As the learning and development coordinator for the Charlotte Mecklenburg (N.C.) Library, it’s my job to ensure that our staff of more than 500 has access to quality and meaningful training opportunities. Over the past few years, this has become more challenging. Library training coordinators across the country express the same frustration of trying to fill classes with staff members from library branches that often cannot spare a team member for training. Yet ironically, it’s in times like these, times when we are asked to do more with less, that library staff needs training the most.
Tough, the Staff Needs Training

by Lori Reed
The Charlotte Mecklenburg Library has moved to a model of “unified services,” meaning that any staff member at any service point can provide the same level of basic service. Library customers can now check out materials from any service point in the building. Likewise, customers can find out about the latest best-sellers from the circulation desk—now renamed Readers Services. While unified services began as an approach to improve customer satisfaction by decreasing referrals throughout the building, it has proven to be an effective strategy for coping with the loss of staff positions through attrition. Staff, thoroughly cross-trained through all service points in a building, can now easily cover shortages for other departments.

While the number of positions lost seems small (see Table 1), compare that to the increase in the use of our library branches over the past 2 years (see Table 2). Like other libraries across America, the Charlotte Mecklenburg Library has witnessed dramatic increases in library use across the board. In tough economic times, library customers flock to their local libraries to access the free services, materials, and programs we provide.

The Trouble With Training

**Face-to-face training.** In an ideal world, we would provide face-to-face training to every staff member on every competency required to work a service point. Even in good economic times, few organizations can achieve this level of facilitated training, and as any learning professional will tell you, most learning happens on the job rather than in the classroom.

**Synchronous training.** We previously used Horizon Wimba to provide synchronous, or live, online training to our staff. With a small group and a session planned with engaging activities, synchronous training is an excellent way to provide learning opportunities when travel to a central location is not possible or ideal. The challenge for us is finding the bandwidth to conduct such trainings. Many of our libraries are already at maximum bandwidth during operating hours. Additionally, synchronous training still requires that learners and a facilitator come together at a specific time. With library usage going up and staffing going down,
Self-paced training often appeals to self-directed learners who are highly motivated. 

**The Missing Link**

What we were missing was a solution that could tie all the training components together—integrate face-to-face training with synchronous training and self-paced training. PeopleSoft, a human resources management system, already functions as our learning management system (LMS). An LMS tracks training registration and attendance and maintains the training history of employees. What we needed was a way to create and deploy self-paced training from the same environment—from within PeopleSoft.

In February 2009, I sent an email blast to training colleagues from the American Society of Training & Development Charlotte Chapter asking for recommendations on software to create and track self-paced training. Experienced with screencasting tools such as Camtasia, I wanted something that would also track the completion of self-paced training courses. What I wanted was a learning content management system (LCMS). Similar to an LMS that tracks training records such as enrollment and attendance, an LCMS adds the ability to create, deploy, and track self-paced training modules and lessons.

As you can imagine, a solution such as an LCMS is not cheap. Even though there are open source solutions available, such as Moodle, I did not have the time or resources to learn and implement an open source solution. While open source solutions have no initial price tag attached, there is still a cost to host, install, configure, and maintain a complex tool such as Moodle. I was also unsure if Moodle would integrate fully with PeopleSoft, and if so, how would I make that happen without hiring a developer.

Within hours of my email blast, Dick Handshaw, owner and president of Handshaw, Inc., a learning services and solutions company located in Charlotte, called me. Handshaw listened patiently as I explained the library’s situation. At that time we were looking at a total budget reduction of 5%–20% for the upcoming fiscal year. We also faced the grim possibility of layoffs. I explained our need for an LCMS or at least a way to easily and effectively deploy self-paced training. Handshaw listened and asked the million dollar question, “What’s your budget?” I timidly replied, “a few hundred dollars.”

Handshaw, Inc. focuses primarily on instructional design. But the Handshaw team found that more and more of their clients needed a total solution—one that combines content creation and distribution along with the ability to track the completion of training. So the team created Lumenix. Handshaw invited me to the company headquarters where I met the people behind Lumenix and viewed a demonstration of the product.

The system has all the features one would expect from an LCMS. There are two components. Lumenix Administrator, the LMS, offers the ability to register for training and maintains training records. Lumenix Developer, the CMS, allows you to easily create self-paced training modules. The WYSIWYG editor allows for content creation in an environment that is familiar to most users who have used a word processor. You can also import content already created in Word or PowerPoint. Plus, the system is entirely web-based and hosted by Handshaw, Inc., so there are no upgrades or backups to worry about.

Lumenix Developer organizes content in a hierarchy of objects such as lessons and pages that are reusable—meaning I can create an introduction to a course and then reuse that same introduction in another course. To take that a step further, I can create an entire module on how to use the internet and reuse that module in multiple courses. The ability to reuse objects is a huge time-saver in creating elearning solutions.

Lumenix offers a number of ways to assess learners taking a course. For example, on any page you can create a quiz with question options such as true/false, fill-in-the-blank, matching, multiple choice, or essay. You can specify the passing grade, and learners can repeat an entire course or part of a course.

Best of all, I discovered that Lumenix would integrate smoothly with PeopleSoft, as Handshaw works with large corporate clients who also use PeopleSoft.

After deciding that Lumenix would fit the library’s needs, I contacted Dick Handshaw. Handshaw told me that his company was prepared to host the software suite for the Charlotte Mecklenburg Library at no charge. In an email message Handshaw said:

We at Handshaw are well aware of the status of the Charlotte Mecklenburg Library. We know it is well
worth our time to support an institution of this caliber, right in our own community. Our other concern is always with how well the product will be used by internal practitioners. It is your level of commitment and passion for your work that impressed us the most. We are confident that you will make the most of our gift by your efforts in using the product.

Handshaw also said that he “challenges other small businesses to use whatever resources they might have to help our local government or charities that are all struggling right now.”

Training the Trainer

After the contract was signed between Handshaw, Inc. and the Charlotte Mecklenburg Library, my first order of business was to learn Lumenix. Chris Adams, product manager at Handshaw, Inc., walked me through creating a course in Lumenix Developer and then deploying that course through Lumenix Administrator. Being a hands-on learner, I did what any motivated learner does—I printed the user manuals and began playing!

The first thing I realized was that unlike developing face-to-face training where you can easily move from slide to slide or page to page, self-paced training requires you to thoroughly plan a course from start to finish before you begin entering content into the system. Unlike PowerPoint where you can easily rearrange slides, an LCMS has a hierarchy of objects that must be planned in advance such as curriculums, courses, lessons, and pages. Though Lumenix allows you to move those items around, it streamlines the process to first create a storyboard for the course.

A storyboard can be as simple or as complicated as you like. The librarians who teach our face-to-face readers’ advisory courses jumped at the chance to convert their existing courses into self-paced modules. With very little instruction on how to create a storyboard, they produced a simple yet effective storyboard for their first course (see Figure 1).

A more elaborate storyboard should be used for more interactive courses as you start building in assessments and learner activities. Figure 2 shows an example of the same content storyboarded in a table. There are prompts for the staff member designing the course to note what graphics or animation are needed; what interaction, if any, there is with the learner; and what positive or negative feedback to offer depending on choices the learner makes.

One of the biggest challenges I’ve faced in this project has been explaining what information I need in a storyboard to the staff who is helping create courses (initially I wasn’t even sure what was needed). Now that we’ve developed our first
course, however, it’s easy to share a copy of that storyboard along with a blank template with any staff member who wants to develop a course.

Final Steps

While the first two courses were being developed, the team from Handshaw, Inc. and I began working with Mecklenburg County’s IT department to determine how we would integrate PeopleSoft and Lumenix together for a seamless user experience.

I estimate that it will take approximately 100 hours to create a single, 1-hour course.

First, we needed to get basic employee information, such as employee ID numbers and names, from PeopleSoft into Lumenix. This now happens on a weekly basis by automated procedures: PeopleSoft leaves a file with our employee information on a secure server; Lumenix then automatically imports this data and updates its records.

When an employee logs in to PeopleSoft and navigates to the training section, he or she will see an option for self-paced training. This automatically opens a new window, and information is transmitted to Lumenix to log the employee in for training. At this point, the employee is logged in to Lumenix where he or she can enroll in and complete self-paced training courses. (The branding and navigation that the learner sees in a course have all been configured by Handshaw, Inc. in our custom course template.) Upon completion of a course, information is transmitted from Lumenix to PeopleSoft to update the employee’s training record. For the user, the experience is seamless. For the training administrator, this is like magic.

Ready, set, slow. Like a well-made movie, a great self-paced training course seems so smooth that it looks like a piece of cake to create. Just how long does it take to create the average 1-hour, self-paced training course?

In 2009, the American Society for Training and Development published survey results of respondents who were asked how long it takes to develop 1 hour of instruction. The respondents reported that it takes between 73 and 365 hours to create a 1-hour self-paced course. The wide variance is due to factors such as how interactive the course is and whether or not you are creating custom artwork and animations. In 2002, the e-Learning Guild published similar findings showing that it takes an average of 117–276 hours to create a 1-hour elearning course.

I estimate that it will take approximately 100 hours to create a single, 1-hour course. This time is significantly shortened when staff members volunteer to help design the training, and I am sure that as I gain more experience with Lumenix, the process will go faster.

Even though the upfront development time is much greater for a self-paced course, the benefits more than make up for time spent. For example, to offer a 1-hour mandatory course to 500 staff members will take about 100 hours of development time. Contrast that with offering a 1-hour face-to-face training session for 500 staff members where you are looking at costs such as the following:

- Trainer time to conduct at least 25 sessions
- Travel time and mileage for staff to travel to and from training
- Lost opportunity for what those staff members could have done with the time lost traveling between library locations
- The impact this level of reduced staffing has on the customers in our branches

For the reasons above we choose our face-to-face training opportunities carefully to ensure that they align with the library’s strategic goals.

Ready, set, go. We are in the final stages of deploying Lumenix for our staff and introducing the first two self-paced courses. We have other courses in various stages of development thanks to a core team of staff who volunteer to help design and deliver training.

Introducing self-paced learning to staff at the Charlotte Mecklenburg Library will enable us to offer a wider variety of courses that can be accessed and completed by employees at a time that is convenient for them without having to drive to another location to attend training. We have plans to supplement self-paced training with synchronous training later in 2010.

In a time when library staff across the country is being asked to do more with less, training is more important than ever. The customers we serve demand and deserve the best. Continuous training and learning opportunities for staff will help libraries provide exceptional customer service to their patrons.

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