ASSOCIATION LEARNING
+TECHNOLOGY

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The Fine Print

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We're grateful to YM Learning for sponsoring this report so we may offer it free of charge. YM Learning contributed the commentary on pages 16 and 17 and information about the company on pages 35 and 51. YM Learning did not otherwise influence or direct the content of this report.

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Executive Summary

Association Learning + Technology 2016 continues the work of three prior reports—*Association Learning + Technology 2014*, *Association Learning + Technology 2011*, and *Association E-learning 2009*—in assessing the use of technology to enable and enhance learning in the association market and provides new insight into how associations are using technology for learning and how that use may evolve in the coming years.

At the core of the report is an online survey. Of the 200 survey responses recorded between August 26 and October 5, 2015, 174 qualified and are included in this report.

The Overview

Of the 174 qualifying responses to the survey, 87.4 percent were from individuals who indicated their organizations currently offer technology-enabled or technology-enhanced learning. An additional 8.6 percent of respondents indicated they plan to start using technology to enable or enhance learning in the coming 12 months, leaving only 2.9 percent not using technology with learning and with no plans to start in the coming year.

There's significant use of technology to deliver and enhance learning even among smaller organizations. Half (50.8 percent) of organizations that reported using technology for learning have annual budgets of $5 million or less, and 15.0 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. Recorded Webinars and Webcasts are offered by 85.7 percent of respondents currently using technology for learning, and 84.9 percent offer real-time ones. Self-paced online courses, tutorials, or presentations come in third (offered by 71.0 percent) and are the only other offering of the five types we asked about to garner a majority. Facilitated learning is last, offered by only 32.1 percent.

We also asked specifically about five emerging types of learning: massive open online courses (MOOCs), flipped classes, gamified learning, microcredentials (like digital badges), and microlearning. Microlearning—an addition since the previous survey—shows the highest rate of adoption but is still offered by under a fifth of respondents using technology for learning (18.1 percent), though a full third (33.3 percent) have plans for microlearning in the coming year. Flipped classrooms are offered by 14.4 percent of respondents. Digital badges, gamified learning, and MOOCs are currently offered by under 10 percent of respondents using technology for learning.

Almost 90 percent of respondents use technology for learning.

Among seven named social media tools, YouTube is the most common in associations' learning programs (used by 34.7 percent of respondents), but Twitter (33.3 percent), LinkedIn (26.6 percent), and Facebook (24.2 percent) follow not far behind. Just a handful of respondents report using Skype (6.7 percent), SlideShare (4.2 percent), or Pinterest (2.5 percent).

Some 41.0 percent of respondents currently using technology for learning provide a mobile version of at least some of their content. Add in those planning to offer a mobile version in the next 12 months (26.4 percent), and we're on track for a majority of associations to make m-learning part of their offerings in the near future.

Only 17.1 percent of associations currently using technology for learning offer a virtual conference, and just a handful (7.1 percent) plan to offer one in the coming year.

With 28.6 percent of respondents reporting they do it, live streaming from a place-based conference is notably more popular than virtual conferences. Another 13.6 percent report plans to live stream in the next 12 months. But the majority (52.9 percent) have no near-term plans to live stream.

In a question new to this survey, organizations currently using technology for learning were asked if they use technology to repeat, reinforce, or sustain learning after participants complete an educational product or service. Not quite a third (31.5 percent) say they do use technology for sustaining learning, and almost as many (29.4 percent) say they plan to in the coming year.

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 90.2 percent use one (up from 84.4 percent in the last survey), and another 5.3 percent plan to begin using one in the next 12 months, which means, essentially, saturation for Webinar and Webcast technologies.

Learning management systems (LMSes) are the second most popular technology platform, used by 61.1 percent of respondents currently offering technology-enabled or technology-enhanced learning. That's up noticeably from 51.0 percent of respondents to the 2013 survey and from 32.6 percent of respondents in 2010.

None of the other platforms we asked about—virtual conference platforms, learning community platforms, and learning content management systems (LCMSes)—is used by even a quarter of respondents. But a fifth of respondents report plans for using a learning community platform in the coming year. If that adoption pans out, that would mean almost a doubling of use of those platforms in the near future.

In a question new to this survey, we asked whether organizations integrate (whether manually or through automation) the data they collect in their learning technology platforms with the data from other technology platforms they use, such as a membership management database or association management system. Almost half (49.3 percent) do, but 29.9 percent don't, leaving room for improvement.

In another question new to this survey, we asked how frequently organizations use the data they collect in their learning technology platforms to make decisions about the current and future educational products and services they offer. Just under at a fifth of respondents (18.7 percent) report always using their data to make such decisions, and another 29.1 percent report using it frequently.

The Business Perspective

Our research shows the majority (52.8 percent) of associations that use technology for learning have increased their organization's net revenue from educational offerings, but under a fifth of respondents have a formal, documented strategy for how technology will be used to enable or enhance learning.

A majority of organizations using technology for learning report net increased revenue from their educational offerings as a result.

Two-thirds (67.2 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 (58.6 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, 52.9 percent use professional instructional designers—essentially the same rate as the last survey.

This year for the first time the survey asked respondents whether anyone at their organization holds the title of chief learning officer (CLO) or a similar C-level title that references learning, education, or knowledge. Some 42.2 percent of respondents say yes, and the survey data offers at least one argument in favor of a CLO-type position—organizations with a CLO or similar position are more likely to report increased net revenue from their use of technology for learning than organizations without someone in that role (66.0 percent versus 43.2 percent).

Whether to offer a formal certification or credential is an important decision both operationally and strategically for an organization. Among the respondents, 67.8 percent offer or provide education to support a credential (20.5 percent for a credential required in their field or industry and 47.3 percent for an optional credential).

The Performance Perspective

We added two questions to the latest survey to probe how organizations are measuring the impact of their learning. The first asked respondents if they measure whether learning occurs as a result of participation in their technology-enabled or technology-enhanced educational products and services. While a full

third (34.3 percent) report always measuring whether learning happens, over a third do it only sometimes (25.7 percent) or never (10.0 percent).

Organizations indicating they measure learning sometimes, frequently, or always were asked how they measure learning. Evaluation questions that align with learning objectives are the most popular method (used by 84.9 percent). Post-participation assessments or follow-ups were the only other approach used by a majority (57.1 percent).

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 60.9 percent of respondents rate themselves as somewhat successful with their use of technology for learning, only 18.8 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 (87.5 versus 52.8 percent).
- Offer facilitated online courses (50.0 versus 32.1 percent), flipped classes (40.0 versus 14.4 percent), gamified learning (28.6 versus 9.5 percent), and digital badges and microcredentials (21.7 versus 9.8 percent).
- Offer at least some mobile learning (58.3 versus 41.0 percent).
- Use technology to sustain learning (45.8 versus 31.5 percent).
- Make use of professional instructional designers (75.0 versus 52.9 percent).
- Use the data they collect in their learning technology platform to make decisions about the current and future educational products and services they offer (37.5 versus 18.7).

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

Technology has changed learning irrevocably, and the rate of change isn't likely to slow. This creates 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
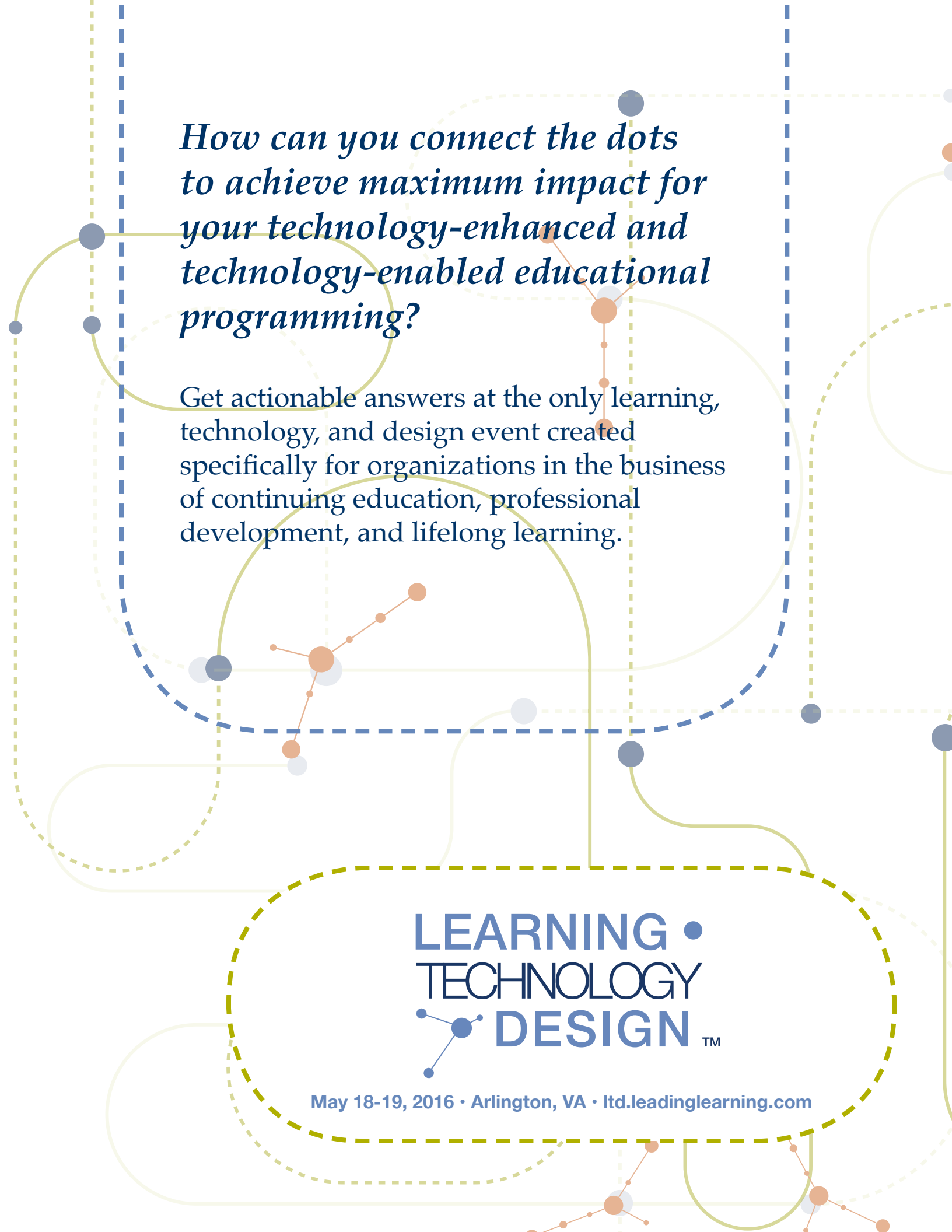
- An increase in competition that will, in turn, drive experimentation as associations look at how best to deliver more value
- The professionalization of the education function overall and the growth of roles like chief learning officer, as the adoption and integration of sophisticated technologies 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.

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Introduction

Building on the work of *Association Learning + Technology 2014*, *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.

At the core of the report is a survey of membership organizations conducted from August 26 to October 5, 2015.

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 and an understanding that the association sector is, by its nature, quite diverse and fragmented and that broad conclusions must be put forward cautiously.

We received 200 responses to this survey, of which 174 qualified and are included in this report. Of the 174 qualifying responses, 87.4 percent indicated their organization currently offers technology-enabled or technology-enhanced learning.

While that number is impressively high, it should be noted that we were inclusive in our definition of technology-enabled and technology-enhanced learning:
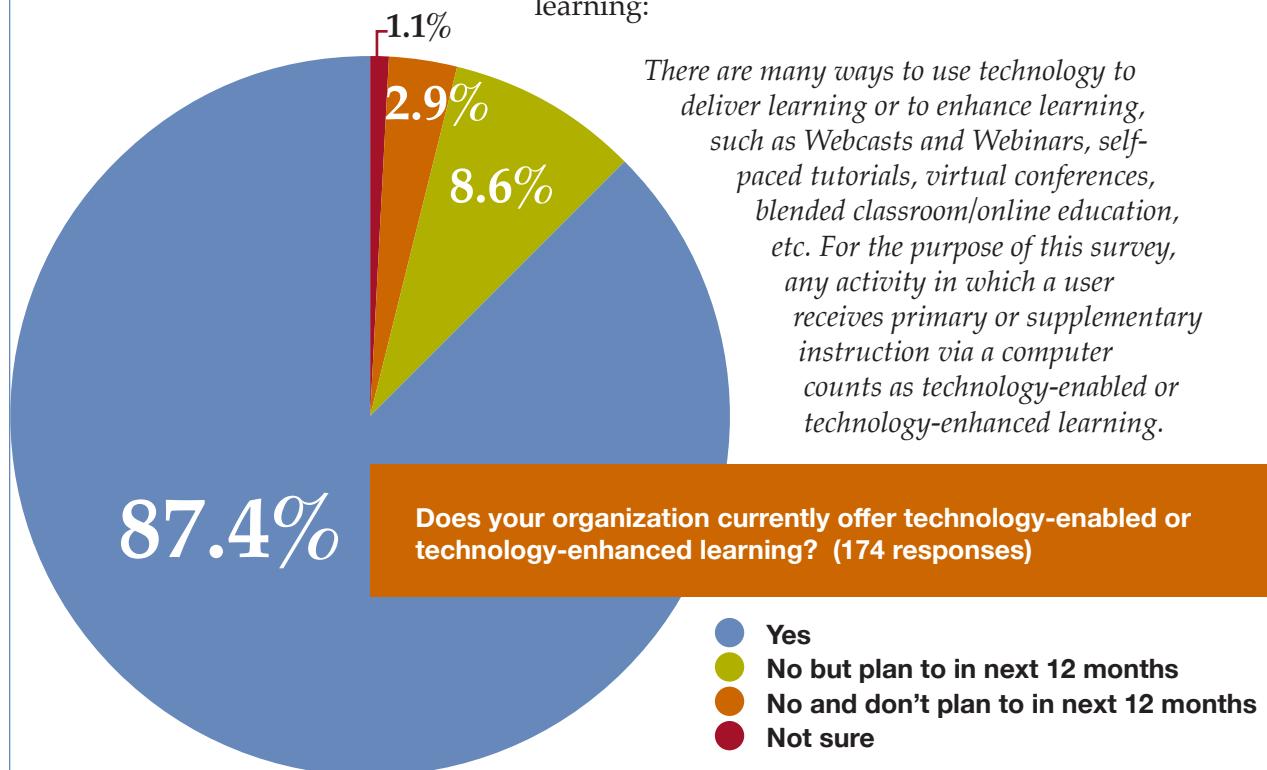
There are many ways to use technology to deliver learning or to enhance learning, such as Webcasts and Webinars, self-paced tutorials, virtual conferences, blended classroom/online education, etc. For the purpose of this survey, any activity in which a user receives primary or supplementary instruction via a computer counts as technology-enabled or technology-enhanced learning.

1.1%

2.9%

8.6%

87.4%

Does your organization currently offer technology-enabled or technology-enhanced learning? (174 responses)

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

An additional 8.6 percent of respondents indicated they plan to start using technology to enable or enhance learning in the coming 12 months, leaving only 2.9 percent not using technology with learning and with no plans to start in the coming year.

Changes to the Survey

While the survey behind this report is very similar to the survey used for the last report in 2014, we made a few changes to focus on key issues and identify emerging trends.

This year we made it clear that, while respondents must represent a membership organization, respondents from both nonprofit or for-profit membership organizations were welcome.

This year for the first time we also asked specifically about microlearning and the use of technology to repeat, reinforce, or sustain learning. We included questions to understand if organizations measure whether learning occurs as a result of participation in their technology-enabled or technology-enhanced educational products and services and, if so, how they measure.

We dug into data in this iteration of the survey, asking organizations whether data they collect in their learning technology platforms is integrated (manually or automatically) with data from their other technology platforms (e.g., the almighty association management system).

Lastly, we added a question to find out if someone in the organization holds the title of chief learning officer (CLO) or a similar C-level title that references learning, education, or knowledge. The CLO question strikes us as a good barometer for the amount of respect and emphasis given to learning in the organization.

The Organization of the Report

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 section on the operational aspects of what's produced (including virtual conferences, mobile learning, and emerging trends like microlearning) and the platforms used to support those products
5. A section that takes the business perspective, looking at the use of strategy, processes, and professional instructional designers and the role of chief learning officers and credentials
6. A section that looks at performance, including whether impact is measured, how technology ties to net revenue, and common characteristics of associations 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 YM Learning (formerly Digital Ignite), a division of YourMembership, who is sponsoring this report so it can be made free of charge to you, and a thought-leader contribution from Tamer Ali, founder of Digital Ignite and senior vice president of YourMembership

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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Professional Education Can Learn from the Sports World

Thoughts from YM Learning's Tamer Ali

In professional sports, there's an influx of statisticians, "math geeks," and data science experts coming into what used to be an industry stubbornly governed on instincts and time-earned experience to guide decisions. Sports in general, from talent scouts to coaches, was historically based on evaluating through "eye-balling" talent by measurables and performance in drills and games. Not too scientific, right?

Metrics and data are now integral to many programs when informing decisions in sports. You may have read *Moneyball* or seen the movie about the Oakland A's baseball team and how a small budgeted program leveraged data to compete with much richer organizations. This "nerd" movement is capitalizing on the power of technology to crunch numbers to help quantify performance and help with future planning. The results are encouraging enough that a renaissance of sorts is happening in many pro sports. And it took awhile to get noticed, given that the movement started in the early 70s with the growth of computing power. The pioneering Dallas Cowboys parlayed data science to a prolific stretch of 20 years of playoff appearances. ESPN did a short video on this that I think you'll find poignant and humorous: http://bit.ly/yml-espn-story.

So back to professional education.

The data in this Tagoras study was encouraging. It's clear that technology-enabled and technology-enhanced learning is here and maturing. We're embracing new concepts, we're no longer holding to traditional formats for our sole delivery styles, and we're diversifying our portfolio of product types. All good signs.

Now that we've embraced the technology, we need to adopt one of its best advantages: the data that it generates.

The results in three particular survey questions help support my claim that we're in need of a shift. The third question below is particularly worth noting, and clearly hammers it home (sorry about the sports reference again):

- Do you measure whether learning occurs as a result of participation in your technology-enabled or technology-enhanced educational products and services? Always: 34.3 percent Frequently: 25.7 percent.
- Does your organization have a formal, documented strategy for how technology will be used to enable or enhance learning? No: 71.9 percent.
- Does your organization have a formal, documented product development process that includes its technology-enabled and technology-enhanced education products? No: 67.2 percent.

These results indicate that we're running our programs more on instinct and career experience than design and data. And we can expect similar results until we make a conscious shift. Although the survey question on satisfaction with revenue performance showed a slight majority of respondents were satisfied, I'll pose this to you: Are we satisfied with revenue due to low or high expectations?

So how to start this shift? The hard part is already done; we've launched our programs. The complementary tools that help generate good data, like assessment and evaluation engines, are doing their part. LMS platforms can now provide richer data and tie it back to tools like Google Analytics. And standards in education, like Tin Can, are further supporting us with the potential of richer analytics. Although I'm representing a biased perspective as a vendor (selfish plug: award-winning Crowd Wisdom™ professional education platform—and we think it's the best in the market), I don't think technology is the complete solution. It's how we can use data it generates to make richer, more relevant learning experiences using technologies that are so cool our audiences are clamoring to use them.

Next for us is just to develop a game plan. Okay, one last sports reference. :)

Tamer Ali
YM Learning

Demographics

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 750 staff members and budgets greater than $100 million.

The largest clusters of survey respondents overall were nationally focused organizations (52.7 percent) with annual budgets between $1 million and $5 million (35.0 percent). The most common membership size was between 1,001 and 5,000 individuals (29.0 percent).

There's significant use of technology to deliver and enhance learning even among smaller organizations. Half (50.8 percent) of organizations that reported using technology for learning have annual budgets of $5 million or less, and 15.0 percent have budgets of $1 million or less.

Respondents averaged 54.0 paid staff (median 19.0) and 11.4 paid staff who spend more than half their time working in education or professional development (median 3.0).

What is your organization's annual budget (in U.S. dollars)? (137 responses)

- 2.2 %
- 8.0 %
- 10.9 %
- 35.0 %
- 21.2 %
- 8.8 %
- 7.3 %
- 4.4 %

- ● **Less than $100,000**
- ● **$100,001 to $500,000**
- ● **$500,001 to $1,000,000**
- ● **$1,000,001 to $5,000,000**
- ● **$5,000,001 to $10,000,000**
- ● **$10,000,001 to $25,000,000**
- ● **$25,000,001 to $50,000,000**
- ● **$50,000,001 to $100,000,000**
- ● **More than $100,000,000**
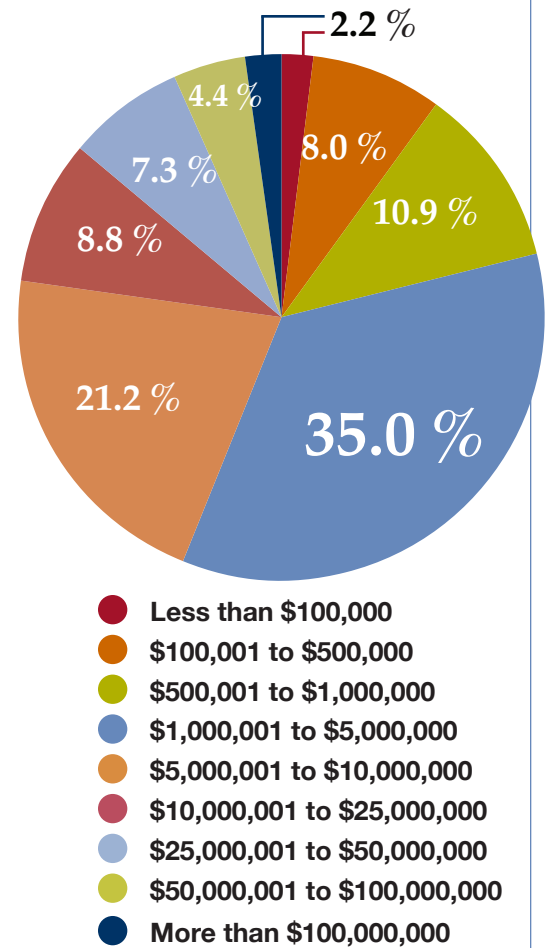
How many paid staff does your organization currently have? (145 responses) // How many paid staff does your organization have who currently spend more than half their time working in education or professional development? (143 responses)

54.0
19.0
11.4
3.0

■ **Average** ■ **Median**

Total paid staff   **Paid education staff**

- 0.7%
- 28.4%
- 8.1%
- 7.4%
- 2.7%
- 52.7%

- ● **Single-community or municipality focus**
- ● **Multiple-community focus within one state**
- ● **Single-state or province focus**
- ● **Multi-state or multi-province focus**
- ● **National focus**
- ● **International focus**

Which best describes the geographic focus of your organization (i.e., which best indicates the areas in which you actively solicit membership)? (148 responses)

Which of the following best characterizes your organization? (147 responses)

1.4%
0.7%
1.4%
6.8%
30.6%
59.2%

- ● Charitable or philanthropic organization
- ● Trade association
- ● Professional society
- ● Educational institution
- ● User group or customer community
- ● Other
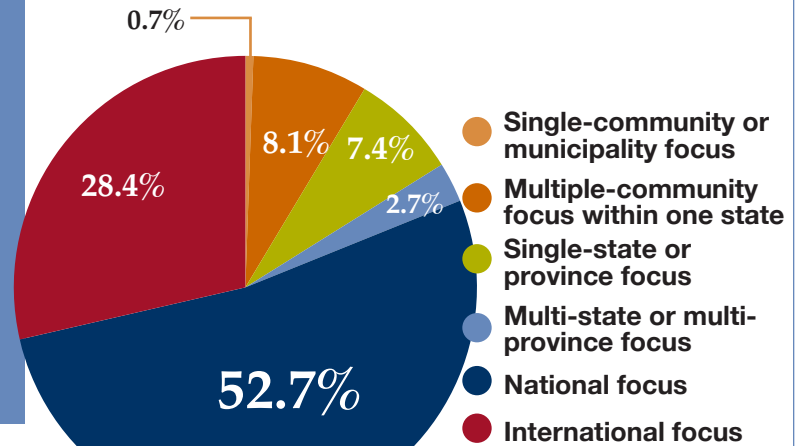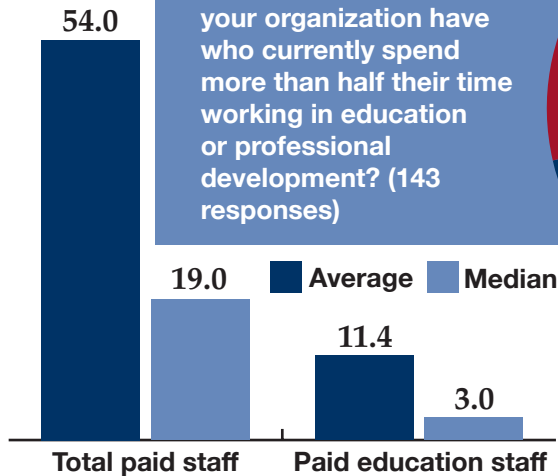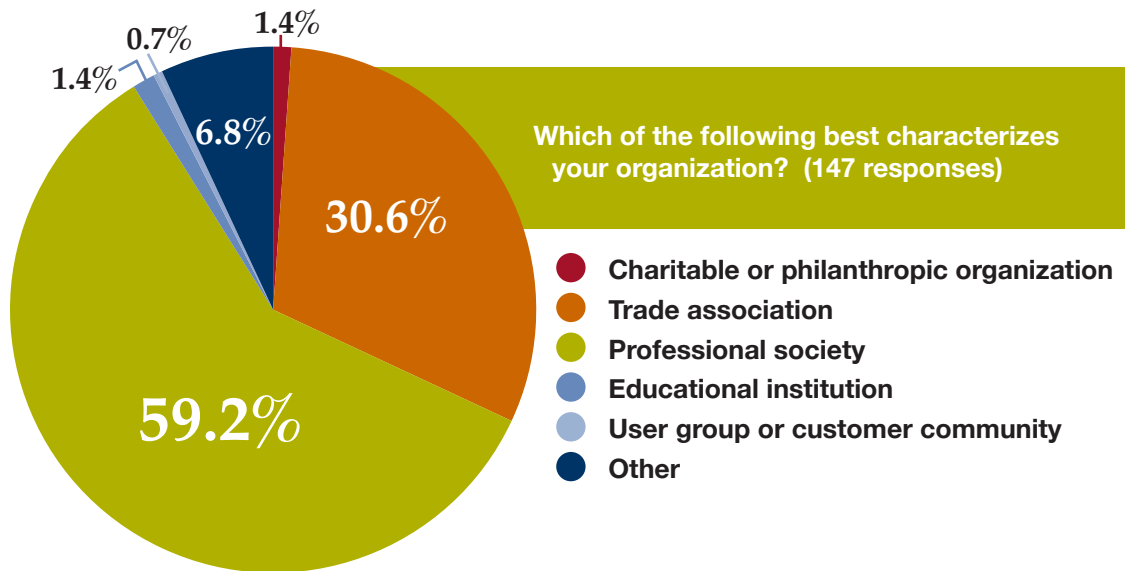
Professional societies (59.2 percent) and trade associations (30.6 percent) make up the lion's share of the organizations surveyed, and 80.0 percent of the surveyed trade associations and whopping 90.8 percent of the surveyed professional associations currently use technology to deliver or enhance learning.

Survey participants serve a wide variety of audiences. Of seven named options, only non-physician healthcare professionals garnered a double-digit response (13.1 percent); all the other options were selected by under 10 percent, leaving 50.3 percent to select "other." Audiences reported by those selecting "other" run a wide gamut, from wastewater professionals and funeral directors to construction workers and digital analysts.

How do you characterize the primary audience your organization serves? (145 responses)	
Physicians	9.7%
Non-physician healthcare professionals	13.1%
Accountants	6.9%
Attorneys	4.1%
Association executives	4.8%
K-12 educators	2.8%
College or university educators	8.3%
Other	50.3%

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

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

In this section, we look at the nuts and bolts of a technology-enabled or technology-enhanced learning program: the products, the offerings, and the platforms.

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. Recorded Webinars and Webcasts are offered by 85.7 percent of respondents currently using technology for learning, and 84.9 percent offer real-time ones. Approximately another 10 percent plan to begin offering both recorded and real-time Webinars and Webcasts. If that happens, both formats will be able to boast an above-95-percent adoption among organizations using technology for learning.

Self-paced online courses, tutorials, or presentations come in third (offered by 71.0 percent of organizations currently using technology for learning) and are the only other offering to garner a majority.

For organizations currently using technology for learning and with annual budgets of more than $5,000,000, one offering—self-paced online courses—shows a sizable jump. Among the bigger-budget organizations using technology for learning, 81.4 percent have self-paced offerings, compared with 71.0 percent of all respondents using technology for learning and only 58.3 percent of organizations using technology for learning with budgets of less of $5,000,000 or less.

Which of the following does your association provide or plan to provide? (147 responses)

Currently offering   Planned for next 12 months

	Currently offering	Planned for next 12 months
Recorded Webinars	85.7%	9.5%
Real-time Webinars	84.9%	10.3%
Self-paced courses	71.0%	14.5%
Blended learning	35.2%	26.1%
Facilitated learning	32.1%	24.1%
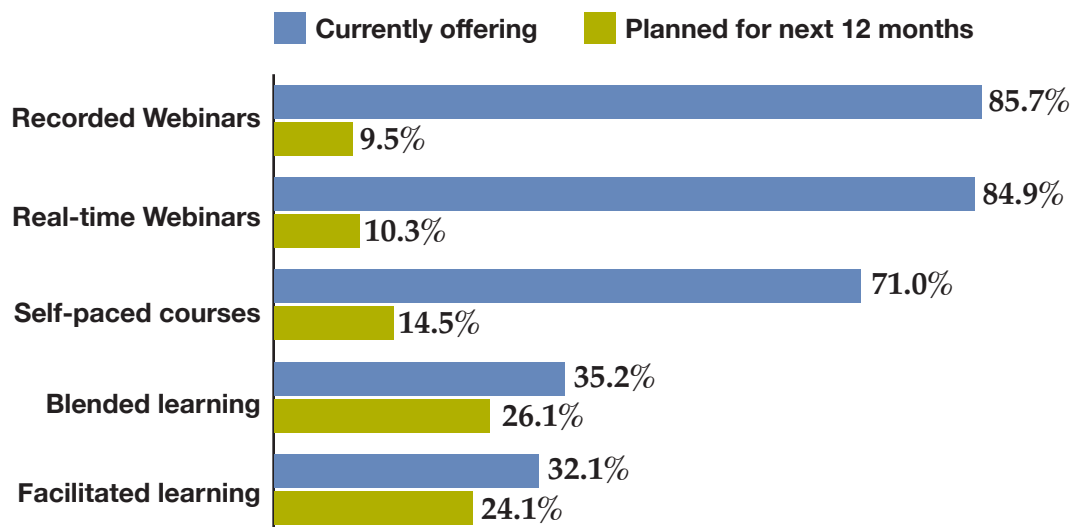
The greater use of self-paced courses among bigger-budget organizations may be explained by the typically higher development costs for self-paced courses when compared to Webinars. We should note, though, that saying self-paced courses are more expensive is a generalization and subject to exceptions. Do-it-yourself and rapid development tools have shortened timelines and lowered costs for self-paced courses.

Blended learning and facilitated learning rank next to last and last, respectively. While blended learning by definition extends learning beyond a single one-off experience and offers the potential for reinforcement of learning—an acknowledged necessity for effective learning—our suspicion is the low uptake is a resourcing issue. Those 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.

With facilitated learning, which acknowledges learning is fundamentally social, we suspect the meager adoption may tie to comfort. Teachers who cut their teeth in the classroom may not be comfortable moving their bag of facilitation tricks online, which leaves facilitated learning relegated predominantly still to place-based offerings that don't make use of technology.

Respondents, however, appear to understand the potential educational value of facilitated and blended learning and to be ready to tackle the challenges, as approximately a quarter of respondents currently using technology for learning plan to begin offering each of these formats in the next year.

MICROLEARNING, FLIPPING, BADGES, GAMES, AND MOOCS ON THE RISE

In the survey, we asked organizations currently using technology for learning about five emerging types of learning: massive open online courses (MOOCs), flipped classes, gamified learning, digital badges or microcredentials, and microlearning. (See the primer on the following page if you aren't clear or want a refresher on these types of learning.)

Microlearning—an addition since the previous survey—shows the highest rate of adoption but is still offered by under a fifth of respondents using technology for learning (18.1 percent),

Which of the following does your association provide or plan to provide? (146 responses)

- **Currently offering**
- **Planned for next 12 months**

	Currently offering	Planned for next 12 months
Microlearning	18.1%	33.3%
Flipped classrooms	14.4%	18.7%
Digital badges or microcredentials	9.8%	24.5%
Gamified learning	9.5%	17.5%
MOOCs	6.4%	12.1%
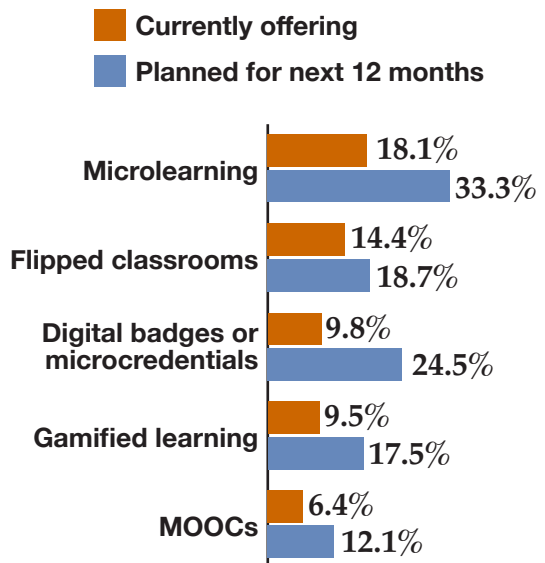
A PRIMER ON EMERGING TYPES OF LEARNING

Microlearning

Microlearning centers on brief learning experiences. Exactly how brief is open for debate, but think shorter than a typical educational offering. Microlearning may be particularly useful for learning reinforcement and just-in-time 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 (https://degreed.com).
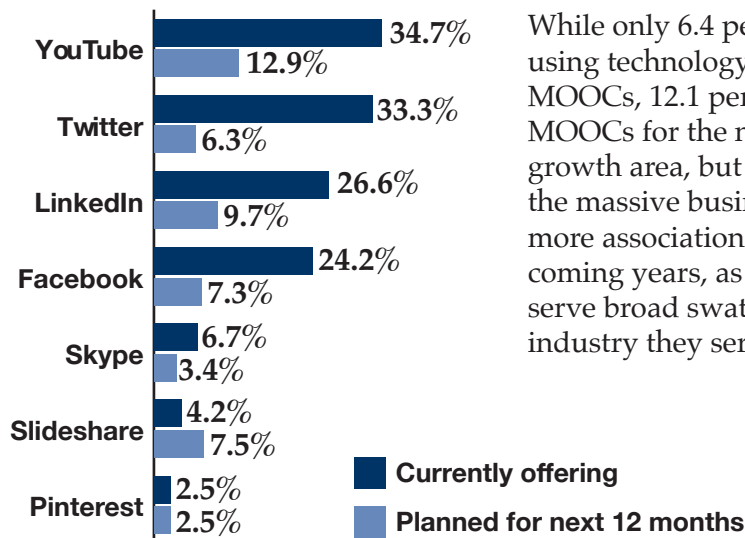
though a full third (33.3 percent) have plans for microlearning in the coming year. The current and planned use reported by respondents confirms our sense of the growing importance of offering small-size learning, though not necessarily to the exclusion of deeper dives.

Flipped classrooms, offered by 14.4 percent, are the second most popular of these emerging types. Plans for the coming year show growing interest; 18.7 percent said their organizations will do something with flipping in the 12 months ahead.

The other three offerings—digital badges, gamified learning, and MOOCs— are currently offered by under 10 percent of respondents using technology for learning. But, with these formats too, the future looks rosier than the present, with digital badges looking rosiest of all. Almost a quarter of respondents report plans for microcredentials in the near future.

A bright future for microcredentialing is a future we can believe. Microcredentials are natural territory for associations and logically connect to microlearning. Learners 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 place we see 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-strapped, and it only makes sense they would want to make best use of time spent together with peers, teachers, and facilitators.

YouTube 34.7% / 12.9%
Twitter 33.3% / 6.3%
LinkedIn 26.6% / 9.7%
Facebook 24.2% / 7.3%
Skype 6.7% / 3.4%
Slideshare 4.2% / 7.5%
Pinterest 2.5% / 2.5%

■ **Currently offering**
■ **Planned for next 12 months**

While only 6.4 percent of respondents using technology for learning offer MOOCs, 12.1 percent are planning MOOCs for the next year. This is a slow-growth area, but we're excited about the massive business model and expect more associations may embrace it in the coming years, as they look at how best to serve broad swaths of the profession or industry they serve.

Which of these 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. (130 responses)

SOCIAL MEDIA SLOW TO FIND ITS PLACE IN LEARNING

Among the range of specific social media tools currently used by associations for learning, YouTube comes out on top (used by 34.7 percent of respondents), but Twitter (33.3 percent), LinkedIn (26.6 percent), and Facebook (24.2 percent) follow not far behind.

Just a handful of respondents report using Skype (6.7 percent), SlideShare (4.2 percent), or Pinterest (2.5 percent).

Social learning is here to stay—learning is, fundamentally, social. 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 dedicated time and attention.

In the last report, we noted the room for growth in the area of social learning and that we expected to see growth but slowly. The numbers from the current survey, which show about the same rates of adoption as the previous survey, indicate we were right to expect the use of social media for social learning to be slow going among associations.

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? (144 responses)

- ● **Yes** — 41.0%
- ● **No but plan to in next 12 months** — 26.4%
- ● **No and don't plan to in next 12 months** — 27.1%
- ● **Not sure** — 5.6%
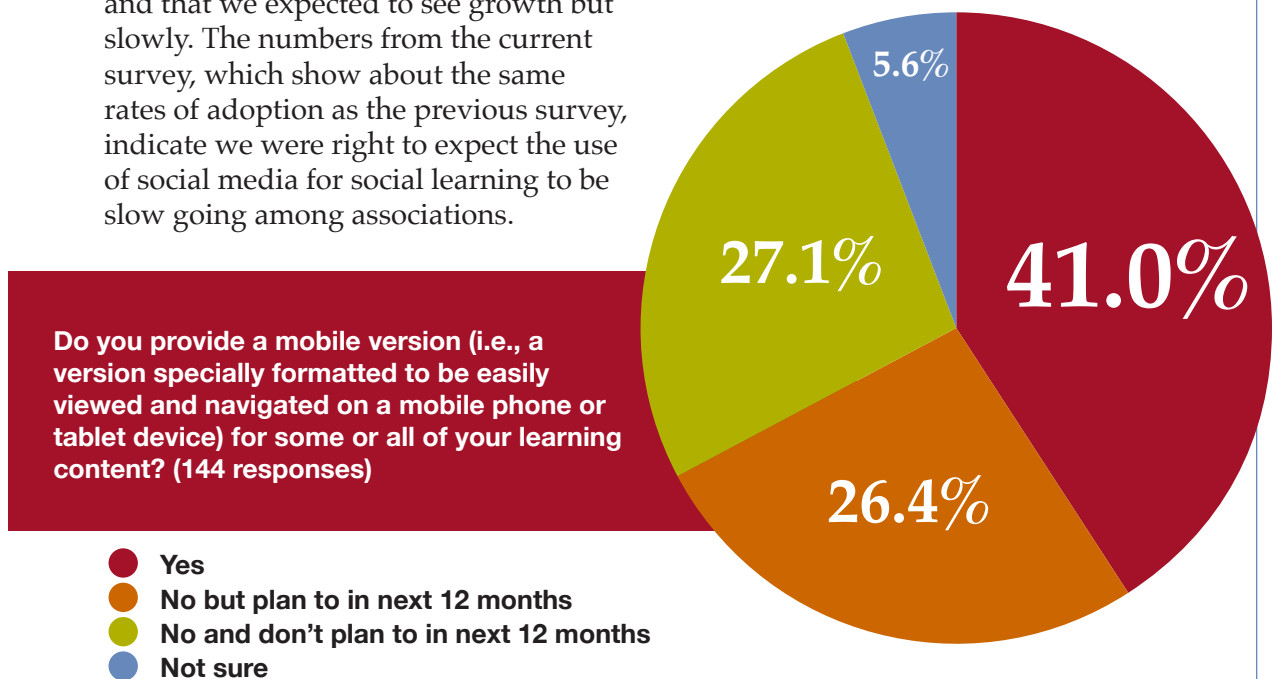
MOBILE LEARNING MAY GO MAINSTREAM

Some 41.0 percent of respondents currently using technology for learning provide a mobile version of at least some of their content. Another 26.4 percent plan to offer a mobile version in the next 12 months. If those plans play out, a majority of associations will 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 oppor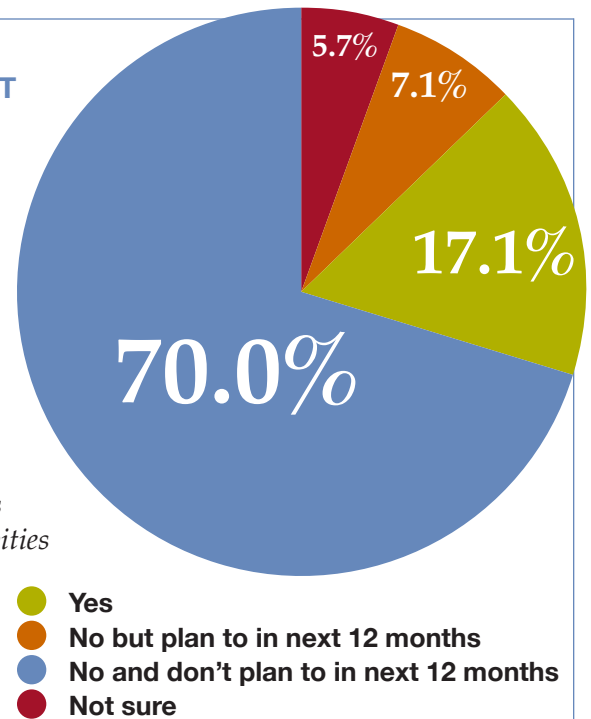tunities, exhibit areas for vendors, and various other features. Activities in a virtual conference may take place in real time (synchronously), on demand (asynchronously), or in some combination of the two.

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

5.7%

7.1%

17.1%

70.0%

- 🟢 **Yes**
- 🟠 **No but plan to in next 12 months**
- 🔵 **No and don't plan to in next 12 months**
- 🔴 **Not sure**

Does your organization offer a virtual conference? (140 responses)
Only 17.1 percent offer a virtual conference. A full 70.0 percent do not— and don't plan to in the coming year.

Only 17.1 percent of associations currently using technology for learning offer a virtual conference, and just a handful (7.1 percent) plan to offer one in the coming year. A full 70.0 percent don't offer a virtual conference and don't plan to in the near future. These percentages are substantially the same as those from our last report, suggesting virtual conferences may be a cooling trend.

But it's a trend we could see warm again. At the very least, we expect technology will play a role in evolving conferences, whether or not the label "virtual conference" gets applied. Our hope, though, is that technology is used as an enabler, not an end in itself. Non-technology changes, like increased focus on meaningful, relevant content and how best to achieve real learning, are the key to truly transforming conferences as educational offerings.

Cannibalization can be a concern, 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—and arguably one that more associations should try.

Associations worried about the impact of virtual conferences on their overall net revenue can stack the odds in their favor by securing sponsorships to replace or supplement registration fees. This thinking fits with the entrepreneurial, experimental mindset that is critical to organizations that want to thrive in the new learning landscape.
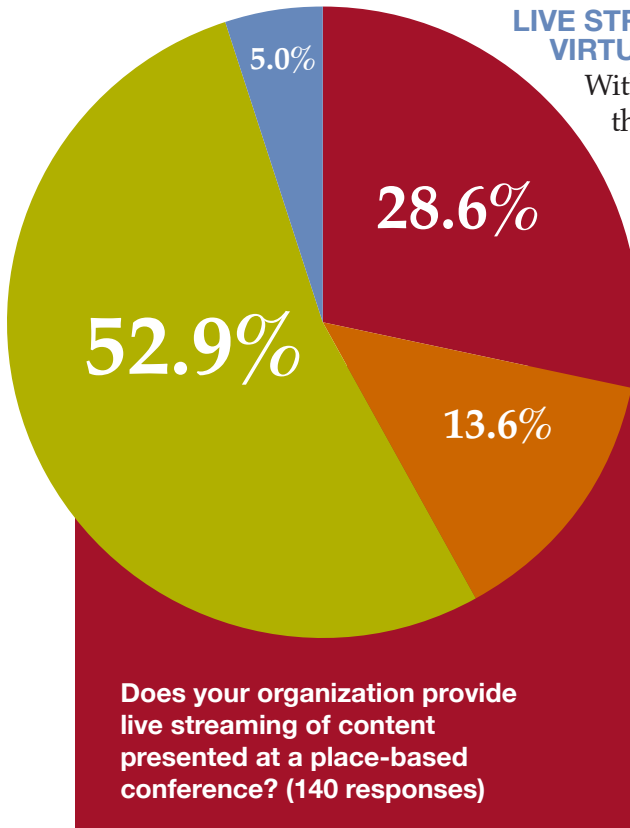
LIVE STREAMING MORE POPULAR THAN VIRTUAL CONFERENCES

With 28.6 percent of respondents reporting they do it, live streaming from a place-based conference is notably more popular than virtual conferences (offered by only 17.1 percent). Another 13.6 percent report plans to live stream in the next 12 months. But the majority (52.9 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 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*.

5.0%

28.6%

52.9%

13.6%

Does your organization provide live streaming of content presented at a place-based conference? (140 responses)

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

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.

SUSTAINING LEARNING

In a question new to this survey, we asked organizations currently using technology for learning if they use it to repeat, reinforce, or sustain learning after participants complete an educational product or service.

Not quite a third (31.5 percent) say they do use technology for sustaining learning, and almost as many (29.4 percent) say they plan to in the coming year.

Some 14.0 percent of respondents indicate they aren't sure if they use technology for sustaining learning, which suggests to us that respondents aren't sure if what

they're doing qualifies as the type of activity the question probes. The comments from those who said they are using or plan to use technology to reinforce learning indicate a spectrum of activities that includes systematic efforts built in dedicated technology platforms to more ad-hoc and selective options that make use of existing technology investments:

- For workshop participants, weekly scenario-based questions followed by feedback (including additional context, information, and resources), developed using the BoosterLearn platform
- "Ask Me Anything" in the organization's online community chats (on specific days, all day) with subject matter experts who delivered or are fluent in the content covered in the original educational product or service
- Follow-up surveys designed to reinforce learning, reassess knowledge gained, and suggest applications to practice
- Post-conference microlearning via the conference mobile app
- Push messaging (including text, video, and infographics) on new developments in the topic the learners studied
- Virtual coaching with an instructor as a follow-up to formal courses
- Informal learning bites in various formats
- Microlearning tasks delivered by e-mail or the learning management system

Using technology for reinforcing learning seems to have a strong toehold, which is heartening. But, given the need to reinforce learning if it's to stick and not be forgotten, we'd like to see near universal adoption of reinforcement techniques.

Are you using technology to repeat, reinforce, or sustain learning after participants complete an educational product or service? (143 responses)
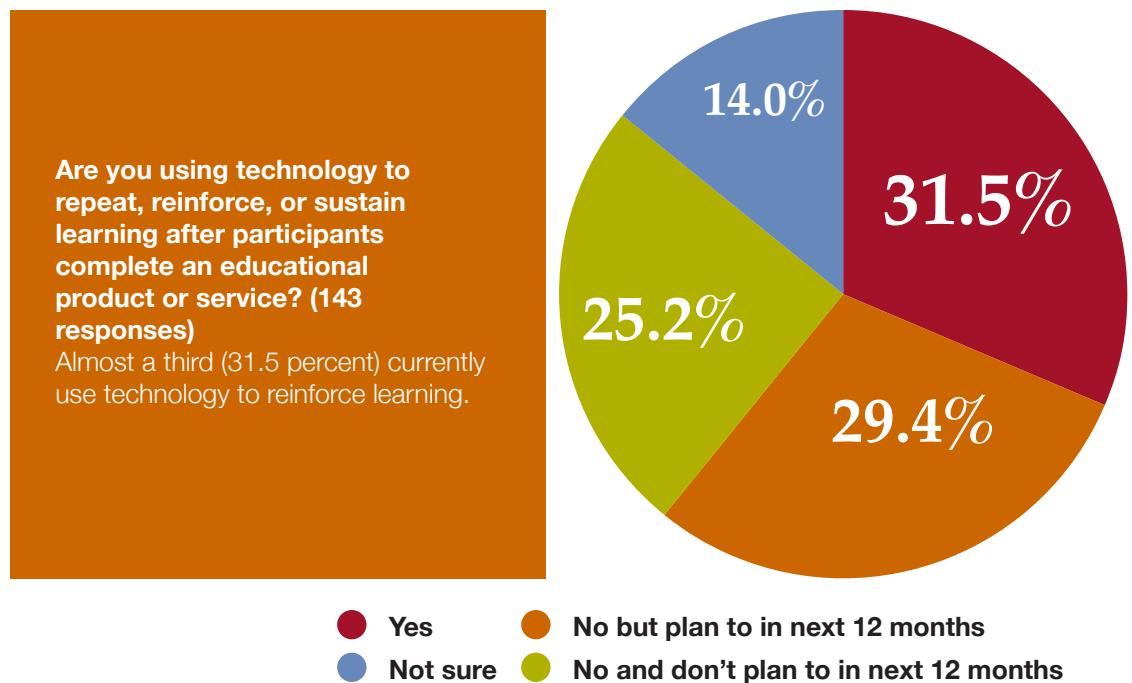Almost a third (31.5 percent) currently use technology to reinforce learning.

14.0%

31.5%

29.4%

25.2%

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

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 90.2 percent use one (up from 84.4 percent in the last survey), and another 5.3 percent plan to begin using one in the next 12 months, which means, essentially, saturation for Webinar and Webcast technologies.

Does your organization use a technology platform dedicated to delivering or enhancing learning? (135 responses)

■ Currently offering
■ Planned for next 12 months

Webinar platform	LMS	Learning community platform	LCMS	Virtual conference platform
90.2%	61.1%	21.7%	21.4%	17.7%
5.3%	16.0%	20.2%	11.9%	9.7%
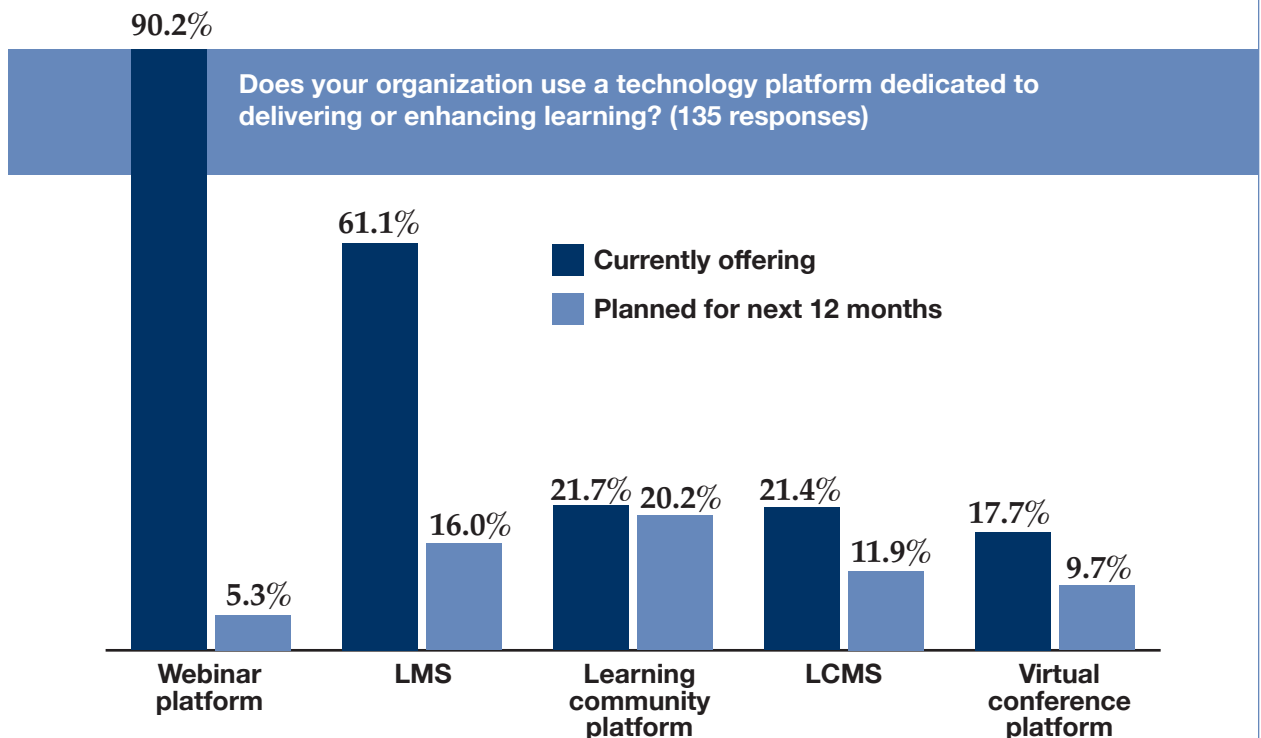
LMS USE UP
Learning management systems (LMSes) are the second most popular technology platform, used by 61.1 percent of respondents currently offering technology-enabled or technology-enhanced learning. That's up noticeably from 51.0 percent of respondents to the 2013 survey and from 32.6 percent of respondents in 2010.

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 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 learning content management systems (LCMSes)—is used by even a quarter of respondents.

But a fifth of respondents report plans for using a learning community platform in the coming year. If that adoption pans out, that would mean almost a doubling of use of those platforms in the near future.

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.

A learning content management system, or LCMS, provides ways to author or import learning content objects into the platform, 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 (which rank last of the platforms we asked about) 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. These platforms rank last out of the types we asked about—not surprising, given a full 70.0 percent of respondents using technology for learning say they don't offer a virtual conference and don't plan to in the next 12 months.

TWO FACTORS INFLUENCING USE OF PLATFORMS

Many factors inform an organization's use of technology platforms, and we can't consider them all based on the survey data, but we did want to note two tendencies.

- Organizations that offer a credential (licensure, certification, accreditation, recognition designations, certificates, etc.) are more likely to use all five of the platforms the survey asked about compared to those not offering a credential or education in support of one.
- Organizations that report they have a formal, documented strategy for how technology is used to enable or enhance learning are significantly

more likely than those without such a strategy to use all types of the platforms the survey asked about except for Webinar platforms, where use is about the same between the strategic and non-strategic groups.

ROOM FOR IMPROVEMENT WITH DATA

At the heart of nearly every association is a membership database. 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). Some data generated in learning technology platforms may need to eventually make its way back to the AMS.

This year we asked two new questions about data in the survey behind this report. We asked if organizations integrate (whether manually or through automation) the data they collect in their learning technology platforms with the data from other technology platforms they use, such as a membership management database or association management system.

While almost half (49.3 percent) do, there's still room for improvement in data integration, as 29.9 percent don't do any data integration. Another 9.0 percent aren't sure, and for 11.9 percent of respondents the question doesn't apply because they don't have a technology platform dedicated to delivering or enhancing learning.

Is the data you collect in the technology platform(s) dedicated to delivering or enhancing learning integrated (whether manually or through automation) with the data from other technology platforms you use (e.g., a membership management database or association management system)? (134 responses)

9.0%

11.9%

49.3%

29.9%

● Yes ● No ● Not sure ● Not applicable

Data integration can provide organizations with new and improved opportunities for serving learners as they get a more complete view of members' and learners' activities, allowing them, for example, to better target content and offerings to interested individuals. Data integration can also streamline the workflows staff within the organization use to serve members and other learners.

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
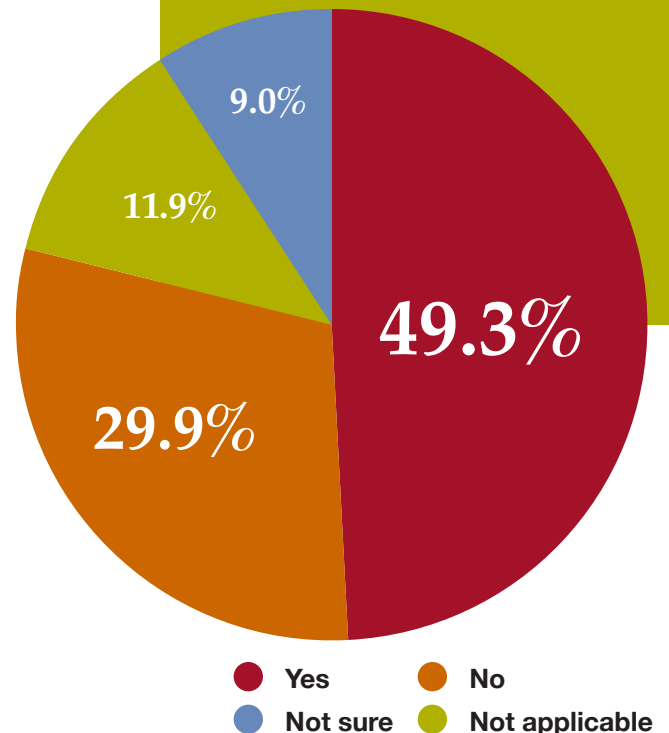
the learning platform and access it without having to log in again. This is the most fundamental level and is generally a prerequisite for other types of integration to occur.

- 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 platform, 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.
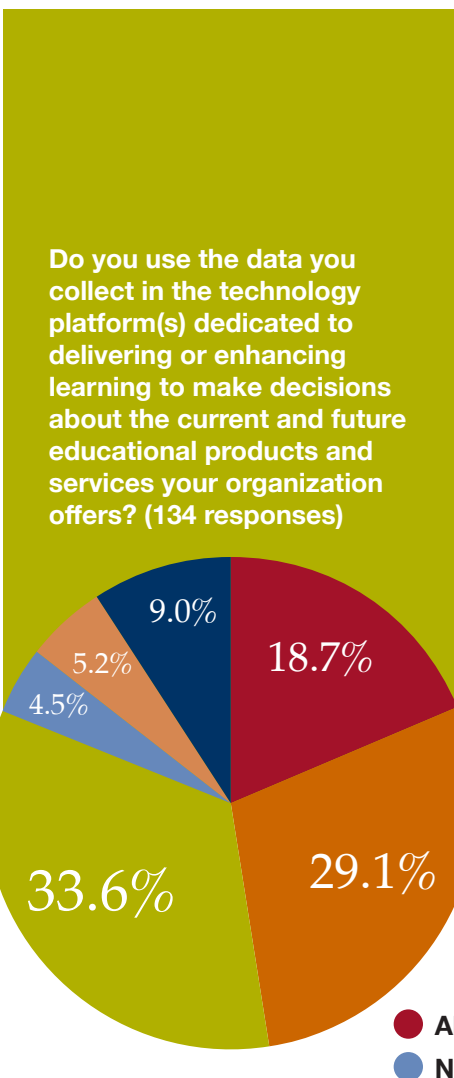
An important aspect of any type of integration between software systems is that there needs to be a clear understanding of which system's database will be the authority, or database of record, for the types of data to be shared among systems. In general, you don't want it to be possible to change data 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.

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

ABOUT HALF USE DATA CONSISTENTLY FOR PRODUCT DECISIONS

The second new question about data asked how frequently organizations use the data they collect in their learning technology platforms to make decisions about the current and future educational products and services they offer.

Do you use the data you collect in the technology platform(s) dedicated to delivering or enhancing learning to make decisions about the current and future educational products and services your organization offers? (134 responses)

18.7%
29.1%
33.6%
4.5%
5.2%
9.0%

- ● Always
- ● Frequently
- ● Sometimes
- ● Never
- ● Not sure
- ● Not applicable

Just under at a fifth of respondents (18.7 percent) report always using their data to make such decisions, and another 29.1 percent report using it frequently. Another third (33.6 percent) make use of it sometimes.

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 section.

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.

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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 easy for designers, facilitators, and learners.

While MOOCs, flipped classes, gamified learning, and digital badges are by no means mainstream, we think these fringe offerings will grow. Microlearning will continue to burgeon.

We expect virtual conferences, offered either as hybrids in conjunction with a place-based event or totally on their own, to remain relatively flat, and we likewise anticipate little growth in pure live streaming. But captured content will make a strong showing, particularly 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.

This year 87.4 percent of respondents report using technology to deliver or enhance learning. With current penetration of technology for learning 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 adoption of learning community platforms and learning management systems approach Webinar platform levels, though it will take time.

Questions to Consider

This section 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 microlearning 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 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 initiatives.

PLATFORM SELECTION

If your organization is considering implementing a learning platform, consider 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?

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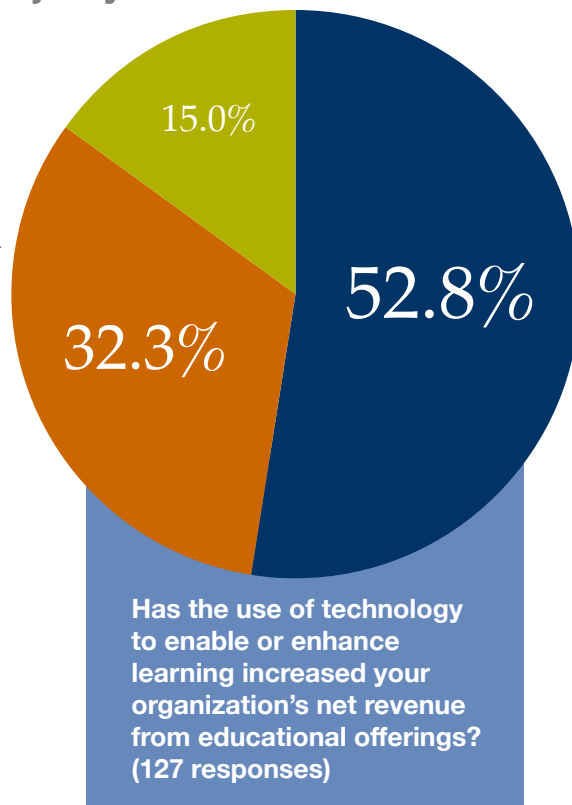
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The Business Perspective

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 role of a chief learning officer (a new question for this survey), the use of professional instructional designers, and the role of 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 (52.8 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.

Strategy Unpopular

Most organizations appear to approach the use of technology for learning in an ad-hoc, informal way—under a fifth of respondents (18.0 percent) 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—69.6 percent of organizations with a strategy report technology has increased the net revenue of their educational offerings compared to only 50.5 percent of those without a strategy.

Organizations that offer a credential or provide education in support of a credential are more likely than those that don't to have a strategy—58.9 versus 30.4 percent.

15.0% **52.8%** **32.3%**

Has the use of technology to enable or enhance learning increased your organization's net revenue from educational offerings? (127 responses)

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

10.2% **18.0%** **71.9%**

Does your organization have a formal, documented strategy for how technology will be used to enable or enhance learning? (128 responses)
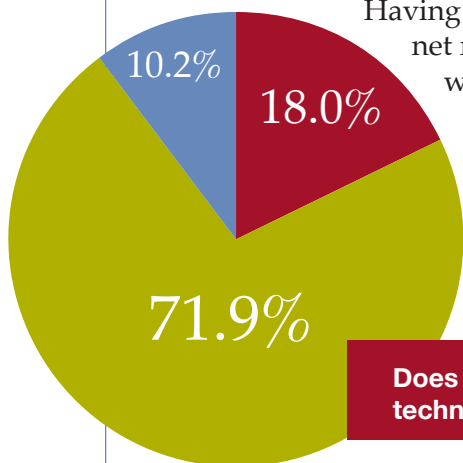
- Formal strategy
- No formal strategy
- Not sure

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 credential or provide education in support of a credential are much more likely to have a strategy points to the value of a strategy in higher-stakes learning.

Our view is that the use of technology will come to be viewed more strategically in the coming years, largely because technology for learning is increasingly expected. 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.

Does your organization have a formal, documented product development process that includes its technology-enabled and technology-enhanced education products? (128 responses)
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.

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
About two-thirds (67.2 percent) of respondents indicated their organization doesn't have a formal, documented product development process that includes its technology-enabled and technology-enhanced education products, and another 11.7 percent aren't sure if they have such a process.

11.7%

21.1%

67.2%

● **Yes**　　● **No**　　● **Not sure**
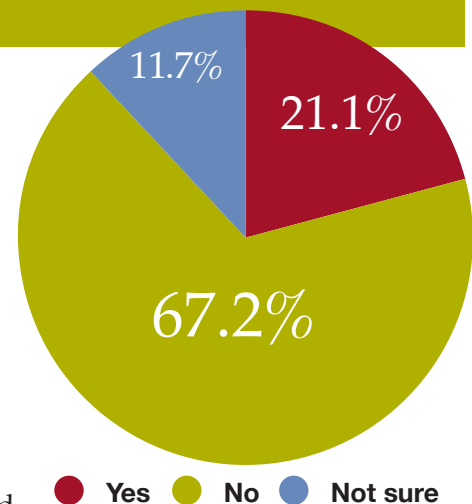
Without a formal process, how are organizations developing education products? From our interactions and work with organizations, we know many rely on a committee or the board to suggest topics. Staff are also a common source for topics. While these approaches solicit input, that input may well be biased, 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 may 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 from 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 overreliance on any one source and combine that input with experimentation, such as pre-selling prior to development to ensure people will make the purchase and releasing minimum viable products to gauge actual demand.

PRICING PROCESSES: EXOTIC TOO

Over half (58.6 percent) of respondents don't have a formal, documented process for setting prices that includes their technology-enabled and technology-enhanced education products; another 6.3 percent aren't sure if they have a pricing process.

Does your organization have a formal, documented process for setting prices that includes its technology-enabled and technology-enhanced education products? (128 responses)
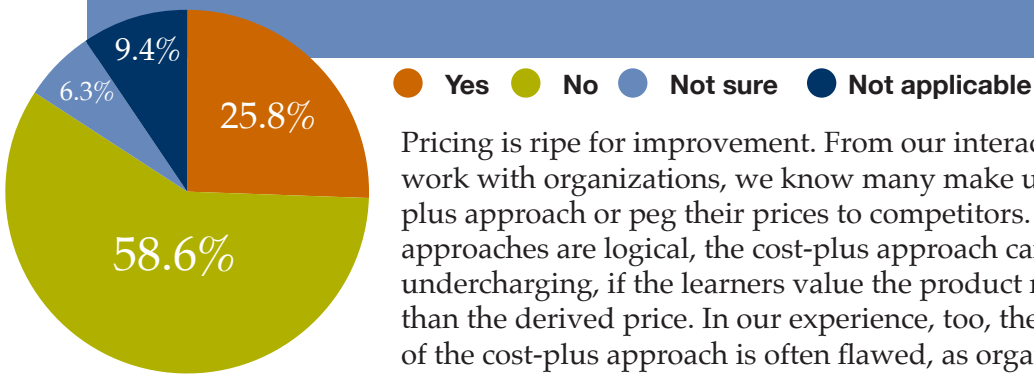
9.4%

6.3%

25.8%

58.6%

● **Yes** ● **No** ● **Not sure** ● **Not applicable**

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 relevant 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.

Need More Professional Instructional Design

For organizations currently using technology for learning, 52.9 percent use professional instructional designers (IDs)—essentially the same rate as the last survey. While we're glad to see no decline, it's still 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 professional instructional designers—73.9 percent of organizations with a strategy use professional IDs compared to 46.7 percent of those without one.

1.5%

45.6%

52.9%

● **Yes** ● **No** ● **Not sure**

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? (136 responses)

Organizations offering a credential or providing education in support of a credential are also more likely to use professional IDs (58.2 percent) than those that don't (39.1 percent).

CLOs More Likely to See Increased Net Revenue

This year for the first time the survey asked respondents whether anyone at their organization holds the title of chief learning officer (CLO) or a similar C-level title that references learning, education, or knowledge.

We were somewhat surprised—pleasantly so—to see 42.2 percent of respondents say yes. For us this bodes well, though there's still room for more top-level education staff at organizations where learning and education factor heavily into their mission and vision.

Does anyone at your organization hold the title of chief learning officer or a similar C-level title that references learning, education, or knowledge? (128 responses)

● **Yes** ● **No**

42.2%

57.8%

The survey data offers at least one argument in favor of a CLO-type position. Organizations with a CLO or similar position are more like to report increased net revenue from their use of technology for learning than organizations without someone in that role (66.0 percent versus 43.2 percent).

As we track responses to this question in future iterations of this survey, we'll look for correlations between changes in rate of adoption of strategy and processes. We hope more CLOs will be the harbinger of more strategic and learning-centered decisions in these organizations.

Does your organization offer a credential or provide education in support of a credential in the field or industry you serve? (146 responses) Credentials include licensure, certification, accreditation, recognition designations, and certificates.

1.4% 8.2% 20.5%

22.6%

47.3%

A Majority Support Credentials Directly or Indirectly

Whether to offer a credential (such as licensure, certification, accreditation, recognition designations, and certificates) 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 learning products and then, if appropriate, to get
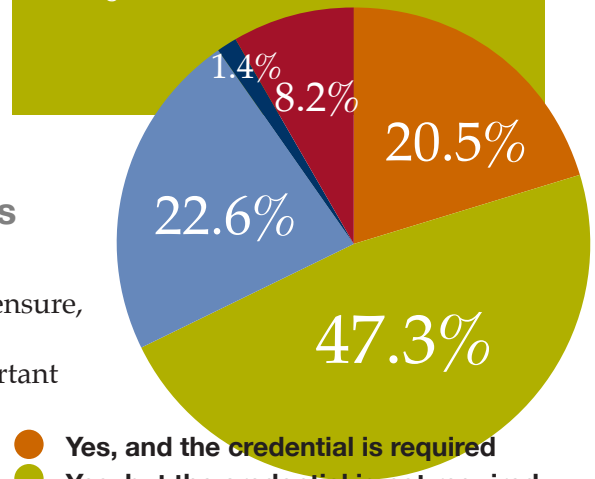
● **Yes, and the credential is required**
● **Yes, but the credential is not required**
● **No**
● **Not sure**
● **Other**

them approved to support a credential—even for a credential maintained by the association itself—and usually there are reporting requirements to be followed.

As a matter of strategy, common sense suggests that, all else being equal, a learner will choose an educational experience that supports a credential over one that doesn't. A large segment of associations appear inclined to place strategic considerations ahead of whatever operational burdens the support of credentials may create. Among the respondents to our survey, 67.8 percent offer or provide education to support a credential (20.5 percent for a credential required in their field or industry and 47.3 percent for an optional credential).

Summary

In this section 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 chief learning officers and professional instructional designers and the impact of 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.

Under a fifth of respondents have a formal, documented strategy that covers how they will use technology to enable or enhance learning.

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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.

Competition for learners will increase.

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 52.9 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. Credentials can be ways for associations to stand out from other options, but associations will need other ways to convey and demonstrate their value.

And determining that value and how to stand out may be a role the chief learning officer can play—at least at the 42.2 percent of organizations that have one.

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?

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? What data do you have to back up your characterization of the segments?

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?

> **We want to see more associations develop and implement a strategy to guide their use of technology for learning. Gut-level governance can work, but more consistent approaches will reap bigger benefits.**

The Performance Perspective

Even given the level of statistical error that may be present in a non-probability survey, the combined survey results from 2008, 2010, 2013, and 2015 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.

In this section, we look at organizations' measurement of impact, their self-reported success and satisfaction, and what they have to say about the future of learning.

Learning Not Measured Often—or Long—Enough

The survey behind this report asked respondents for the first time if they measure whether learning occurs as a result of participation in their technology-enabled or technology-enhanced educational products and services.

While 34.3 percent report always measuring whether learning happens, over a third do it only sometimes (25.7 percent) or never (10.0 percent).
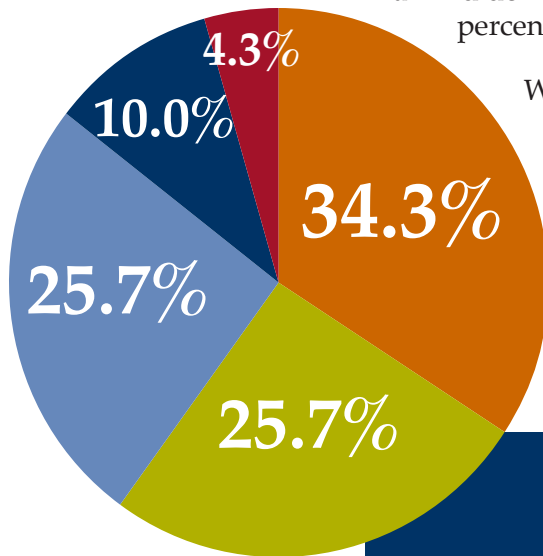
We hope to see the percentage of organizations frequently, if not always, measuring learning grow. This kind of measurement seems essential for informed product and service decisions at the organizational level and for convincing learners and would-be customers in today's highly competitive market why they should choose one organization's educational offerings over other options.

4.3%
10.0%
25.7%
34.3%
25.7%

- ● Always
- ● Frequently
- ● Sometimes
- ● Never
- ● Not sure

Do you measure whether learning occurs as a result of participation in your technology-enabled or technology-enhanced educational products and services (e.g., through assessments or evaluation questions tied to learning objectives)? (140 responses)
Over a third measure whether learning happens only sometimes or never.

How do you measure whether learning occurs as a result of participation in your technology-enabled or technology-enhanced educational products and services? (Check all that apply.) (119 responses)

Through evaluation questions that align with learning objectives	84.9%
Through post-participation assessments or follow-ups	57.1%
Through a combination of pre- and post-participation assessments	24.4%
Through evaluations conducted a month or more following participation	16.0%
Other	8.4%

Overall, how satisfied are you with your current technology-enabled and technology-enhanced learning initiatives? (133 responses)

- Very satisfied
- Somewhat satisfied
- Somewhat dissatisfied
- Very dissatisfied

14.3%
58.6%
19.5%
7.5%
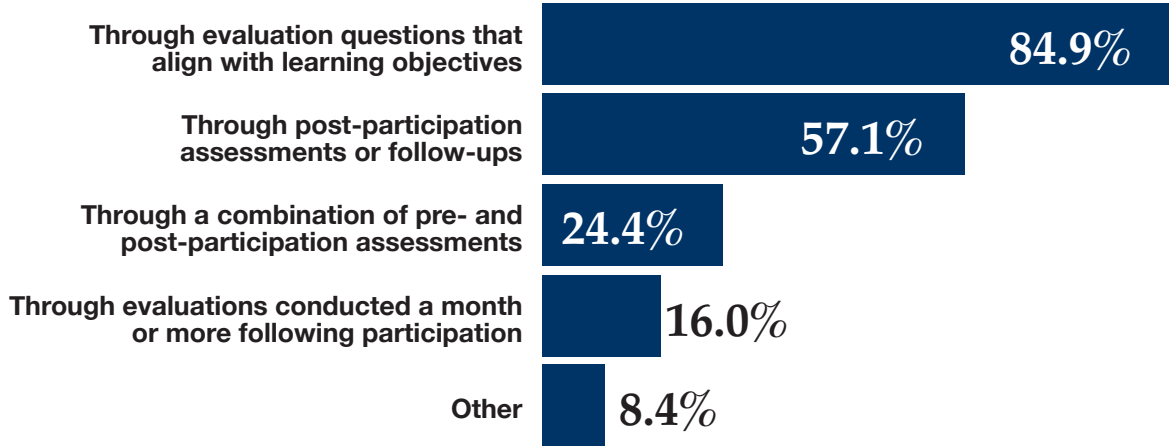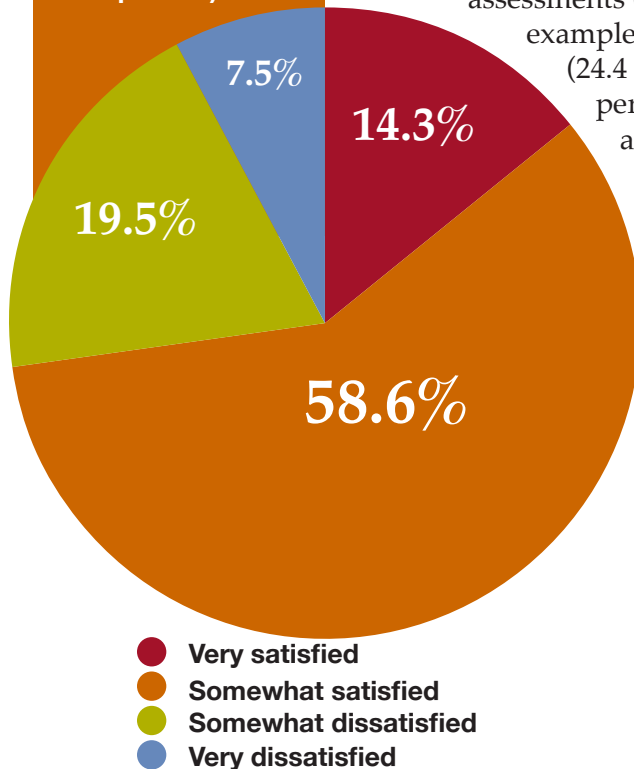
Organizations indicating they measure learning sometimes, frequently, and always were asked how they measure learning. Evaluation questions that align with learning objectives are the most popular method (used by 84.9 percent). Post-participation assessments or follow-ups were the only other approach used by a majority (57.1 percent).

A combination of pre-participation and post-participation assessments (think pre-tests and post-tests, for example) are used by only a quarter of respondents (24.4 percent). Most disappointingly, only 16.0 percent make use of evaluations conducted a month or more following participation—this despite the fact that many educational opportunities offered for associations gun for long-term changes in behavior and are up against the likelihood of forgetting if not reinforced periodically.

Overall Satisfaction High But Dissatisfaction with Staff Time and Revenue

We asked associations whether they're satisfied overall with their current technology-enabled and technology-enhanced learning initiatives, and 72.9 percent report being either somewhat (58.6 percent) or very (14.3 percent) satisfied.

Legend: Very satisfied · Somewhat satisfied · Somewhat dissatisfied · Very dissatisfied · Not applicable

Usage: 11.6%, 51.9%, 23.3%, 9.3%, 3.9%
Revenue: 8.5%, 40.3%, 27.1%, 10.1%, 14.0%
Cost of creating: 11.7%, 39.8%, 29.7%, 12.5%, 6.3%
Cost of maintaining: 10.9%, 44.2%, 33.3%, 7.8%, 3.9%
Staff time to develop: 4.7%, 39.4%, 37.0%, 15.7%, 3.1%
Staff time to maintain: 7.8%, 41.4%, 37.5%, 10.2%, 3.1%
Tools and technologies: 8.5%, 48.8%, 28.7%, 13.2%, 0.8%
Feedback: 18.0%, 52.3%, 18.0%, 3.9%, 7.8%
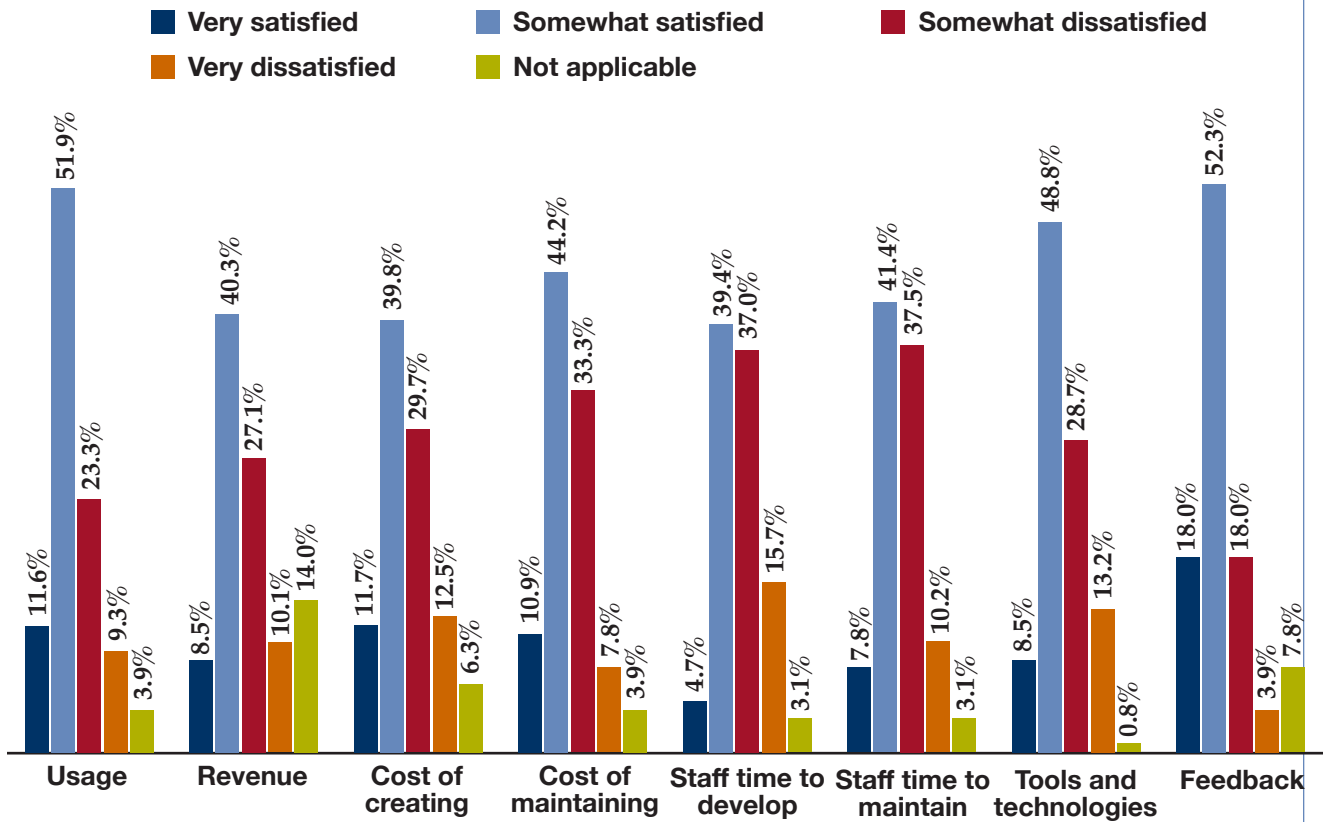
Overall, how satisfied or dissatisfied are you with your current technology-enabled or technology-enhanced learning initiatives in terms of these specific items? (129 responses)
Respondents are most satisfied with the feedback from participants. The three areas of highest dissatisfaction are the staff time required to develop offerings, the staff time required to maintain them, and revenue.

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: 70.3 percent report being very or somewhat satisfied with participant feedback.

The three biggest areas of dissatisfaction are the staff time required to develop offerings (only 44.1 percent are very or somewhat satisfied), the staff time required to maintain them (only 49.2 percent are satisfied), and revenue (only 48.8 percent are satisfied with revenue).

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.

Portrait of Success

Respondents rate themselves as more successful than satisfied—79.7 percent characterize their organization's use of technology-enabled and technology-enhanced learning as somewhat (60.9 percent) or very (18.8 percent) successful.

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

- Report increased net revenue from their education offerings as a result of their use of technology for learning (87.5 versus 52.8 percent).
- Offer facilitated online courses (50.0 versus 32.1 percent), flipped classes (40.0 versus 14.4 percent), gamified learning (28.6 versus 9.5 percent), and digital badges and microcredentials (21.7 versus 9.8 percent).
- Offer at least some mobile learning (58.3 versus 41.0 percent).
- Use technology to sustain learning (45.8 versus 31.5 percent).
- Make use of professional instructional designers (75.0 versus 52.9 percent).
- Use the data they collect in their learning technology platform to make decisions about the current and future educational products and services they offer (37.5 versus 18.7).

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.

2.3%

18.8%

18.0%

60.9%

How would you rate the success of your organization's use of technology-enabled and technology-enhanced learning? (128 responses)

- Very successful
- Somewhat successful
- Somewhat unsuccessful
- Very unsuccessful
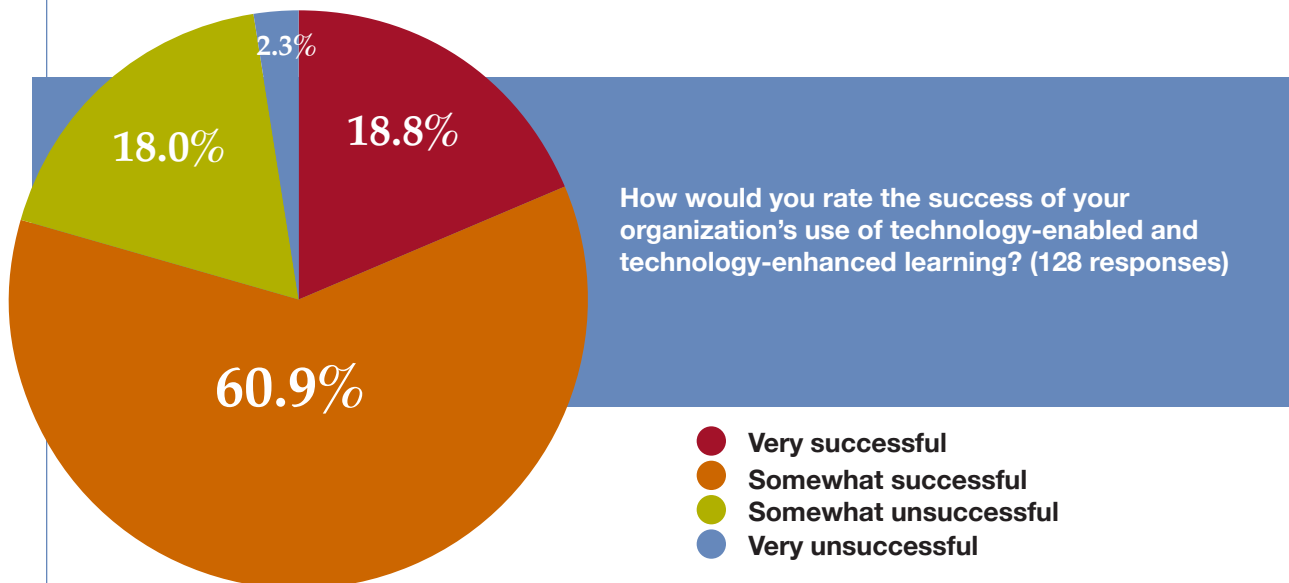
- A commitment to listening to members—initially and continually—to identify and align with their needs
- A focus on concrete outcomes, including awarding credentials and delivering relevant, valuable content
- An entrepreneurial mindset that's open to reasonable risk, experimentation, and leading learners 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. Some focus on new technology investments (e.g., in a new LMS or AMS). Others home in on content and specific products and services. Still others focus on preparation that must be done before new technology or products or services can even be considered.

The plans outlined in the responses run the gamut from ambitious change to incremental improvement, from the strategic to the tactical. Here's a sampling of what's on tap for the coming year in the words of survey respondents:

- "Exploring shorter learning opportunities—less time than Webinars—to increase participation and access."
- "Launching a MOOC aimed at teaching prospective students about the industry and career paths."
- "Much deeper analysis, market segmentation, and research."
- "Building in competency-based training."
- "I'd like to develop online courses and create certificate programs ,which will include assessments. All three things would be new for us. Plus, we'd begin charging members for access to the courses, which is new."
- "Consistent plan; learning objectives; one-stop access to all course material."
- "We do not have concrete plans for specific implementations over the next 12 months. Rather, we have plans to evaluate our strategy and develop a plan for increasing our involvement in this area. This could lead to some trial offerings within the next 12 months, but nothing specific is on the table at this time."
- "With the addition of new staff, the next 12 months will be spent in a review of current education initiatives/plans and how they relate to corporate strategy."
- "We won't be investing any further resources in technology enhanced learning next year. Our members have tried it and don't really engage

with it, unless it's free. And then we only get 25-30 attendees versus our live face-to-face programs where we can get 80-250, depending on the topic. We are still a high-touch, low-tech industry."

- "The list of things we are not doing but that we would like to do or at least explore doing is very long. If we narrowed it down to the things might have a shot at starting in the next 12 months, it would include looking at digital badging for our credentials; finding a mobile app or other technology that could replace our paper and pencil end-of-course exams; enhancing or changing our test engine so that learners can get detailed feedback about their performance on exams (i.e., content areas of strengths and weaknesses); getting a consultant or vendor to help us evaluate whether a virtual version of any of our conferences would make sense; and building on success with mobile apps at our conferences and thinking of ways to use the mobile app to enhance learning for other things like our face-to-face courses, credentials, etc."

- "The sky is the limit now that we have dedicated staff and a new LMS on the way! We are actually seeing some dreams come true."

While there's room for improvement in associations' use of technology for learning, the sky is indeed the limit. Onward and upward.

Remember the sky is the limit.

Onward and upward.

About Tagoras
Publisher of the Report

This report is published by Tagoras, Inc. (www.tagoras.com), which was cofounded by Jeff Cobb and Celisa Steele.

Through a combination of independent research, educational events, and strategic advisory services, Tagoras helps organizations in the business of lifelong learning maximize the reach, revenue, and impact of their offerings. We are the founders and hosts of Learning • Technology • Design and the Leading Learning Symposium, annual events designed specifically for organizations in the business of continuing education and professional development. We also facilitate the Leading Learning community, a private, invitation-only community for education business leaders. Other Tagoras reports include *Association Learning Management Systems*, *Association Virtual Events*, and *The Speaker Report*.

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. She also served as vice president of operations at LearnSomething. 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.

Jeff Cobb

A managing director at Tagoras, Jeff has spent nearly two decades immersed in the global market for adult lifelong learning as an entrepreneur, consultant, teacher, and author. 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* (AMACOM 2013). He currently serves on the governing board of NIGP: The Institute for Public Procurement, to which he was specifically appointed as an education thought leader. He has previously served on the Professional Development Section Council of the American Society of Association Executives, the research committee of the eLearning Guild, and the editorial board of Innovate.

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.
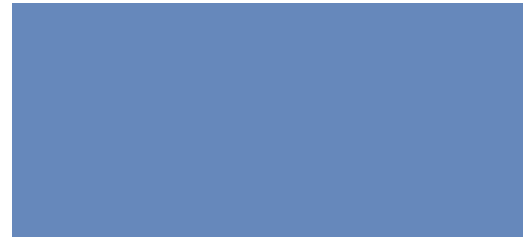
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About YM Learning
Sponsor of the Report

YM Learning, formerly Digital Ignite, was founded in 2006 with the vision of building a better learning experience for the adult, working professional.

Our goal was to break the model of impersonal e-learning technologies to create a personalized, social, and engaging learner-centric platform that could handle the rigors and demands of critical learning and professional education programs. Thus, we developed a platform with scalability, global presence and the infrastructure to deliver greater and richer learning experiences.

In short, e-learning deserves the same advances in aesthetics, personalization, analytics, and infrastructure that the Internet continues to experience. Our team works with customer stakeholders to maximize their investments in technology, while strategizing the best approach for future educational product development.

ymlearning®

Formerly *Digital Ignite*

Appendix: Survey Data

We're grateful to the hundreds of organizations that took the time between August 26 and October 5, 2015, to participate in the 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? (174 responses)

Yes	12.6%
No	87.4%

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? (174 responses)

Yes	87.4%
No, but plan to in the next 12 months	8.6%
No, and don't plan to in the next 12 months	2.9%
Not sure	1.1%

GEOGRAPHIC FOCUS

Which best describes the geographic focus of your organization (i.e., which best indicates the areas in which you actively solicit membership)? (148 responses)

Single-community or municipality focus	0.7%
Multiple-community focus within one state	8.1%
Single-state or province focus	7.4%
Multi-state or multi-province focus	2.7%
National focus	52.7%
International focus	28.4%

TYPE OF ORGANIZATION
Which of the following best characterizes your organization? (147 responses)

Charitable or philanthropic organization	1.4%
Trade association	30.6%
Professional society	59.2%
Educational institution	1.4%
User group or customer community	0.7%
Other	6.8%

AUDIENCE
How do you characterize the primary audience your organization serves? (145 responses)

Physicians	9.7%
Non-physician healthcare professionals	13.1%
Accountants	6.9%
Attorneys	4.1%
Association executives	4.8%
K-12 educators	2.8%
College or university educators	8.3%
Other	50.3%

CREDENTIALS
Does your organization offer a credential or provide education in support of a credential in the field or industry you serve? Credentials include licensure, certification, accreditation, recognition designations, and certificates. (146 responses)

Yes, and the credential is required	20.5%
Yes, but the credential is not required	47.3%
No	22.6%
Not sure	1.4%
Other	8.2%

INDIVIDUAL MEMBERSHIP

How many active individual members does your organization currently have? (145 responses)

1,000 or less	9.7%
1,001 to 5,000	29.0%
5,001 to 10,000	11.0%
10,001 to 25,000	17.2%
25,001 to 50,000	10.3%
50,001 to 100,000	4.1%
More than 100,000	5.5%
We have only organizational members.	13.1%

ORGANIZATIONAL MEMBERSHIP

How many active organizational members does your organization currently have? (145 responses)

Less than 100	20.0%
101 to 200	10.3%
201 to 500	11.0%
501 to 1,000	9.0%
1,001 to 5,000	9.7%
More than 5,000	2.8%
We have only individual members.	37.2%

OVERALL STAFF

How many paid staff does your organization currently have? (145 responses)

Mean	54.0
Median	19.0

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? (143 responses)

Mean	11.4
Median	3.0

BUDGET SIZE

What is your organization's annual budget (in U.S. dollars)? (137 responses)

Less than $100,000	2.2%
$100,001 to $500,000	8.0%
$500,001 to $1,000,000	10.9%
$1,000,001 to $5,000,000	35.0%
$5,000,001 to $10,000,000	21.2%
$10,000,001 to $25,000,000	8.8%
$25,000,001 to $50,000,000	7.3%
$50,000,001 to $100,000,000	4.4%
More than $100,000,000	2.2%

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? (147 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)	71.0%	14.5%	10.3%	4.1%
Facilitated online courses (excluding Webcasts or Webinars)	32.1%	24.1%	33.6%	10.2%
Real-time Webcasts or Webinars	84.9%	10.3%	3.4%	1.4%
Recorded or on-demand Webcasts or Webinars	85.7%	9.5%	4.1%	0.7%
Blended learning (e.g., technology-based programs combined with classroom-based learning)	35.2%	26.1%	28.2%	10.6%

EMERGING TECHNOLOGY-ENABLED AND TECHNOLOGY-ENHANCED PRODUCTS

Which of the following does your association provide or plan to provide? (146 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)	6.4%	12.1%	70.2%	11.3%
Flipped classes	14.4%	18.7%	41.7%	25.2%
Gamified learning	9.5%	17.5%	55.5%	17.5%
Digital badges or microcredentials	9.8%	24.5%	41.3%	24.5%
Microlearning (i.e., very brief learning experiences)	18.1%	33.3%	32.6%	16.0%

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? (144 responses)

Yes	41.0%
No, but plan to in the next 12 months	26.4%
No, and don't plan to in the next 12 months	27.1%
Not sure	5.6%

SUSTAINING LEARNING

Are you using technology to repeat, reinforce, or sustain learning after participants complete an educational product or service? (143 responses)

Yes	31.5%
No, but plan to in the next 12 months	29.4%
No, and don't plan to in the next 12 months	25.2%
Not sure	14.0%

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? (140 responses)

Yes	17.1%
No, but plan to in the next 12 months	7.1%
No, and don't plan to in the next 12 months	70.0%
Not sure	5.7%

LIVE STREAMING

Does your organization provide live streaming of content presented at a place-based conference? (140 responses)

Yes	28.6%
No, but plan to in the next 12 months	13.6%
No, and don't plan to in the next 12 months	52.9%
Not sure	5.0%

MEASURING LEARNING

Do you measure whether learning occurs as a result of participation in your technology-enabled or technology-enhanced educational products and services (e.g., through assessments or evaluation questions tied to learning objectives)? (140 responses)

Always	34.3%
Frequently	25.7%
Sometimes	25.7%
Never	10.0%
Not sure	4.3%

HOW LEARNING IS MEASURED

How do you measure whether learning occurs as a result of participation in your technology-enabled or technology-enhanced educational products and services? (Check all that apply.) (119 responses)

Through evaluation questions that align with learning objectives	84.9%
Through post-participation assessments or follow-ups	57.1%
Through a combination of pre-participation and post-participation assessments	24.4%
Through evaluations conducted a month or more following participation	16.0%
Other	8.4%

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. (130 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	26.6%	9.7%	54.0%	9.7%
Facebook	24.2%	7.3%	58.9%	9.7%
Twitter	33.3%	6.3%	51.6%	8.7%
Skype	6.7%	3.4%	75.6%	14.3%
YouTube	34.7%	12.9%	42.7%	9.7%
SlideShare	4.2%	7.5%	72.5%	15.8%
Pinterest	2.5%	2.5%	84.2%	10.8%

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? (136 responses)

Yes	52.9%
No	45.6%
Not sure	1.5%

TECHNOLOGY PLATFORMS FOR LEARNING

Does your organization use a technology platform dedicated to delivering or enhancing learning? (135 responses)

	Yes	No, but plan to start in the next 12 months	No, and don't plan to start in the next 12 months	Not sure
Learning management system (LMS)	61.1%	16.0%	17.6%	5.3%
Learning content management system (LCMS)	21.4%	11.9%	55.6%	11.1%
Webinar or Webcast platform	90.2%	5.3%	2.3%	2.3%
Virtual conference platform	17.7%	9.7%	62.9%	9.7%
Learning community platform	21.7%	20.2%	42.6%	15.5%

DATA INTEGRATION

Is the data you collect in the technology platform(s) dedicated to delivering or enhancing learning integrated (whether manually or through automation) with the data from other technology platforms you use (e.g., a membership management database or association management system)? (134 responses)

Yes	49.3%
No	29.9%
Not sure	11.9%
Not applicable (we don't have a technology platform dedicated to delivering or enhancing learning)	9.0%

DATA USED FOR PRODUCT DECISIONS

Do you use the data you collect in the technology platform(s) dedicated to delivering or enhancing learning to make decisions about the current and future educational products and services your organization offers? (134 responses)

Always	18.7%
Frequently	29.1%
Sometimes	33.6%
Never	4.5%
Not sure	5.2%
Not applicable (we don't have a technology platform dedicated to delivering or enhancing learning)	9.0%

OVERALL SATISFACTION WITH TECHNOLOGY-BASED LEARNING

Overall, how satisfied are you with your current technology-enabled and technology-enhanced learning initiatives? (133 responses)

Very satisfied	14.3%
Somewhat satisfied	58.6%
Somewhat dissatisfied	19.5%
Very dissatisfied	7.5%

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? (129 responses)

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied	Not applicable
Usage (e.g., number of course enrollments)	11.6%	51.9%	23.3%	9.3%	3.9%
Revenue (e.g., from course sales)	8.5%	40.3%	27.1%	10.1%	14.0%
Financial cost of creating the initiatives	11.7%	39.8%	29.7%	12.5%	6.3%
Financial cost of supporting and maintaining the initiatives	10.9%	44.2%	33.3%	7.8%	3.9%
Staff time required to develop the initiatives	4.7%	39.4%	37.0%	15.7%	3.1%
Staff time required to maintain the initiatives	7.8%	41.4%	37.5%	10.2%	3.1%
Tools and technologies used to develop and maintain the initiatives	8.5%	48.8%	28.7%	13.2%	0.8%
Feedback from participants in the initiatives	18.0%	52.3%	18.0%	3.9%	7.8%

SUCCESS WITH TECHNOLOGY-BASED LEARNING

How would you rate the success of your organization's use of technology-enabled and technology-enhanced learning? (128 responses)

Very successful	18.8%
Somewhat successful	60.9%
Somewhat unsuccessful	18.0%
Very unsuccessful	2.3%

INCREASED NET REVENUE

Has the use of technology to enable or enhance learning increased your organization's net revenue from educational offerings? (127 responses)

Yes	52.8%
No	32.3%
Not sure	15.0%

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? (128 responses)

Yes	18.0%
No	71.9%
Not sure	10.2%

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? (128 responses)

Yes	21.1%
No	67.2%
Not sure	11.7%

PRODUCT PRICING PROCESS

Does your organization have a formal, documented process for setting prices that includes its technology-enabled and technology-enhanced education products? (128 responses)

Yes	25.8%
No	58.6%
Not sure	6.3%
Not applicable (we don't charge for technology-enabled and technology-enhanced offerings)	9.4%

CHIEF LEARNING OFFICER

Does anyone at your organization hold the title of chief learning officer or a similar C-level title that references learning, education, or knowledge? (128 responses)

Yes	42.2%
No	57.8%