

# ASSOCIATION E-LEARNING

March 2009



## **The State of the Sector**

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# Introduction to Association E-learning 2009

## About This Report

To the best of our knowledge, *Association E-learning 2009: State of the Sector*, represents the first major effort to assess the state of e-learning in the association market and provide insight into how the role of e-learning in the sector may evolve in the coming years.†

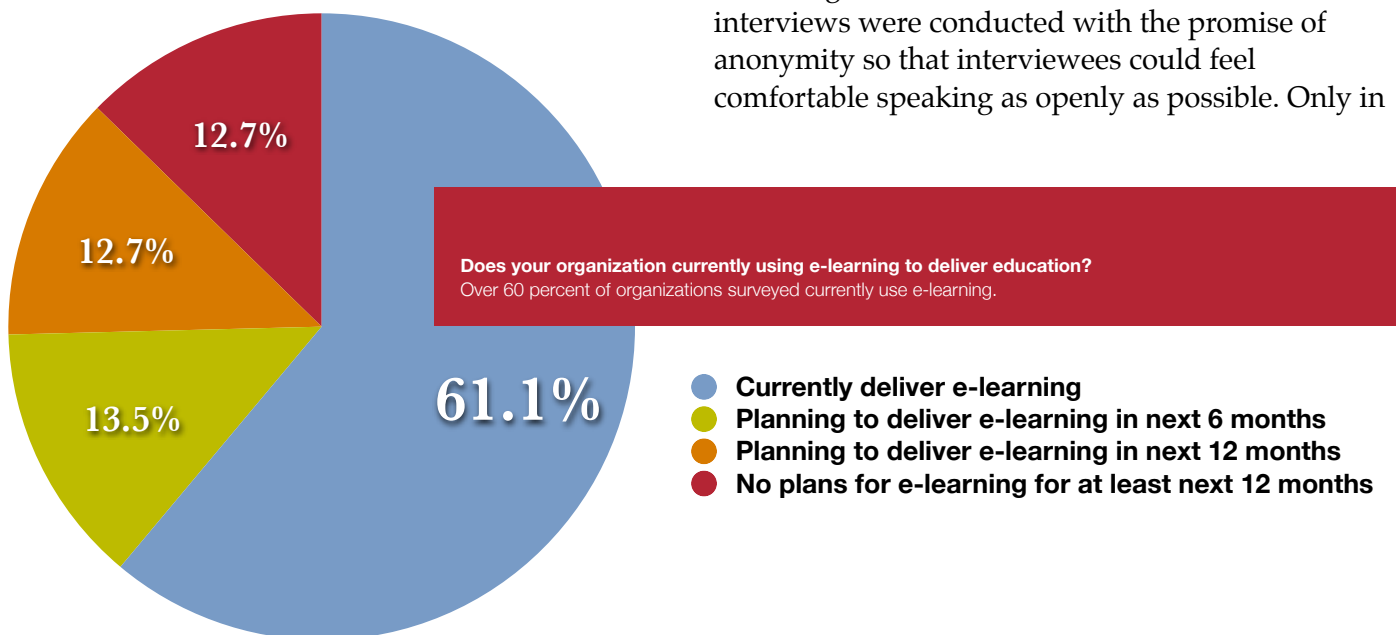
Our hope is that the information here will be useful in providing points of reference and perspective to organizations planning for e-learning initiatives or hoping to grow their current initiatives. We view it as a starting point for continuing, in-depth research about e-learning in the sector that we plan to conduct over the coming years.

At the core of the report is a survey of associations conducted from November 20, 2008, to December 19, 2008. We received 488 responses to this survey. Out of these responses, 61.1 percent were from individuals who indicated that their organization is currently using e-learning. An additional 26.2 percent indicated they plan to start using e-learning within the coming 6 to 12 months, while 12.7 percent indicated they have no plans to start using e-learning in the coming 12 months.

It is important to note that we were purposely broad in defining e-learning. In our experience, a significant number of organizations limit the term *e-learning* to self-paced online courses and do not use it for Webinars, Webcasts, or other forms of educational content delivery online. In an attempt to ensure that survey participants took into account all forms of online education, the following definition was presented prior to asking organizations whether they use e-learning to deliver education:

*E-learning, also known as computer-based training or online distance education, refers to computer-enabled learning carried out by individuals or groups outside of a physical classroom, either over the Internet or an internal network. There are many methods of e-learning such as Webcasts, self-paced tutorials, podcasts, facilitated discussions, etc., but for the purpose of this survey, any activity in which a user receives instruction via a computer counts as e-learning.*

To add to the data collected through the survey, we also conducted phone or e-mail interviews with 20 associations and 12 providers of e-learning technologies and services to the sector. These interviews were conducted with the promise of anonymity so that interviewees could feel comfortable speaking as openly as possible. Only in



† We conducted surveys focusing on e-learning in the broader nonprofit sector, including associations, from 2004 through 2006. The current report represents a continuation of those earlier efforts in many ways, but is also much more comprehensive. The 2004 through 2006 survey results are available, free of charge, at [www.jeffthomascobb.com/writing](http://www.jeffthomascobb.com/writing).

few limited instances, and with the permission of the interviewee, are the sources of quotations or other information revealed in the report. Our frequent use of quotations from the interviews is purposeful—we heard from many interviewees that they do not have sense of what their peers are doing or where to go to find out what other organizations are doing. Our hope is that the extensive use of quotations will help a voice for e-learning in the sector emerge.

In addition to quoting frequently from the interviews, we have also crafted brief case studies to highlight the efforts of some of the organizations we interviewed. These were done with the organizations' permission, and we tried to be as diverse as possible in selecting the organizations. The case studies span a range of industries and feature associations of varying size and geographic focus. Our intention is to continue to mine case studies from the more than 300 pages of interview transcripts we have collected as well as from our ongoing conversation with organizations and to share these, as they become available, with purchasers of the report.

Finally, the two authors of this report have each worked in e-learning for more than a decade and have worked specifically with associations for the better part of that time. Throughout the report we provide our own analysis of the information collected through the survey and the interviews, and we draw on our own experience to offer perspectives that may not be readily apparent from the data. Our approach to doing this is relatively conservative, based on the limitations naturally imposed by a non-probability survey (see the chapter "Methodology"), but even more importantly, on our sense that we are still in the early stages of e-learning in the association sector—a sector that is, by its nature, quite diverse and fragmented—and that broad conclusions must be put forward cautiously.

The report is structured into the following sections:

1. The executive summary
2. This introduction
3. An overview that discusses demographic data, the purposes of association e-learning, the barriers to and benefits of e-learning, and satisfaction with e-learning
4. A chapter on operations and e-learning that looks at what's produced, who produces it, using what process, and with what tools
5. A chapter that takes the business perspective, looking at the strategy that drives e-learning initiatives, expenses and income, marketing, and competition
6. A chapter on e-learning technology, including the end user point of view and the organizational standpoint
7. The state of e-learning in the association sector based on our analysis of the survey data and interviews
8. A discussion of the methodology used for collecting the data that is the basis of this report
9. A series of appendices that provide a list of participating organizations, the raw online survey data (parts of which are cited throughout the report), the survey methodology, and information about Tagoras (publisher of this report) and Jeff Cobb and Celisa Steele (authors of this report)

Our sincere hope is this report proves useful to associations as they assess their e-learning initiatives or contemplate throwing their hats in the e-learning ring.

**Partial data from the online survey is included throughout this report. See Appendix B for the raw survey results.**

**The chapters on the operational, business, and technology perspectives end with a summary of trends and a list of questions for organizations to ask themselves.**

## Appendix D: About Tagoras Publisher of The Report

Tagoras is a market research firm and consultancy focused on the design, marketing, and management of digital learning and knowledge. We work with associations, philanthropies, and small-to-mid-sized businesses to help these organizations better understand and leverage the opportunities made possible by the new Web—what we like to call the learning Web. Our emphasis is on what achieves results, not on new gadgets and theories. *Association E-learning 2009: State of the Sector* represents the first in a line of research we plan to publish on e-learning in the association sector.



### About the Authors

All the research and writing for this report was done by Tagoras principals Jeff Cobb and Celisa Steele.

#### JEFF COBB



Jeff has nearly two decades of experience in the world of education and technology. After starting his career as a research analyst for the Investor Responsibility Research Center, he first became involved with computer-assisted approaches to learning in the early 1990s as an instructor at the University of North Carolina at Chapel Hill. In

1997, he joined University Access, a company focused on developing online learning experiences for colleges and universities and ultimately went on to lead the academic division of the company. He became senior vice president of business development when the company merged with IEC, a leading developer of computer-based training for Fortune 500 companies, and re-branded itself as Quisic.

In 2001, Jeff left Quisic to found Isoph with the specific aim of helping nonprofit organizations develop successful online learning initiatives. Serving as Isoph's chief executive officer, he worked

directly with a wide range of nonprofit clients and developed a deep understanding of the business, technical, and instructional issues that impact nonprofit learning initiatives. In 2005, Isoph was acquired by LearnSomething. Jeff continued on with LearnSomething until the fall of 2008, when he embarked on the research and consulting activities that now form the core of Tagoras.

Jeff is an award-winning teacher, a frequent speaker in the e-learning world, and author of the e-book *Learning 2.0 for Associations* as well as the popular Mission to Learn blog. He serves on the Professional Development Council of the American Society of Association Executives as well as on the advisory board for Philantech, provider of the PhilanTrack™ online grant proposal, reporting, and management system. He has previously served on the research committee of the eLearning Guild and the editorial board of *Innovate*, a leading resource for information about technology and education.

#### CELISA STEELE

Celisa has led the development and deployment of successful online education sites with numerous nonprofit organizations ranging from smaller groups like the Frameworks Institute and the Alliance of Chicago Community Health Services to large national and multinational organizations like the American Red Cross, the American College of Radiology, the Society for Human Resource Management, and WebJunction, an initiative of the Bill & Melinda Gates Foundation.



Celisa is a managing director at Tagoras, and she was a cofounder and chief operating officer of Isoph, one of the leading providers of e-learning services to the nonprofit sector. Prior to Isoph, she worked in creative services at Quisic, a developer of high-end online course content for major universities and Global 2000 companies. Before joining Quisic, Celisa worked in curriculum

development for the not-for-profit Family and Children's Resource Program (FCRP), part of the Jordan Institute for Families at the School of Social Work at the University of North Carolina at Chapel Hill.

A veteran of the e-learning world, Celisa served on the research committee of the eLearning Guild and has served multiple times as a judge in Brandon Hall's annual e-learning awards.