

Selecting Your Association LMS

In Three (Semi-) Easy Steps

Jon Aleckson

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The special report [Association Learning Management Systems](#), by Jeff Cobb and Celisa Steele, offers a wealth of data on the unique needs of the association and non-profit sector, and on the various LMSs that seek to meet these needs. This white paper, intended as a starting point for associations looking for an LMS, is based on Cobb and Steele's report.

1. Educate yourself

What is an LMS?

An LMS (learning management system) is a software system that makes it easier for organizations to administer and track online educational experiences.

Why would we use an LMS?

Every organization is different, and there are many possible benefits to an LMS. However, most associations seek:

1. *Non-dues revenue generation.* Many associations use their LMS to set up online Continuing Education and Certification programs with associated fees. Additionally, an LMS with eCommerce functionality can lower the resources required by automatically collecting and crediting the fees to you.
2. *Continuing education management.* An LMS provides automated administration and tracking of your educational programs. When a user attends an online course or seminar, it is automatically logged in that user's account.
3. *Increased operational efficiency.* For organizations that use an AMS (association management system), integration of the LMS with the AMS can centralize the eCommerce and record-keeping functions of the LMS within the AMS.

How would we use an LMS?

Boiled down to the bare essentials, here is how an association would typically use an LMS:

1. The association's Education Manager opens a web browser and logs onto the LMS with an administrative login.

"Learners," "Learning Content" and "Learning Management Systems"

A "learner" is a user of eLearning. "Student" and "trainee" were judged to be too specific to describe all eLearning users.

Learning content is any experience or material that a person could learn from: courses (online and classroom), tests (online and offline), webinars, videos, PDFs, forums, and simulations.

Learning management systems are platforms for distributing online content to learners, administering user, and for tracking learners' interaction with this content.

2. The Education Manager uploads a piece of learning content, such as an online Continuing Education course, into the LMS.
3. The association's members purchase access to the Continuing Education course, log into the LMS, and take the course.
4. The Education Manager logs back into the LMS and accesses reports on how many learners have taken the course, whether they have completed it, and assessment scores.
5. If the LMS is integrated with the association's AMS, the members' Continuing Education credits could appear automatically on the members' records.

2. Decide on requirements: you, your must-haves, and your nice-to-haves

Cobb and Steele recommend that you think about how you need the LMS to add value for your organization *before* you start making lists of required features. Think of the “verbs” of what you want to do with the system—then translate those into the “nouns” of features.

The basics. What almost all organizations need to do:

- *Create accounts (usernames and passwords) for learners.* All LMSs give you this ability, but there is differentiation in how you do it: do you have to create them one-by-one, or can you do bulk creation by uploading a spreadsheet or CSV with all the users listed? (If you are planning on registering your entire membership, you probably want the latter.)
- *Enroll learners in a selection of courses.* In the simplest scenario, everyone sees the same courses in the LMS—but many organizations provide dozens or even hundreds of courses. If not all learners will take the same courses, you need a way to enroll them: one-by-one, by including them in a group that gets a certain set of courses, or through the spreadsheet upload method.
- *Monitor how learners are doing in courses.* If you are getting an LMS, you are probably doing so because you need to know learner interaction data. But what do you need to know—whether they have viewed a course? Time in course? Performance on an exam? Or more detailed information, like all the actions taken in a branching simulation? Do you need

What is SCORM?

Everyone looking for an LMS asks this question at some point. SCORM (Shareable Content Object Reference Model) is an industry standard that allows learning management systems to “talk to” eLearning from many different sources. SCORM is the medium through which eLearning components report learner interaction data to the LMS, including information like a learner's time in a course and exam scores.

The SCORM standard does for eLearning what the HTML standard has done for the web. Just as HTML allows objects (web pages) created in different tools to be read by different web browsers on different platforms, SCORM allows eLearning objects (courses, assessments, etc.) from different sources to communicate with different LMSs. Using this common language, a SCORM-compliant LMS can “plug and play” modules of content from other places. For example, SCORM might allow an LMS to launch and track members' progress and performance in an HTML eCourse from one vendor, a JavaScript-based quiz from another vendor, and a Flash-based simulation from yet another vendor. This works as long as the LMS and the eLearning objects are all SCORM-compliant.

How about AICC?

AICC (Aviation Industry Computer-Based Training Committee) was the predecessor to SCORM. It is commonly used in older LMS software.

The bottom line: SCORM and AICC allow your LMS to plug and play modules of content from a variety of sources—whether you purchase the content pre-built, have it custom-developed, develop it internally, or inherit it from an older system.

aggregated data, like what percentage of learners got each question on an exam correct?

- *Play content created outside of the LMS itself.* SCORM compliance (see the sidebar) is a must for most organizations. It allows you to plug and play content from other sources or from your past LMS (where applicable). If you create SCORM-compliant for your new LMS, you will be able to use it in other LMSs, such as a partner's LMS or, if necessary, a different LMS used by your organization in the future.

Options. What you may need to do:

- *Collect fees for enrollment.* If you need to charge learners for access to eLearning, built-in eCommerce or eBusiness functionality will save you the work of manually enrolling learners into courses after they pay their fees. If the LMS integrates with your AMS, it may give you the ability to use the AMS's shopping cart, allowing one-stop shopping for your members.
- *Integrate the LMS with your AMS.* Many associations seek the efficiencies and usability gained through integration with an Association Management System (AMS). An LMS that is integrated with an AMS may, for example, sign members into the LMS as soon as they sign into the AMS (single sign-on). An integrated LMS may also automatically report learner activity to the AMS. Association staff find members' continuing education data and accreditations in the AMS, in the same place as other member data, without having to manually enter the data there.
- *Host the LMS yourself, or don't.* Both SaaS (software as a service, i.e. vendor-hosted) and conventional (you host it) LMSs are available.
- *Set up a certification or continuing education program.* Some LMSs offer features to automate the administrative legwork of maintaining a certification or continuing education program, such as tracking a learner's progress toward certification, achievement of the requirements, enrolling learners who pay for certification paths in the appropriate courses, and even tracking learner's achievements outside of the LMS (for example, awarding credit for attending a classroom CE

LMS or LCMS?

An LMS (learning management system) is designed to deliver eLearning to members, then record their interactions with that learning. From a member's perspective, the LMS is a password-protected website where they access courses, exams, and other types of content. For the learning administrator, the LMS provides detailed reports on what content learners have accessed, which courses they have completed, their exam scores, and much more.

An LCMS (learning content management system), on the other hand, is a tool for content generation: that is, designing, writing, and developing new learning content. LCMSs are used by organizations that need to standardize a large amount of content, keep it updated, and publish it in various formats.

For example, a restaurant chain might use an LCMS to house the "meta version" of the 6-step process for making a menu item. Then, they would use the LCMS to generate a training manual, a web page, and a laminated job aid, all containing that exact same process. To deliver this content to learners, the same chain might use an LMS (without the 'C'). In short, LMSs are "learner-facing," while LCMSs are "back-office."

In practice, the line between LMSs and LCMSs is often blurred. Many LMSs provide tools for generating content—although generally without providing an LCMS's special functionality for standardization. Similarly, while an LCMS might provide a way to deliver content to end learners, it would usually not have an LMS's ability to track learner interactions. Nor would most LCMSs have a SCORM-compliant LMS's ability to handle externally-generated content.

seminar). Finally, LMSs that integrate with your AMS may report this data to the learner's individual record.

- *Create local portals.* Do you need to create local sites and administrators for a sub-set of your users—for instance, all of your members in one region or city? Some LMSs facilitate the creation of local “portals,” which may include separate URLs, local branding, and administrative levels.
- *Deliver eLearning in multiple languages.* Many LMSs offer a selection of languages. Support for non-Roman scripts (right-to-left scripts, vertical scripts) also varies between systems.
- *Let users create their own content inside the LMS.* User-generated content, such as blogs, wikis, and discussion forums, is supported by some LMSs—as is tracking of users' generation of this content.
- *Create your own content within the LMS.* Many LMSs have built-in editors to create courses and assessments within the LMS (these are often called courseware or quiz builders). If you are concerned about being able to use these courses in a different LMS, find out whether the courses created are in a format that can only be read by the LMS, or if they are SCORM-compliant (i.e., portable to other LMSs).
- *Get content created to go into your LMS.* Many LMS vendors also provide eLearning design and development (i.e. instructional design and programming), and may be willing to give you a package deal.

3. Find your best fit

Once you know what you need, create your Request for Proposals. It is a good idea to shop your RFP to vendors rather than putting it up on the web—in the long run, this will save you time.

What do vendors need to know about you? That depends, in part, on your requirements—but a typical list would include:

- Your requirements. Emphasize concision and precision.
- Number of learners currently, and number of learners expected. This is especially important, of course, if the vendor is hosting.

Navigating the LMS landscape

LMS is a distinct software “genre,” separate from genres like CMS and social networking platform, which are general website management tools that do not provide the education-specific functionality of an LMS. Within the LMS genre, there are also sub-genres:

Higher Education. These LMSs tend to be geared toward organizing and redistributing the content used and submitted by students in a conventional university course: that is, distributing readings and collecting papers.

Compliance Systems. These LMSs are specialized toward fostering a linear experience in which trainees receive required information, such as Benefits and Safety Regulations courses.

Corporate. These LMSs borrow compliance functionality from the Compliance System sub-genre, and add special functionality for talent management within large organizations.

Association Niche. These LMSs are tailored for educating association members, who are neither corporate employees (who do not pay for education), nor university students (who pay and are registered for classes in separate software systems). As associations move toward online education as a means of revenue generation, key functions for this sub-genre include: eCommerce, specialized Continuing Education and Certification modules, and learner self-registration.

- Contact point and procedure for questions. Few RFPs can anticipate all the questions vendors may have. An efficient process is to give vendors a deadline to submit questions, then share your answers with all vendors in a web conference.
- Your timeframe: dates for questions received, receipt of proposal, meetings with finalists, final decision, project initiation, user testing, and going live.
- A list of available internal resources, such as your project lead, internal IT, and learning administrator.
- Desired pricing model and range. Cobb and Steele's report includes typical price ranges for various systems at various sizes and levels of customization.
- Hosting preferences. Who will host it—the vendor, you, or a third party?
- An outline for how vendors should respond in their proposal, and the desired length of the response.

Finding value

Once you receive proposals, how do you find value? Cobb and Steele strongly emphasize that you should require clear, real-time demonstrations of each of your requirements from vendors. This is the best way to understand what the actual experience of using the LMS will be like for your administrators and learners. Keep in mind that LMS RFPs are often specific enough on certain points that they require custom programming: in other words, sometimes vendors will not be able to demonstrate a capability because they have not programmed it yet.

Proposals and demo strategy

Ideally, an Education Manager and a Technology Manager should collaborate on an LMS purchase. The Technology manager should be concerned with validating technical issues: hosting, the service agreement, functionality that relates to integration with other systems, and the technical “sand box” review. The Education manager should look at instructional design features, usability for non-developers, and the system's overall suitability for your business model.

Conclusion

Getting a robust and useable LMS requires some work. This white paper is a digestible introduction to the process, based on the hundreds of pages of detailed market intelligence offered in Cobb and Steele's report, *Association Learning Management Systems*. The report has done much of the legwork required for a comprehensive RFP, listing the features and functionality of ten LMSs and leaving more time for deeper conversations about your strategy. It is available for purchase at <http://www.tagoras.com/catalog/association-lms/> or by calling Tagoras at 800-867-2046.