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The Alma Learning Programme at Plymouth University

Learning to learn in permanent beta

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INTRODUCTION

In September 2012 at Plymouth University Charles Seale-Hayne Library, we embarked on the project to upgrade the library management system to Ex Libris Alma, a next-generation library services framework (Ex Libris, 2012). When I was asked to oversee the training programme for Alma I realised this was going to be a significant challenge. Putting together a training programme of any kind is never easy as there is so much to consider: learning styles, the trainees' existing skills and knowledge, time, resources, learning environment. In our case there were additional factors to take into account:

- 1 Unlike Voyager (Ex Libris, 2012), our previous library management system, Alma is delivered as web-hosted software, allowing Ex Libris to improve and develop the system constantly. Updates are frequent (monthly) and we are no longer able to schedule or stop the process to ensure everyone has time to learn how to use new features. A key learning outcome would have to be acquiring the ability to learn quickly and adapt to Alma as it developed.
- 2 We had a diverse group of 50 staff clustered into two distinct teams, one handling front-desk duties and the other back-office operations such as acquisitions and resource management. The teams, particularly the larger front-facing one, were used to learning in traditional ways, usually in small groups or one-to-one training sessions delivered

by supervisors and the occasional hands-on workshop.

- 3 We had very limited resource. I was able to secure the support of five team supervisors, who would provide expert knowledge in their own areas. Even with their help, however, it was doubtful that we would be able to cover everything in the three months we had before the new system went live. In some cases supervisors were only a few steps ahead in learning Alma themselves. There wasn't enough time for them to become proficient and transfer their knowledge to their teams.

But perhaps what originally seemed like a logistical nightmare was in fact an opportunity to equip our staff with the mindset needed to work with Alma.

In the software industry, 'beta' refers to the final stage of software development when a product is close to being ready for release, but still undergoing testing. In the past, there was a clear line between beta and 'release to manufacturing'. Nowadays, as more and more software solutions are hosted in the Cloud, the boundaries have blurred, and specialist software companies like Ex Libris are following in the steps of Google with products that are never fully out of development. In recent years, the concept has been extended to represent a life-long commitment to continuous personal growth, an understanding that every day is an opportunity to learn and that we are also in 'permanent beta' (Hoffman & Casnocha, 2012). After all, if the system is developing, don't we need to be doing so too?

We felt that if we were able to provide a learning framework in which our staff could take responsibility for their own learning, with guidance and support from their supervisors, the task could be manageable. This approach would prepare our teams to get into the mindset of continuous development and fit in with a key theme of the Plymouth University Digital Strategy, which vows to 'develop the digital literacy skills and confidence of our professional services staff to enable them to develop and deliver efficient services, communicate effectively and promote the reputation of the University' (Plymouth University, 2012).

THE ALMA LEARNING PROGRAMME – TRAINING, BUT NOT AS YOU KNOW IT

This is how the Alma Learning Programme for Plymouth University came about. The idea was to create a self-directed programme of learning activities that would allow staff to get familiar with Alma and acquire the competences that they need to work with our new library management system.

Self-directed meant that we would provide the structure for the programme, as well as a support framework. Staff would be able to set their own pace and decide in what areas they would need to spend more or less time. Each individual would have control over their own learning, but this also meant that they were expected to engage and take the initiative to learn and to ask for help if they got stuck.

By moving away from traditional training we thought we could reach a number of goals:

- The programme could be adapted to each personal learning style.
- It would account for staff having different levels of awareness, e.g. some team members had helped to test our Alma data and settings and were therefore more familiar with the interface than those who had not been involved in the tests.
- It allowed us to embed the concept of continuous development and draw a parallel between Alma being constantly improved and staff being able to pick up new features as they appeared. This was the future, and it made sense to make this new way of working part of our culture from the very beginning.
- In time, staff would become more resilient as they gained familiarity with the online help and other support materials. There would be less dependence on other colleagues and increased ability to deal with situations 'outside the script'.
- Supervisors could make better use of their time by looking through the existing provision of training materials and contributing to the design and implementation of the self-learning programme, as well as supporting those who needed it most.

FUNDAMENTALS OF THE PROGRAMME

The learning programme was created around three interconnected concepts (Fig. 1):

- competences
- supported self-learning
- self-assessment.



Fig. 1 Principles of the Alma Learning Programme

Competences

The competences, or learning outcomes, reflected the knowledge and skills that staff needed to have in order to operate Alma effectively. Competences were listed in a table and mapped across to existing learning materials and activities that could be used to learn and practise each task (Fig. 2).

Supported self-learning

From the beginning, we knew that this plan would require some supervision and significant support. We could ask staff to take responsibility for their own learning, but they might have questions, or experience problems accessing the materials. And what about time? How long should people spend on their learning? Which parts of the day-job could be dropped or halted?

We addressed these issues by providing a supported self-learning combo:

Learning materials + Study time + Mentors + Workshops

- Staff had at their disposal a variety of **learning materials**, including workbooks, webinars and short online tutorials, as well as the Alma online help. Due to the relatively short timescale we had for skilling staff in the use of such a vast system, instead of creating our own resources we used the learning materials that had already been provided by Ex Libris.
- Study spaces were provided and staff were encouraged to book **study time** to go over the learning materials. We used the online tool Doodle (<http://www.doodle.com>) to keep track of bookings and allow everyone to see when study spaces were available.

ALMA – FULFILMENT COMPETENCES

ALMA Category	Competence	Notes	Role	Learning materials	Other support materials
General	Understanding Fulfilment Infrastructure	Includes: • Libraries • Locations • Circulation Desks	Any	• ExL Learning Center classes Alma 106 (contact Project Team for log in)	• ALMA Training – Fulfilment Infrastructure PowerPoint
General	Understanding Alma-Primo integration		N/A	• ExL Learning Center classes Alma 601 + Alma 602 (contact Project Team for log in)	
Circulation Desk Operations	Finding items and understanding item information	Includes: • Searching for items • Item status • Notes	Any	• ALMA Help Contents – Resource Management • ALMA Help Search - Viewing items • ExL Learning Center classes Alma 106 (contact Project Team for log in)	• ALMA Training – Day to Day Operations PowerPoint • ALMA Training - Day-to-Day operations hands-on activities practice handout
Circulation Desk Operations - Managing Patron Services	Viewing and understanding patron information	Includes: • Searching for patrons • User groups/roles • Blocks • Notes	Circulation Desk Operator (logged into a circulation desk)	• ALMA Help Contents – Fulfilment – Circulation Desk operations - Managing Patron Services • ExL Learning Center classes Alma 106 + Alma 603 (contact Project Team for log in)	• ALMA Training – Managing Patrons PowerPoint • ALMA Training - Managing Patrons hands-on activities practice handout • ALMA Training – Day to Day Operations PowerPoint • ALMA Training - Day-to-Day operations hands-on activities practice handout
User Management – Managing Users	Managing Patrons	Includes: • Adding Users • Editing Users • Importing External Users • Deleting Users • Deactivating Users	User manager User administrator	• ALMA Help Contents – General - User Management • ExL Learning Center classes Alma 106 + Alma 701 (contact Project Team for log in)	• ALMA Training –User Management PowerPoint • ALMA Training - Alma User Management hands-on exercises

Fig. 2 An extract of the competences table for the 'Fulfilment' area

- Each person was given a **mentor** to support them through the process. It was important to communicate what staff could expect from their mentors. Mentors were not there to answer functional questions about Alma (although some might well be able to). Their role was to discuss progress and answer general questions or concerns. They would monitor whether staff were struggling in any aspect of the programme, e.g. understanding the learning concepts, or finding time to study and practise. The mentors were a key part of the plan, tasked with monitoring the process and reporting back in weekly review meetings. In total we had five mentors for fifty staff.
- We ran **workshops** to troubleshoot problems or go through topics that were not covered sufficiently in the learning materials. The workshop topics were identified from queries raised by staff and concerns picked up by the mentors.

Self-assessment

The final part of the programme required staff to use a series of tasks and exercises to assess their own ability to use Alma. Just as with the learning materials, the self-assessment tasks mapped out to the list of competences (Fig. 3). When staff completed a certain exercise satisfactorily, they could consider themselves competent in that area. If needed, mentors provided additional guidance, and once again, monitored progress and reported back to the implementation team with any issues.

TIME TO SPREAD THE NEWS: LAUNCHING THE ALMA LEARNING PROGRAMME

Once all the pieces of the jigsaw were ready we just needed to bring it all together and explain the process to staff. We took a double approach. First we created a site to tie together all the elements of the learning programme (Fig. 4). The site would allow us to provide links to the competence lists, learning materials, mentors' names and contact details, study room booking forms, etc. We added a feedback form so staff could ask questions or raise concerns. We also had a list of FAQs where we posted information in response to queries.

We could have left it there, sent the link out to staff and let them get on with it. For some people that would have been enough, but we knew the concept of self-learning was not familiar to everyone and it was important to give every individual the opportunity to hear the same information. Hence, we organised workshops for all our staff where we explained the process step by step. This also gave everyone the opportunity to express concerns and raise queries.

KEEPING THINGS ROLLING

After the kick-off workshops, it was time for the mentors to step into action. Their role – keeping in touch with the staff and identifying issues – was key to the success of the project. Just as with the learners themselves, it was important to allow them enough flexibility to choose when and how

<YOUR NAME>		COMPETENCES												Task Completed Yes/No	Your Comments											
		General		Acquisitions Competences				Resource Description Competences																		
INSTRUCTIONS: Work through the task list to meet the Acquisitions and Resource Management competences. When you have done a Task, enter "Yes" in the Task Completed column. You can make annotations for yourself or your mentor in the Comments column.		Searching the repository	Understanding the Purchasing Workflow	Creating and Searching for PO Lines	Packaging Purchase Order Lines	Processing Renewals	Understanding the Invoicing Workflow	Creating and searching for invoices	Working with invoices waiting for payment	Understanding Alma Inventory Data structure	Understanding the Metadata Editor functions and information	Creating and Editing records	Getting records from External Resources	Using Authorities	Using Templates	Adding, Updating, Deleting and Relinking holdings	Adding, Updating, Deleting and Moving Items	Activating Electronic Resources	Editing electronic package and portfolio information	Adding, updating and deleting Local Packages	Adding, updating and deleting Local Portfolios					
		NO TEST AVAILABLE																								
		TASKS	Finding bibliographic records	*																						
			Ordering individual items			*																				
			Checking previously ordered items			*																				
			Packaging various order lines into a single order				*																			
			Completing the ordering of materials		*																					
			Creating invoices for ordered items						*																	
			Checking previously created invoices						*																	
			Paying invoices							*																
			Completing the invoicing of materials					*																		
			Navigating successfully between bibliographic records, holdings and items									*														
			Viewing and understanding records in the Metadata Editor										*													
			Creating and editing records using the Metadata Editor										*													
			Finding and importing records from external resources, eg BL or LOC										*													
			Using existing templates to create a bibliographic record from scratch											*												
			Adding/updating holdings												*											
Adding/updating items														*												
Activating e-portfolio/package															*											
Editing e-portfolio/package information, eg coverage, license details															*		*	*	*	*						

Fig. 3 Example self-assessment checklist

The Alma Learning Programme website interface includes a navigation sidebar on the left with links to Home, Competences, Learning materials, Links to Alma environments, Workshops, Mentors, Feedback form, Discussions, and Team Discussion. The main content area features a header for 'The Alma Learning Programme...' followed by a descriptive paragraph and a numbered list titled 'How will it work?'. A central graphic depicts a white box with colorful, abstract shapes rising from it. To the right, there are sections for 'Workshops' (with a diary and 'Add new event' button), 'Practice and Learning Materials' (with 'Links to Alma Environment' and 'Add new link' button), and 'Mentors' (with a brief description and 'Add new link' button). At the bottom, a 'Competences' section lists documents with columns for 'Type Name' and 'Modified By'.

Fig. 4 The Alma Learning Programme website

they contacted their 'mentees'. Most mentors chose a combination of email and face-to-face contact, which worked well.

The mentors got together weekly, and as learning programme coordinator I took the role of 'mentor to the mentors'. I checked that things were on

track, but it was also an opportunity to discuss concerns and find solutions as a group. The feedback from the mentors was very important, not only because they relayed how things were progressing in their teams, but mainly because they were a key instrument in the delivery of the programme. If they appeared positive and confi-

dent, their staff would pick up on that vibe, whilst any negativity could quickly transmit to the teams and ruin the whole plan. Meeting weekly allowed us to identify issues and respond to them in a timely fashion, putting more resources where they were needed.

REACTIONS

One of the most interesting things about the process of creating and rolling out this learning programme has been seeing the changing reactions from staff. The initial meetings with the learning programme implementation team members revealed anxiety about the huge task we had ahead of us: a whole new library system, so many staff, different skills and abilities, changing the existing culture... It was a great challenge and some were sceptical about what we could achieve.

Breaking down the process into smaller, more manageable tasks made the goal achievable. As we moved forward, we also took encouragement from the positive feedback we received. Staff liked the website and the fact that all the information they needed was well presented in a single place. The workshops were very well attended and staff welcomed having someone taking them through sticky points, as well as the opportunity to ask questions. We noticed that the queries were very focused and aimed at extending understanding beyond what was on the learning materials.

Some of our staff sailed through the learning materials and quickly completed their self-assessment. As expected, others needed some support, but this is where resources could be used wisely. By freeing up those who were quite capable of completing the programme alone, we had more time to spend with the staff who needed assistance.

Not all the feedback was positive. For example, as mentioned earlier, we compromised by using learning materials provided by Ex Libris, instead of writing our own. Generally, the materials covered the competences well, but inevitably there was duplication in some areas and a lack of information in others. With more time and resources we would have spent longer filtering through the resources to present a more targeted learning experience.

Some colleagues would also have liked more workshops. They missed the directed training they had got accustomed to over the years. We were careful to balance the need for more work-

shops against the desire to be taught, to become a passive learner again. Yes, we know that on this occasion we asked staff to work harder on their own learning; the result, we feel, is that they are better prepared to deal with the challenges and surprises that a new system is going to throw at us.

CONCLUDING THOUGHTS

The real proof of the success of the programme, however, was the attitude of staff as we went live with Alma. Despite some last-minute technical issues, staff at the information desks were in control and coped with the change extremely well. The self-directed approach has reinforced independent and collaborative learning behaviours, with individuals supporting one another and reaching out for additional information when required.

No doubt there will be some hiccups along the way, when a new feature appears or things do not work as expected, but we feel that we have taken the first decisive steps in equipping our staff with the best possible skill: the ability to work with Alma in permanent beta.

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