

In the Classroom 98  
**What You Need to Consider for  
a Learning Management System Migration**

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**Stan Skrabut:** Well, thanks ever so much for taking time to listen to this podcast. I know you could be doing other things, perhaps you are, and you're still hanging out with me. I really appreciate it. As we're coming-- I guess this episode, we should be pretty darn close to hitting 5,000 downloads, and I'm really excited. I can't wait to officially hit that mark but we're also getting very close to 100 episodes. Not sure exactly how what I'm going to do for the 100 Episode episode, but I'll have to figure out something.

Been extremely busy trying to get my family moved in with the new job and everything that's going on. Lots of changes going on. Speaking of changes, well, it's that season again. I'm not talking about Thanksgiving or Christmas, I'm talking about switching to a new learning management system. When I first got to Jamestown Community College, SUNY and JCC switched from Angel to Blackboard, or at least JCC switched from Angel to Blackboard.

That was a transition. My role was to help faculty acclimate to the new learning management system. Now, SUNY is reviewing its contract and may switch to a new learning management system. Next month, I think they're going to make it official which one they're moving to. That may require Jamestown to move to a new learning management system. Well, also, when I left the University of Wyoming, they switched. That was a new learning management system for them.

Right now, I'm also in the midst of switching LMSs and we're just at the beginning stages. Not beginning as in deciding if we're going to move or what we're going to move to but I think we're definitely going to move. We've identified a learning management system and we started the beginning stages of that. I'm not really at liberty to say what we're moving to at this point but it'll be coming out. People will know, sooner or later.

Since I'm just starting the process as well as the team lead, I thought I would talk to you about my thought process as I'm preparing for this migration, because there's a lot to consider when making a migration. As I mentioned, the decision to switch LMSs has already taken place. It is now a matter of executing the decision. Making the decision to switch to a new LMS is saved for another conversation. Fortunately, I have been mostly on the execution side.

A lot of other folks are into making the decision and that is-- Lots of conversation goes into that. Instead, I'm going to focus on the plan to make the migration itself.

Starting with my new role, it was with the understanding that the college was going to switch their learning management system and I was going to take the lead on that migration. Well, naturally, I want to do a good job and make a good impression.

Most importantly, I want to make this as smooth as possible, especially for the faculty because I'm responsible for supporting the faculty with this new learning management system. The more work I do upfront, the more likely that it's going to mitigate all the additional support that I'll have to provide after the fact. I want to try to make it as smooth as possible. With these type of projects, I do not believe that you can over plan. Currently, I'm developing my plan right now.

There are things that I think should be in a plan and I'm going to share those things with you. I'm also going to talk to you a little bit about my thought process. The first thing is deciding what's going to go into your plan. This is, I think, the research or the finding this information that's part of that first phase was to gather all this information that's going to help me create action items that I need to check off and make sure that we have into place.

To do this, I first went to the internet. Basically, I was looking for previous plans. Since institutions have been migrating and switching LMS's for 20 years, I was pretty confident that others shared their insights and I certainly was not disappointed. I scoured the internet for plans and insights related to the LMS I was transitioning to as well as lessons learned from getting out of the LMS that I'm currently in. Fortunately, people have been very giving and forthcoming with the knowledge that will help them make this move easier.

I've gleaned as much as I think I can. It's basically a research project. You just go look and you try to pull the nuggets of information that you think will help you and start organizing that. Another place I looked was tapping into my network. As I mentioned, the University of Wyoming had recently made a move to a new LMS. I asked them for their plan. Lucky for me, they had also written a book chapter around the process, and they were kind enough to share, I really appreciated that.

Another place to look is look at the LMS website. The LMS that you're moving to provides a lot of support and training and therefore has a wealth of information that can help you identify key points that you need to consider when building your plan. You're looking for anything that you need to make a decision around. It could be variables that you need to set in the administrative settings. It could be items that you want to train on, or you think need to be trained on.

All that comes into play and you just start cataloging. It also helped by looking at this learning management system, their support, and training site. It helps to gain a familiarity about what supports that they provide, where the gaps are, and what supports that you need to provide for your faculty and students. You're seeing how robust their site is. Then you have to figure out what gaps that you need to fill up. Also, consult your transition team. Early on in your process, you will need to put together a transition team.

This transition team should have representation across your institution. From academic affairs, you'll have faculty, students, students support and information technology, Instructional Technology, accessibility, et cetera. You're going to have all kinds of different groups and people that you're going to interface with. They serve a number of roles early on. They're going to help look at your plan and identify additional gaps and make sure that they're written into the plan so you can take care of them.

They are going to provide a valuable input from their perspective. Then also, part of this is the vendor's plan. If you're working with a vendor, some LMSs don't have a vendor and you're on your own. In most cases, you have a vendor that you're working with. They have a transition plan but I found most of these plans lack the detail that makes me comfortable. They're really on the big picture, the high-level milestones.

I just find that much more needs to be done at the institutional level. Some really small pieces that they're not really going to touch on but having their plan in hand also helps to identify different items that you need to consider. Now it comes, you done all this fact-finding, you're collecting all this information, you need someplace to put it. I use Diigo to collect these references, these resources, and have links. I put that in Diigo.

When it comes to actually mapping out your plan, I recommend that you use a project management tool such as Microsoft Project, or Asana. In our case, our vendor is using Asana for the high-level milestones, and I'm fleshing out our plan with Microsoft Project. A project management tool allows you to do a lot of really powerful things. Not only can you create a task, but you can also assign it to an individual who's going to be responsible for its completion.

You can establish deadlines, and also create dependencies. Some things have to happen before other things can happen. Mapping those out, you can really identify if your plan is on track or not. The nice thing is, is you can check these things off as you're working through your plan. Everybody can see what the progress is and whether you're on track to meet the goals that you've set. Make sure that you're using a project management tool of some sort.

There's also Open Source, OpenProject is another tool that you can use. This project plan, I'm also using Microsoft Teams that I will get the whole transition team in one place. That project plan will be as part of Microsoft Teams so they have an opportunity to look at it and also have an opportunity to have input in too. What do you put into this plan? Here's some items that I'm considering. First of all, putting together my transition.

It's going to be imperative that I put together a transition team. A lot of the early design and operational decisions will have to be reviewed by the team. This team can also serve to help faculty with the transition. They're going to be used for training, they're going to be used for coaching. That is going to be an important role as things move forward but early on in the project, they're going to be making

decisions based on the setup of the learning management system. Early on in the learning management system, we have the LMS setup.

You will have to basically get the LMS to a certain operational status. There's lots of tasks that are involved from setting up data feeds to getting the look and feel the way you want, determine what global navigation that you'll need, a course template, and installing third-party applications. Let me briefly touch on those. First, your data feed. When you're setting up your data feeds, you're going to want to be able to set up automatic feeds from your student information system.

These feeds typically include courses, students, faculty, your terms, and you want to make sure that this goes pretty smoothly, that when students are added, that they're added. When they drop a course, that they're pulled out of the course when you want. You want to make sure that that's all working properly. You also want to set up your single sign-on if possible so students are not required to learn a whole new password and login system. They can sign in one way and they make that connection.

Because learning management systems are mature and folks have already set up processes for all the different types of combinations from student information systems to different LMSs, the odds are that those processes are documented and it's just a matter of getting them, make the tweaks for your local settings and they should work.

After getting the data feeds, or the same time is to set the branding and look and feel. One of the first things that I did was consult with our marketing department to brand our site with the right colors and imagery. "Can you get that all setup? Looks great, I'm pretty happy with that." Another consideration is global navigation. What navigation elements do you want to add? For example, do you need special links to your library? Student support, faculty support, those types of things.

You have to determine where they're going to show up in your learning management system and who has access to what pieces that's all done at this time. Same thing goes with admin or global settings. There are countless, countless different settings that need to be reviewed and set, having these conversations with your transition team are important because you are allowing or denying permissions to different users.

Depending on the sophistication of your learning management system, it may be for groups of users and you have to determine those roles and what permissions they have. For example, can users create their own courses or can they drop a course? Those are decisions that need to be made and then, you set. Ideally, once you set them, you pretty much forget them. They just work.

Building a course template. Building a course template, I think is one of the more important tasks because it speeds up course development. It increases consistency for students and ensures key elements are included in your course because you've created this course template that if there's elements dealing with universal design for

learning that you want to put in consideration, you can bake this right into your course template. Your transition team, that's a good group to help define how that's going to look and feel.

Also during your setup, you need to identify and install third-party application. Some of these third-party applications may include open-source platforms. They may be commercial textbook or just other academic tools that you want to put into your learning management system. You need to get them in there and make sure they work, know how they work so you can train faculty later on how that works.

That is basically the whole LMS set up, getting those important pieces, and from there you start building on that. One consideration is student support. This LMS is going to be new to students. What can you put in place to help them with the transition? What can you do to help them learn how to use the LMS, to make the technology transparent, to the course content that they're going to be shown?

One suggestion for doing this is to review your past request for assistance, especially if you've had a prior LMS. What is your help desk reporting? Those are great places to start identifying what support mechanisms that you need and start building them around those types of requests. If there's not a student orientation available, then probably a good idea to create one and make sure that that's ready to go so students can learn how to use the LMS.

Also, how do students ask for support, can you incorporate that into the LMS, and possibly even down to the course level? You want to make it as simple as possible for students to ask for help or get the support that they need. In addition to student support, you also have faculty support, it's very similar. For many faculty members to switch to a new LMS, it may be entirely new to them.

If you've used another LMS, your lift is going to be a little easier because they're going to benefit from the transfer of knowledge that they know quizzing is possible. It's just how do you do the quizzing? They know discussions as possible how do you do it in this new LMS? They know what the questions are now and many of them will use Google in combination of what LMS they are looking for, discussions in this type of LMS and they'll get the answers that they need.

Also, you want to make it so you're providing the supports that they need, kind of a just in time learning that as you're ramping up on a new term, you want to provide instruction on how to add content, how to add quizzes, those basic task, and provide that to the faculty as soon as possible. Then later in the term, you're going to provide other recommendations. Maybe at the end of the term, how to archive their course, things like that.

Once again, looking at past requests and try to get ahead of it, but also for faculty that have additional requests and to make that as easy as possible to collect those requests, how you should try to do that. In the past, I've created forms to collect requests for merging courses or copying courses, or other routine tasks. That's something I'm looking at as we're moving forward and how to best do that. That is



faculty support. Another thing is looking at training needs. Training has to be a prime consideration for everyone involved in the LMS, from the admin to the faculty, to the students, there has to be training available that they can take in the modality that they want.

Considering self-paced courses, like orientation, having a self-face course, face-to-face workshops that you set aside time to bring faculty together, to show them how to do certain pieces of the LMS, webinars with this current, COVID doing things on Zoom or Teams, or some other webinar platform, that has to be taken into consideration. I talked before about email delivery courses. That's another way to get information out to faculty.

All this has to be planned, created, and scheduled, and that has to be built into your plan. Then comes course migration. What courses are you bringing over from your previous LMS that can be copied over and reshaped to the new LMS and make it just really easy for the faculty to get up and running? You can't bring everything over and you can't bring-- Well, maybe you can, but you can't bring it over all at once.

You have to have a plan on how many courses can you migrate? How many should you migrate? You're going to have to export those courses, you're going to have to set priorities on what is exported. This is probably one of the most labor-intensive processes, it just doesn't necessarily go easy, that has to be built-in. Communication plan. Communicate, communicate, communicate. You cannot over-communicate.

It is essential to establish a communication plan to identify, schedule, and distribute key messages throughout the transition and even well past the transition period and this is for faculty and students, just being able to get the message out. What's happening, keep everybody apprised of what's going on, how they can be part of the process, what they need to do for success. All of that is baked into your communication.

Then finally it's important to identify and schedule key performance indicators. Basically, knowing your metrics, but before you can do that, you have to know what success looks like and what are the objectives that you're going to measure and keep tabs on. That's that whole reporting piece that has to be definitely a part of your plan. Individuals are going to want to know if this migration was successful, how successful it was.

Well, that's my list. It's certainly not complete, but it's what I'm going to be starting with. Over the next few weeks, I'm going to be building on it with the support of my transition team and I will let you know how the transition goes. In the meantime, here's a quick plug for my book.