ASSOCIATION LEARNING +TECHNOLOGY

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published by Tagoras

sponsored by Peach New Media

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Table of Contents

Association Learning + Technology 2014

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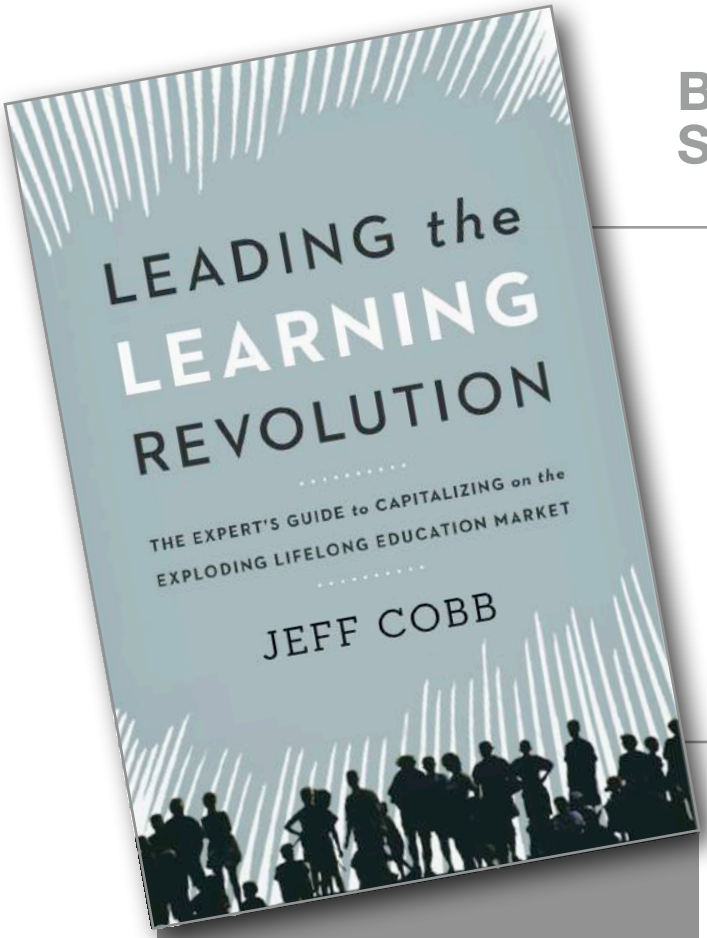

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- Techniques for fueling your content marketing and value creation engine
- Essential practices for delivering high-quality experiences that rise far above the "junk" learning that floods the market
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- Strategies for positioning and pricing that will set you far apart from the competition

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Executive Summary
Association Learning + Technology 2014

Association Learning + Technology 2014 continues our work in two prior reports (one published in 2009, the other in 2011) to assess the use of technology to enable and enhance learning in the association market and provide insight into how the use of technology for learning may evolve in the coming years.

While the primary purpose of this report remains consistent with our past efforts in *Association Learning + Technology 2011* and *Association E-learning 2009*, this time we streamlined the underlying survey to focus on key issues and identify emerging trends, and we abandoned the term *e-learning* entirely. We find *e-learning* inadequate at best (used often for only a subset of educational content delivered online). We've opted instead for the more inclusive (if wordier) *technology-enabled or technology-enhanced learning*.

At the core of the report is an online survey of 200 associations conducted in October 2013.

The Overview

Out of 200 responses to the survey, 88.7 percent were from individuals who indicated their organizations currently offer technology-enabled or technology-enhanced learning. An additional 10.6 percent indicated they plan to start using technology to enable or enhance learning in the coming 12 months, leaving only 1.7 percent not using technology with learning and with no plans to start in the coming year.

When viewed with the data from our past surveys, the 2013 numbers show a steady increase in the use of technology for learning. Of respondents to our 2008 survey (the basis for the initial 2009 report), 61.1 percent reported using e-learning; in 2010, that rose to 77.4 percent.

While there's been a somewhat greater tendency for larger associations to be early adopters of technology for learning, there's significant use of technology to deliver and enhance learning even among smaller organizations. Almost half (48.5 percent) of the organizations that reported using technology for learning have annual budgets of $5 million or less, and 17.6 percent have budgets of $1 million or less.

The Operational Perspective

The most popular type of technology-enabled or technology-enhanced learning is the all but ubiquitous Webinar. Over 80 percent of respondents using technology for learning offer recorded (i.e., on-demand) and real-time (i.e., live) Webinars or Webcasts. Self-paced online courses, tutorials, or presentations come in third (offered by 65.5 percent) and are the only other offering of the five types we asked about to garner a majority. Blended learning is last, offered by only 31.4 percent.

We also asked specifically about four emerging types of learning: massive open online courses (MOOCs), flipped classes, gamified learning, and microcredentials, like digital badges. While these offerings are still fringe (none has above a 10-percent adoption rate), we expect them to grow, particularly microcredentialing, a natural for associations.

Among six named specific social media tools, YouTube is the most common in associations' learning programs (used by 33.1 percent of respondents), but Twitter (32.2 percent), Facebook (28.8 percent), and LinkedIn (27.6 percent) follow not far behind. Under a fifth of respondents (17.3 percent) use Skype for education, and SlideShare ranked last (used by only 8.7 percent).

We're over *e-learning*.

Almost 37 percent of respondents currently using technology for learning provide a mobile version of at least some of their content—way up from 2010, when under 9 percent provided a mobile version. Add in those planning to offer a mobile version in the next 12 months, and we're on track for a majority of associations to make m-learning part of their offerings in the near future.

Only 17.8 percent of associations currently using technology for learning offer a virtual conference—but that's a bump up from 11.7 percent in 2010.

With 32.5 percent of respondents reporting they do it, live streaming from a place-based conference is almost twice as popular as virtual conferences. Another 11.9 percent report plans to live stream in the next 12 months. But the majority (51.0 percent) have no near-term plans to live stream.

Given recorded and real-time Webinars and Webcasts are the most common product offerings, it's not surprising that Webinar and Webcast platforms come out on top among the five types of platforms we asked about—a whopping 84.4 percent of respondents already use one, and another 8.2 percent plan to begin using one in the next 12 months, which, if it happens, would push Webinar and Webcast platform penetration above 90 percent, meaning, essentially, saturation.

Learning management systems (LMSes) are the second most popular technology platform, used by 51.0 percent of respondents currently using technology for learning. That's up noticeably from the 32.6 percent of respondents in 2010 reporting use of an LMS *or* a learning content management system (LCMS) for the delivery or tracking of e-learning.

The majority of associations using technology for learning say it's increased their net revenue from educational offerings.

None of the other platforms we asked about—virtual conference platforms, learning community platforms, and LCMSes—is used by even a quarter of respondents. But projected adoption for the next year is in the teens for all three. If that adoption pans out, around a third of organizations will be using virtual conference platforms, learning community platforms, and LCMSes in the near future.

The Business Perspective

Our research shows the majority (51.7 percent) of associations that use of technology for learning have increased their organization's net revenue from educational offerings, but under a quarter of respondents have a formal, documented strategy for how technology will be used to enable or enhance learning.

Almost three-quarters (71.6 percent) of respondents indicated that their organization doesn't have a formal, documented product development process that includes its technology-enabled and technology-enhanced education products, and over half (56.0 percent) of respondents don't have a formal, documented process for setting prices that includes their technology-enabled and technology-enhanced education products.

For organizations currently using technology for learning, 52.0 percent use professional instructional designers, which is a notable increase from 39.7 percent in 2010. We're glad to see the increase and hope it continues, as even 52.0 percent is too low in our opinion.

Whether to offer a formal certification or credential is an important decision both operationally and strategically for an organization. Among the respondents, 43.1 percent offer a formal certification, and 49.1 percent offer either their own or another organization's formal credential (e.g., certification or license).

The Performance Perspective

When asked if they're satisfied overall with their current technology-enabled and technology-enhanced learning initiatives, 80.0 percent of associations said they were either somewhat (55.3 percent) or very (24.7 percent) satisfied.

However, when it comes to specific aspects of technology-enabled and technology-enhanced learning, the numbers of the very and somewhat satisfied are notably lower. The three biggest areas of dissatisfaction are revenue (only 45.0 percent are very or somewhat satisfied with revenue) and the related areas of the cost of creating offerings (54.9 percent are satisfied) and the staff time required to develop offerings (53.9 percent are satisfied).

While two-thirds of respondents rate themselves as somewhat successful with their use of technology for learning, only 19.1 percent characterize their use of technology for learning as very successful.

We found organizations that consider themselves to be very successful are significantly more likely than average to do the following:

- Report increased net revenue from their education offerings as a result of their use of technology for learning.
- Have a formal, documented strategy for their use of technology for learning.
- Have formal, documented product development and pricing processes that cover their technology-enabled and technology-enhanced learning.
- Offer facilitated online courses, gamified learning, virtual conferences, and at least some mobile learning—in general, be more innovative and forward-thinking.
- Use a learning content management system (LCMS).
- Offer a formal credential (e.g., a certification or license), whether or not the credential is their own.

These traits suggest a more focused, professional approach to technology for learning and a desire to provide engaging, effective learning experiences.

A range of factors—from the economy to technology advances to younger generations entering the workforce—point to growth in the use of technology for learning and to a clear opportunity for technology to transition into a more significant, more strategic part of the mix of education and professional development associations provide to members. As this transition occurs, it's likely to be accompanied by the following:

- Growth in implementation of learning platforms and their integration with other key systems, like association management systems
- A continued focus on professional instructional design to help ensure educational products are effective
- The slowly growing use of social media for learning and increased dabbling in emerging products, like microcredentials and massive courses
- An increase in competition that will, in turn, drive experimentation as associations look at how best to deliver more value
- The professionalization of the education function overall, as the adoption and integration of sophisticated technologies increase the demand for savvy, experienced leaders in the continuing education and professional development business

We're excited about the changes and improvements we see on the horizon, and we look forward to continuing to track the course of associations' use of technology for learning.

Introduction to *Association Learning + Technology*

About This Report

Building on the work of *Association Learning + Technology 2011* and *Association E-learning 2009*, this report looks at the state of technology-enabled and technology-enhanced learning in the association market and provides insight into how the role technology plays in learning may evolve.

While the primary thrust of the report remains consistent with our past efforts—that is, we hope the information here proves useful to organizations looking to improve their education initiatives—this time, we streamlined the underlying survey to focus on key issues and identify emerging trends. Notably, we abandoned the term *e-learning* entirely. In 2011, we distanced ourselves from the term by renaming the report, noting a significant number of organizations limit *e-learning* to self-paced online courses and don't use it for Webinars, Webcasts, or other forms of educational content delivered online, which we include under the rubric. But we stood by the term *e-learning* in the body of the 2011 report.

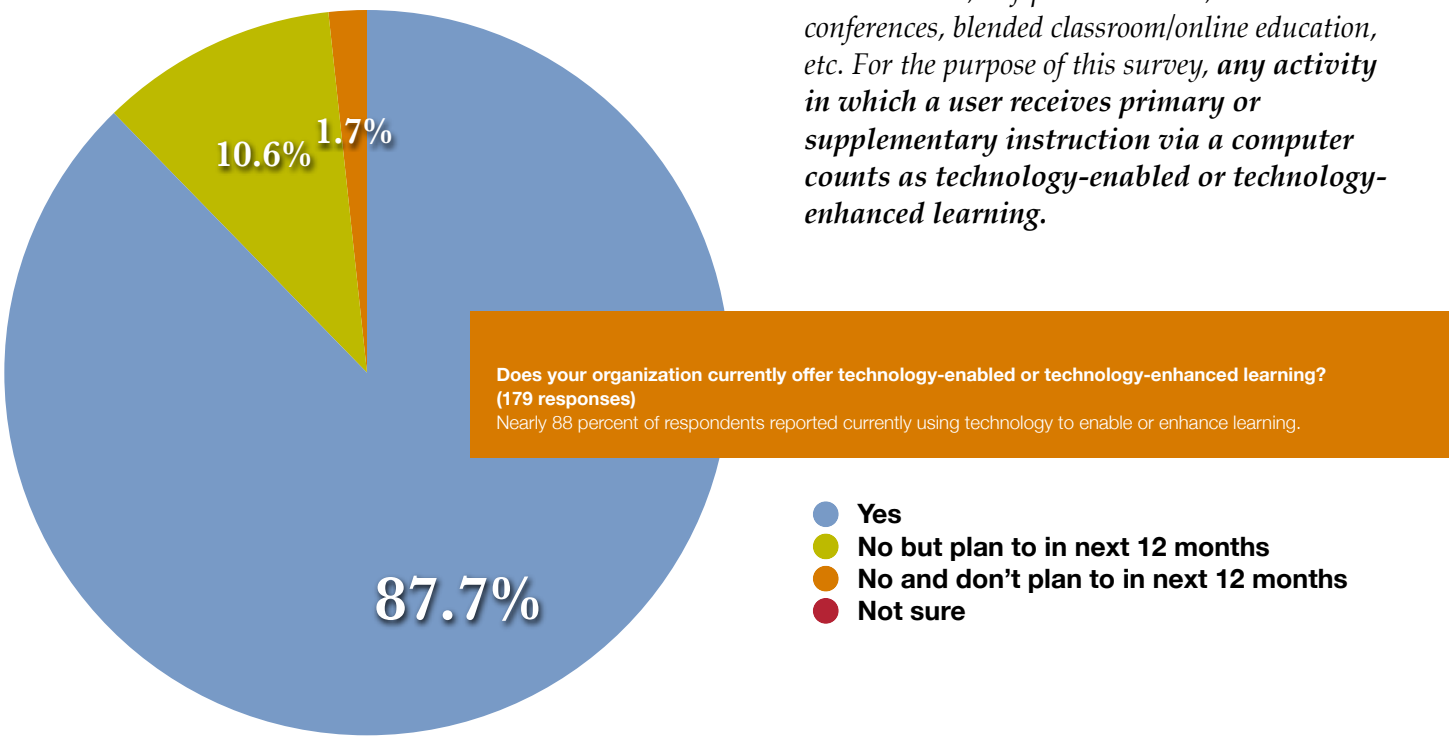
Two years later, we find ourselves ready to forgo the term, finding *e-learning* inadequate at best and misleading at worst. We've opted instead for the more inclusive (if wordier) *technology-enabled or technology-enhanced learning*.

At the core of the report is a survey of associations conducted from October 2 to 28, 2013. We received 200 responses to this survey. Out of these responses, 88.7 percent indicated their organization currently offers technology-enabled or technology-enhanced learning. An additional 10.6 percent indicated they plan to start using technology to enable or enhance learning in the coming 12 months, leaving only 1.7 percent not using technology with learning and with no plans to start in the coming year.

When viewed with the data from our past surveys, the 2013 numbers show a steady increase in the use of technology for learning. Of respondents to our 2008 survey (the basis for the initial 2009 report), 61.1 percent reported using e-learning; in 2010, that rose to 77.4 percent.

We were purposely broad in defining *e-learning* for the previous reports (wanting to make sure respondents didn't limit the term to self-paced online content), and we applied that same inclusiveness to the definition we presented to survey participants, prior to asking whether they use technology to deliver or enhance education:

> *There are many ways to use technology to deliver learning or to enhance learning, such as Webcasts and Webinars, self-paced tutorials, virtual conferences, blended classroom/online education, etc. For the purpose of this survey,* ***any activity in which a user receives primary or supplementary instruction via a computer counts as technology-enabled or technology-enhanced learning.***



We (the two authors of this report) have together worked in the field of technology-enabled and technology-enhanced learning for more than 30 years, and we've 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 draw on our 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-statistical survey, but also on an understanding that the association sector is, by its nature, quite diverse and fragmented and that broad conclusions must be put forward cautiously.

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

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

The report is structured into the following sections:

1. The executive summary
2. This introduction
3. A look at the survey respondents' demographic data
4. A chapter on the operational aspects of what's produced, including emerging trends like social learning, virtual conferences, and mobile learning, and the platforms used to support those products
5. A chapter that takes the business perspective, looking at the use of strategy, processes, and professional instructional designers and the role of formal certification and credentials
6. A chapter that looks at performance, including how technology impacts net revenue and common characteristics of associations satisfied with and successful in their use of technology for learning
7. Information about Tagoras (publisher of this report) and us (Jeff Cobb and Celisa Steele, authors of this report)
8. Information about Peach New Media, who is sponsoring this report so it can be made free of charge to you, and a thought-leader contribution from Chief Executive Peach Dave Will
9. An appendix with the raw online survey data (parts of which are cited throughout the report)

Our sincere hope is this report proves useful to associations as they assess their use of technology for learning and contemplate their next steps.

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From *Should We Do It* to *Making It Better*
Thoughts from Peach New Media's Dave Will

For most organizations, the question about technology and learning has changed from "Should we use technology in our educational content?" to "How do we better our educational content with technology?" The conversation used to be focused on the benefits of creating technology-enabled or technology-enhanced learning. The spotlight has shifted from *should we do it* to *making it better*. The sophistication of the administrators and end users has evolved, causing us to ask *how*. How do we create an educational program that helps us achieve our mission? How do we drive more non-dues revenue? How do we drive loyalty to our organization? How do we increase the value of membership?

As the Chief Executive Peach at Peach New Media, I speak on behalf of our team and our experience with hundreds of associations that deliver learning to millions of professionals through our Learning Content Management System, Freestone™. Our experience supports the data we see in this Tagoras *Association Learning + Technology* report, where we learned that nearly 90 percent of associations and member-based organizations are already delivering technology-enabled learning, primarily via live and on-demand content. The emphasis is not on social media or gamification, as much as it's on delivering a valuable, reliable, accessible continuing education program. My conversations with association executives tell me that doing learning well is the ultimate goal. The more Peach partners with clients, the more evident it is that doing it well is not about offering more bells and whistles; it's about providing an effective and enjoyable learning experience.

Since I've mentioned the focus on doing it well, here are three trends that are at the forefront of successful technology-based learning programs.

- **Platform integration**

  When dabbling in technology-based learning, it's only natural to start with a few Webinars, Webcasts, and on-demand seminars. However, part of the evolution of many associations not only includes ramping up the volume of content, but also utilizing a learning platform to its potential. This means allowing your learning platform to "talk" to your membership platform, as well as any other database your association uses. By utilizing APIs as the key to data exchange, you can offer end users a single sign-on experience. You'll offer your members the opportunity to only have to remember one ID and password to access everything available to them on separate systems.

  Oftentimes, it's your association management system (AMS) that acts as the database of record and the gateway to the other platforms. An integration allows data to transfer back and forth between platforms. This data transfer can happen

in a wide variety of ways. A common need we see is for membership status from the member database to control the privileges of an end user on your learning platform. This can be easily managed through integrations. Many clients also track member activity in their membership database, meaning a push of information from your learning platform will have to be accepted to track members' learning data. A successful integration can manage all aspects of data exchange for you, allowing you to have a far greater understanding of your members, their interests, and their involvement in your association.

- **Software as a service (SaaS)**

  Traditionally, enterprise software solutions were sold with a perpetual license and installed on your on-site servers. This usually required a large and complicated up-front investment, followed by expensive upgrades upon new product releases. Today's market is offering faster configurations with Web-based solutions. Learning platforms are no exception. The best platforms require a minimal up-front investment and are paid on a flat-fee, monthly model that may incorporate live and on-demand content capture, hosting, and distribution. This allows for growth in your program without penalty. This style of solution provides regular updates to the software that don't require changes to critical integrations. SaaS learning platforms also have a comprehensive set of administrative controls so that you can configure the platform specifically to your needs while managing the learner path for the end users.

- **Free versus fee**

  Everything worth doing is worth overdoing, right? Well, we're beginning to see strong competition in online content. It's forcing content providers, like you, to think about competitive pricing and increased value. A common trend is to incorporate some component of free content in your learning strategy. Often this contributes to membership retention and your organization's value proposition. Some associations are focused not only on driving non-dues revenue via technology-based learning, but also boosting membership value, therefore increasing retention and growing membership.

Of course, there are many other important components to a continuing education program, like superior customer service, or the need for mobile accessibility as highlighted in the Tagoras report. These factors and more show us every organization is thinking about delivering learning even better than they are now.

I'd love to hear your thoughts. Is this on the mark or completely off base? Please reach out to me any time.

Dave Will
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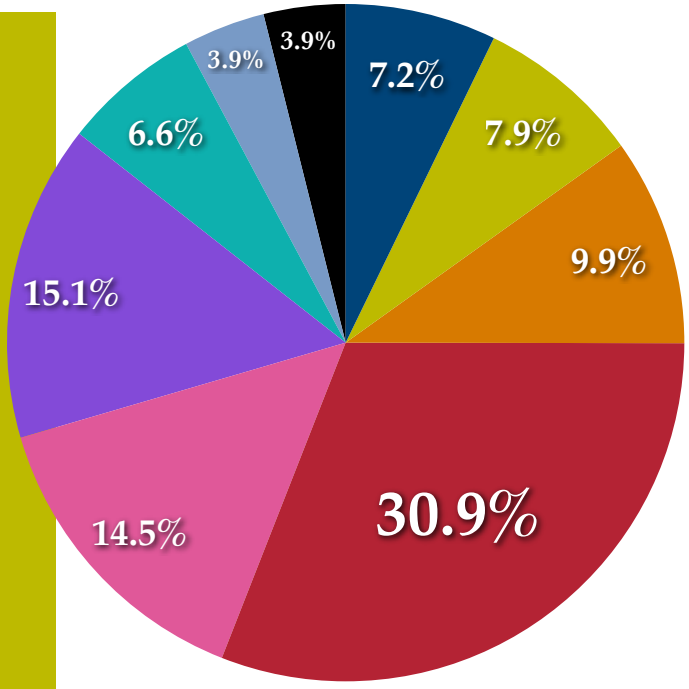
The Demographics
Budget, Organization Type, Geographic Focus, and Size

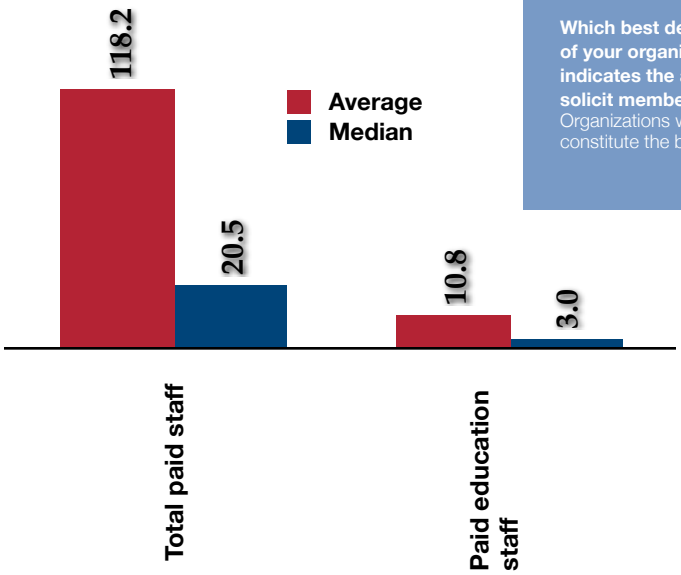
Responses to the survey were distributed across a broad range of organizations—from those with no paid staff and annual budgets under $100,000 to those with 7,500 staff members and budgets greater than $100 million.

The largest clusters of survey respondents overall were nationally focused organizations (36.8 percent) with annual budgets between $1 million and $5 million (30.9 percent). The most common membership size was between 1,001 and 5,000 individuals (22.5 percent).

There's significant use of technology to deliver and enhance learning even among smaller organizations. Almost half (48.5 percent) of organizations that reported using technology for learning have annual budgets of $5 million or less, and 17.6 percent have budgets of $1 million or less.

What is your organization's annual budget (in US dollars)? (152 responses)
Most respondents have budgets between $1 million and $5 million.

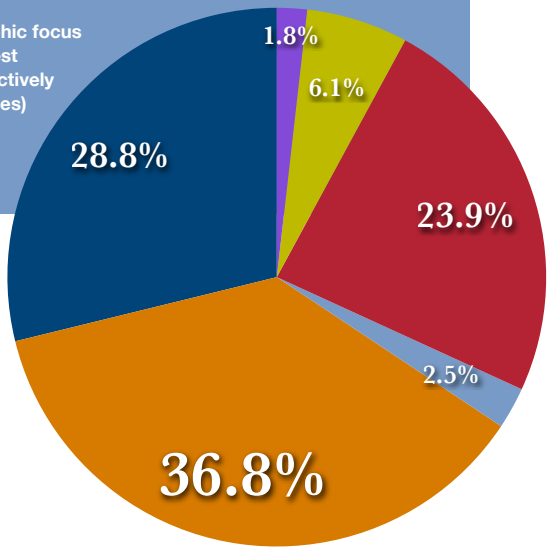


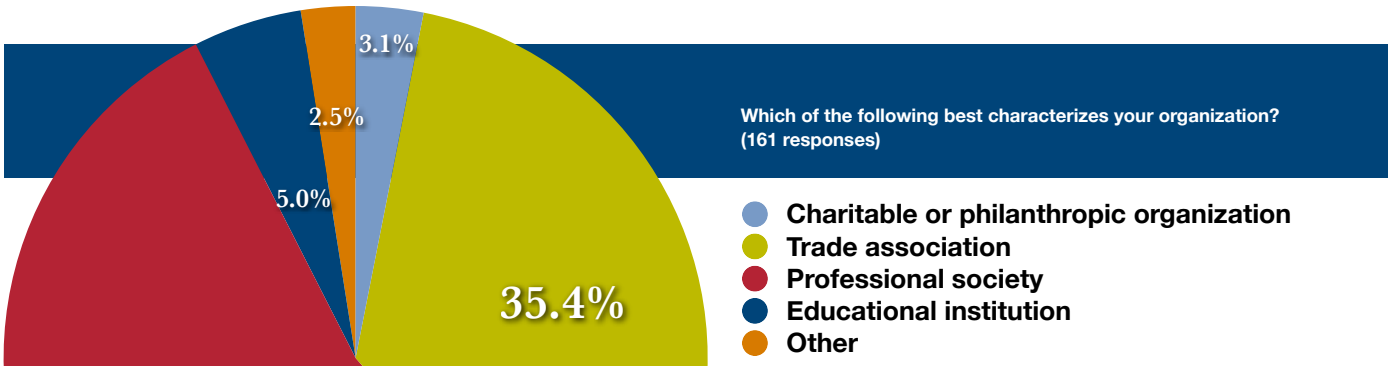


How many paid staff does your organization currently have? (160 responses)

How many paid staff does your organization have who currently spend more than half their time working in education or professional development? (159 responses)

Which best describes the geographic focus of your organization (i.e., which best indicates the areas in which you actively solicit membership)? (163 responses)
Organizations with a national focus constitute the biggest group.





Respondents averaged 118.2 paid staff (median 20.5) and 10.8 paid staff who spend more than half their time working in education or professional development (median 3.0).

Professional societies (54.0 percent) and trade associations (35.4 percent) make up the lion's share of the organizations surveyed, and almost 90 percent of both association types currently use technology to deliver or enhance learning (89.5 percent of the surveyed trade associations and 87.4 percent of the surveyed professional associations).

Survey participants serve a wide variety of audiences. Of seven named options, only non-physician healthcare professionals garnered a double-digit response (11.2 percent); all the other options were selected by under 10 percent, leaving 57.8 percent to select "other." Audiences reported by those selecting "other" run the gamut from technical writers and engineers to dog trainers and child welfare workers.

Having looked at the demographics of the survey respondents, we now delve deeper into operations, the business view, and performance.

How do you characterize the primary audience your organization serves? (161 responses)

Physicians	8.7%
Non-physician healthcare professionals	11.2%
Accountants	5.6%
Attorneys	1.9%
Association executives	5.6%
K-12 educators	4.3%
College or university educators	5.0%
Other	57.8%

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.

The Operational Perspective
Products, Offerings, and Platforms

In this chapter, we look at the nuts and bolts of a technology-enabled or technology-enhanced learning program: what's produced and what platforms are used.

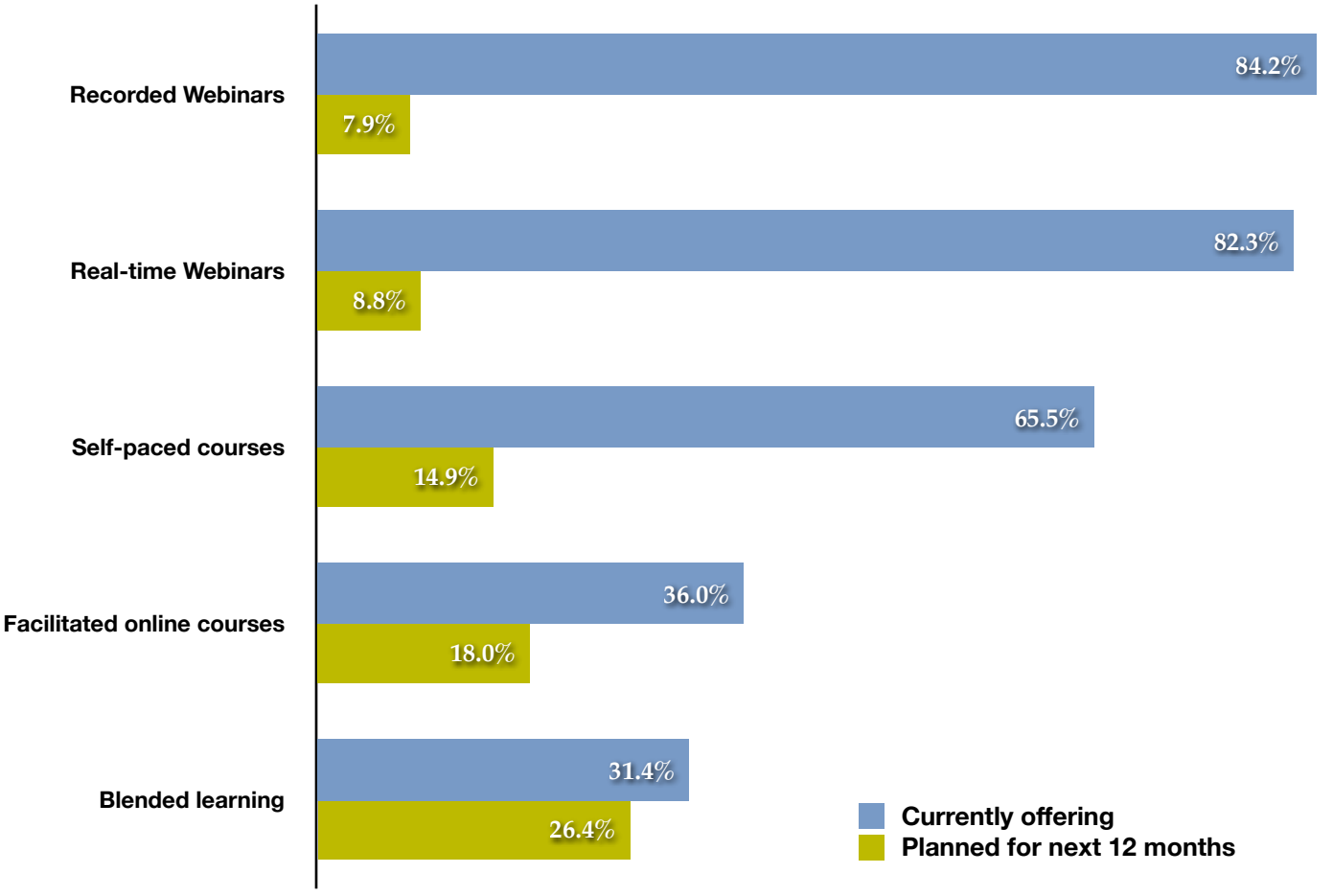
Products and Offerings

In the online survey, we asked organizations currently using technology to deliver or enhance learning which types of products and services they offer or plan to offer.

Recorded (i.e., on-demand) and real-time (i.e., live) Webinars and Webcasts essentially tie for the top spot (both are offered by over 80 percent of respondents). Self-paced online courses, tutorials, or presentations come in third (offered by 65.5 percent) and are the only other offering to garner a majority.

For organizations with more than 5,000 members, the rate of two offerings shows a sizable jump—facilitated online courses go up to 48.5 percent (from 36.0 percent of all organizations currently using technology for learning), and self-paced online courses rise to 79.5 percent (from 65.5 percent). For organizations with more than 10,000 members, the use of self-paced courses increases even more, to 87.6 percent. The greater use of self-paced courses among larger organizations may be partially explained by the typically longer development timelines and bigger budgets for self-paced courses when compared to Webinars, making them a better

Which of the following does your association provide or plan to provide? (154 responses)
Recorded and real-time Webinars come out on top among current offerings.



bet for larger markets where the association can recoup the costs. We should note, though, that saying self-paced courses are more expensive is a generalization, and one that's been increasingly challenged in recent years as do-it-yourself and rapid development tools have emerged, shortening timelines and lowering costs.

We find it interesting that blended learning ranks last (although facilitated learning doesn't beat it by much), in spite of blended learning arguably being the most instructionally effective format in the list of offerings. Our suspicion is that resourcing is an issue—folks designing and implementing blended learning have to be comfortable online and in the classroom, and the time commitment can be more significant than for other formats.

MOOCS, FLIPPING, GAMES, AND BADGES ONLY FRINGE

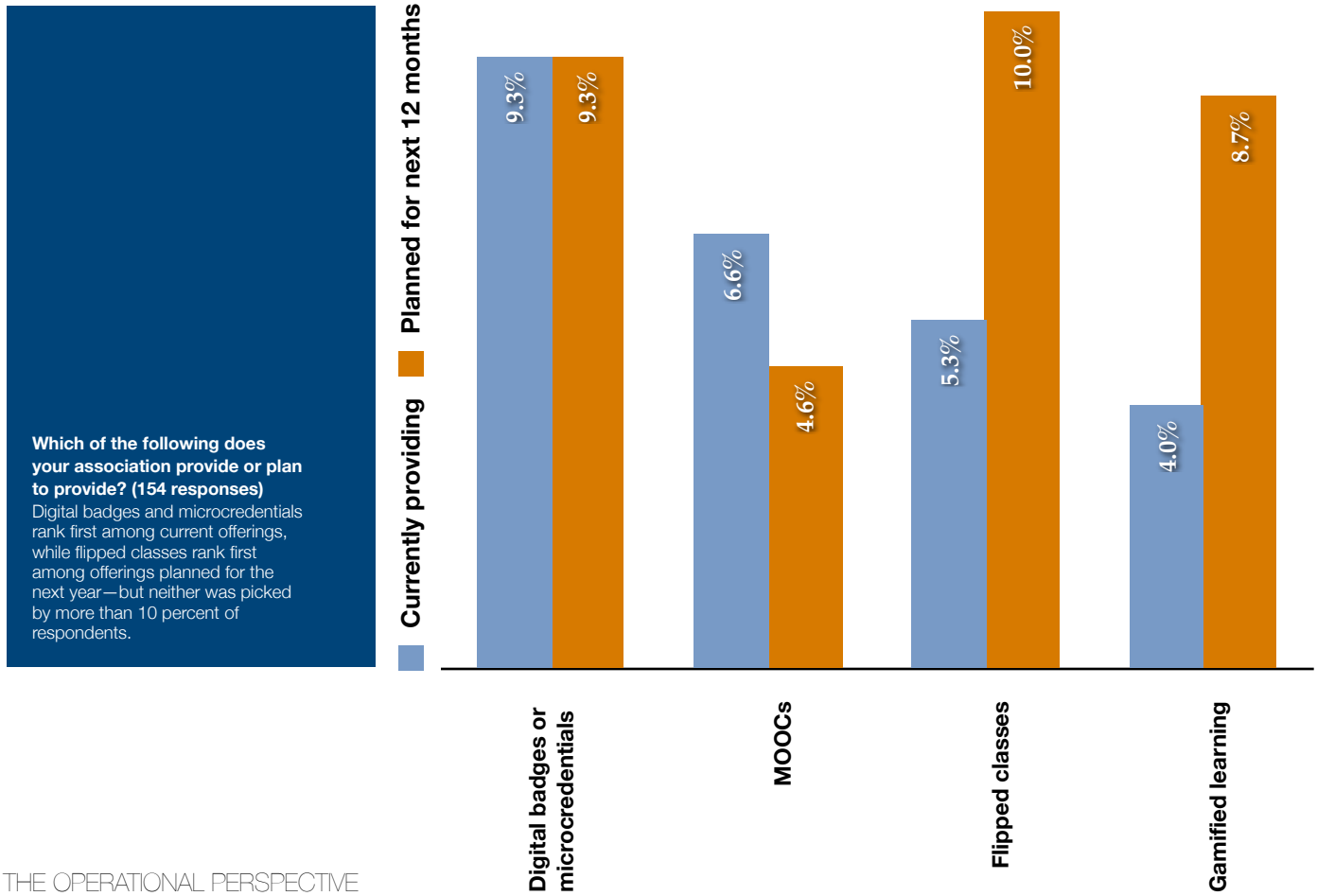
In the survey, we asked specifically about four emerging types of learning: massive open online courses (MOOCs), flipped classes, gamified learning, and digital badges or microcredentials.

These offerings are still fringe (none has above a 10-percent adoption rate), and a more than a quarter of respondents indicated they weren't sure if their organization offers these emerging types of learning, suggesting they aren't even clear on what the terms mean (see the primer on the following page if you aren't clear or want a refresher).

Digital badges or another microcredential are offered by 9.3 percent of respondents, placing it first in this list. Among those currently using technology for learning, digital badges (9.3 percent) and flipped classrooms (10.0 percent) essentially tie as the top offering to pursue in the next year.

Microcredentialing is a trend we think likely to grow rapidly from this early-adopter phase, as it's natural territory for associations. And learners will increasingly appreciate and seek out ways to demonstrate their ongoing learning in what we term "the other 50 years"—the typical lifespan after adults leave higher education.

Flipped classes are another trend with significant potential, especially when applied beyond traditional classrooms to conferences, seminars, and workshops. With flipped learning, learners do work in advance so they come together with a shared baseline of knowledge. People today are time-



Which of the following does your association provide or plan to provide? (154 responses)
Digital badges and microcredentials rank first among current offerings, while flipped classes rank first among offerings planned for the next year—but neither was picked by more than 10 percent of respondents.

A PRIMER ON EMERGING TYPES OF LEARNING

MOOCs

A massive open online course, or MOOC, is a free online course in which large numbers of people can enroll. MOOCs typically feature a blend of video content, discussion boards, downloadable readings, and peer-to-peer evaluation of learning. Key examples include Coursera (https://www.coursera.org), edX (https://www.edx.org), and Udacity (https://www.udacity.com).

Gamified Learning

Gamification uses game mechanics and strategies in non-game contexts to engage users and improve learning. Gamified learning plays off our natural proclivity for competition, achievement, and status. As an example, gamification might reward learners for completing tasks with points, badges, or virtual currency.

Flipped Classes

Flipped learning involves offering preparatory or foundational content (often as Web-based video) outside of the classroom and then using class time for more active learning. It "flips" the traditional approach of using class time for lecture and non-class time for hands-on work related to the lecture. Khan Academy (https://www.khanacademy.org), more than any other organization, has put flipped learning on the map.

Digital Badges and Microcredentials

The MacArthur Foundation, a vocal proponent of digital badges, describes them as a way to "make visible and validate learning in both formal and informal settings" (http://www.macfound.org/programs/digital-badges). You might also think of them as the Web's equivalent to Girl Scout or Boy Scout badges: acquire a new skill or new knowledge, and get a badge to mark your accomplishment. Badges give learners a stamp of credibility for the wide variety of learning activities they can now engage in on the Web. See also http://openbadges.org.

Digital badges are the primary example of microcredentialing—basically a type of credentialing that's significantly less complex and time-consuming than traditional degrees and certifications.

Alternative credentialing refers to pretty much any approach to verifying and validating education that falls outside of the traditional degree and certification system. Badges, again, are an example, but so are certificates as well as new approaches to tracking educational achievement like Degreed (http://degreed.com).

strapped, and it only makes sense they would want to make best use of time spent together with peers, teachers, and facilitators.

While only 6.6 percent of respondents offer MOOCs and only 4.6 percent more plan to begin offering MOOCs in the next year, we're excited about the massive business model and expect more associations to embrace it in the coming years, as they realize the ready-built audience of their profession or industry could benefit from a MOOC offering.

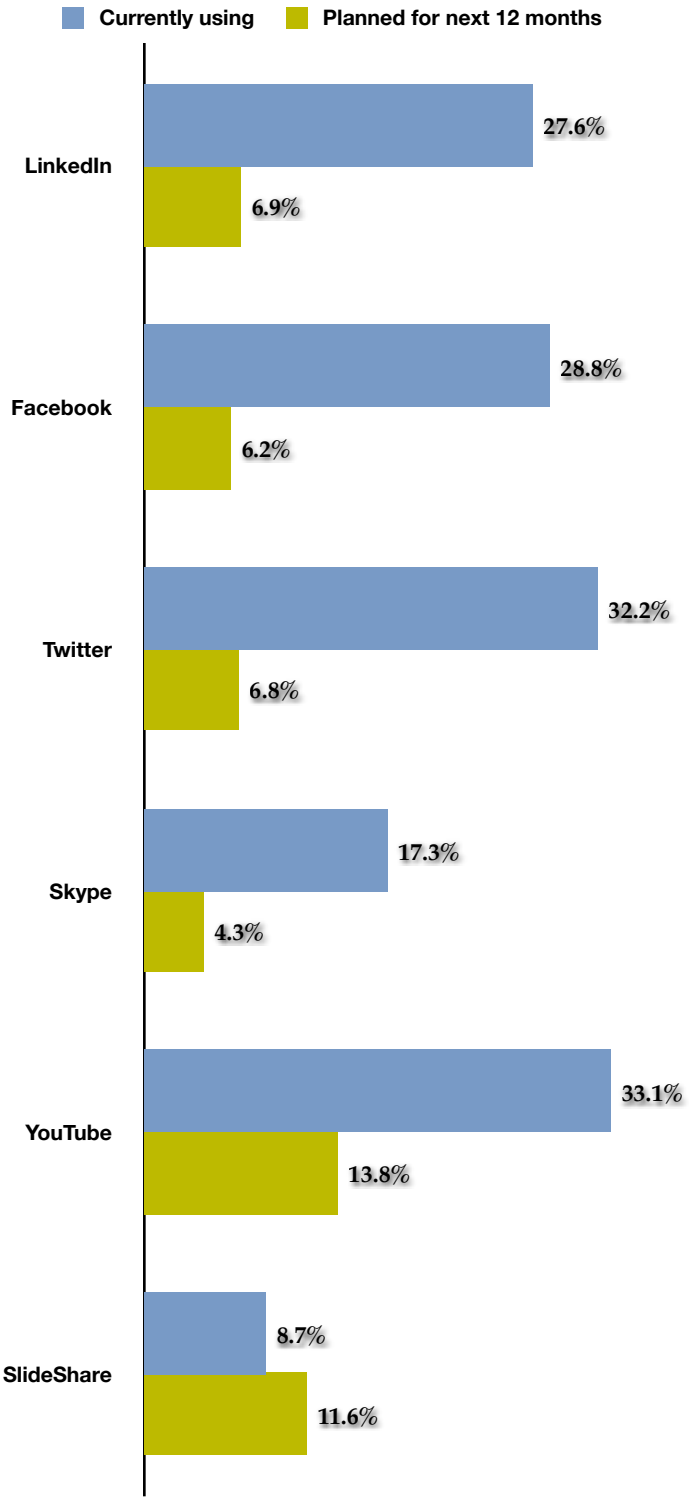
Gamified learning ranks the lowest of the four emerging types of learning; only 4.0 percent report currently using it, but 8.7 percent report planning to use it in the next 12 months. *Gamified learning* may be a little like *e-learning*, in that the term was needed and made sense at a point, but as technology has become more pervasive, differentiating learning from e-learning grows difficult. Similarly, games may just become a familiar tool in the instructional designer's box. The best gamified learning we know of is transparent—a natural extension of the content and the learning goals.

SOCIAL LEARNING HERE TO STAY

Among the range of specific social media tools† currently used by associations for learning, YouTube comes out on top (used by 33.1 percent of respondents), but Twitter (32.2 percent), Facebook (28.8 percent), and LinkedIn (27.6 percent) follow not far behind.

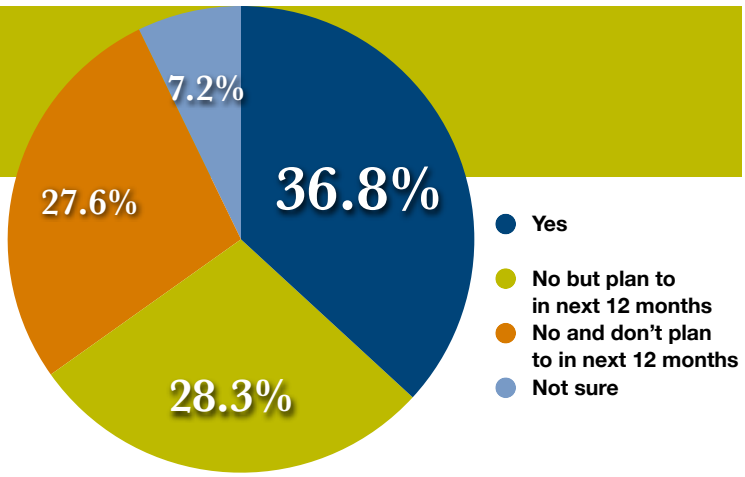
Under a fifth of respondents (17.3 percent) use Skype for education. SlideShare ranked last (used by only 8.7 percent). Given the PowerPoint juggernaut, it's a little surprising that SlideShare doesn't rank higher. Our theory is posting a file (like a deck of slides) is familiar territory for associations, 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. If our hunch is right, that means associations are down-playing, or

Which of the following social media tools does your organization use or plan to use as part of its learning offerings? Please only indicate tools 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 offerings, do not select that item. (149 responses)
YouTube comes out on top, but not by much.



† For individuals seeking a primer on social media tools and how they can be used in for learning, we recommend our free e-book, *Learning 2.0 for Associations*, available at http://www.tagoras.com/catalog/association-learning20.html.

Do you provide a mobile version (i.e., a version specially formatted to be easily viewed and navigated on a mobile phone or tablet device) for some or all of your learning content? (152 responses)
Over 65 percent offer m-learning or plan to in the next 12 months.



ignorant of, the content marketing value of a site like SlideShare that can help expose content to new audiences and improve search engine results.

Social learning is here to stay—it is, after all, a very old idea. But associations are sorting through questions of how to harness social media for learning, how to work out shared ownership of social media tools with marketing and other functions, and how to staff for social learning, as making effective use of the tools takes some dedicated time and attention.

There's clearly room for growth in the area of social learning, and we expect to see just such growth, albeit slow, in the coming years.

MOBILE LEARNING GROWING

Almost 37 percent of respondents currently using technology for learning provide a mobile version of at least some of their content—way up from 2010, when under 9 percent provided a mobile version. Add in those planning to offer a mobile version in the next 12 months, and we're on track for a majority of associations to make m-learning part of their offerings in the near future.

M-learning has hit a tipping point, and for associations it's no longer a matter of whether to offer a mobile version but what to offer and how soon.

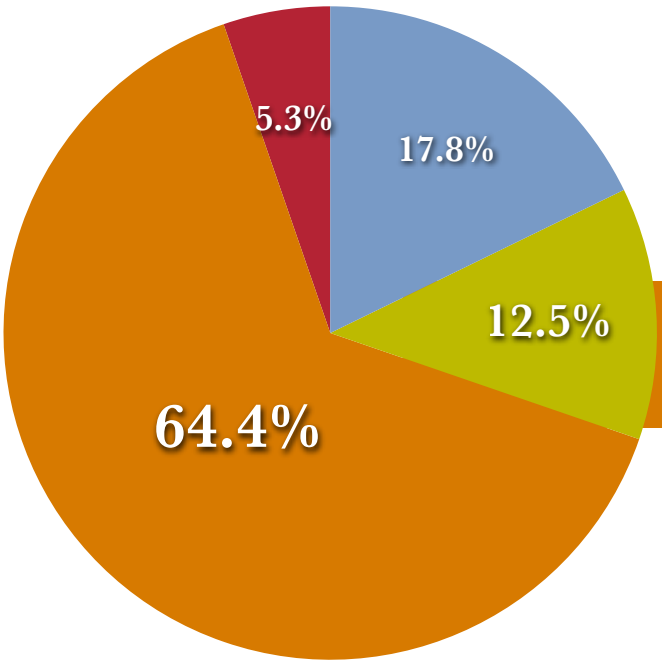
VIRTUAL CONFERENCES STILL NASCENT

We asked survey respondents to report on their use of or plans for virtual conferences based on the following definition:

> *A virtual conference is a Web-based event that replicates many aspects of a traditional place-based conference. It features multiple sessions (not just a single Webinar or Webcast) and may include keynote presentations, training and education workshops, discussion areas, social networking opportunities, exhibit areas for vendors, and various other features. Activities in a virtual conference may take place in real time (synchronously), on demand (asynchronously), or in some combination of the two.*

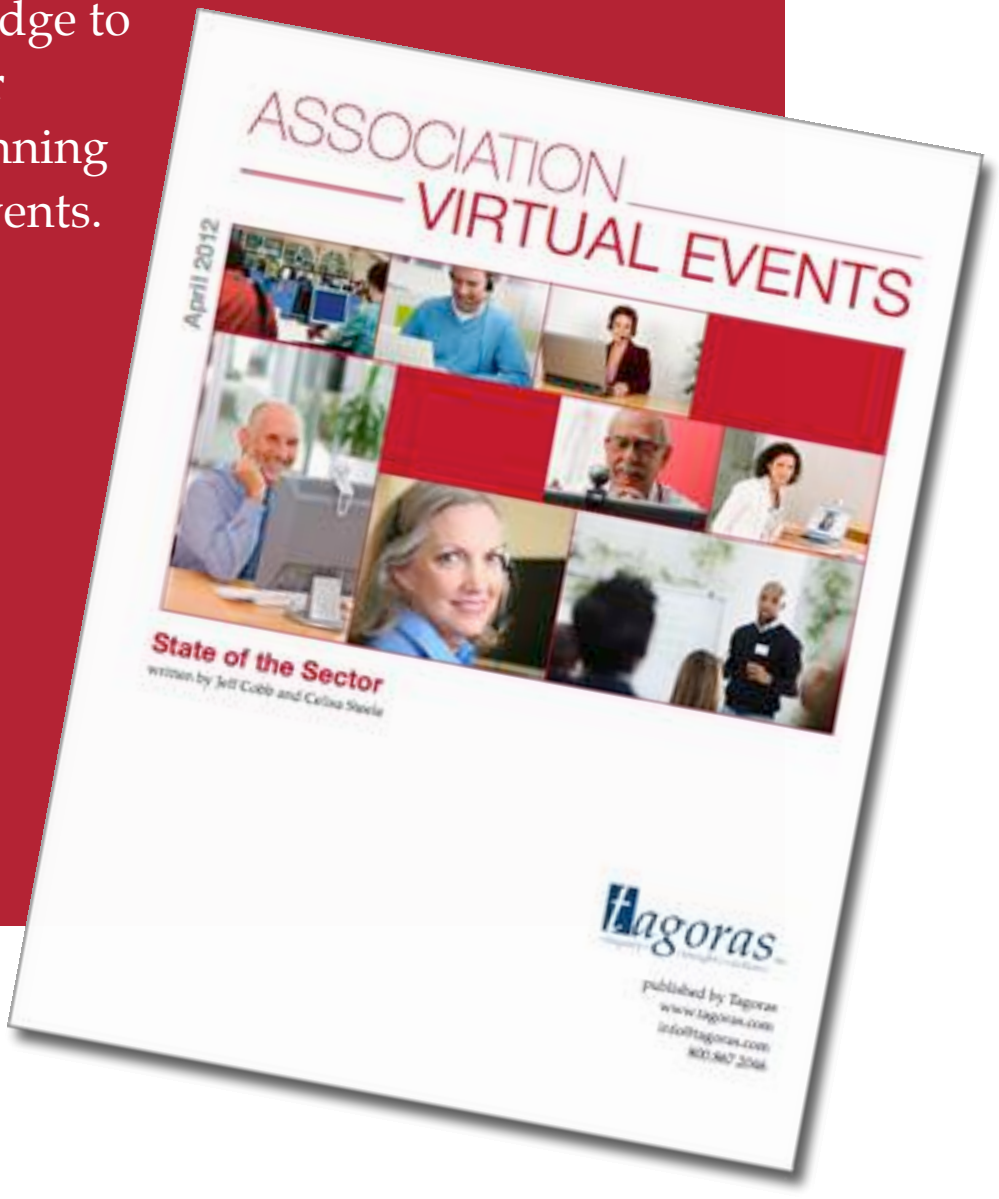
This definition encompasses both standalone conferences—ones that don't include any type of in-person contact—as well as hybrid conferences—ones that are offered in tandem with and as an extension of a place-based event. It also allows for a

Does your organization offer a virtual conference? (152 responses)
Almost 18 percent of respondents offer a virtual conference.



Ready to Make Virtual Events a Part of Your Strategy?

Then you'll want *Association Virtual Events*, available at http://www.tagoras.com/catalog/virtual-events. The comprehensive report is designed for trade and professional association decision-makers who want leading-edge knowledge to support their strategic planning for virtual events.



wide range of delivery technologies and methods—from Webinars to 3D environments to intensive, social media-driven interactions.

While only 17.8 percent of associations currently using technology for learning offer a virtual conference, that's a bump up from 11.7 percent in our last survey—though still shy of the third anticipated based on the 2010 data (in which another 23.7 percent reported plans to offer a virtual conference in the coming 12 months).

While virtual conference adoption is nascent among associations, it's growing, driven by a variety of factors: the chipping away at bandwidth as a barrier; the emergence of lower-cost, easier-to-use platforms; the rapid, widespread adoption of social and gaming technologies; time and cost pressures; and the increasingly common expectation, particularly among younger generations, that meaningful collaboration and learning can be done online. We know bandwidth continues to be a real or perceived barrier for some. As one survey respondent comments, "Because our members are located in rural communities across the U.S. and don't have large travel budgets, we're actively pursuing online options for our educational programs. Unfortunately, many of these options require a high-speed Internet connection, which our members may or may not have."

While technology will play a role in evolving conferences, we see technology as, ideally, an enabler, not an end in itself. Non-technology changes, like increased focus on content and how best to achieve real and relevant learning, are needed to truly transform conferences as educational offerings.

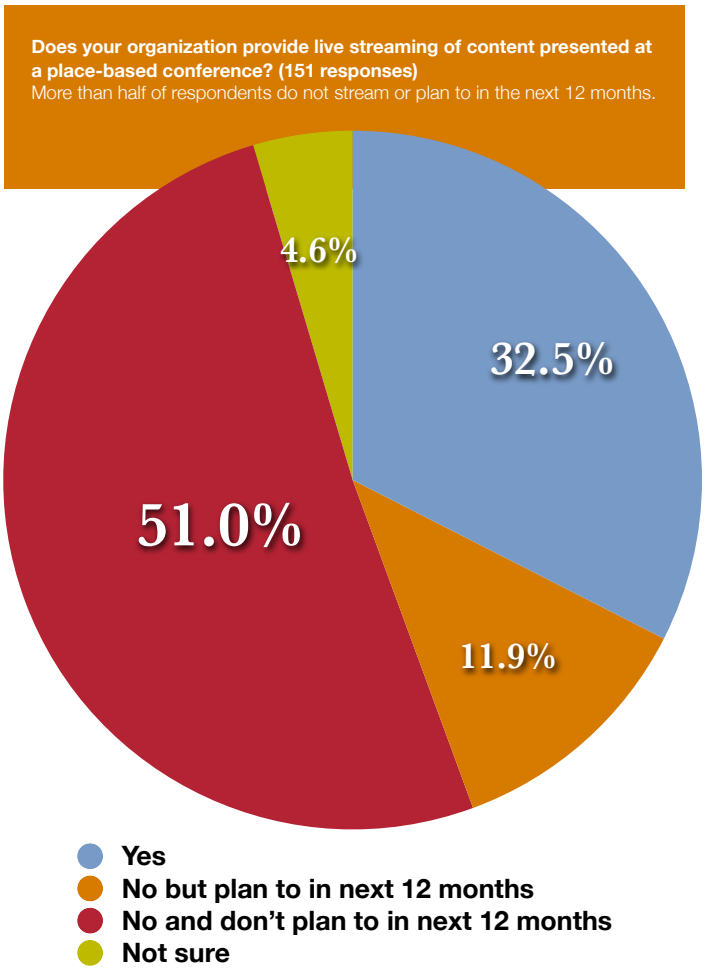
We know cannibalization is a concern for many associations. But, in our experience, it's a specter, not a real phenomenon. Few organizations get more than 20 to 30 percent of their members to their annual conference, which means they're not reaching a significant swath of their membership with the conference. With that in mind, it seems reasonable to view virtual conferences as an opportunity rather than a threat.

We've seen associations worried about the impact of virtual conferences on their overall net revenue stack the odds in their favor by securing sponsorships to replace or supplement registration fees. This thinking fits with the entrepreneurial, experimental mindset we see as critical to organizations that want to thrive in the new learning landscape.

LIVE STREAMING MORE POPULAR THAN VIRTUAL CONFERENCES

With 32.5 percent of respondents reporting they do it, live streaming from a place-based conference is almost twice as popular as virtual conferences are. Another 11.9 percent report plans to live stream in the next 12 months. But the majority (51.0 percent) have no near-term plans to live stream.

In data collected for *The Speaker Report: The Use of Professional and Industry Speakers in the Meetings Market* (published by Tagoras and Velvet Chainsaw Consulting in November 2013), we found only 22.5 percent of respondents (who represented a broader range of entities than nonprofit membership organizations) offer live video streaming of all or



some of their keynote sessions at their major meeting (it was left to respondents to decide which of their meetings qualified as their major meeting, as long as it had more than 500 attendees), and less than 12 percent do so for their concurrent sessions at their major meeting. Those numbers are essentially the same as those from the survey behind the 2011 version of *The Speaker Report*, showing live streaming to remain relatively flat.

We believe content capture with scheduled replays that increase learner engagement is more likely to take hold, and we expect pure live streaming to remain flat in the near future.

Technology Platforms

We asked survey respondents currently using technology for learning which types of technology platforms they use or plan to use in the next year for delivering or enhancing learning.

WEBINAR AND WEBCAST PLATFORMS ON THE VERGE OF SATURATION

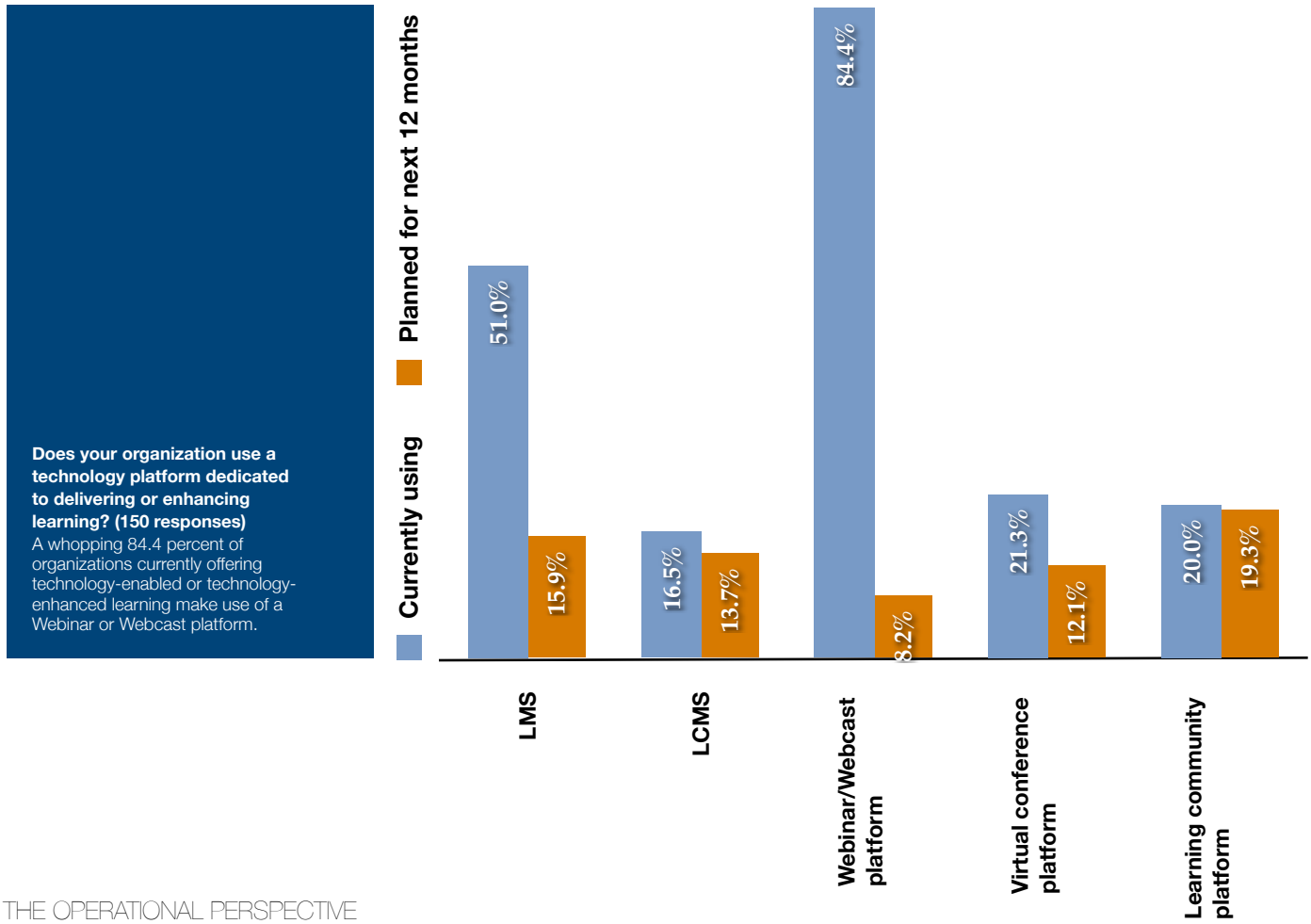
Not surprisingly, given recorded and real-time Webinars and Webcasts are the most common product offerings, Webinar and Webcast platforms come out on top among the platforms—a whopping 84.4 percent already use one, and another 8.2 percent plan to begin using one in the next 12 months, which, if it happens, would push Webinar and Webcast penetration above 90 percent, meaning, essentially, saturation.

LMS USE UP

Learning management systems (LMSes) are the second most popular technology platform, used by 51.0 percent of respondents currently offering technology-enabled or technology-enhanced learning. That's up noticeably from the 32.6 percent of respondents in 2010 reporting use of an LMS *or* a learning content management system (LCMS) for the delivery or tracking of e-learning.

While Webinars are often seen as a relatively easy, low-risk way to enter the technology-based learning market, implementation of an LMS is usually a sign that an organization has made the decision to invest significantly in technology to support its learning—presumably because it sees the potential for a positive return on that investment. Like other complex software, these systems often come with significant licensing fees, and the time and cost for

Does your organization use a technology platform dedicated to delivering or enhancing learning? (150 responses)
A whopping 84.4 percent of organizations currently offering technology-enabled or technology-enhanced learning make use of a Webinar or Webcast platform.



implementation can be substantial, particularly if integration with other systems is involved.

Even people familiar with the term *LMS* may not really understand what a learning management system does. In its most basic form, an LMS is database software—not unlike Microsoft Access or FileMaker Pro—specifically designed for registering users for course experiences and then tracking and maintaining data related to those course experiences (for example, whether a learner has successfully completed a course).

LMSes have evolved into sophisticated, powerful systems that can manage catalogs of courses, present learners with menus of content tailored specifically to their needs, and track learners' progress towards new competencies, credentials, or other career-related goals.

USE OF OTHER PLATFORMS MODEST

None of the other platforms we asked about—virtual conference platforms, learning community platforms, and LCMSes—is used by even a quarter of respondents. But projected adoption for the next year is in the teens for all three. If that adoption pans out, around a third of organizations will be using virtual conference platforms, learning community platforms, and LCMSes in the near future.

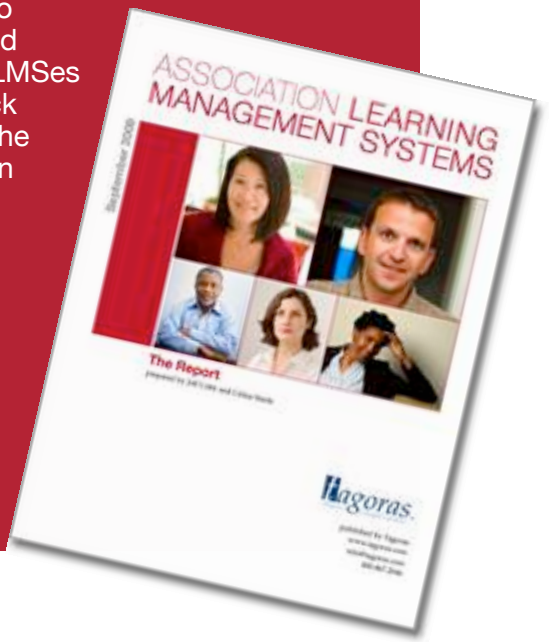
A learning content management system, or LCMS, provides ways to author or import learning content objects into the system, edit them, assemble them into learning experiences, and repurpose them into other, different learning experiences. While we asked about LMSes and LCMSes separately, we should note that some vendors blend the two types of offerings into a single, unified platform.

Virtual conference platforms are designed to enable offering online, multi-session events. They range from more Webinar-like interfaces with presentation screens coupled with real-time chat to immersive 3D environments à la Second Life.

Learning community platforms provide for proprietary Web sites (versus "digital sharecropping" on Facebook or LinkedIn), where learners can engage and interact with one another, facilitators, and subject matter experts.

Let Us Save You Time

In *Association Learning Management Systems* (http://www.tagoras.com/catalog/association-lms), we've done the work to identify and compare LMSes with a track record in the association sector.



THE STRATEGY-TECHNOLOGY CONNECTION

Having a strategy for how technology will be used to deliver or enhance learning noticeably increases the likelihood that organizations make use of an LMS (69.7 percent versus 44.3 percent of organizations without a strategy), an LCMS (29.0 percent versus 11.7 percent), and a learning community platform (38.7 percent versus 13.5 percent). Having a strategy makes it a bit more likely organizations have a virtual conference platform (25.8 percent versus 19.8 percent). The only platform for which having a strategy doesn't seem to be a factor is a Webinar or Webcast platform.

FACTORS INFLUENCING USE OF PLATFORMS

There are a range of factors determining an organization's use of technology platforms, and we can't consider them all based on the survey data, but we did see the following tendencies.

- Organizations with budgets of $5 million or less are much less likely to have an LMS (31.7 percent) than those with budgets over $5 million (71.4 percent), and only 14.3 percent of organizations with budgets under $1 million have an LMS.

- Organizations with 5,000 or fewer individual members are less likely than organizations overall to use an LMS (27.3 percent) and Webinar platform (74.4 percent). Organizations with more than 5,000 individual members are more likely to use an LMS (72.2 percent) and a learning community platform (29.2 percent).
- Organizations with a formal certification program are more likely to use an LCMS than those without (21.3 percent versus 9.0 percent) and a learning community platform (27.0 percent versus 13.2 percent).
- Organizations offering a formal credential are more likely to use an LMS than those not (58.0 percent versus 43.9 percent) and a learning community platform (26.5 percent versus 12.5 percent).
- Using a learning community platform increases the likelihood that the organization offers real-time Webinars, self-paced and facilitated courses, and blended learning—that is, all types of offerings we asked about other than recorded Webinars.
- Similarly, organizations using a virtual conference platform are more likely to offer all types of learning products other than recorded Webinars.
- Having an LCMS makes organizations more likely to offer all types of learning products other than recorded and real-time Webinars (all of them offer self-paced courses, which makes sense given the ability of LCMSes to streamline reuse of content, particularly in the context of creating self-paced courses).
- Having an LMS makes organizations more likely to offer self-paced courses (91.9 percent) and blended learning (42.0).
- Organizations offering at least some m-learning are more likely to use an LMS (61.1 percent), an LCMS (24.5 percent), and a Webinar platform (96.4 percent) than organizations overall.

A NOTE ON INTEGRATION

At the heart of nearly every association is a membership database of some sort. In smaller organizations, this may take the form of an Excel sheet or a Microsoft Access database. As organizations grow, they often adopt a more sophisticated association management system (AMS). Data related to educational programs and certification very often finds a home in these systems, thus creating a need for all or some data generated in other systems to eventually make its way back to the AMS.

When is a more likely question than _whether_ when it comes to integration with the almighty AMS.

In our experience, Webinar and Webcast platforms are often implemented initially without integration, whereas LMSes, virtual conference platforms, and learning community platforms may be required to deal with integration from the get-go, at least at a base level.

As a general rule, integration between a learning platform and an association management system happens at three levels:

- Single sign-on
  A user who's logged into the association's AMS (usually perceived by the end user as being logged into the organization's Web site) can navigate to the learning platform and access it without having to log in again. This is the most fundamental level and is generally a prerequisite for other types of integration to occur.
- E-commerce
  A user purchases a learning experience or resource using an e-commerce system that is provided as part of the AMS or is already integrated with the AMS, and details of the purchase are automatically passed to the learning platform so when the user next accesses the learning platforms, the platform knows to make the newly purchased content available to the user.

- Learner activity data
  As a learner accesses courses and other materials, the learning platform accumulates a variety of data about the learner's activities—for example, time spent in a course, scores on assessments or responses to attention checks, and whether a learning experience has been completed. It's often useful for the AMS to know about some or all of this data—particularly data related to course completion and issuance of continuing education credit or certificates.

An important aspect of any type of integration between software systems is that there needs to be a clear understanding of which system's database will be the authority, or database of record, for the types of data to be shared among systems. In general, you don't want it to be possible to change data in multiple places. If this happens, member records can get out of sync and create a mess that's difficult—sometimes impossible—to clean up. In nearly all cases, it makes most sense for the association management system to serve as the database of record for everything other than data that's generated by the learner's activity in the LMS system. But the question is still actively debated.

Summary

Product offerings—familiar (e.g., Webinars) and emerging (e.g., digital badges)—and the technology platforms used to support them were the focus of this chapter.

We'll conclude this section with some trends and opportunities we see and questions to ask of your organization as you begin to plan or continue to pursue your use of technology for learning.

While nearly 90 percent of associations use technology for learning, there's still lots of room for growth in the use of platforms like LMSes and offerings like digital badges.

Trends and Predictions

Webinars will remain a staple, but we expect to see other product types close the gap, especially as the technologies supporting blended and facilitated learning become increasingly transparent to users.

While MOOCs, flipped classes, gamified learning, and digital badges are by no means mainstream, we think these fringe offerings will grow, and **flipped learning and microcredentials will become mainstays in the association market.**

We also expect to see **more virtual conferences**, offered either as hybrids in conjunction with a place-based event or totally on their own, as more associations accept **cannibalization is a myth.** We anticipate **little growth in pure live streaming** but look to see captured content make a strong showing, particular as part of a facilitated learning experience, like a live chat to accompany a recorded session.

We expect to see an **increase in the adoption of social media for learning purposes** in the coming year but expect it to be slow as organizations experiment with the best tools and methods for integrating social media. In particular, we think **YouTube and SlideShare—both visual media—are poised for faster growth then the other social media tools.**

This year 87.7 percent of respondents reported using technology to deliver or enhance learning, showing marked growth (in 2008, 61.1 percent of respondents reported offering e-learning; in 2010, 77.4 percent). **Given current penetration of technology for learning is near 90 percent, we don't expect to see another big leap**, as the holdouts are likely to hold out a while longer. But we believe even many of the holdouts will eventually come around—tools have gotten cheaper, better, and easier. The use of technology for learning doesn't have to be sophisticated or expensive to succeed. Ultimately, the need for a term like *technology-enabled or technology-enhanced learning* (mouthful that it is) won't even be needed, as it will come to be expected that all learning makes use of technology in at least some minor way.

We expect to **see learning management system adoption approach Webinar platform levels**, as LMSes get better and better at dealing with a variety of types of learning, from facilitated and blended to mobile.

Questions to Consider

This chapter focused on the types of products organizations offer and the platforms used to deliver and support them.

1. Which formats are right for your audience, topic, budget, and human resources ? Is your audience cutting-edge, or are they wary of new technology? What are you capable of and comfortable doing

internally? As an example, live Webinars may be more difficult to schedule for international organizations because time differences leave a small slice of overlapping work hours and because different regulations (and therefore topics) apply, but the extra effort allows you to connect people who wouldn't otherwise get to interact.

2. Should you branch into new products? Which emerging options, like MOOCs or digital badges, might provide more value to your learners or improve learning outcomes?
3. How might social media tools enhance the value of your offerings? Are there potentially new pricing models or business models social media could make possible?
4. What value does your technology-enabled and technology-enhanced learning offer that is different from, or potentially superior to, the value offered in your face-to-face educational offerings? Is this value clearly reflected in your positioning and promotion?
5. Are you asking for—and getting—valuable input from the platform providers you use? Look for vendors who provide more than a tool and can help support your overall learning initiative.

PLATFORM SELECTION

If your organization is considering implementing a learning platform, review these questions.

6. Has the platform been implemented before at an association? How many times? What were the issues, and how were they addressed? Association needs for e-commerce, handling credit, brandability, and integration with membership management systems are different from those of corporate or academic users. All else being equal, it pays to go with a system that's been successfully implemented at one or more associations.
7. Don't get bogged down in feature lists and bells and whistles. Think through and reach internal agreement around the overall user experience you want to deliver. Ask vendors to describe and demonstrate clearly how their platform supports that experience.
8. Understand how content gets imported into the system or is authored in the system. Are these easy, intuitive processes, or is there a steep learning curve?
9. Has the system been integrated with association management systems or other types of enterprise software your organization uses? With your specific system or systems? How is integration achieved, how much does it cost, and what are the issues that typically arise?
10. What are the available financial models (e.g., based on usage or enrollments)? Do fees cap out, or do they continue to grow?
11. How brandable is the end user environment? Can the platform easily be made to look and feel like your main Web site?
12.

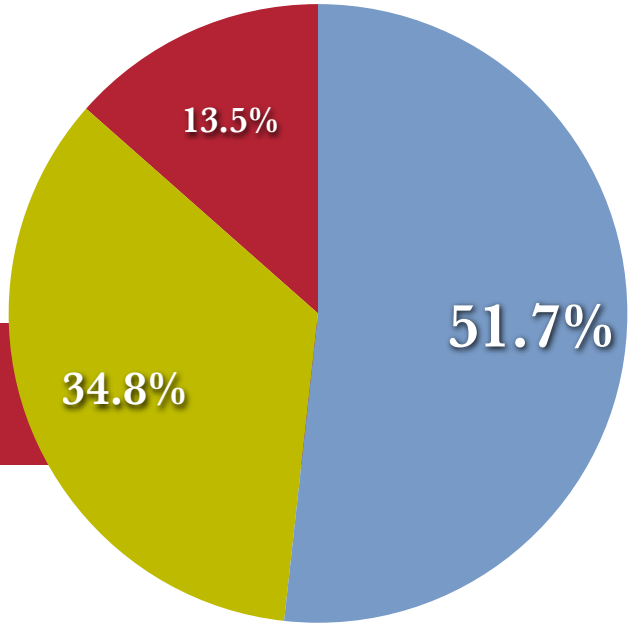
The Business Perspective
Revenue, Strategic Choices, and Processes

We concentrate in this section on the business perspective of technology-enabled and technology-enhanced learning: technology's impact on net revenue from educational offerings, the strategy that drives the use of technology for learning, product development and pricing processes, the use of professional instructional designers, and the role of formal certification and credentials.

Increased Net Revenue for the Majority

One of the key ways in which association learning differs from online education and training in the commercial corporate sector is that most associations look to education as a source of revenue—learning is a line of business rather than a cost center for most organizations. That said, we still hear plenty of debates about whether education should be baked-in as a member benefit or charged separately as a source of non-dues revenue.

The majority (51.7 percent) of associations that use technology for learning say it's increased their organization's net revenue from educational offerings. Good news for the bottom line and learners, in our opinion.



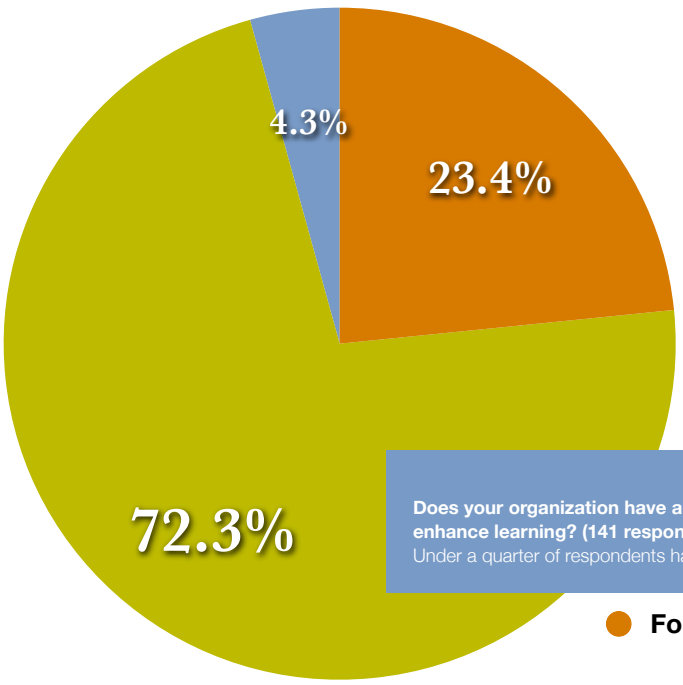
Has the use of technology to enable or enhance learning increased your organization's net revenue from educational offerings? (141 responses)
The use of technology for learning has improved the bottom line for the majority of respondents.

- **Increased net revenue**
- **Didn't increase net revnue**
- **Not sure**

Strategy Unpopular

Most organizations appear to approach the use of technology for learning in an ad-hoc, informal way —under a quarter of respondents have a formal, documented strategy for how technology will be used to enable or enhance learning.

Having a strategy is associated with increased net revenue—69.7 percent of organizations with a strategy report technology has increased the net revenue of their educational offerings compared to only 45.5 percent of those without a strategy.



Does your organization have a formal, documented strategy for how technology will be used to enable or enhance learning? (141 responses)
Under a quarter of respondents have a formal strategy.

- **Formal strategy**
- **No formal strategy**
- **Not sure**

Organizations with a formal certification program or offering a formal credential are more likely to have a strategy—60.6 versus 39.4 percent and 63.6 versus 36.4 percent, respectively.

That only a slice of associations are deliberate and formal about a strategy points to huge opportunity for growth, and that those that offer a formal certification or credential are much more likely to have a strategy points to the value of a strategy in higher-stakes learning.

Our view is that a number of factors will contribute to the use of technology being viewed more strategically in the coming years. Certainly the state of the economy will continue to play a role. Organizational leaders will look to cut their own costs (which the use of technology may or may not do) and to provide lower-cost options for members whose travel budgets have been slashed or cut entirely. The economy aside, the growth of green thinking, the growing array of cheap and easy learning technologies, and the coming of age of a generation comfortable doing almost everything online will generate more demand and tear down remaining barriers. Organizations will have to pursue the use of technology for learning more strategically or risk losing learners—and members—to competition that sees the opportunity in educational products delivered or enhanced by technology.

Processes Unpopular Too

To assess how practical decisions about technology-enabled and technology-enhanced learning are made, we asked survey respondents about product development and pricing processes.

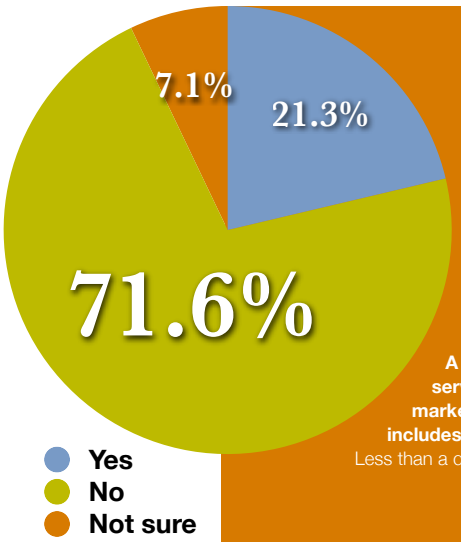
PRODUCT DEVELOPMENT PROCESSES: RARE BIRDS

Almost three-quarters (71.6 percent) of respondents indicated that their organization doesn't have a formal, documented product development process that includes its technology-enabled and technology-enhanced education products, and another 7.1 percent aren't sure if they have such a process.

Organizations with an overarching strategy see that cascade down to more practical matters—57.6 percent of those with a strategy have a formal, documented product development process compared to only 21.3 percent in general.

On the whole, organizations with a product development process tend to have larger overall staffs (an average of 359.8 individuals compared to an average of 75.8 for organizations without a process and 118.2 for all respondents), as well as more education staff (an average of 37.9 individuals versus 5.4 at organizations without a process and 10.8 for all respondents).

Without a formal process, how are organizations developing education products? From our interactions and work with organizations, we know that many rely on a committee or the board to suggest topics. Staff are also a common source for



A product development process typically includes steps for determining which products or services to produce as well as a detailed process by which products are created and taken to market. Does your organization have a formal, documented product development process that includes its technology-enabled and technology-enhanced education products? (141 responses)
Less than a quarter of organizations have a formal product development process.

topics. While these approaches solicit input, that input may well be biased, if committees or the board represent particular segments of membership but don't account for the full range of learners the organization can reach. And staff tend to hear from squeaky-wheel members, whose opinions wind up overemphasized.

Some organizations mine evaluation data collected from current learners and survey the membership base to gauge interest in particular educational offerings or topics. While such feedback comes the horse's mouth, it still has limitations—the biggest being the gulf between what people say they'll do or buy and what they actually do or buy.

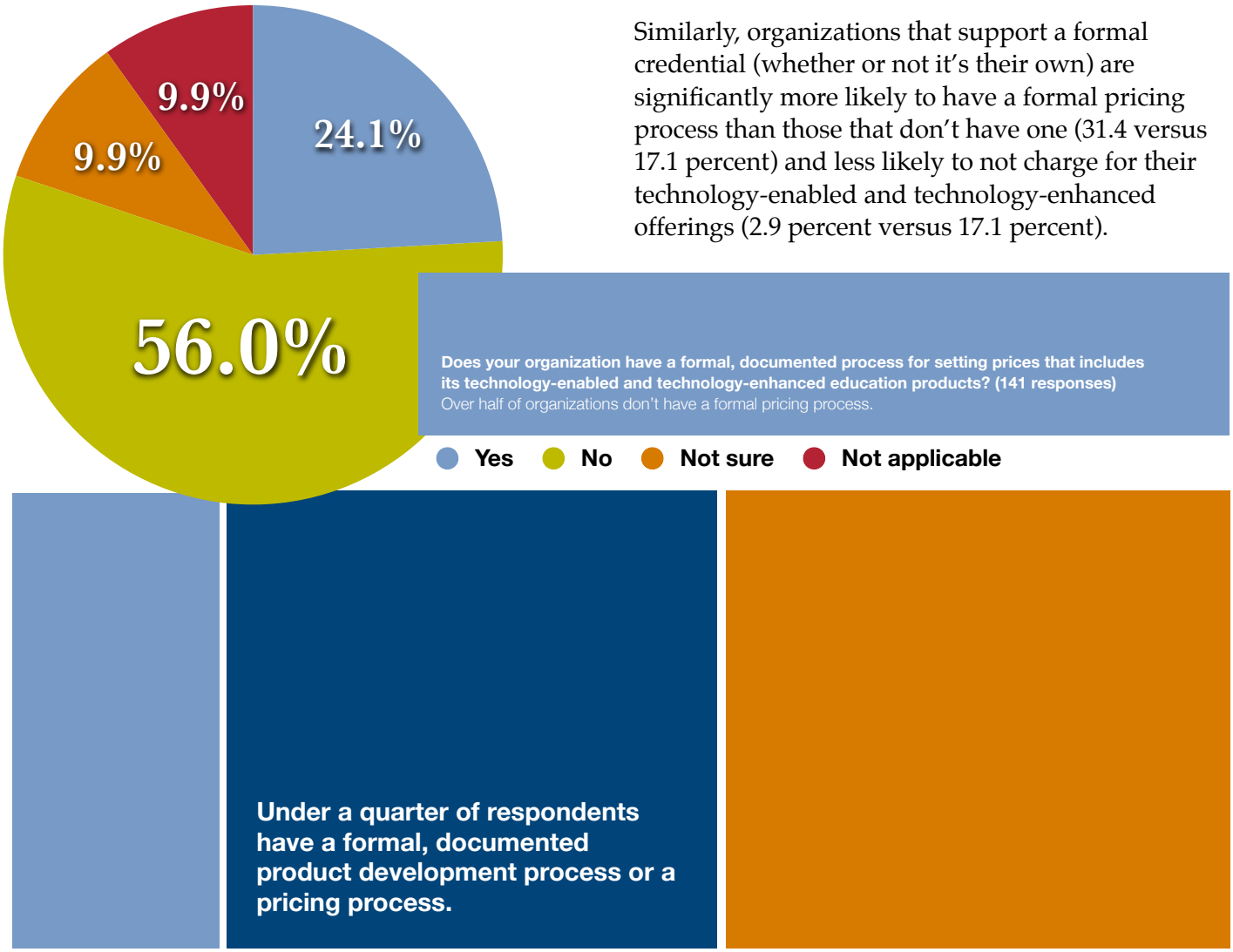
The best organizations use a variety of methods to assess their market to avoid over-reliance on any one source. They couple that input with experimentation, such as pre-selling prior to development to ensure people will make the purchase versus just saying they will, or developing and releasing minimum viable products to gauge actual demand.

PRICING PROCESSES: EXOTIC TOO

Over half (56.0 percent) of respondents don't have a formal, documented process for setting prices that includes their technology-enabled and technology-enhanced education products; another 9.9 percent aren't sure if they have a pricing process.

Organizations that offer a formal certification program are significantly more likely to have a formal pricing process (30.3 percent) than those that don't have (19.2 percent), and those without a formal certification program are significantly more likely than those that have one to indicate they don't charge for their technology-enabled and technology-enhanced offerings (16.4 percent versus 3.0 percent).

Similarly, organizations that support a formal credential (whether or not it's their own) are significantly more likely to have a formal pricing process than those that don't have one (31.4 versus 17.1 percent) and less likely to not charge for their technology-enabled and technology-enhanced offerings (2.9 percent versus 17.1 percent).



And as we saw with organizations with a product development process, pricing-process organizations employ more people overall (an average of 328.5 individuals compared to an average of 73.0 for organizations without a pricing process and 118.2 for all respondents) and in education (an average of 35.3 individuals versus 4.9 at organizations without a pricing process and 10.8 for all respondents).

Pricing is ripe for improvement. From our interactions and work with organizations, we know many make use of a cost-plus approach or peg their prices to competitors. While both approaches are logical, the cost-plus approach can result in undercharging, if the learners value the product more highly than the derived price. In our experience, too, the application of the cost-plus approach is often flawed, as organizations capture their hard, direct costs but fudge (or sometimes totally ignore) their soft, indirect costs like percentages of select staff salaries.

The competitor approach is also inherently limited; it reinforces similarity with other products when education could be—and, we'll argue, should be—a differentiator for your association.

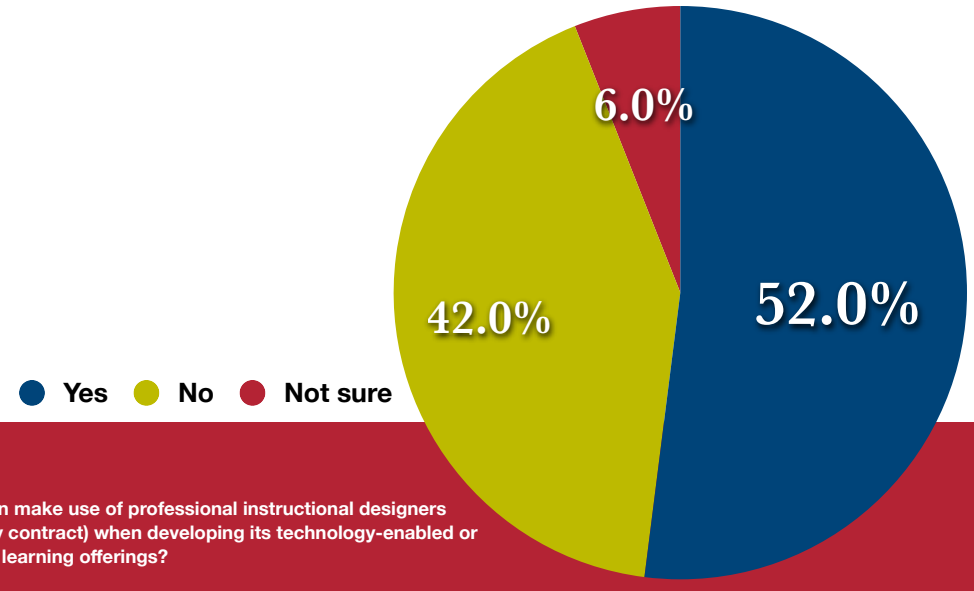
More Professional Instructional Design

For organizations currently using technology for learning, 52.0 percent use professional instructional designers (IDs), which is a notable increase from 39.7 percent in 2010. We're glad to see the increase and hope it continues—it's a little concerning (if not surprising) to us that more organizations don't make use of professionals.

Having a strategy in place correlates to a higher use of of professional instructional designers—63.6 percent of organizations with a strategy use professional IDs compared to 33.3 percent of those without a strategy.

Organizations that offer a formal certification program are significantly more likely to use professional IDs (60.6 percent) than those that don't have (43.8 percent). The distinction is even more pronounced when we look at organizations that offer a formal credential (whether or not it's their own): 65.7 percent make use of professional IDs, compared to 37.7 percent of those that don't offer a formal credential.

If you factor in the type of learning produced, you see that organizations



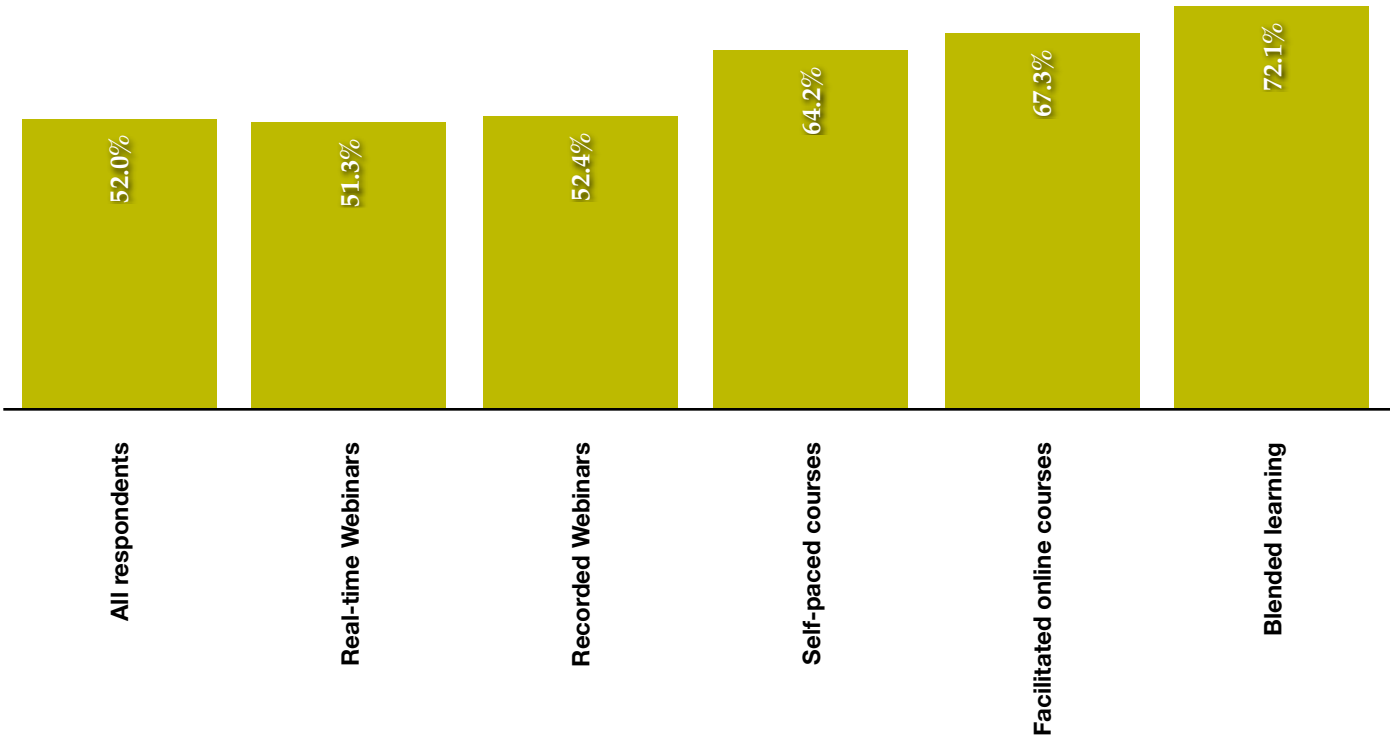
Does your organization make use of professional instructional designers (whether on staff or by contract) when developing its technology-enabled or technology-enhanced learning offerings?
(150 responses)
Over half of respondents use professional instructional designers.

offering blended learning (72.1 percent), facilitated online courses (67.3 percent), and self-paced courses (64.2 percent) are 12 to 20 percentage points more likely than respondents overall (52.0 percent) to make use of professional IDs, perhaps due to the usually increased complexity and longer program length of these offerings when compared to cut-and-dry, 60-minute Webinars or Webcasts.

The use of professional IDs is also higher among organizations using any learning platform other than a Webinar or Webcast platform—73.9 percent of those using a learning content management system (LCMS), 73.3 percent of those with a virtual conference platform, 66.2 percent of organizations with a learning management system (LMS), and 64.3 of organizations with a learning community platform make use of professional IDs.

While organizations still have to struggle with the "right" approach to instructional design—in-house or outsourced, university degree or on-the-job experience—we're heartened to see what appears to be a growing commitment to wrestle with such questions and make use of professional IDs. That can only mean better learning.

While use of professional instructional designers is up to 52.0 percent, that's still too low.



Use of professional instructional designers among all respondents and those offering particular types of technology-enabled or technology-enhanced learning

Formal Certifications and Credentials

Whether to offer a formal certification or credential is an important decision both operationally and strategically for an organization. From an operational standpoint, there's typically a significant amount of footwork to be done to create the learning and then, if appropriate, to get it accredited—even for a credential maintained by the association itself—and usually there are reporting requirements to be followed once accreditation is established.

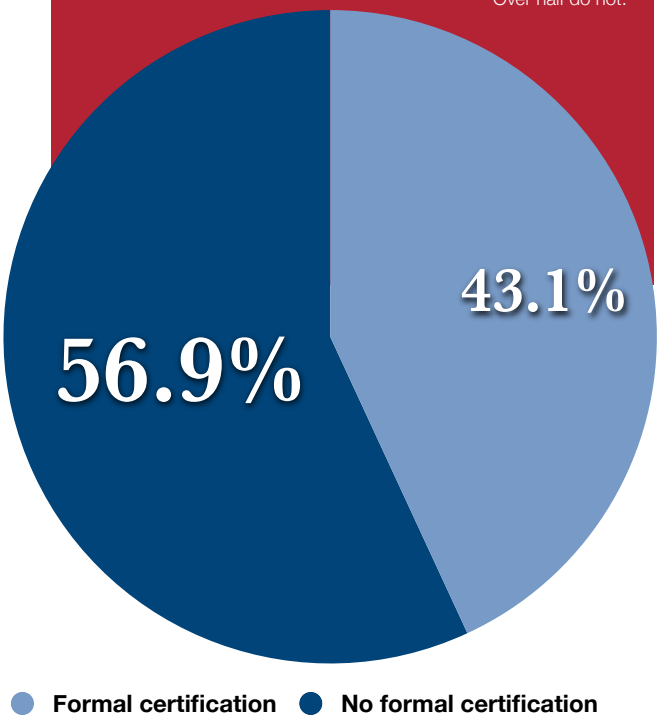
As a matter of strategy, common sense suggests that, all else being equal, a learner will choose an educational experience that offers some credential over one that doesn't. A large segment of associations appear inclined to place strategic considerations ahead of whatever operational burdens the awarding of credentials may create. Among the respondents to our survey, 43.1 percent offer a formal certification, and 49.1 percent offer either their own or another organization's formal credential (e.g., certification or license).

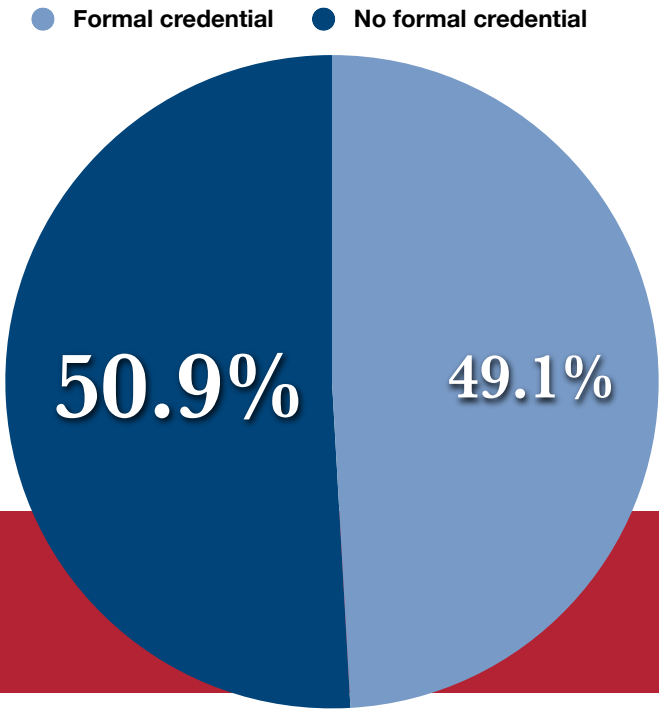
Summary

In this chapter we considered issues important to managing technology-enabled and technology-enhanced learning as a line of business, including the presence of an overarching strategy and relevant processes. We also looked at the role of professional instructional designers and the impact of formal certifications and credentials.

We conclude this section with some trends and opportunities we see and questions to ask of your organization as you begin to plan or continue to pursue your use of technology for learning.

Does your organization offer a formal certification program? (160 responses)
Over half do not.





Does your organization offer a formal credential (e.g., certification or license), whether or not the credential is your own? (161 responses)
Almost half do.

We want to see more associations develop and use a strategy to guide their use of technology for learning. Gut-level governance can work, but more consistent approaches empower staff all over the org chart.

Trends and Predictions

We expect **even more organizations that use technology for learning to see it positively impact the net revenue from educational offerings.** As associations grow more comfortable with the platforms and technology choices, they'll dump those that don't perform and replace them with ones that support education as a moneymaker.

More a fervent hope than an evidence-based prediction, we want to **see associations improve in the use of strategy and processes to guide the use of technology for learning**—and improvement means, first and foremost, associations have to take the time to develop and disseminate a strategy and document key processes.

As organizations look to grow their offerings and create higher-quality products, we believe the **interest in instructional design will continue.** The 52.0 percent of organizations that currently use professional IDs can claim that as a differentiator, but we believe the use of professional designers, whether as in-house staff or contract workers, will become the norm as organizations realize the value of their offerings is tied to their ability to produce learning results in a hyper-competitive market.

Competition for learners will continue to increase. Where it doesn't exist right now, it will start to appear. Formal certificates and credentials can be ways for associations to stand out from other options, but associations will need other ways to convey and demonstrate their value.

Questions to Consider

1. Does your use of technology to support learning increase the net revenue from your educational offerings? If no, what's making learning technology a cost, rather than a revenue, center?
2. Do you have a formal strategy for your use of technology for learning? If yes, is the strategy understood broadly across your organization? How does it contribute to the overall strategy of the organization, and how is that contribution measured?
3. What are the factors that drive or will drive demand for your technology-enabled and technology-enhanced learning offerings? How have you aligned your products to meet those demand factors, and where could you make improvements?
4. What is your process for determining the forms of learning you offer, the topics you address, and how technology can deliver or enhance the experience? Do you have a standardized process for working with subject matter experts? Have you documented these processes so they can be shared with those who need to know them?

5. What is your approach to building capacity for technology and its application to learning in your organization? Do you have a good understanding internally of adult learning principles and instructional design? One survey respondent comments on his efforts in this area: "Of the nine staff working in the education department, two are meeting planners, and three spend a lot of time 'processing' education data, such as payments, grades, etc. They don't think of themselves as educators and don't have education backgrounds. I'm trying to change that."
6. How will you leverage the resources of other functional areas in the organization to deliver, market, and support your technology-enabled and technology-enhanced learning products?
7. Has your leadership tried your (or other) technology-based learning? Getting leadership's buy-in and participation can be critical to making your use of technology for learning really work.
8. How large is your potential audience for any given offering, and what percentage of this audience can you expect to enroll in the offering?
9. What are the key segments in your learning audience? How much do you know about what drives the demand for learning in each of those segments? A survey respondent comments, "Our members are high-touch, low-tech. Digital, e-learning initiatives must be *very* user-friendly, brief, come with training certificates for continuing education contact hours, and not replace place-based, face-to-face trainings. Our members like to come together for both learning and networking." Can you provide a similar characterization for each of your segments? What data do you have to back up your characterizations?
10. What is your process for establishing the price for your learning offerings? Have you documented this process so you can share it with those who need to understand it?
11. How much do you currently know about your competition, and when is the last time you updated your knowledge?

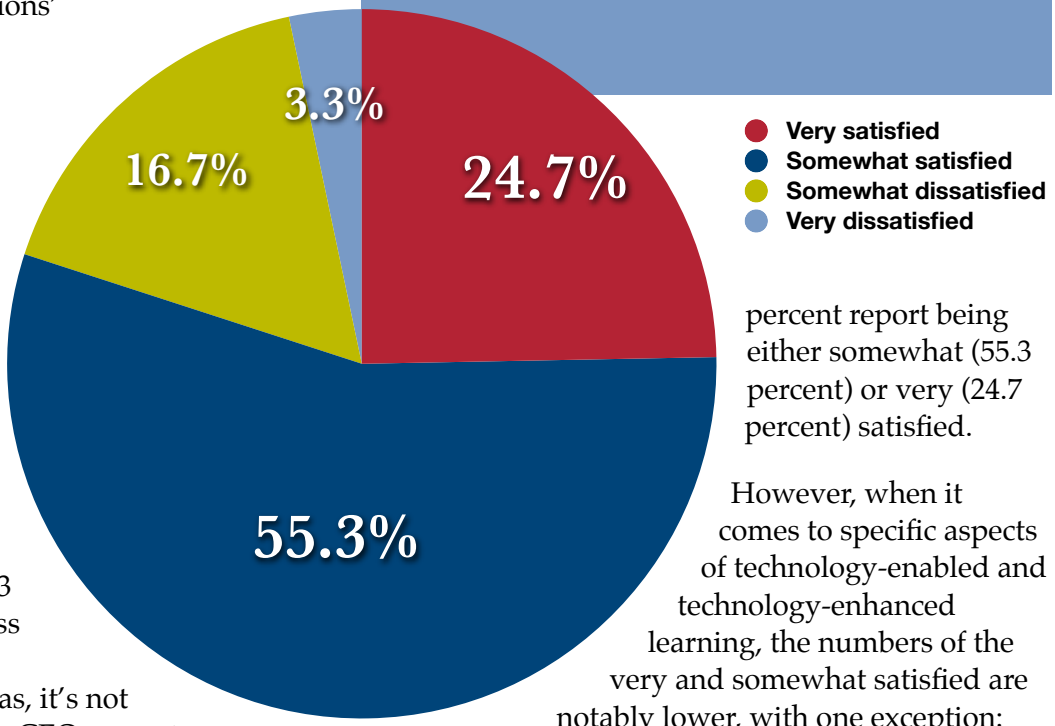
The Performance Perspective
Satisfaction, Success, and a Look Ahead

Even given the level of statistical error that may be present in a non-probability survey, the combined results from 2008, 2010, and 2013 make it clear that technology-enabled and technology-enhanced learning is a mainstay in the association sector and will continue growing until it's a significant part of almost all associations' education initiatives.

But offering technology-enabled and technology-enhanced learning as an educational option is not the same as achieving the desired results.

As noted earlier in the report, relatively few organizations using technology for learning have a formal strategy (23.4 percent), product development process (21.3 percent), or pricing process (24.1 percent). Given shortcomings in these areas, it's not surprising that association CEOs report education, training, and professional development programs offered online haven't produced the increase in revenue for their organizations they'd anticipated. Data from the ASAE Foundation published in the study "Associations in an Uncertain Economy: Attitudes and Behaviors Among CEOs and Members" (winter 2012, available at http://www.asaecenter.org/files/EconomyStudy2012.pdf) shows a gap of more than 20 percent between revenue gains anticipated by association CEOs from online education in 2011 (62.4 percent) and actual results (only 35.9 percent)—and the data charts this gap of at least 20 points between expectation and reality back to 2009.

Overall, how satisfied are you with your current technology-enabled and technology-enhanced learning initiatives? (150 responses)
Eighty percent of associations currently using technology for learning are very or somewhat satisfied overall.



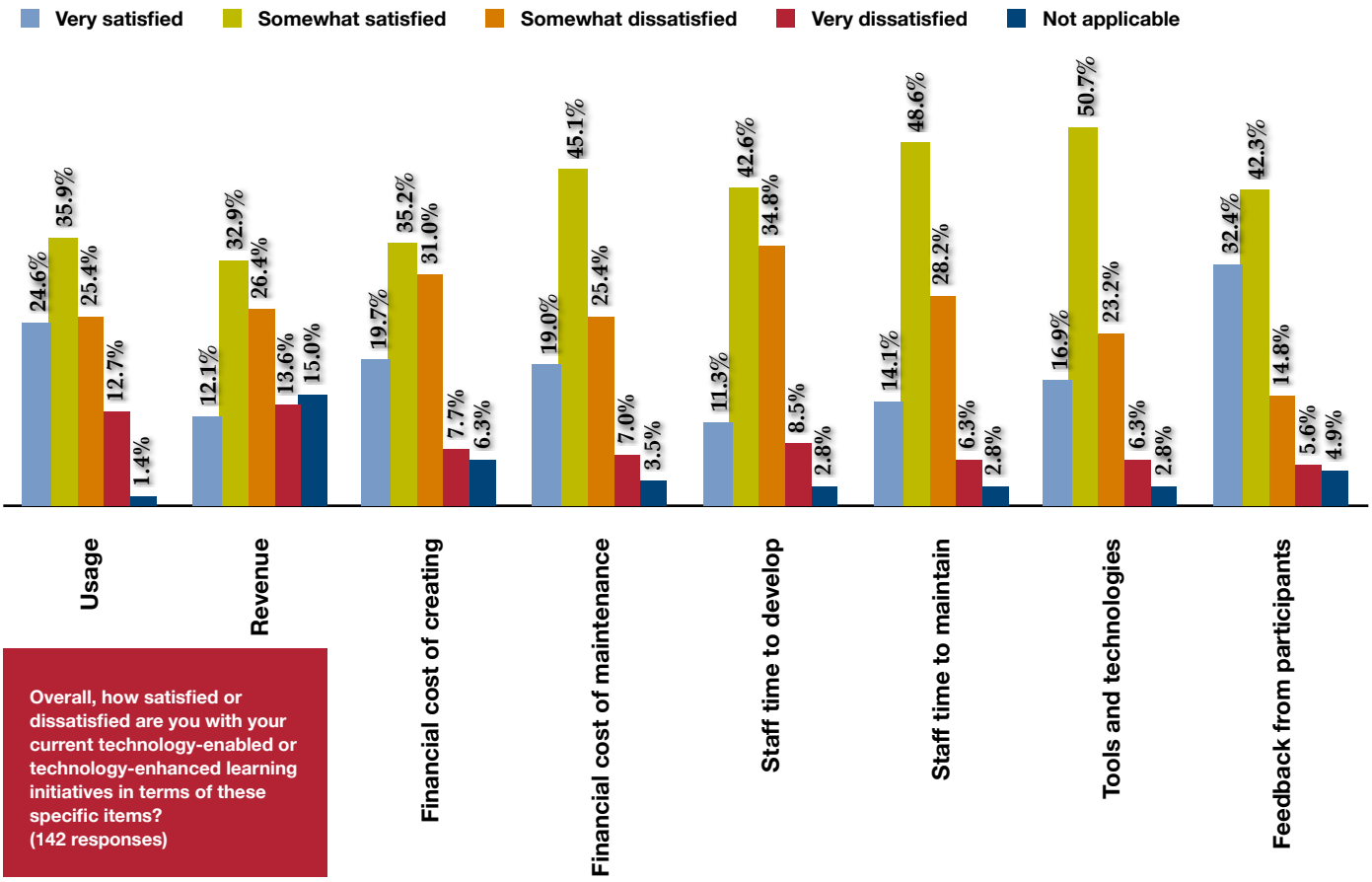
Overall Satisfaction High, Revenue Not As Rosy

We asked associations whether they're satisfied overall with their current technology-enabled and technology-enhanced learning initiatives, and 80.0 percent report being either somewhat (55.3 percent) or very (24.7 percent) satisfied.

However, when it comes to specific aspects of technology-enabled and technology-enhanced learning, the numbers of the very and somewhat satisfied are notably lower, with one exception: 74.7 percent report being very or somewhat satisfied with participant feedback. We find this particularly interesting given the degree to which many associations fret over member readiness for technology-based learning.

The three biggest areas of dissatisfaction are revenue (only 45.0 percent report being very or somewhat satisfied with revenue) and the related areas of the cost of creating offerings (54.9 percent are satisfied) and the staff time required to develop offerings (53.9 percent are satisfied).

In short, technology for learning is well received by members, but organizations nonetheless struggle to get the levels of operational and business performance out of the offerings that they would like. One survey comment points to the work-in-progress nature of many associations' use of technology for learning: "The cost of course development, hosting, and support was far more



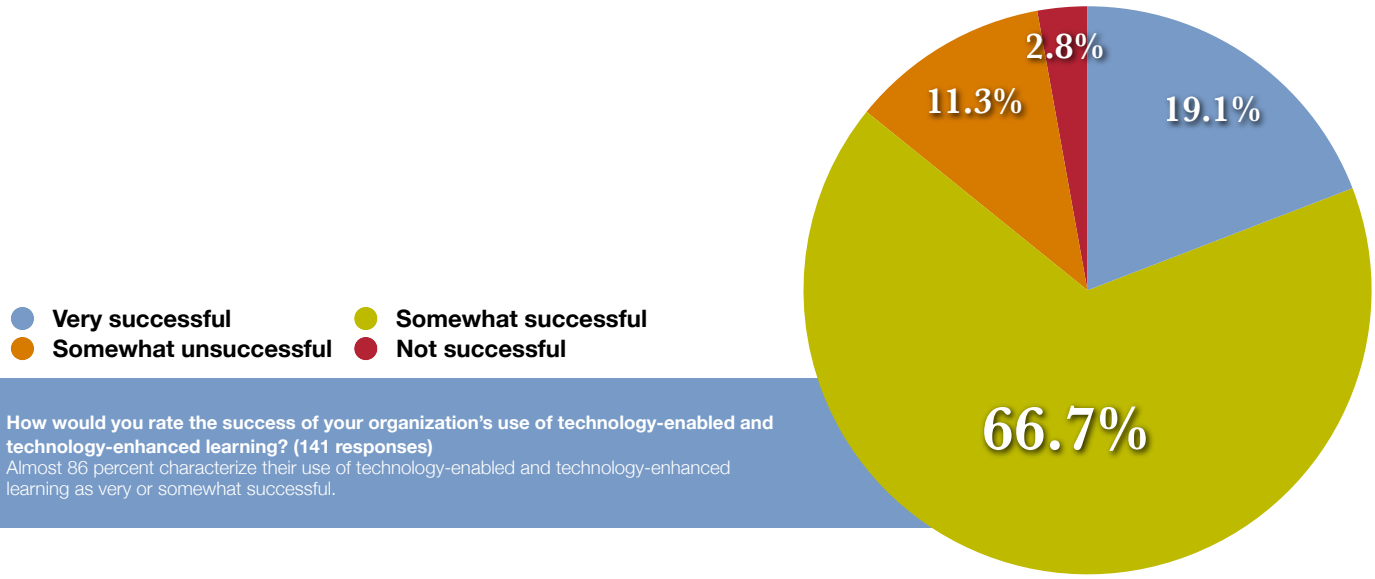
Overall, how satisfied or dissatisfied are you with your current technology-enabled or technology-enhanced learning initiatives in terms of these specific items? (142 responses)

than the revenue generated. However, the experience has made us smarter, and we are taking steps to expand in a more cost-effective manner. Also, the experience vastly improved the quality of our courses." The expectation is that processes will get better and support better learning. Another respondent comments, "We are always looking for ways to incorporate new technology without spending money." We can almost see the smiley face icon that should follow that statement.

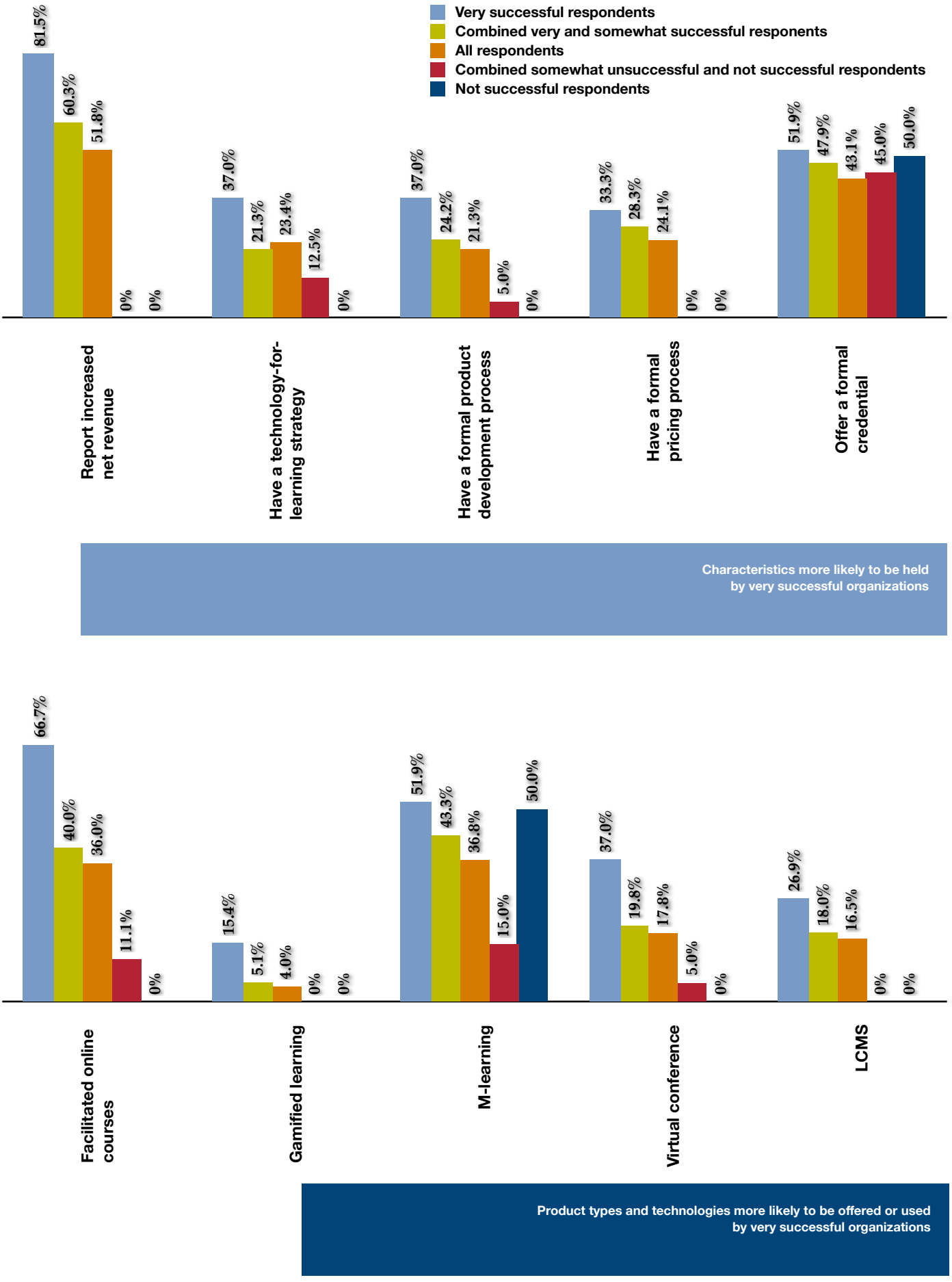
Portrait of Success

While two-thirds of respondents rate themselves as somewhat successful with their use of technology for learning, only 19.1 percent characterize their use of technology for learning as very successful.

We found that organizations that consider themselves to be very successful were significantly more likely than average to do six things.



How would you rate the success of your organization's use of technology-enabled and technology-enhanced learning? (141 responses)
Almost 86 percent characterize their use of technology-enabled and technology-enhanced learning as very or somewhat successful.


Very successful respondents
Combined very and somewhat successful responents
All respondents
Combined somewhat unsuccessful and not successful respondents
Not successful respondents
81.5%
60.3%
51.8%
0%
0%
37.0%
21.3%
23.4%
12.5%
0%
37.0%
24.2%
21.3%
5.0%
0%
33.3%
28.3%
24.1%
0%
0%
51.9%
47.9%
43.1%
45.0%
50.0%
Report increased net revenue
Have a technology-for-learning strategy
Have a formal product development process
Have a formal pricing process
Offer a formal credential
Characteristics more likely to be held by very successful organizations
66.7%
40.0%
36.0%
11.1%
0%
15.4%
5.1%
4.0%
0%
0%
51.9%
43.3%
36.8%
15.0%
50.0%
37.0%
19.8%
17.8%
5.0%
0%
26.9%
18.0%
16.5%
0%
0%
Facilitated online courses
Gamified learning
M-learning
Virtual conference
LCMS
Product types and technologies more likely to be offered or used by very successful organizations

- Report increased net revenue from their education offerings as a result of their use of technology for learning
- Have a formal, documented strategy for their use of technology for learning.
- Have formal, documented product development and pricing processes that cover their technology-enabled and technology-enhanced learning.
- Offer facilitated online courses, gamified learning, virtual conferences, and at least some mobile learning.
- Use a learning content management system (LCMS).
- Offer a formal credential (e.g., a certification or license), whether or not the credential is their own.

All in all, these traits suggest a more focused, professional approach to technology for learning and a desire to provide engaging, effective learning experiences.

WHAT WE THINK IT TAKES TO SUCCEED

Technology has changed learning irrevocably, and the rate of change isn't likely to slow. In these fast-paced times, we believe a few core characteristics will distinguish the truly successful from the rest.

- A commitment to listening to members—initially and continually—to identify and align with their needs
- A focus on concrete outcomes, including awarding credentials and delivering relevant, valuable content
- An entrepreneurial mindset that's open to reasonable risk, experimentation, and leading learners to new opportunities they may not have even thought of
- An integrated approach to learning—not just integration of technology systems, but the inclusion of multiple departments and voices in planning and an understanding of technology-enabled and technology-enhanced learning as one part of an overall portfolio of educational offerings and of the association's overarching strategy and mission
- An ability to secure buy-in across all major stakeholders and manage expectations

A Look Ahead

We offered survey respondents the opportunity to tell us what they're *not* doing now in the area of technology-enabled and technology-enhanced learning but that they plan to begin doing in the next 12 months.

The responses, as expected, are varied, but we see in many a commitment to use technology to improve learning—despite the very real challenges of budgets, staffing, and mastering new formats and technologies.

- "We have just started incorporating technology into our learning planning, so we are still figuring out the best ways to utilize technology to help us reach people…."
- "[We will] develop and document an overall strategy."
- "We are developing a content strategy—what content should we focus on and how we will deliver it. This will drive development of business strategy and include processes and selection of technology. To support this effort,

staff have been pulling together data sources from past efforts and member surveys and working with appropriate member groups/committees to vet them and help develop the strategy."

- "We have several e-learning courses, but the next one will be capable of mobile using Articulate Storyline. Education staff capacity is the main thing that slows are progress with education technology. It is difficult too find staff who are skilled and experienced with learning technology who are willing to work for what associations pay. We can afford external consultants but even that requires staff time and expertise to work with them."
- Content marketing ("targeting segments of the industry on [our] Web site with relevant materials (Webinars, events, white papers)") and the use of learning analytics made it on some respondents' to-do lists.

While there's room for improvement in associations' use of technology for learning, good progress has been made in the years we've been tracking the sector. But, to be honest, there will always be room for improvement. So, onward and upward.

-

***Entrepreneurship* and *experimentation* have replaced *electronic* in *e-learning*.**

About Tagoras
Publisher of the Report

This report is published by Tagoras, Inc. (www.tagoras.com). 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, the Healthcare Financial Management Association (HFMA), the American College of Rheumatology (ACR), the College Board, Booke Seminars (a Division of Aon), and Castle Worldwide. Other Tagoras reports include *Association Learning Management Systems*, *Association Virtual Events*, and *The Speaker Report*.

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About the Authors

JEFF COBB

A managing director at Tagoras, Jeff has nearly two decades of experience in the world of marketing, adult learning, and technology. He was cofounder and CEO of Isoph, a leading provider of e-learning technologies and services to associations. He has also served as senior vice president of business development for Quisic, an e-learning partner to top-tier business schools and fortune 500 companies, and as vice president of business development for LearnSomething.

Jeff is a respected expert on the global market for lifelong learning and author of *Leading the Revolution: The Expert's Guide to Capitalizing on the Exploding Lifelong Education Market* (AMACOM 2013). He has served on the Professional Development Section Council of the American Society of Association Executives as well as on the research committee of the eLearning Guild.

Jeff speaks frequently about the impact of new technologies on business, education, and society in general. More information about his speaking is available on his personal Web site at www.jeffthomascobb.com.

CELISA STEELE

Celisa has led the development of successful online education sites with smaller groups like the Frameworks Institute and the Alliance of Chicago Community Health Services and 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, where she serves as editor-in-chief of the company's research publications. She was cofounder and COO 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.

Celisa is a published poet (www.celisasteele.com) and the current poet laureate of Carrboro, North Carolina.

About Peach New Media
Sponsor of the Report

"About Peach New Media" is really the wrong heading for this section. Why? To us, it's all about you.

You're doing amazing things in your association through your education and outreach. You're changing society and improving lives every day. You're making law a stronger system, empowering women, discussing safety regulations, and curing disease. These are just a few of the ways you truly are changing the world around us. As much as we all want to be the hero of the story, the hero always needs a support team. In this story, you're Batman; let us be Alfred.

I want to use this as our opportunity to tell you how Peach New Media can help complete your story.

Peach has been helping associations and member-based organizations capture, host, and distribute live and on-demand content for 12 years. Here's how we do it:

1. Freestone™, our learning content management system, hosts live and on-demand content with full CE credit management and functionality.
2. Our services team offers managed Webinars and Webcasts that drive more content to your constituents.
3. Our production team captures content from your conferences, so you can continue the development of your education library.

But what really allows us to do our job is our ability to offer a highly configurable platform that, utilizing our API, can integrate with all of your existing databases, including your AMS or homegrown membership management system, your educational content, your private community, and anything else with relevant data.

It's our mission to make it easier for you to change society and improve lives. Let's start our story together.

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Appendix: Survey Data
Responses for All Questions

We're grateful to the hundreds of organizations that took the time to participate in the October 2013 online survey of association learning and technology.

All Respondents

The following questions were asked of all respondents.

ASSOCIATION MANAGEMENT COMPANY

Do you work for your association through an association management company? (182 responses)

Yes	10.4%
No	89.6%

USE OF TECHNOLOGY FOR LEARNING

There are many ways to use technology to deliver learning or to enhance learning, such as Webcasts and Webinars, self-paced tutorials, virtual conferences, blended classroom/online education, etc. For the purpose of this survey, any activity in which a user receives primary or supplementary instruction via a computer counts as technology-enabled or technology-enhanced learning. Does your organization currently offer technology-enabled or technology-enhanced learning? (179 responses)

Yes	87.7%
No, but plan to in the next 12 months	10.6%
No, and don't plan to in the next 12 months	1.7%
Not sure	0.0%

GEOGRAPHIC FOCUS

Which best describes the geographic focus of your organization (i.e., which best indicates the areas in which you actively solicit membership)? (163 responses)

Single-community or municipality focus	1.8%
Multiple-community focus within one state	6.1%
Single-state or province focus	23.9%
Multistate or multiprovince focus	2.5%
National focus	36.8%
International focus	28.8%

TYPE OF ORGANIZATION

Which of the following best characterizes your organization? (161 responses)

Charitable or philanthropic organization	3.1%
Trade association	35.4%
Professional society	54.0%
Educational institution	5.0%
Other	2.5%

AUDIENCE

How do you characterize the primary audience your organization serves? (161 responses)

Physicians	8.7%
Non-physician healthcare professionals	11.2%
Accountants	5.6%
Attorneys	1.9%
Association executives	5.6%
K-12 educators	4.3%
College or university educators	5.0%
Other	57.8%

CERTIFICATION PROGRAM

Does your organization offer a formal certification program? (160 responses)

Yes	43.1%
No	56.9%

CREDENTIAL

Does your organization offer a formal credential (e.g., certification or license), whether or not the credential is your own? (161 responses)

Yes	49.1%
No	50.9%

INDIVIDUAL MEMBERSHIP

How many active *individual* members does your organization currently have? (160 responses)

1,000 or less	13.8%
1,001 to 5,000	22.5%
5,001 to 10,000	11.9%
10,001 to 25,000	17.5%
25,001 to 50,000	10.6%
50,001 to 100,000	4.4%
More than 100,000	3.1%
We have only organizational members	16.3%

ORGANIZATIONAL MEMBERSHIP

How many active *organizational* members does your organization currently have? (158 responses)

Less than 100	14.6%
101 to 200	8.9%
201 to 500	13.9%
501 to 1,000	7.6%
1,001 to 5,000	13.3%
More than 5,000	4.4%
We have only individual members.	37.3%

OVERALL STAFF

How many paid staff does your organization currently have? (160 responses)

Mean	Median
118.2	20.5

EDUCATION STAFF

How many paid staff does your organization have who currently spend more than half their time working in to education or professional development? (159 responses)

Mean	Median
10.8	3.0

BUDGET SIZE

What is your organization's annual budget (in U.S. dollars)? (152 responses)

Less than $100,000	7.2%
$100,001 to $500,000	7.9%
$500,001 to $1,000,000	9.9%
$1,000,001 to $5,000,000	30.9%
$5,000,001 to $10,000,000	14.5%
$10,000,001 to $25,000,000	15.1%
$25,000,001 to $50,000,000	6.6%
$50,000,001 to $100,000,000	3.9%
More than $100,000,000	3.9%

Respondents Currently Using Technology for Learning

The following questions were asked only of organizations currently using technology for learning.

TECHNOLOGY-ENABLED AND TECHNOLOGY-ENHANCED PRODUCTS

Which of the following does your association provide or plan to provide? (154 responses)

	Yes	No, but plan to in the next 12 months	No, and don't plan to in the next 12 months	Not sure
Self-paced online courses, tutorials, or presentations (excluding recorded Webcasts or Webinars)	65.5%	14.9%	16.2%	3.4%
Facilitated online courses (excluding Webcasts or Webinars)	36.0%	18.0%	38.8%	7.2%
Real-time Webcasts or Webinars	82.3%	8.8%	6.8%	2.0%
Recorded or on-demand Webcasts or Webinars	84.2%	7.9%	5.3%	2.6%
Blended learning (e.g., technology-based programs combined with classroom-based learning)	31.4%	26.4%	32.9%	9.3%

EMERGING TECHNOLOGY-ENABLED AND TECHNOLOGY-ENHANCED PRODUCTS

Which of the following does your association provide or plan to provide? (154 responses)

	Yes	No, but plan to in the next 12 months	No, and don't plan to in the next 12 months	Not sure
Massive open online courses (MOOCs)	6.6%	4.6%	62.9%	25.8%
Flipped classes	5.3%	10.0%	52.7%	32.0%
Gamified learning	4.0%	8.7%	59.7%	27.5%
Digital badges or microcredentials	9.3%	9.3%	52.3%	29.1%

MOBILE LEARNING

Do you provide a mobile version (i.e., a version specially formatted to be easily viewed and navigated on a mobile phone or tablet device) for some or all of your learning content? (152 responses)

Yes	36.8%
No, but plan to in the next 12 months	28.3%
No, and don't plan to in the next 12 months	27.6%
Not sure	7.2%

VIRTUAL CONFERENCES

A virtual conference is a Web-based event that replicates many aspects of a traditional place-based conference. It features multiple sessions (not just a single Webinar or Webcast) and may include keynote presentations, training and education workshops, discussion areas, social networking opportunities, exhibit areas for vendors, and various other features. Activities in a virtual conference may take place in real time (synchronously), on demand (asynchronously), or in some combination of the two. Does your organization offer a virtual conference? (152 responses)

Yes	17.8%
No, but plan to in the next 12 months	12.5%
No, and don't plan to in the next 12 months	64.5%
Not sure	5.3%

LIVE STREAMING

Does your organization provide live streaming of content presented at a *place-based conference*? (151 responses)

Yes	32.5%
No, but plan to in the next 12 months	11.9%
No, and don't plan to in the next 12 months	51.0%
Not sure	4.6%

SOCIAL MEDIA TOOLS FOR LEARNING

Which of the following social media tools does your organization use or plan to use as part of its learning offerings? *Please only indicate tools 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 offerings, do not select that item. (149 responses)

	Yes	No, but plan to in the next 12 months	No, and don't plan to in the next 12 months	Not sure
LinkedIn	27.6%	6.9%	62.1%	3.4%
Facebook	28.8%	6.2%	61.0%	4.1%
Twitter	32.2%	6.8%	58.2%	2.7%
Skype	17.3%	4.3%	72.7%	5.8%
YouTube	33.1%	13.8%	46.2%	6.9%
SlideShare	8.7%	11.6%	59.4%	20.3%

PROFESSIONAL INSTRUCTIONAL DESIGNERS

Does your organization make use of professional instructional designers (whether on staff or by contract) when developing its technology-enabled or technology-enhanced learning offerings? (150 responses)

Yes	52.0%
No	42.0%
Not sure	6.0%

TECHNOLOGY PLATFORMS FOR LEARNING

Does your organization use a technology platform dedicated to delivering or enhancing learning? (150 responses)

	Yes	No, but plan to in the next 12 months	No, and don't plan to in the next 12 months	Not sure
Learning management system (LMS)	51.0%	15.9%	26.9%	6.2%
Learning content management system (LCMS)	16.5%	13.7%	55.4%	14.4%
Webinar or Webcast platform	84.4%	8.2%	5.4%	2.0%
Virtual conference platform	21.3%	12.1%	57.4%	9.2%
Learning community platform	20.0%	19.3%	42.9%	17.9%

OVERALL SATISFACTION WITH TECHNOLOGY-BASED LEARNING

Overall, how satisfied are you with your current technology-enabled and technology-enhanced learning initiatives? (150 responses)

Very satisfied	24.7%
Somewhat satisfied	55.3%
Somewhat dissatisfied	16.7%
Very dissatisfied	3.3%

SATISFACTION IN SPECIFIC AREAS

How satisfied or dissatisfied are you with your current technology-enabled or technology-enhanced learning initiatives in terms of the specific items below? (142 responses)

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied	Not applicable
Usage (e.g., number of course enrollments)	24.6%	35.9%	25.4%	12.7%	1.4%
Revenue (e.g., from course sales)	12.1%	32.9%	26.4%	13.6%	15.0%
Financial cost of creating the initiatives	19.7%	35.2%	31.0%	7.7%	6.3%
Financial cost of supporting and maintaining the initiatives	19.0%	45.1%	25.4%	7.0%	3.5%
Staff time required to develop the initiatives	11.3%	42.6%	34.8%	8.5%	2.8%
Staff time required to maintain the initiatives	14.1%	48.6%	28.2%	6.3%	2.8%
Tools and technologies used to develop and maintain the initiatives	16.9%	50.7%	23.2%	6.3%	2.8%
Feedback from participants in the initiatives	32.4%	42.3%	14.8%	5.6%	4.9%

SUCCESS WITH TECHNOLOGY-BASED LEARNING

How would you rate the success of your organization's use of technology-enabled and technology-enhanced learning? (141 responses)

Very successful	19.1%
Somewhat successful	66.7%
Somewhat unsuccessful	11.3%
Very unsuccessful	2.8%

INCREASED NET REVENUE

Has the use of technology to enable or enhance learning increased your organization's *net* revenue from educational offerings? (141 responses)

Yes	51.8%
No	34.8%
Not sure	13.5%

STRATEGY FOR USE OF TECHNOLOGY FOR LEARNING

Does your organization have a formal, documented strategy for how technology will be used to enable or enhance learning? (141 responses)

Yes	23.4%
No	72.3%
Not sure	4.3%

PRODUCT DEVELOPMENT PROCESS

A product development process typically includes steps for determining which products or services to produce as well as a detailed process by which products are created and taken to market. Does your organization have a formal, documented product development process that includes its technology-enabled and technology-enhanced education products? (141 responses)

Yes	21.3%
No	71.6%
Not sure	7.1%

PRODUCT PRICING PROCESS

Does your organization have a formal, documented process for setting prices that includes its technology-enabled and technology-enhanced education products? (141 responses)

Yes	24.1%
No	56.0%
Not sure	9.9%
Not applicable (we don't charge for technology-enabled and technology-enhanced offerings)	9.9%