responsibility for tracking and reporting training, which may make finding the right solution critical to compliance.

There are many things to consider once you decide to purchase an LMS. Here are 8 basic tips to get you started (an explanation of each is presented below):

- Conduct an LMS needs assessment;
- Determine your requirements and make sure they are clearly specified in your contract;
- Talk candidly with people administering LMSs in similar organizations about their experiences;
- Conduct an initial evaluation of Learning Management Systems for the purpose of creating a short-list for full in-depth evaluation;
- Get leadership support;
- Engage the user population in the selection process;
- Focus on the process from the learner's perspective; and,
- Prepare your organization for change.

Conduct an LMS needs assessment:
During this phase you will want to determine what it is you want your LMS to do. Do you want to integrate the LMS with other HR systems? Do you want to integrate the LMS with your financial system? Conducting needs assessments can help you develop a clear picture of required functionality and create LMS bid specifications that most closely align with your business needs. Some standard assessments to consider are:

- **Strategic analysis** that identifies the organization's strategic objectives as they relate to workforce development, defines high-level priority target areas for knowledge and skills transfer, and describes--in basic terms--the current and desired future learning environment. This analysis should answer the question, "what is it you want the LMS to do?"

- **IT infrastructure assessments** that provide baseline information about the current configuration of the organization's IT backbone and programs that exist on desktops across the enterprise. This assessment should define connectivity that remote learners and those closer to the central IT hubs will experience. One major collateral benefit from conducting this sort of assessment is that it engages the IT department at the beginning of the process. Support from IT is critical to a successful LMS implementation.
- **Cultural readiness assessments** help determine an organization's ability to embrace new learning strategies and the extent organizational change efforts are needed during implementation. Often, LMS implementation projects address all of the technical aspects adequately but overlook political, cultural, and practical implications. That oversight generally results in a stalled or failed initiative. A cultural readiness assessment helps define parameters for success, such as whether you need intense internal marketing for your programs.
- **Administrative process analysis** that maps existing administrative efforts that govern the training function and identifies procedures that will change due to an LMS implementation. Examples include how to handle overbooked classes and capturing and recording learner results and feedback. Analysis will also determine where the LMS needs to connect to existing HR software systems and databases.

Determine your requirements and ensure they are clearly specified in your contract:
Determining your requirements is the most crucial step in selecting an LMS vendor. If you don't know your requirements you will not be able to effectively communicate them to vendors. Here are a few important points about your requirements:

- First begin by documenting your current state - how do you conduct your work today.
- Next record your future state - where you would like to be?
- Finally, document the requirements for getting to your future state.

Consider how an LMS will help bridge the gap and enable you to meet your goals. Failure to determine requirements may result in your selection criteria being based on vendor features rather than your organization's needs.

Talk candidly with people administering LMSs in similar organizations about their experiences:
Find people administering LMSs in organizations like yours (with similar goals and objectives) and have a conversation with them about their experiences. Talk to them about their process and set-up and how they'd do it differently. Their "lessons learned" can save you a lot of time and effort by helping you anticipate and plan for possible pitfalls throughout the acquisition process. You can also get information on LMS vendors from vendors' websites or research and comparison reports. You should be able to develop a list of LMS providers that would be a good fit for your organization based on research reports you can obtain, reviewing vendor websites, and talking with previous clients,.

Conduct an initial evaluation of Learning Management Systems for the purpose of creating a short-list for full, in depth evaluation:
Secondary research and talking candidly with other LMS users, coupled with your requirements document, is a great start to your initial LMS evaluation. In addition, you should:

- Identify candidates: By undertaking an internet search and soliciting information from other users you can identify leading LMSs of interest
- Develop evaluation criteria: Instead of a detailed list of features, the evaluation criteria are focused on overall requirements using a graded (Likert scale) checklist approach. Examples of criteria are:

  - **'Fit for purpose'**: Does the application deliver a feature set that aligns with the requirements document? Does the development path align with your objectives?
  - **Architecture**: Does the application satisfy scalability, modularity, security, robustness and hardware requirements?
  - **Usability**: Is the application user friendly?
  - **Interoperability**: Does the LMS have ease of system integration and standards compliance?
  - **Cost of ownership**: What are the costs of development and support? How would you rate ease of maintenance?
  - **Strength of community**: How would you rate the number and quality of installations?

Get leadership support:
Make a persuasive business case to senior management early so you will have an easier time getting their signatures on the purchase order. It is important to identify and gain leadership support in the form of an internal "champion" for the LMS effort. The "champion" will be responsible for advocating for the LMS and leading the acquisition and implementation process. Consider using your IT, HR or financial officer to chair the process.

Focus on the process from the learner's perspective:
The best LMS won't help you if your end-users, your learners, hate it. You need to test your LMS from your learner's perspective. Some questions to ask:

- How do you know what courses are assigned to you?
- Where do you see the courses you've completed?
- How do you take the test or complete the electronic signature requirement?
- When do you learn about new courses as they become available?
- How can you add a course to your learning plan?

Engage the user population:
Gaining user support is critical to the success of the LMS. The user population includes learners, supervisors, and managers. There are ways you can engage users while simultaneously building interest and acceptance:

- Request feedback from users early and often;
- Use feedback (from pilot group or initial training) to make improvements to the LMS; and,
- Make users aware of the new system ahead of time— advertise and try to build up some excitement.

Prepare your organization for change:
New systems mean change and change is not always welcome. Promote the change as you would reorganization. Employ change management "tactics" to begin to sell the system long before it is ready to launch. Find ways to consistently communicate the benefits.

REFERENCES:

Without some basic technical knowledge, it can be virtually impossible to understand what LMS suppliers are offering, so be sure to have a meaningful discussion with your internal IT department. Unfortunately, some training professionals may be reluctant to address technical issues because they do not know where to start. The information below can provide some basic explanations, definitions, and questions for starting the conversation with your information technology group and e-learning supplier.

- The *Learning Circuits: Field Guide to Learning Management Systems* (*http://www.astd.org/NR/rdonlyres/12ECDB99-3B91-403E-9B15-7E597444645D/23395/LMS_fieldguide_20091.pdf*), published by the American Society for Training & Development (ASTD), discusses LMS product features, costs, pricing models and procurement and implementation best practices, to include detailed steps in ensuring a Learning Management System that can:
    - Centralize and automate administration,
    - Use self-service and self-guided administration,
    - Assemble and deliver learning content rapidly,
    - Consolidate training initiatives on a scalable web-based platform,
    - Support portability and standards, and
    - Personalize content and enable knowledge reuse.

- SumTotal's white paper, ***"Selecting the Right Learning Management System: Challenges and Opportunities for Small and Medium Size Businesses"*** (*http://www.sumtotalsystems.com/success/whitepapers/ROD_SMB_WP.pdf*) includes a checklist for selecting the best LMS solution and a list of potential obstacles in the LMS selection process. This document also provides guidance on procuring a solution that allows organizations to start with a smaller investment but needs an extensible product that can scale to keep pace with a growing organization. The end result will be an adaptable, unified and complete solution that can ultimately drive initiatives that will positively impact customer satisfaction, productivity and compliance.

- Geo-Learning's ***"Learning Management Systems Requirements Checklist"*** (*http://api.ning.com/files/RFP3EEJaRb*lt8kxA-SA-nm6HCxokwEAWySnXeeAyatZMnvA2QKzE8Oz6KuihfTXgDJOWLErKOKm2Uhuh8u-9CI81c1M1rqO/LMSRequirementsChecklistGeoLearning.xls*) allows agencies to rate the importance of different features and functionalities they may be looking for in a Learning Management System, such as:
  - Hosting,
  - Support,
  - Security capabilities,
  - User features, and
  - Reporting capabilities.

  The template aims to be comprehensive, but is by no means all-inclusive. Features and functionalities can be added, deleted, and modified as necessary to meet an organization's unique circumstances.

- The ***Office of Domestic Preparedness (ODP) LMS White Paper*** (*http://www.ojp.usdoj.gov/odp/blendedlearning/pdfs/LMS.pdf*) offers considerations for acquiring a Learning Management System, to include a list of LMS self-evaluaiton questions agencies can ask potential vendors to help them focus on certain "critical considerations" when selecting an LMS. The purpose of this document is to:
  - Outline the characteristics of various blended learning delivery products (e.g., LMS and LCMS),
  - Present some best practices in selecting an LMS,
  - Offer a set of "self-evaluation" questions to help interested organizations focus on products that best fit their particular needs, and
  - Highlight suggested "next steps" in acquiring an LMS.

- The eLearning Guild's 2008 slide presentation on ***"Selecting an LMS: Practical Skills"*** (*http://www.elearningguild.com/showFile.cfm?id=2871*) identifies common reasons for LMS implementation failures and ways to avoid them. This document also provides a case history that breaks down 4 key factors in LMS implementation:
  - Defining your requirements,
  - Finding a good partner,
  - Taking responsibility, and
  - Selling it to your organization.