

# SOCIAL LEARNING

## TRENDS IN THE ASSOCIATION SPACE

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## Why Social Learning Matters So Much for Associations

Social learning is essential for associations for five primary reasons.

- Social learning is in the DNA.

Associations are, by definition, social organizations. They exist to connect people with common aims and interests. But the value of connection doesn't come with paying money and getting added to the membership roll. The value is in the knowledge that can be gained through sharing experiences and resources with others in the association's network.

**association** *noun*

\ ə-,sō-sē-'ā-shən \

: a group of people organized for a joint purpose; a connection or cooperative link between people

This is social learning, and excellence in facilitating it is at the core of the value associations offer. If your organization is fretting about relevance, your capacity for fostering social learning is arguably the first place you should look to improve.

- Social learning is effective.

Most behaviors that support successful learning are social. We model the behavior of mentors and avatars to build new skills. We demonstrate actions, repeat new information, and teach others to solidify our own knowledge. The social context in which we learn is usually what supplies relevance—a critical element for adult learning, or andragogy—and it's by wrestling with ideas in a social context that we make sense of them, modify them, and make them our own. We can, and sometimes must, learn in relative isolation, but social interaction is usually the glue that makes learning stick.

- Social learning catalyzes innovation and impact.

Association education is often quite conservative in its aims. Organizations strive to preserve a body of knowledge, build on it where relevant, and pass it on. While it undeniably supports these goals, social learning is a “nice to have” in this light. But if you seek to solve tough emerging problems, discover new opportunities, and lead your field or industry to a brighter future through your educational efforts, social learning simply isn't optional.

There's a growing body of research demonstrating we're more effective in solving complex problems and generating breakthrough ideas as a group

(see, for example, Peter Miller’s *The Smart Swarm*). Teaching individual learners effectively is a fine goal, but if you want to move the dial across your entire field or industry, you’re unlikely to do it without an effective social learning strategy.

- Social learning connects to informal learning, which is how most learning happens.

As much as 80 percent of learning happens in an informal manner, and a great deal of informal learning is based on interactions with other people. It’s very often in informal settings that people make decisions about more formal learning opportunities. If you’re not present in the informal context and providing value, then the chances a prospect will view your association as the go-to source for more formal, paid learning experiences are low.

Social learning isn’t just about using social tools in formal learning experiences. It’s about thinking of your entire, extended stakeholder base as a social learning ecosystem. This mindset is fundamental to catalyzing the impact and innovation discussed in the last point, but it’s also fundamental to marketing your products effectively, generating ongoing demand and revenue, and remaining relevant.

- Social learning is available to your competition.

These days almost anyone can put the mechanics of membership in place by leveraging low-cost or no-cost technologies. Even solo entrepreneurial subject matter experts now have amazing opportunities for organizing events, launching learning communities, and selling online courses. Most organizations are seeing higher levels of competition for their educational products and events than ever before.

Competing successfully these days is less about logistics or the size and quality of your catalog—though these remain important—and more about the quality of the ongoing relationship you establish with your customers and prospects. In short, mastering social learning is essential to competing effectively.

In the remainder of this white paper, we look specifically at a slice of social learning—the latest manifestation, all that’s enabled by the use of social technologies. But we believe these social technologies must be seen as part of bigger social learning landscape, and that’s why we’re beginning by making the point that social learning is much more than a trend or buzzword. It’s been around a long time, and it’ll remain with us for a long time more.

Along with the results of survey data, we provide real-world examples and commentary from the paper’s sponsor, Meridian Knowledge Solutions. We hope this resource proves useful to you and your association as you assess your use of social technologies for learning and contemplate your next steps.

## A Definition of Social Technologies for Learning

At the core of this white paper is a non-statistical online survey of associations conducted from April 11 to May 7, 2014, which received 102 qualifying responses. (For demographic data about the survey respondents' organizations, see the appendix.) We offered this definition of *social technologies* at the beginning of the survey to normalize responses:

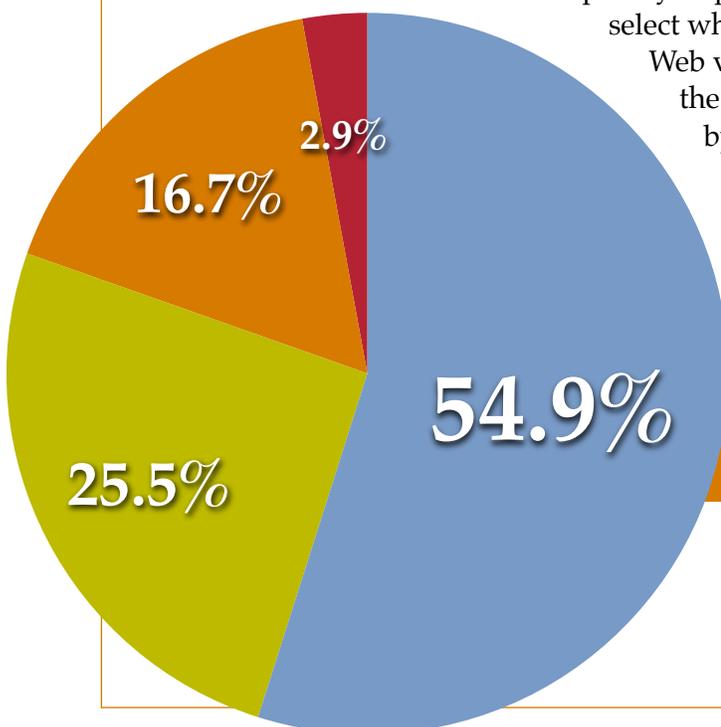
*For the purposes of this survey, social technologies are any technology that enables users to communicate with each other over the Internet or cellular networks and share text, audio, graphics, video, etc. Popular examples of social technology include, but are not limited to, discussion boards, blogs, Twitter, social networks like Facebook and LinkedIn, YouTube, and podcasts. **Please only consider technologies that are or will be an explicit part of a learning product or service.** For example, if your organization has a blog or other social technology, but does not use or plan to use it as part of its learning products or services, do not indicate that you use social technology for learning.*

Out of these responses, 54.9 percent indicate their organization uses social technologies as part of at least one learning product or service it provides. An additional 25.5 percent indicate they plan to start using social technologies for learning in the coming 12 months, leaving 16.7 percent not using social technologies for learning and with no plans to start in the coming year.

With over four-fifths of respondents using or planning to use social technologies for learning, it seems clear that not only is the old practice of social learning alive and well, but technology is giving it fresh legs.

## Associations' Use of Social Technologies for Learning

Survey respondents who reported using social technologies explicitly as part of their learning initiatives where asked to select which of 11 types of social technologies they use. Web video sites such as YouTube (70.0 percent) top the list of technologies currently in use, followed by discussion forums (65.3 percent), microblogging tools like Twitter (53.2 percent), and publicly available social networking sites (51.0 percent).



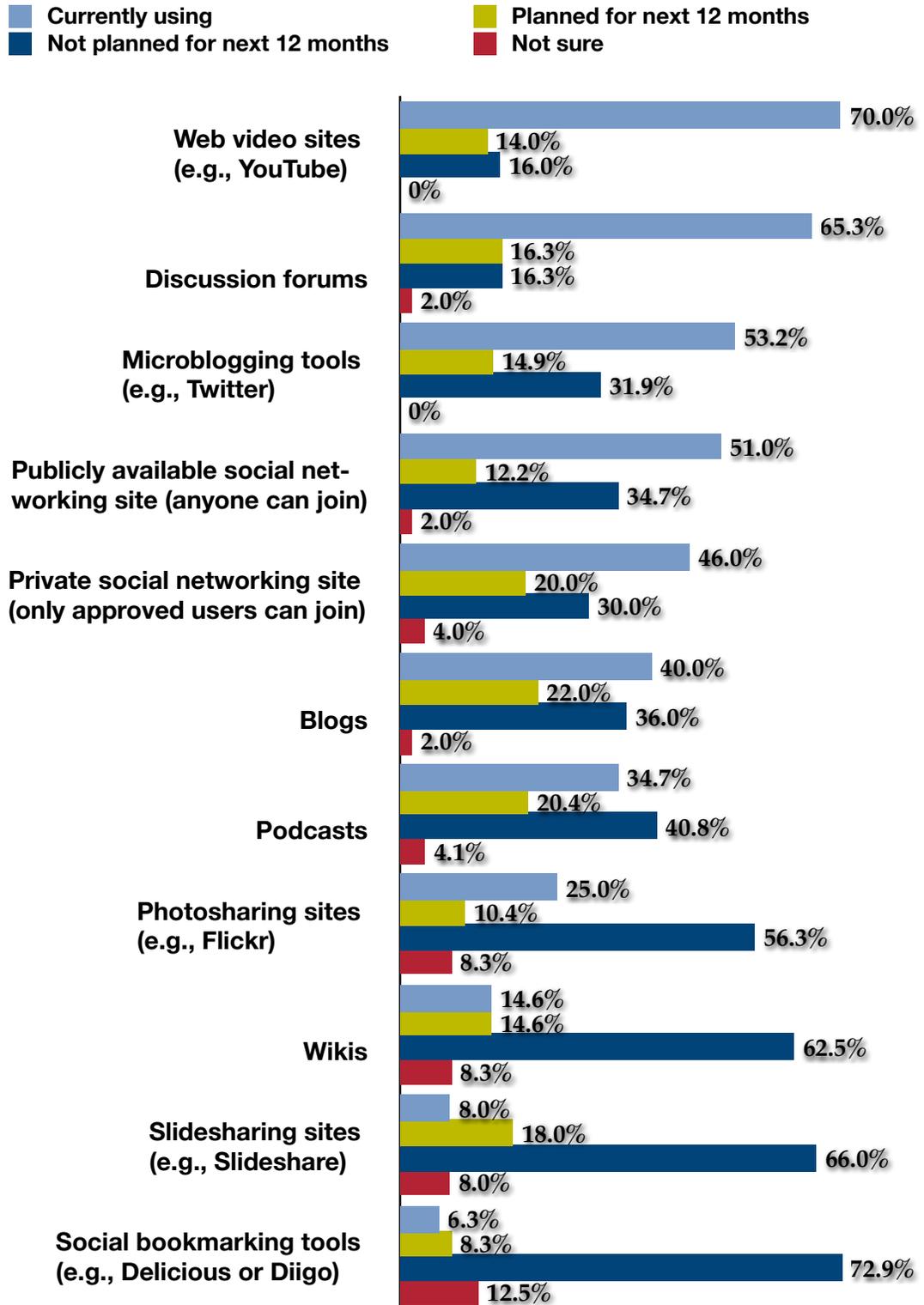
**Does your organization use social technologies as part of any learning product or service it provides? (102 responses)**

Nearly 55 percent of respondents report currently using social technologies for learning.

- Yes
- No but plan to in next 12 months
- No and don't plan to in next 12 months
- Not sure

Which of the following social technologies does your organization use as part of learning products or services it provides? Please only indicate technologies that are explicitly a part of your learning initiatives. For example, if your organization has a blog, but doesn't use it as part of its learning products or services, do not indicate that you use blogs for learning. (52 responses)

Web video sites top the list of currently used social technologies.

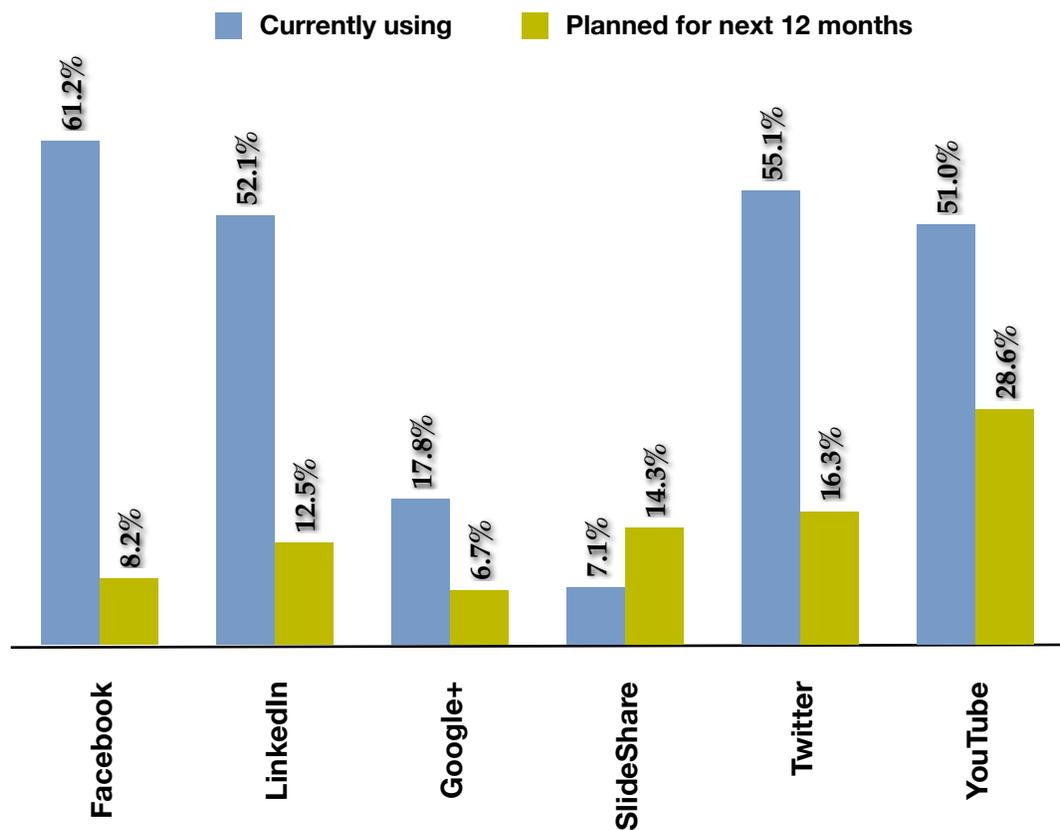


None of the other types of social technologies garners a majority, but the next four technologies are used by a quarter or more of respondents: private social networking sites (46.0 percent), blogs (40.0 percent), podcasts (34.7 percent), and photosharing sites like Flickr (25.0 percent).

Wikis, slidesharing sites, and social bookmarking tools aren't getting much use currently (all are under 15 percent)—nor is much use planned for the coming year.

### SPECIFIC SOCIAL TECHNOLOGIES USED FOR LEARNING

Over 60 percent of respondents using social technologies in general for learning are using Facebook specifically—not surprising given the prevalent use of publicly available (AKA anyone can join) and private (AKA only approved users can join) social networking sites for learning.



Which of the following specific social technologies does your organization use as part of its learning products or services? Please only indicate technologies that are explicitly a part of your learning initiatives. For example, if your organization has a Facebook presence, but does not use it as part of its learning products or services, do not indicate that you use Facebook for learning. (51 responses)

LinkedIn, used by 52.1 percent, ranks not too far behind Facebook, but only 17.8 percent of respondents use Google+ for learning. Given that some analysts predict Google+ use will surpass Facebook in terms of social sharing (+1s versus likes) in the near future (2016, according to <http://www.searchmetrics.com/en/searchmetrics/press/social-sharing-google-overtake-facebook-2016-pred/>) and that Google+ users are catching up with Facebook users (as of February 2014, Google+ had over 1 billion registered users; Facebook 1.2 billion), it may be prudent for associations to give Google+ more attention.

Twitter ranks second among the brand-name social technologies the survey asks about—used by 55.1 percent. YouTube (used by 51.0 percent) comes in fourth, behind LinkedIn, but is poised for the greatest near-term growth; 28.6 percent of respondents report they plan to begin using it to support learning in the next twelve months.

SlideShare comes in last, used by 7.1 percent of respondents. This low use is consistent with the data collected for our 2014 *Association Learning + Technology* report (<http://www.tagoras.com/catalog/association-learning-technology>), but, given the PowerPoint juggernaut on training materials, we continue to find it a bit surprising that SlideShare and similar tools don't rank higher. Our theory is posting a file (like a deck of slides) is familiar territory for associations, and so they tend to make use of internal resources (staff and Web site) for doing that, whereas hosting and streaming video seems difficult without YouTube.

We also suspect that intellectual property fears factor in. But associations need to weigh the content marketing value of a site like SlideShare, that can help expose content to new audiences and improve search engine results, against the belief that content needs to be kept under lock and key.



## Collaboration Catalyzes Learning at NIGP

As NIGP: The Institute for Public Procurement (NIGP) sought to expand its e-learning efforts in 2009, providing participants with ways to collaborate with facilitators and each other emerged as a key part of the learning strategy. In the years since, NIGP has converted a number of its traditional face-to-face offerings into interactive online courses with asynchronous discussion as an important component.

Two options are offered for the interactive courses: a 24-contact-hour option that runs for 8 weeks and a 16-contact-hour option that runs for 6 weeks. In both options, participants are assigned to groups and use discussion boards to collaborate on weekly assignments. The 16-contact-hour courses also feature four online live learning events, or OLLEs, in which students can ask the instructor questions in real time.

ONLINE COURSE OPTIONS		
<p><b>INTERACTIVE* 24 CONTACT HOURS</b></p> <p>Collaborate with your group on your schedule</p> <p>8 weeks</p> <p>Discussions on your schedule</p>	<p><b>INTERACTIVE* 16 CONTACT HOURS</b></p> <p>Collaborate with your group on your schedule</p> <p>6 weeks</p> <p>Discussions on your schedule</p> <p>Added Discussion during 4 Online Live Learning Events (OLLE)</p>	<p><b>INDEPENDENT LEARNING 1-8 CONTACT HOURS</b></p> <p>Learning at your pace, on your time</p> <p>14, 30, 60, 90 days to complete</p> <p>No collaboration</p> <p>No discussion</p>
<p><b>In NIGP's experience, students don't always understand the added commitment involved in the social learning elements.</b></p>		

Holly Eva, e-learning designer at NIGP, notes that the organization was careful to set parameters for engagement in the online courses. To help promote participation and interactivity, students are required to respond to at least one question from another student each week. Additionally, the groups are charged with coming to a consensus around how assignments will be completed and a different student serves as the group leader for each project.

Eva says the programs are successful from a business standpoint. Enrollments have grown annually, as have revenues. On the other hand, the social aspects of the programs have presented some challenges. There are always a few students who drop after the start of each program because they don't fully appreciate the extra commitment the collaborative and social elements involve.

Additionally, NIGP has found it challenging to integrate the various pieces of the programs—documents, discussions, assessments, evaluations, reporting—into a single, cohesive destination. As a result, students engaged in the social aspects of the courses may forget about or have difficulty finding resources stored on a different platform, or vice versa. And administrators can find it cumbersome to pull together disparate data about student activities.

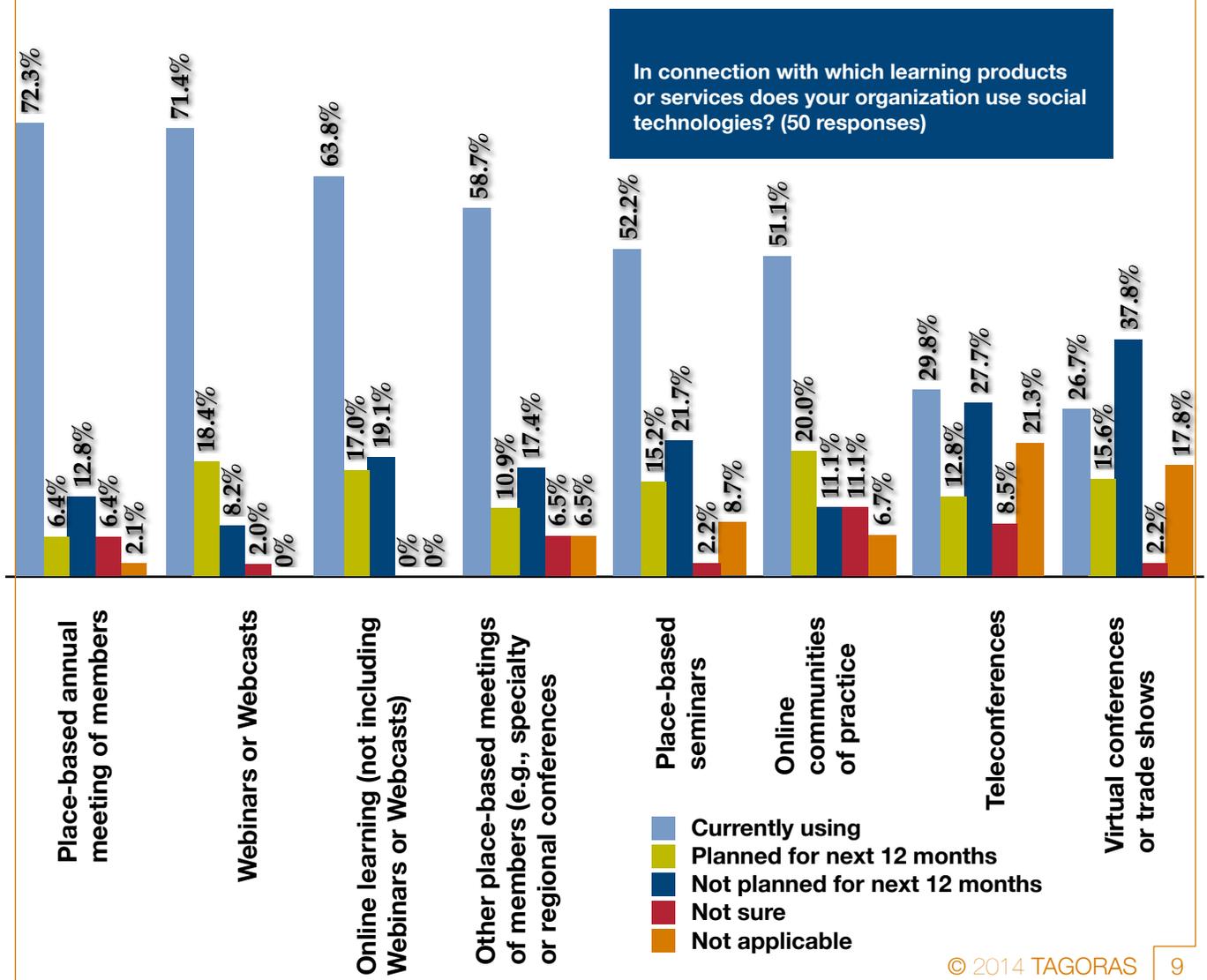
Even with these challenges, NIGP sees significant potential for its collaborative online courses. Going forward, the organization plans to continue fine-tuning its instructional approaches and to identify options for more fully integrating social tools with the other components of the courses.

## Learning Products and Services Associated with Social Technologies

Cited by almost three-quarters of survey respondents, a place-based annual meeting of members is the number one type of learning product associated with social technologies. Webinars and Webcasts are a close second, cited by 71.4 respondents. Four other learning products and services are cited by a majority of respondents as ones with which they currently use social technologies:

- Online learning, excluding Webinars and Webcasts (63.8 percent)
- Place-based meetings of members other than an annual conference, such as regional or specialty conferences (58.7 percent)
- Place-based seminars (52.2 percent)
- Online communities of practice (51.1 percent)

Social technologies are used least frequently for teleconferences (29.8 percent) and virtual conferences or trade shows (26.7 percent). If we exclude the relatively high percentage of respondents who indicated these two options aren't applicable, use increases by six to eight percentage points for both.





## CASE Boosts Conference Learning with Online Discussions and Blogs

The Colorado Association of School Executive (CASE), the professional association for administrators in Colorado K-12 education, is using social technologies to expand the availability and increase the efficacy of its learning offerings.

CASE recently piloted the use of discussion boards tied to sessions presented at its February conference. Speakers posted discussion topics to get attendees talking and thinking about their sessions, and those discussions continued after the live sessions. To be effective, learning needs to be embedded and applied—a goal that it’s hard to accomplish in one-off events, but one that pre- and post-activities can promote.

While Ryan Harrison, professional learning program manager, characterizes participation in the February pilot as modest, CASE sees potential and will take a similar approach to its upcoming July conference—each presenter can have a discussion forum and blog to begin conversations before the conference and continue them afterwards.

Harrison notes that figuring out how to implement social learning can be tricky: “I learned a lot about what the different systems—our Web site, our AMS, the LMS—can do. But it’s not always clear how they could, or should, work together.” She adds, “It would be great to have a cohort or community to tap into for that kind of knowledge.”

The metrics to measure success at the July conference are “somewhat arbitrary,” given the lack of prior data, but Harrison would like to see presenters from 20 of the conference’s 75 sessions engaging online and 15 to 20 percent of attendees (of the event’s 1,200 overall) actively participating online. Down the road, she’d like to grow the online participation to around 50 percent of attendees.

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Presenters at CASE’s annual convention can use discussion forums and blogs to engage learners.

“Our members want to continue to expand their learning, but there aren’t many professional development opportunities that allow them to connect and have a fluid stream of contact with experts and each other,” says Harrison. Using social technologies for learning as part of its conferences, place-based workshops, and completely online courses, CASE is looking to fill that gap.

## Participation in Social Technologies for Learning

The largest segment (44.9 percent) of survey respondents report that the social technologies that are used as part of learning products and services are used by some participants. About a fifth report the technologies are used by most participants. Over a third report that very few participants make use of the social technologies offered as part of learning products and services.

While our data can't confirm it (as we asked respondents to characterize participant use across all learning products and services that make use of social technologies), we think it safe to assume that participation varies depending on the type of learning product or service. For example, we expect use to be higher when participation is required as part of the learning experience.

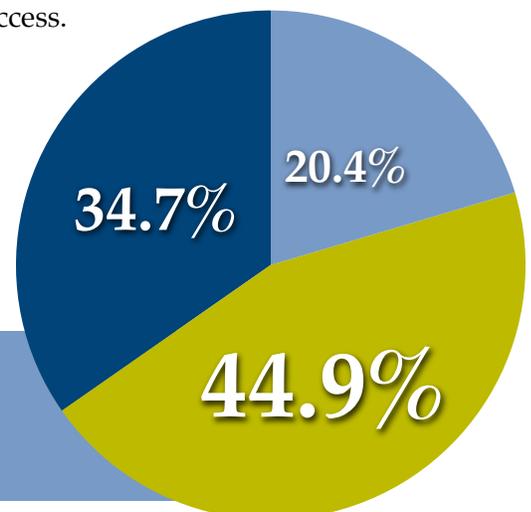
We also expect use to be higher in learning products that tightly integrate social technologies, and the data suggests that's true. Among organizations using social technologies for virtual conferences and trade shows—which presumably feature built-in social capabilities whose absence would compromise the overall value of the experience—36.4 percent report social technologies for learning are used by most participants.

Similarly, fewer organizations using social technologies for online communities of practice (which imply social technologies) report the technologies are used by very few participants (26.1 percent versus the 34.7 percent among all respondents).

Interestingly, organizations offering teleconferences also report a higher than average use of social technologies for learning by most participants (35.7 percent). Among organizations using social technologies for place-based seminars, the use is lower than average—8.7 percent report that most participants use the social technologies, compared to 20.4 percent overall.

Our conversations with those working in the field confirm that participation rates are important. Daila Boufford, director of professional development at the American Association of Family and Consumer Sciences, sees frequency of use as the best indicator of success. "It's easy to have a large number of users," she says, "but if 99 are lurkers, and you have one person trying to have a conversation with herself, that's not good."

- Used by most participants
- Used by some participants
- Used by very few participants



Which of the following best characterizes use of social technologies by participants in all your learning products or services that make use of social technologies? (49 responses)



## Learning Is the Currency of Associations —and Social Is Key, Per SCUP

The Society for College and University Planning (SCUP) has used a variety of social technologies for learning since the first issue of its e-mail newsletter in 1987. In 2012, its journal, *Planning for Higher Education*, went digital-only, a move that allowed the association to launch what it dubs a MOJO (multilevel online journal odyssey) in a nod to the MOOC (massive open online course) phenomenon.

Created by Terry Calhoun, director of publications, and described as “a social reading and content curation experience” (<http://mojo.scup.org/page/about>), the SCUP Mojo serves up journal content (always free to members and free on a time-limited basis to nonmembers), video Google+ hangout interviews with authors, and other related content and provides users the opportunity to engage with each other via discussions, comments, and sharing options.

SCUP also uses Scoop.it, a social publishing tool, to create a stream of curated links, articles, and resources, which feeds Twitter, LinkedIn, Facebook, and more. Users can easily reshare any item via the SCUP Links page (<http://links.scup.org>).

At its upcoming 2014 annual meeting, SCUP for the first time will designate “tweet seats,” chairs to be used by attendees who will live-tweet from and about the sessions.

**SCUP's Mojo is a social reading and content curation experience.**

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At 1:00am on May 31, 2013, **Sanette Boshoff** said...  
 Thank you for including me in this great platform!

Asked what prompted the organization to start using social technologies for learning, James Young responds, “Social and mobile—they’re the obvious way learning happens now. They’re how people get their information.” Serving in the newly created chief learning officer position, Young was brought on board to develop and implement an overarching content strategy for SCUP’s professional development offerings and publications.

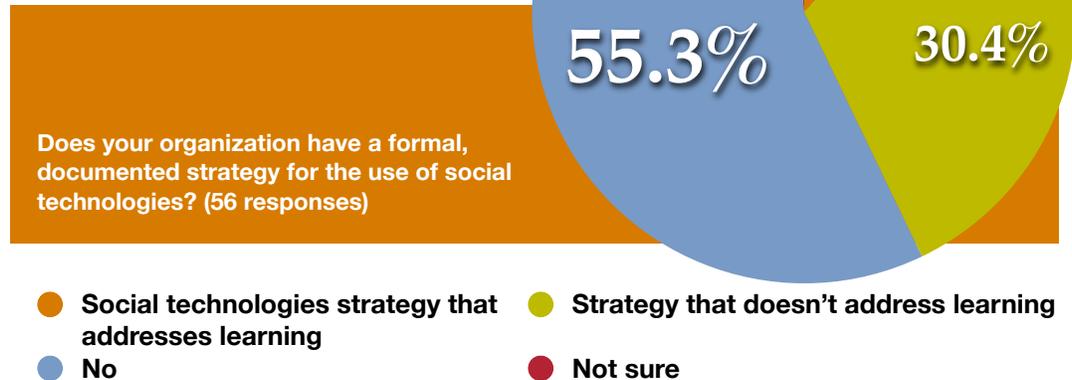
While SCUP has been using social technologies for learning, Young wants to make sure the use is guided by a coherent purpose from the get-go: “I want to instill a culture and ethos of content marketing—which is marketing married to social media, married to a content reuse framework. If we don’t build with social in mind, then it’s an add-on, and we’re left using the social technologies as a marketing tool only, rather than as a learning tool too. We shouldn’t add social on—we should integrate it.”

SCUP will also include metrics as part of its content strategy. Young wants to move from “siloeed conversations” to “shared value creation” and create an “intentional, multimodal metric approach [that] will result in a more anticipatory and resilient learning strategy.” He believes his “association’s job is to be a facilitator of big ideas. We absorb and communicate trends and share information, and learning is key to that. Learning is the currency of associations, and it should be functional, interactive, collaborative, responsive, and longitudinal.”

The screenshot shows a Scoop.it page for 'SCUP Links'. The page header includes the SCUP logo, the title 'SCUP Links', and a description: 'Members of the Society for College and University Planning (SCUP) scan higher education, inside and out, and present this curated collection of links, articles, and resources. www.scup.org'. Below the header, there are two main content cards. The first card is titled 'SCUP Updates and Deadlines' and includes a date 'March 7, 9:34 AM' and a sub-heading 'SCUP Events and Updates:'. The second card is titled 'Rearranging Warhol's Legacy' and includes a date 'May 28, 10:37 AM' and a quote: 'The reorganized Andy Warhol Museum dedicates as much attention to Warhol's role in pop culture as it does to his celebrated art.' Both cards have a 'Scoop.it!' button. At the bottom of the screenshot, there is an orange banner with the text: 'SCUP uses Scoop.it to create a stream of curated links, articles, and resources. Users can easily reshare any item via the SCUP Links page.'

## Strategy and Social Technologies for Learning

Only an eighth of respondents have a formal, documented strategy that addresses the use of social technologies for learning. Just over 30 percent have a strategy for social technologies that doesn't cover learning. Expanding that strategy may be a logical next step.



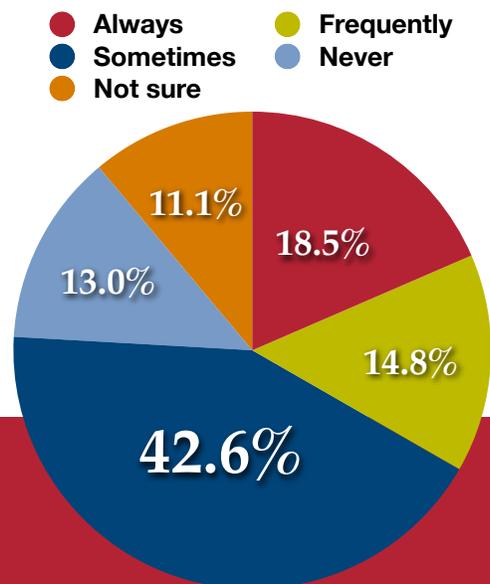
A noteworthy 55.3 percent have no strategy at all for social technologies. While perhaps disappointing, that figure is not surprising, as the data collected for our 2014 *Association Learning + Technology* report (<http://www.tagoras.com/catalog/association-learning-technology>) shows that only 23.4 percent of associations have a formal, documented strategy for how technology in general will be used to enable or enhance learning. It follows logically that only a subset would have a strategy that specifically addresses social technologies.

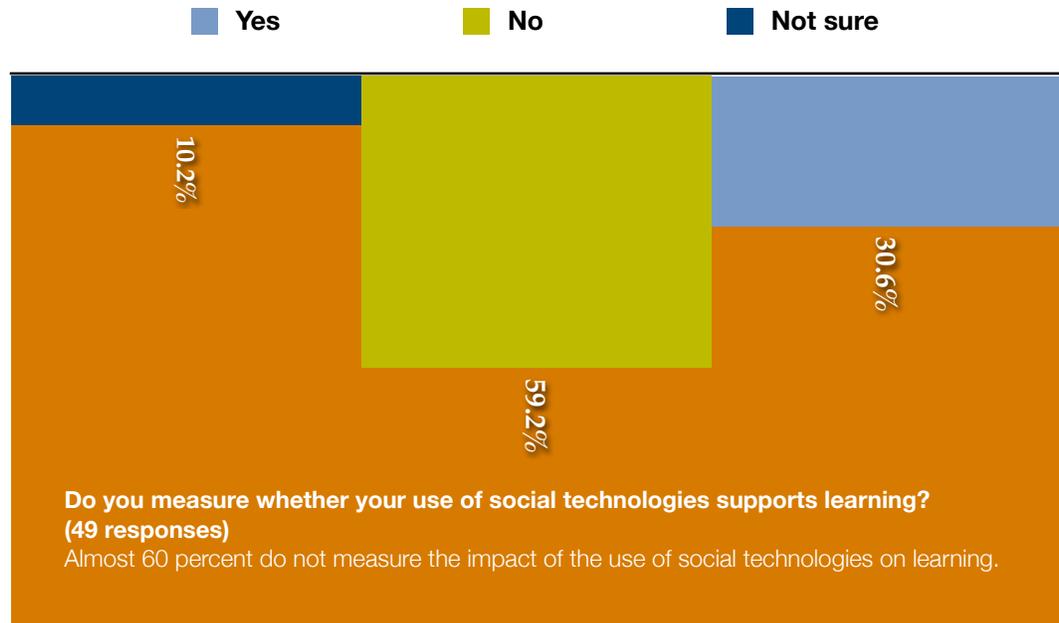
Our personal bias is that strategies are important, as they serve to unite an organization around common goals, contextualize investments (of time, money, or both) in terms of the value expected in return, and provide insight into what to pursue and what to lay aside.

## Learning Objectives

Organizations seem to be more buttoned up at the tactical level than at the strategic level—over three-quarters of respondents tie their use of social technologies to clearly defined learning objectives at least some of the time. That said, only about a third do so frequently (14.8 percent) or always (18.5 percent).

When you use a social technology as part of a learning product or service, is the use designed to support clearly defined learning objectives? (54 responses)





### Measurement of Social Technologies' Support of Learning

Almost 60 percent of respondents do not measure whether their use of social technologies for learning actually supports learning, but just over 30 percent do. Another 10 percent aren't sure.

From the free-text responses received when we asked how organizations that do measure are measuring, it seems the methods at this point are basic. Most of those who measure are doing so at the lowest level of Donald Kirkpatrick's four-level evaluation model, reaction—they ask users of a particular learning product or service, via a post-completion survey, whether they liked the use of social technologies.

A few respondents also mention analytics (e.g., page hits), but such approaches arguably fall short of showing impact on learning and focus only on quantifying use. Still, looking at analytics is a step in the right direction, in our opinion.

Some respondents acknowledge that what they're doing for measurement is less than ideal. In the words of one respondent, "Since it's voluntary continuing professional development, it's difficult for us to directly test our online learners without them ignoring the test or getting their noses out of joint. But post-course surveys ask them to self-rate changes in themselves based on the learning objectives (which are directly tied to the technology usage). This is not ideal since it's a self-report, but it does provide us with at least some indication of which parts were and were not successful."

## Social Learning for Associations Three Reasons It's Important in Your LMS

*by Ramsey Chambers, vice president of product management and strategy  
at Meridian Knowledge Solutions*

Social learning is the buzz right now, but many association learning professionals are still unsure of the meaning and benefits of this learning concept. According to Jeff Cobb, principal with Tagoras, one way of thinking about social learning is “people learn through interacting with each other; this learning—like all learning—changes them as individuals, but it also has the potential to change the broader groups within which they participate.”

According to Michael Rochelle, chief strategy officer at Brandon Hall Group, the majority of social learning takes place through four channels of interaction: chat, discussion forums, wikis, and blogs. These channels have proven to be most effective in fostering collaborative learning among communities of learners.

Here are three reasons why associations may want to consider incorporating one or more of these social learning channels into their learning strategy and why they should be included in a learning management system.

- Social learning boosts retention.

Sharing and actively discussing subject matter is key to retaining the knowledge gained during in-person or virtual learning. Threaded discussion forums are an excellent way for learners to ask questions, share ideas, and reinforce the concepts presented during the class or online session. Discussion forums can also help alleviate any sense of disconnection or isolation experienced by people taking classes individually and can help build knowledge communities and professional networks.

- Social learning can be ongoing.

Though classroom learning is effective, it can also be transactional—a class is taken once, and then people move on. Participation in social learning channels ensures that learners can continue to collaborate and gain knowledge even if they’re not in class or face-to-face with others. Vehicles like blogs and wikis can act as repositories for information related to a particular subject. Visiting those sites can help learners refresh their knowledge on a topic and find out about new developments.

Thanks to Meridian Knowledge Solutions for its intellectual and financial contributions to this white paper.

- Social learning is motivational.

People pick up social and contextual clues from each other all the time when interacting in person; the same is true for online learning. Seeing what others do and understanding what has made them successful are strong motivators for learning and for sharing experiences with others. People who share their progress and learning achievements through social channels can gain powerful reinforcement from their peers.

Social learning transcends the physical and transactional nature of one-time courses to offer continuous learning and collaboration opportunities to a learning community. Through discussion forums, wikis, blogs, and chat, learners can increase the value of their learning investment in addition to building their professional networks.

Associations can foster these benefits by selecting a learning management system that incorporates social learning features. They don't need to be complex, but they do need to be present and promoted along with the learning curriculum. Before investing in a learning management system, make sure it can support the social learning channels that make the most sense for your members and extended learners.

### **About Meridian Knowledge Solutions**

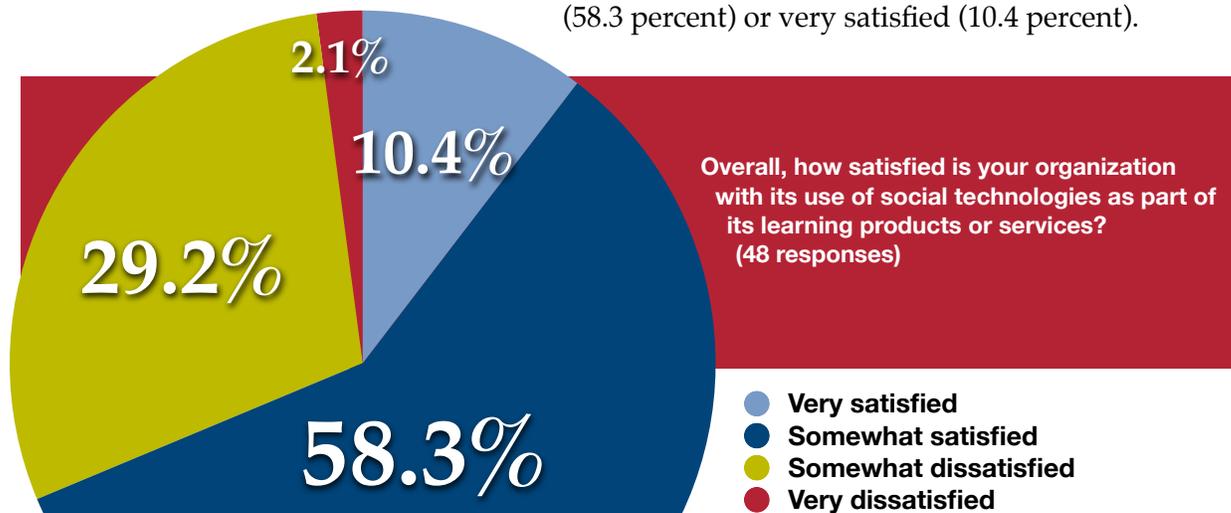
Meridian Knowledge Solutions helps you create measurable value with your learning strategy. Meridian provides technology platforms that empower enterprises, governments, and member-based organizations to develop their people by delivering learning, assessing performance, and fostering collaboration. We've been making customers our partners since 1997.

At the core of the Meridian Global® suite is a multiple-award-winning learning management system (LMS) that supports an organization's learning, development, and performance strategy by giving users access to a learning technology platform from their desktops or mobile devices. The platform helps organizations address learning challenges across the extended enterprise, provides full integration capabilities, and offers secure deployment options.

For more information, visit [www.meridianks.com](http://www.meridianks.com).

## Satisfaction with the Use of Social Technologies for Learning

We asked associations responding to the survey how satisfied they are with their use of social learning technologies as part of their learning products and services, and almost 70 percent report being either somewhat (58.3 percent) or very satisfied (10.4 percent).



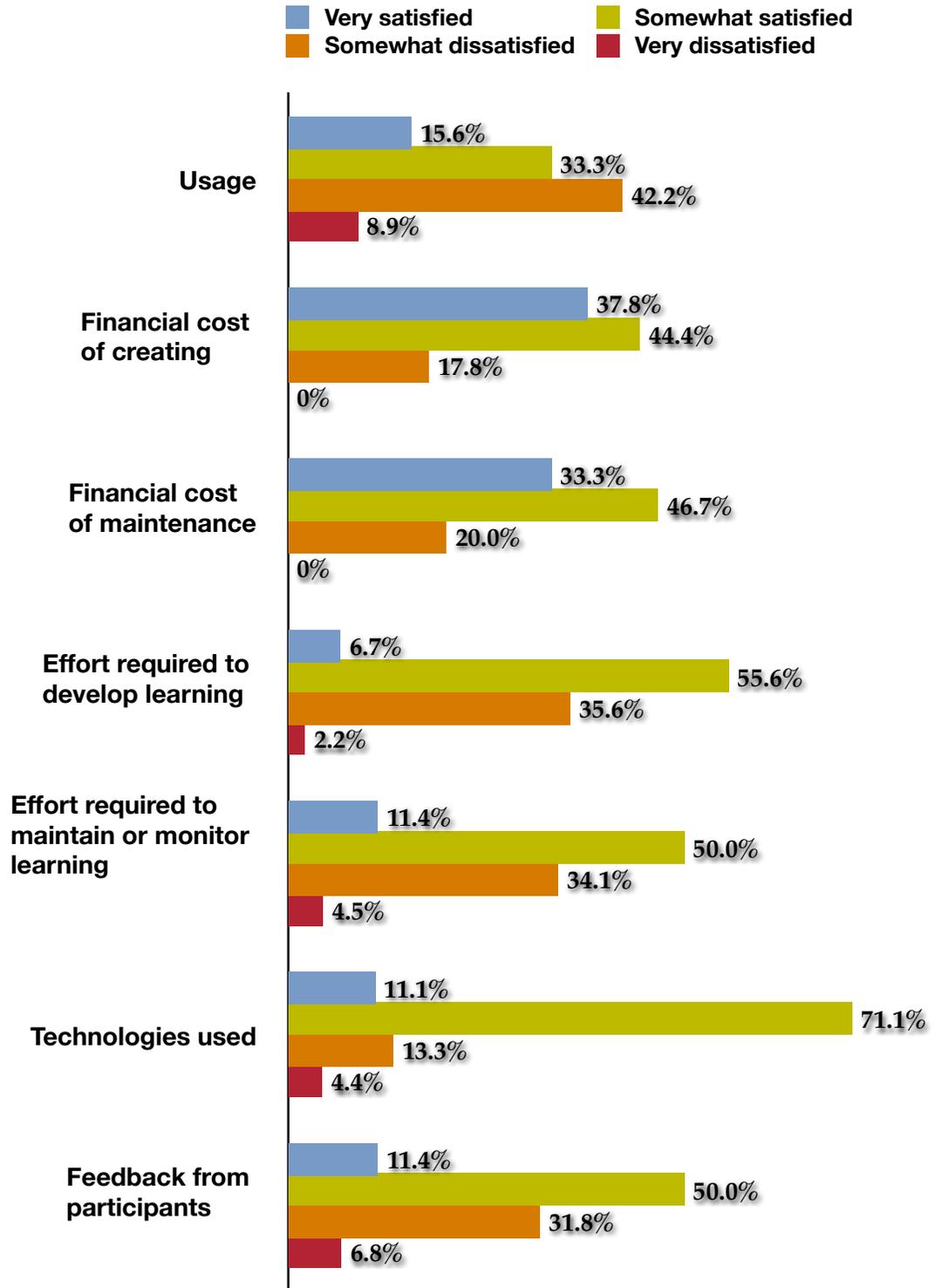
When it comes to satisfaction with the specific aspects of the use of social technologies probed by the survey, the very satisfied group was at least marginally larger than the very-satisfied-overall group for every item except the effort required to develop learning products and services that use social technologies (only 6.7 percent are very satisfied there).

The areas of highest satisfaction (and the only ones that have a significantly higher ranking than the 10.4 percent of very satisfied respondents overall) deal with the financial cost of creating or implementing the social technologies for learning (37.8 percent are very satisfied with that) and the financial cost of supporting and maintaining the social technologies (33.3 percent very satisfied).

We suspect that high level of satisfaction with the financial costs stems from the fact that associations may be using no-cost tools like Twitter, Facebook, LinkedIn, and YouTube.

The area of lowest satisfaction is usage, which seems expected given that 34.7 percent of respondents report that very few participants make use of the social technologies offered as part of learning products and services.

Overall, how satisfied or dissatisfied is your organization with its use of social technologies as part of its learning products or services in terms of the specific items below? (45 responses)





## Social Learning Dovetails with AAMFT Members' Focus on System Therapy

Amanda Darnley, director of communications and marketing at the American Association for Marriage and Family Therapy (AAMFT), describes her members' social media behavior as generally "introverted, lurkers who join and want to follow but tended not to engage in social media conversations." So she and her team put in place tactics for engaging members on social media—and for using social media as an educational opportunity. The association's executive director, Tracy Todd, a licensed marriage and family therapist himself, holds live monthly Twitter chats on topics like what it takes to work internationally as a marriage and family therapist and prepping for the licensure exam.

AAMFT also fosters peer-to-peer education through its Facebook page. Members are asked to send in questions, and, once a week, one question is posed on the page for all to respond to and comment on.

At the more formal end, AAMFT rolled out a learning management system last year. Darnley says, "We were, admittedly, a little late to the online learning game. But once we decided to do it, we went all in." The association has developed online trainings that are a composite of three elements:

- Self-paced courses, which provide foundational and background information on the topics
- Assignments, which have learners interact via discussion boards (learners are required to make at least one post to a discussion and to comment on at least one other)
- Live Web cam discussions powered by GoToWebinar's HDFaces

The Web cam discussions are limited to six participants because HDFaces can only handle six, but that's been good, according to Darnley: "Keeping classes and interactions small has been key to the success so far. Helping 10 people a month with any technology hiccups is a lot easier than helping 200, and starting small has allowed us to work out the kinks in these first offerings."

The two-month-old courses that include the Web cam discussions have already yielded a new product idea. One member, who's worked as a marriage and family therapist years, was so enamored of the discussions—which reminded him of his early working days when the field was so new that talking issues over



**AAMFT holds live monthly Twitter chats.**

with colleagues was almost the only way to learn—that he commented he wished those could continue.

Darnley and AAMFT are now looking to develop an online networking offering that would allow learners to connect with peers using Web cam technology for a nominal fee. The sessions would make use of a facilitator, but there wouldn't be an expected outcome, as there is in the case of the composite courses.

Darnley sees the AAMFT audience as perfect for social learning. “Our folks approach their work from a systemic viewpoint—everyone is part of a larger system,” she says. “They passionately believe that interaction is what makes the world go round.”

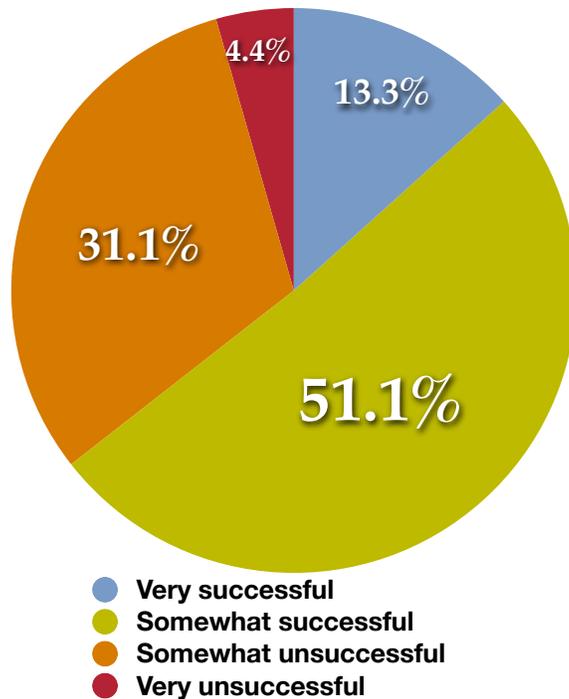
The AAMFT culture is also conducive to making use of social technologies for learning: “We have a lot of outside-the-box thinkers here, the leadership is open to experimenting, and nothing has been terribly expensive. The learning center [powered by the LMS] is the biggest cost, but the leadership knew we were behind, and so they were supportive.”

But all that support doesn't mean it's been without trials. Asked what challenges she's encountered in the use of social technologies for learning, she quips, “Tons.” The main challenge has been the wide range of technical skills among the learners, who tend to be in their late 40s and 50s. “For some, this is totally new; for others, it's all old-hat,” Darnley points out.

AAMFT staff have had to step in and provide tech support. Despite some difficulties using the technology, the learners are satisfied. “The initial feedback is great—they're all saying they'd recommend the courses,” says Darnley. “Our learners seem to really love it.”

**AAMFT uses Facebook to foster peer-to-peer education.**





**Overall, how would you rate the success of your organization's use of social technologies as part of its learning products or services? (45 responses)**

Just over 82 percent characterize their use of social technologies for learning as very or somewhat successful.

### Self-Described Success with the Use of Social Technologies for Learning

While only a handful of organizations (4.4 percent) rate their use of social technologies for learning as very unsuccessful, the group at the other end of the spectrum isn't much larger—just 13.3 percent characterize their efforts as very successful.

A majority of respondents (51.1 percent) say their efforts are somewhat successful, leaving 31.1 to label their use of social technologies for learning somewhat unsuccessful.

Given the small number of organizations that rate themselves as very successful or very unsuccessful, we looked at how the very and somewhat successful respondents, grouped together, compared to the very and somewhat unsuccessful respondents, grouped together. We found that the successful are more likely to hold four characteristics than the unsuccessful.

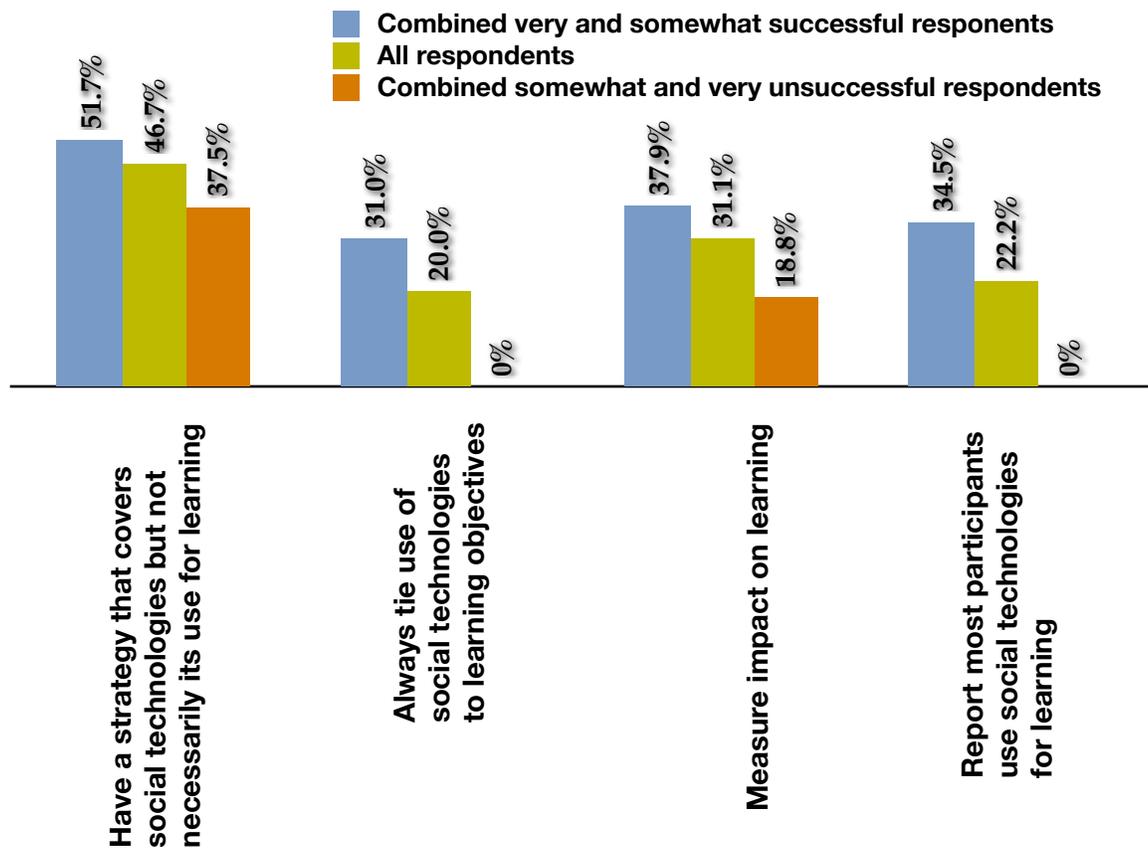
- The successful are more likely to have a formal, documented strategy for the use of social technologies than the unsuccessful (51.7 versus 37.5 percent), though the strategy in place at successful organizations is *not* notably more likely to specifically address the use of social technologies for learning.
- The successful are more likely to report that, when they use a social technology as part of a learning product or service, its use is designed to support clearly defined learning objectives (31.0 percent of the successful versus none of the self-identified unsuccessful).
- The successful report more frequently that they measure whether their use of social technologies supports learning (37.9 versus 18.8 percent).
- The successful are more likely to report that most participants make use of their social technologies across the board, in all learning products or services that make use of social technologies (34.5 percent of the successful versus none of the unsuccessful).

The successful are significantly more likely than the unsuccessful to use five general types of technology—Web video sites (74.0 versus 56.3 percent),

microblogging tools (64.0 versus 33.3 percent), photosharing sites (38.5 versus 6.7 percent), slidesharing sites (14.8 percent versus none), and social bookmarking tools (11.5 percent versus none)—and four specific technologies—Facebook (71.4 versus 42.9 percent), YouTube (57.7 versus 31.3 percent), Google+ (26.0 versus 13.3 percent), and SlideShare (13.6 percent versus none). Our sense is that the specific type or even brand of social technology isn't what contributes to the successful use of social technologies for learning; rather, the successful may be more open to experimentation and more willing to try out an approach in the real world.

In terms of the types of learning products and services that involve social technologies, the successful are more likely to offer a virtual conference or trade show (32.0 versus 13.3 percent) and less likely to offer place-based seminars (40.7 versus 66.7 percent) and online communities of practice (51.9 versus 69.2) when compared to the unsuccessful.

The successful are also less likely to offer a formal credential such as a license or certification (44.8 versus 56.3 percent). This may be explained by the sense or even reality that social technologies aren't appropriate for formal learning.

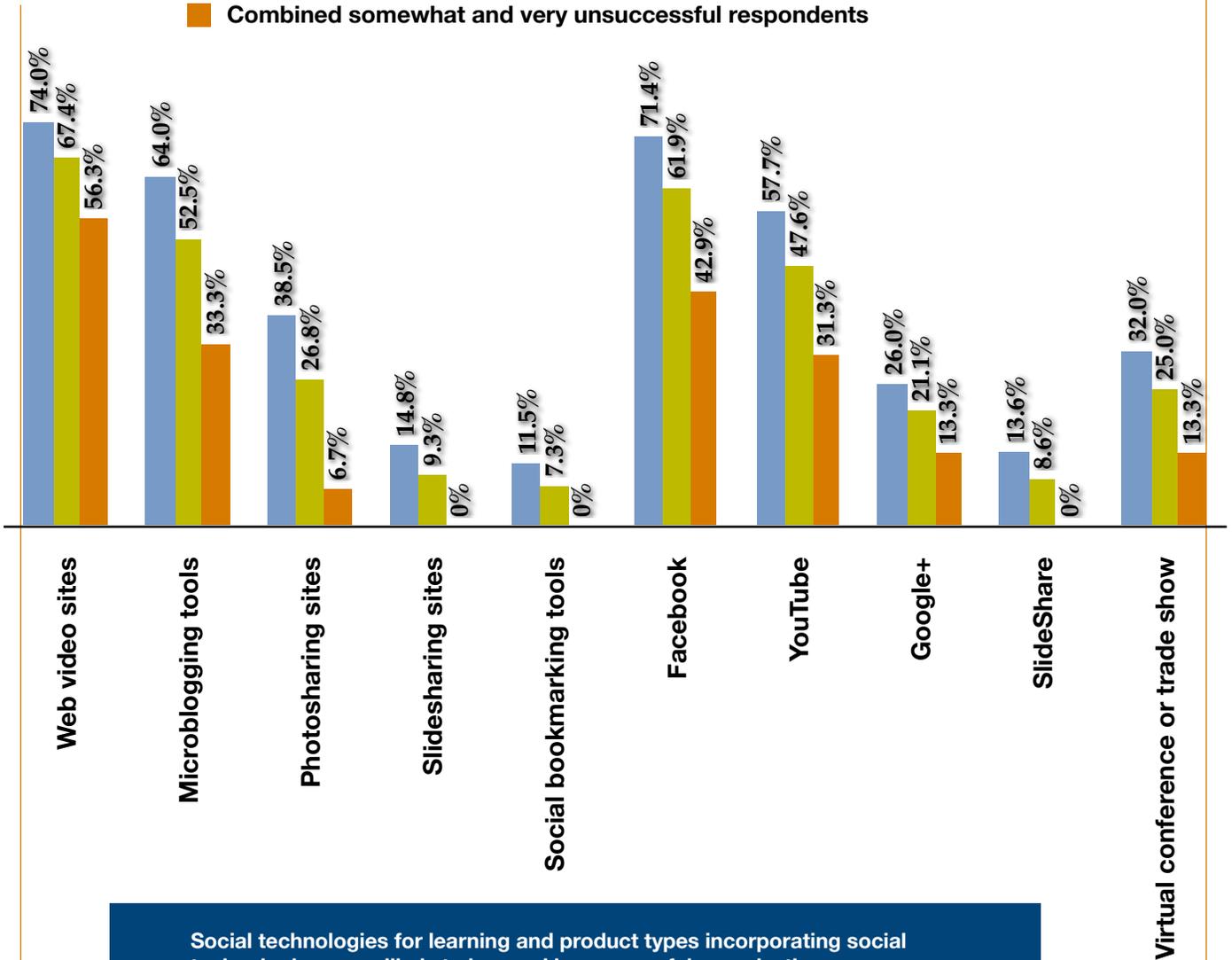


Characteristics more likely to be held by successful organizations

As Tracy King, associate director at the American Academy of Neurology (AAN), puts it, “Social technologies are really too casual at this point to deliver CME, which is so highly regulated.” But that doesn’t mean AAN isn’t active in its use of social technologies.

Rather than focus on social media for the delivery of CME, AAN uses it to recruit and drive new audiences to its more formal programs, such as its weekly podcast of content from its journal *Neurology*, which offers CME to listeners who complete an online quiz. King says, “Our assumption and expectation is that those learners who’ll be attracted to e-learning will be on social media. We’re just reaching them where they are.” She adds, “We’re working on ways to use social technologies for subsequent touch points after the learning activity occurs, as a way to measure that the learning stuck.”

- Combined very and somewhat successful respondents
- All respondents
- Combined somewhat and very unsuccessful respondents



Social technologies for learning and product types incorporating social technologies more likely to be used by successful organizations



## AHIP Uses Social to Keep Its New Designation Up to Date

A few years ago, America's Health Insurance Plans (AHIP) noticed a big uptick in the use of the courses that serve as the basis for its successful PAHM (Professional, Academy for Healthcare Management) and FAHM (Fellow, Academy for Healthcare Management) designations. But the uptick wasn't among the target audience (health plans) for the courses but among affiliate members (i.e., vendors that sell products and services to the health plans, especially those in India).

"We saw the affiliates were getting something out of the courses, clearly, but we thought we could do better for them," says Stewart Freeman, AHIP's business development associate. In response, AHIP developed its IT Series (<http://www.ahip.org/ciepd/options/itf-itp.html>), accompanied by two new designations: the Information Technology Professional (ITP) and the Information Technology Fellow (ITF). The lower-level ITP can be earned by passing four self-paced online courses that cover the core concepts of health care IT.

### IT Series

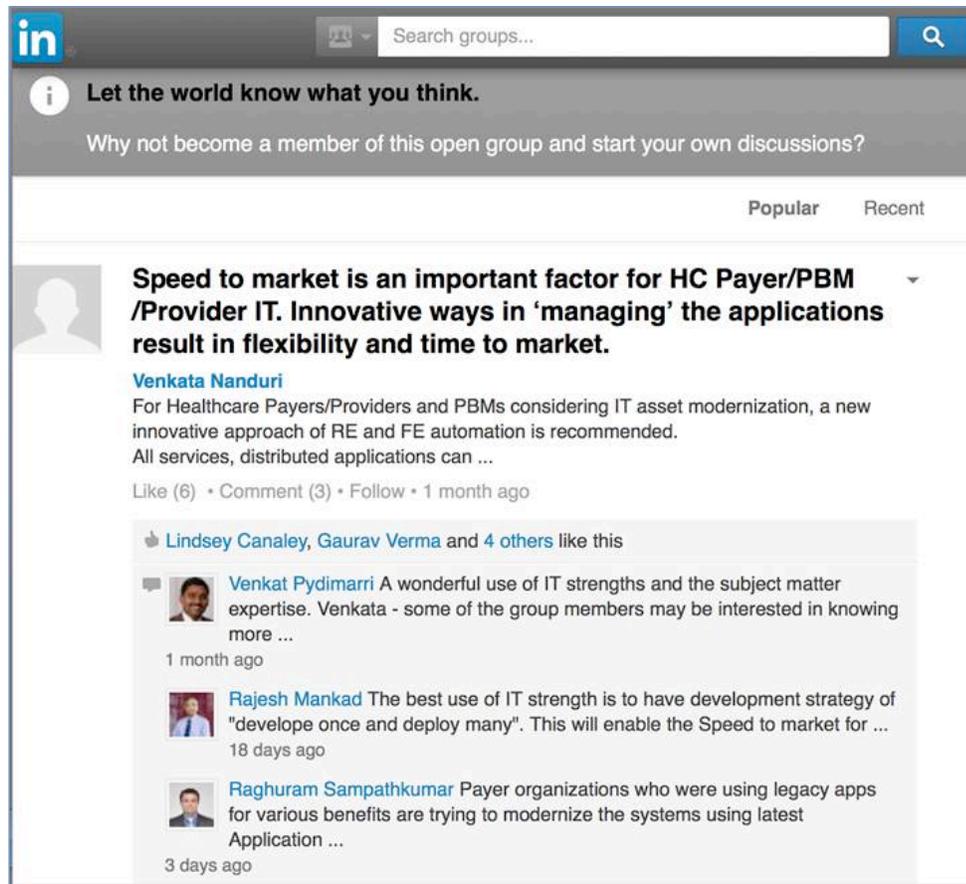
Health Insurance-Focused Training for IT Professionals



The higher-level ITF designation represents a completely new approach for AHIP, unlike what the organization has done in the past. The ITF requires the same four courses as the ITP, but learners must also earn 50 credits in a two-year period to initially gain the designation and then earn 20 additional credits every subsequent two-year period to maintain the designation. The credits can be acquired by attending Webinars and place-based workshops and by joining the AHIP IT Series LinkedIn Group.

The ITF approach allows AHIP to tackle the "shelf-life issue," as Freeman puts it. "With the IT series we're not only dealing with the dynamic legislative side but also the fast pace of IT evolution." With the smorgasbord approach, learners get to choose Webinars or workshops on timely issues relevant to them. The social piece on LinkedIn provides another way to keep learners up to date on late-breaking news and its implications. Freeman gives an example: "Last week the discussions were about yet another delay with ICD-10 [a version of the International Classification of Diseases]."

AHIP also uses speakers from its conferences and workshops to seed content on the LinkedIn group and has enlisted help from the 30-person curriculum-steering committee that was formed to create the IT series. "The curriculum-steering committee is invested in the program and seeing its success, and so we're asking them to each assume ownership of the LinkedIn group for a month and to be responsible for starting and chiming in on conversations."



**Using LinkedIn helps AHIP keep learners up to date on late-breaking news and its implications.**

The LinkedIn group is a relatively new effort on AHIP’s part, and Freeman says it “hasn’t hit its full stride yet,” but she’s already thinking of ways to expand it down the line—by, for example, offering credits for participating in discussions or responding to polls—and she’s keeping an eye on the possibility of moving away from LinkedIn. “You can only go so far with LinkedIn,” Freeman points out, “and it can be tricky to give folks credit because we can’t download list of members from LinkedIn, so we have to do it manually. If I’m not linked to a person on LinkedIn, I only see a first name and last initial, so even manually can be tricky.”

For now, AHIP is dealing with that issue by asking learners to contact AHIP if there’s a discrepancy on their credit record and saving the bigger issue of when and if to leave LinkedIn for later, once the new designations have had time to take off.

## Barriers Preventing the Use of Social Technologies for Learning

We asked survey respondents who indicated they aren't currently using social technologies to identify the three biggest barriers preventing their organization from using social technologies as part of its learning products or services. Those planning to begin using social technologies for learning in the next year and those with no near-term plans to begin agree that the top barrier deals with concerns about the staff time required.

Staff time remains a concern even for those organizations that have made initial forays into social learning, a barrier to taking things to the next level. Dave Jennings, vice president of education at the Community Associations Institute, notes, "Our staff is pretty stretched right now, so we need help to get social learning really going." In addition to time, it's also a question of expertise. Jennings adds, "Our staff can conceptualize a new class or face-to-face event, but this is a little different. I wouldn't want us to do it on our own. It would be great to work with a consultant or firm that has helped other organizations do this."

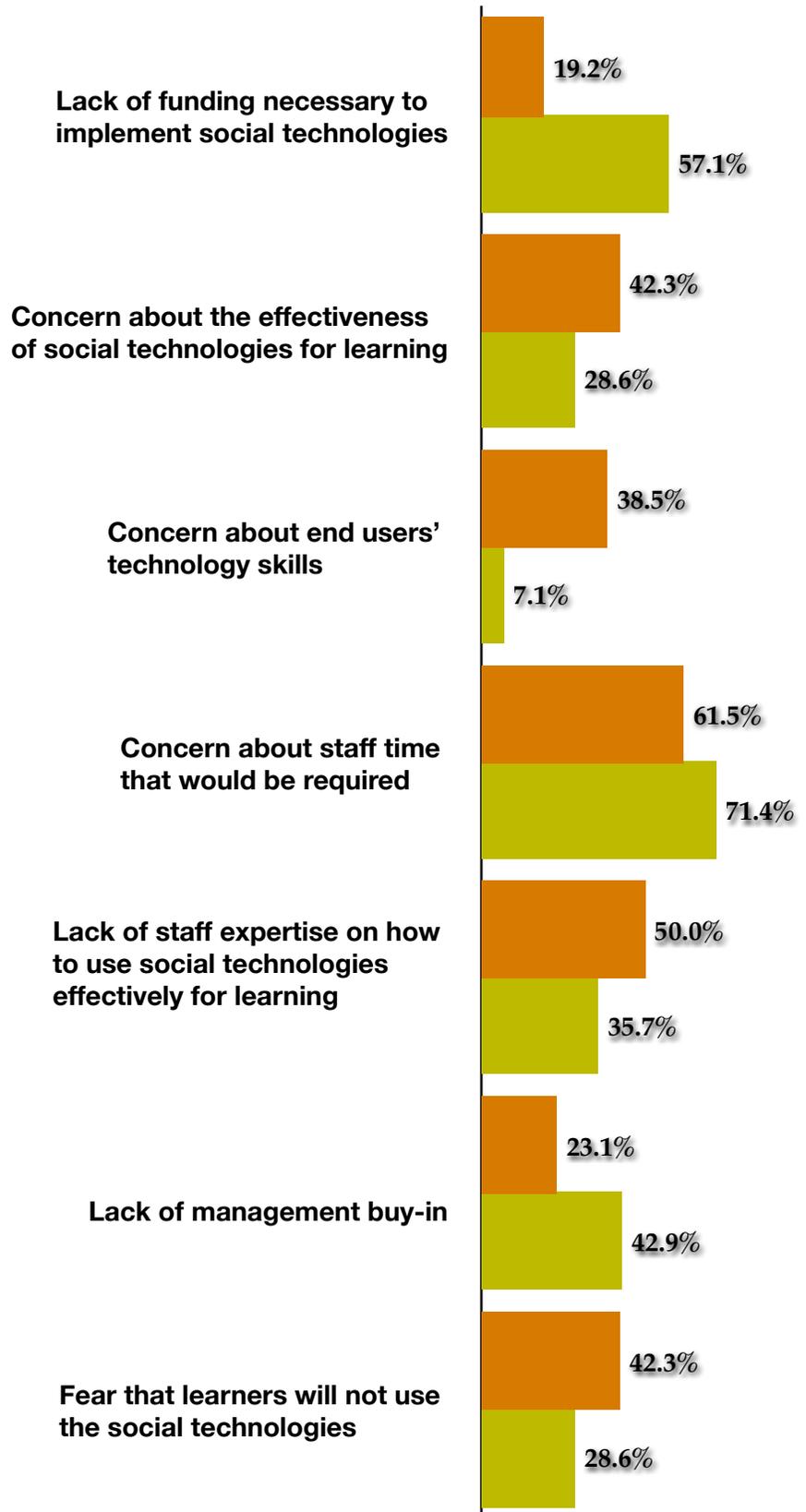
While they agree on the top barrier, those planning to begin using social technologies for learning in the next year and those with no near-term plans diverge on what constitutes the next biggest barrier. Among those planning to begin using social technologies for learning in the next year, the second most common barrier is the lack of staff expertise on how to use social technologies effectively for learning. Fear that learners won't use the social technologies and concerns about the effectiveness of social technologies for learning tie for the third-place spot, and, for some, that fear has played out.

Brandon Robinson, vice president of professional development and communications at the Virginia Society of Association Executives, says, "Part of our strategic mission is to be a trusted resource for association professionals. Having a recognized voice on social media channels is one way to accomplish this task." Robinson continues, "Unfortunately, my audience's use of social media is lower than I anticipated or expected. As such, there isn't the critical mass—yet—to have those conversations and dialogs or contribute in a meaningful way through social media. I expect it will come in the future, though we aren't there today."

For those without any near-term plans to use social technologies for learning, the second most common barrier is the lack of funding needed to implement the technologies, and the third is lack of management buy-in.



What are the three biggest barriers preventing your organization from using social technologies as part of its learning products or services? Please check only the three that your organization considers most important. (40 responses)



■ Planning to start using social technologies for learning in next 12 months  
■ Not planning to start in the next 12 months

## The Made Case for the Use of Social Technologies for Learning

To conclude, we'll repeat something we said at the beginning the white paper—but it warrants repetition: Social learning is effective.

Add to that the fact that social technologies for learning don't have to be particularly difficult or expensive. Think of the examples shared here: SCUP's tweet seats at its conference, AAFMT's monthly Twitter chats and featured questions from the community on its Facebook page, AHIP's use of LinkedIn to keep its IT Series learners up to date on late-breaking news. None of those examples is particularly hairy or hard or costly to implement.

What Boufford of the American Association of Family and Consumer Sciences says resonates with us: "I believe in social learning. I think it's *the* thing that has the greatest potential in education to help learners grow and excel and change."

Given that social learning is effective, why not try it, if you're not already? If you are engaging in social learning, doing more or it, or making sure you're aligning with your overarching education strategy, or putting a strategy in place if you don't have one could be good next steps.

To our minds, the case for social learning is made, and the question at hand is not whether to make use of it but how to incorporate it as effectively, as strategically as possible.

### About Tagoras and the Authors

Through a combination of independent research and strategic consulting, Tagoras helps organizations in the business of lifelong learning maximize the reach, revenue, and impact of their offerings. We provide our clients with a unique blend of experience in marketing, technology, and education and back it up with years of successful projects with clients like the American Institute of Certified Public Accountants (AICPA), the Association of American Medical Colleges (AAMC), the Healthcare Financial Management Association (HFMA), the American College of Rheumatology (ACR), and the College Board.

Tagoras reports include *Association Learning + Technology*, *Association Learning Management Systems*, *Association Virtual Events*, and *The Speaker Report: The Use of Professional and Industry Speakers in the Meetings Market*.

Jeff Cobb and Celisa Steele cofounded Tagoras.

[www.tagoras.com](http://www.tagoras.com)

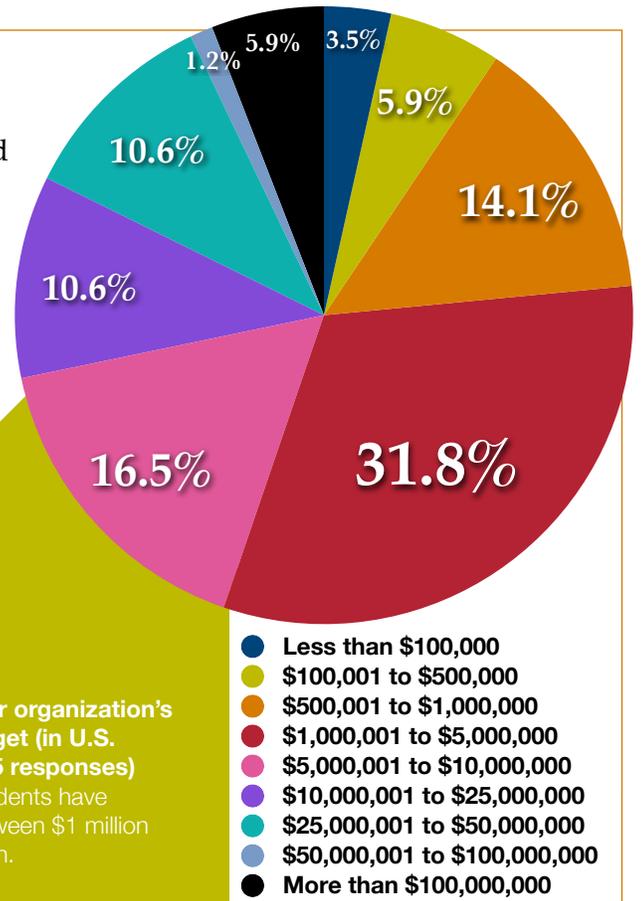


### Appendix: Demographics

Responses to the survey were distributed across a broad range of organizations—from those with no paid staff, annual budgets under \$100,000, and a focus limited to a single community or municipality to those with 7,200 staff members, budgets greater than \$100 million, and an international focus.

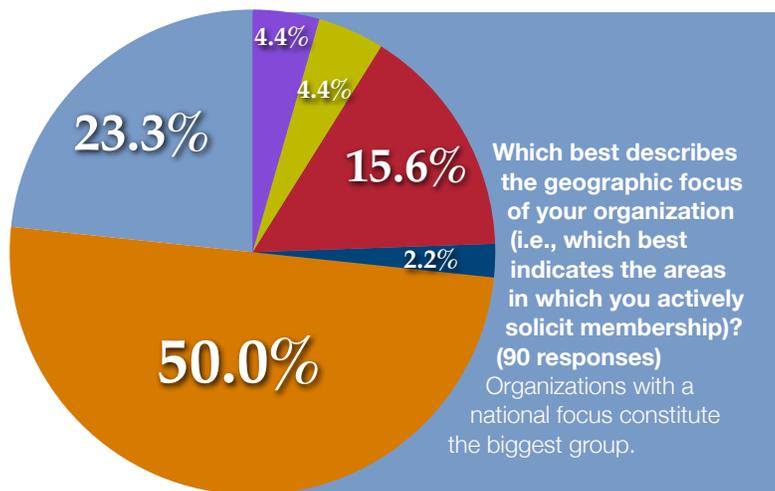
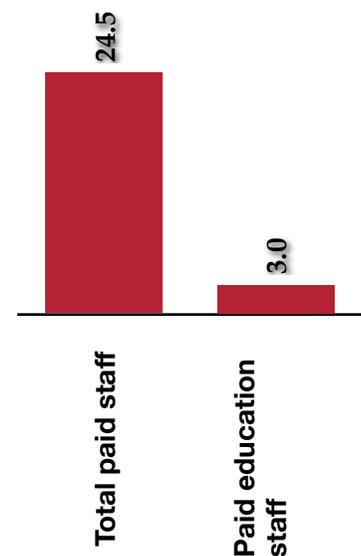
The largest clusters of survey respondents overall were nationally focused organizations (50.0 percent) with annual budgets between \$1 million and \$5 million (31.8 percent). The most common membership size was between 1,001 and 5,000 individuals (25.3 percent).

There's use of social technologies for learning across these demographics even among smaller organizations—including those reporting budgets under \$100,000 and zero paid staff.

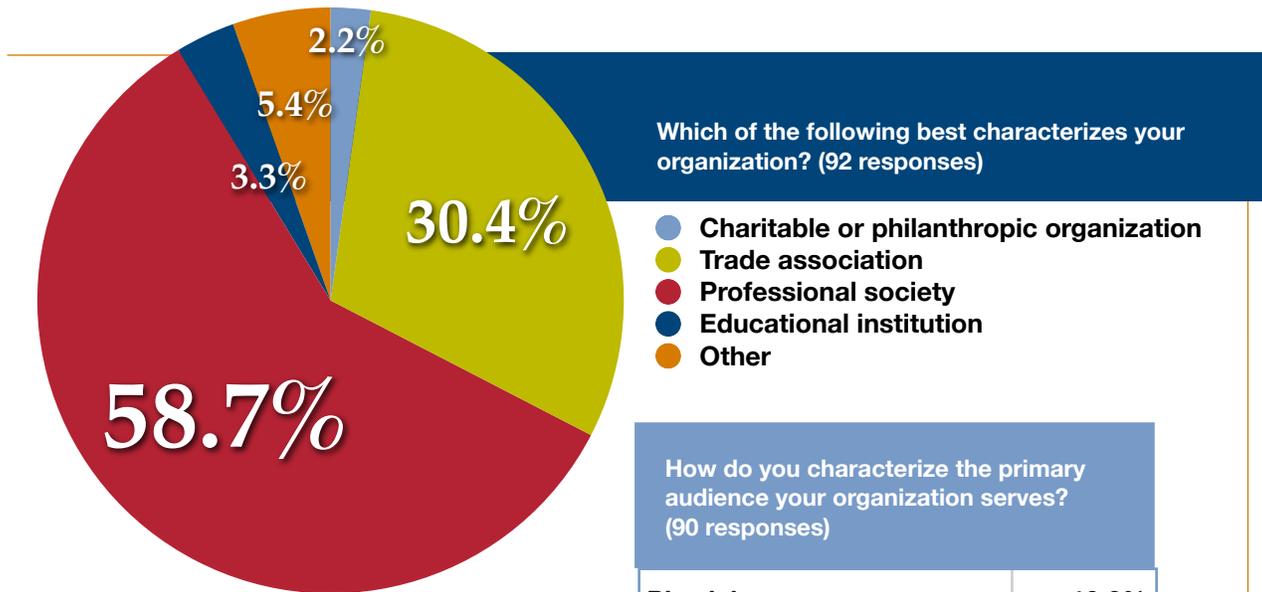


**How many paid staff does your organization currently have? (90 responses)**

**How many paid staff does your organization have who currently spend more than half their time working in education or professional development? (87 responses)**



- Single community or municipality focus
- Multiple community focus in one state
- Single state or province focus
- Multistate or multiprovince focus
- National focus
- International focus



Respondents averaged 871.4 paid staff, a figure inflated by a single respondent with a very large staff of 72,000. The median is much lower: 24.5 paid staff. The average number of paid staff who spend more than half their time working in education or professional development (33.1) was again skewed by a single organization with an education staff of 1,000. The median education staff size is a more modest 3.0.

Professional societies (58.7 percent) and trade associations (30.4 percent) make up the lion’s share of the organizations surveyed.

Survey participants serve a wide variety of audiences. Of seven named options, only non-physician healthcare professionals (18.9 percent), K-12 educators (11.1

Physicians	10.0%
Non-physician healthcare professionals	18.9%
Accountants	5.6%
Attorneys	4.4%
Association executives	3.3%
K-12 educators	11.1%
College or university educators	5.6%
Other	41.1%

percent), and physicians (10.0 percent) garnered double-digit responses; the other four options were selected by under 10 percent, leaving 41.1 percent to select “other.” Audiences reported by those selecting “other” run the gamut from writers and civil engineers to funeral directors and gemstone dealers.

The largest groups of survey respondents were from nationally focused organizations with annual budgets between \$1 million and \$5 million, and 1,001 to 5,000 individual members.