

SOCIAL LEARNING

TRENDS IN THE ASSOCIATION SPACE

© 2016 TAGORAS



written by Jeff Cobb
and Celisa Steele
published by Tagoras

sponsored by



HIGHER LOGIC
ALL TOGETHER

www.tagoras.com

info@tagoras.com

800.867.2046

tagoras[™]
<inquiry><insight><action>

Copyright and Disclaimer: The Fine Print

© 2016 Tagoras, Inc. All rights reserved, including the right of reproduction in whole or in part in any form.

Quoting from this report on a limited basis for the purposes of creating articles, blog posts, and other publications is considered within the realm of “fair use.”

Other than as provided for above, no portion of the material copyrighted herein may be reprinted or published in any form without the prior written consent of Tagoras, Inc. For additional copies of this report, please visit <http://www.tagoras.com/catalog/association-social-learning>.

The contents of this document are based on data gathered from a variety of sources. While we deem these sources, including subjective estimates and opinions of the report authors, to be reliable, Tagoras does not guarantee the accuracy of the document’s contents and expressly disclaims any liability by reason of inaccurate source materials.

Declaration of Independence

This report was independently researched and produced by Tagoras.

We’re grateful to Higher Logic for sponsoring this report so we may offer it free of charge. Higher Logic contributed the commentary and information about the company on pages 12 and 13. Higher Logic did not otherwise influence or direct the content of this report.

Tagoras does not compensate any individual, organization, or company for contributing to its research.

Table of Contents

Why Social Learning Matters So Much for Associations	 4
Defining Social Technologies for Learning and Gauging Their Use	 8
On the Use (or Non-Use) of Social Technologies for Learning	9
Social Technologies Explicitly As Part of Learning Products or Services	 9
On Choosing Social Technologies for Learning	11
Learning Products and Services Associated with Social Technologies	 14
Participation in Social Technologies for Learning	 17
Strategy and Social Technologies for Learning	 20
Learning Objectives and Social Technologies	 20
Measurement of Social Technologies' Support of Learning	 21
Satisfaction with Use of Social Technologies for Learning	 24
Success with Use of Social Technologies for Learning	 24
Social Learning Isn't a Goal But a Given	 26
How Online Communities Boost Social Learning: Thoughts from Higher Logic's Andy Steggle	 12
Real-World Examples	
CGP Rolls Out Brown-Bag Case-Based Online Groups	6
NIGP Focuses on Ease of Use and Motivation in Interactive Courses	15
International Foundation Moves Study Groups—and Social Learning—Online	18
HBA Experiments with Social Technologies Before Homing In	22
About Tagoras: Publisher of the Report	 27
Appendix A: Demographics	 28
Appendix B: Survey Data	 31

Why Social Learning Matters So Much for Associations

Social learning is essential for associations for five primary reasons.

- Social learning is in the DNA.

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

association *noun*

\ ə-,sō-sē-'ā-shən \

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

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

- Social learning is effective.

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

- Social learning catalyzes innovation and impact.

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

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

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

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

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

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

- Social learning is available to your competition.

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

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

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

Along with the results of an online survey, the report offers real-world examples from associations and commentary from the report sponsor, Higher Logic. We hope this report proves useful to you and your association as you assess your use of social technologies for learning and contemplate your next steps.



CGP Rolls Out Brown-Bag Case-Based Online Groups

The National Association of Charitable Gift Planners (CGP) is a professional society for the individuals who lead charitable planning at nonprofits across the United States. These individuals deal with complicated, big-dollar deals, and they need both technical training around rules and regulations and support with confidence in areas like how to have conversations with potential donors.

Barbara Yeager, director of operations, says the organization spent time to proactively determine its niche. “A lot of software providers and consultants provide technical training,” she says, “so we landed on the confidence area.” That focus on softer and interpersonal skills makes social learning an obvious choice.

At its place-based conference, CGP has activated social learning by designing sessions around real-world cases that draw attendees into practice—rather than preaching at them.

CGP is now in the process of deploying a private online community, and in January 2017 it will take its first case online, piloting it with a small group, limited to 10. “We have a case we’ll use, and we’ll ask people to do some reading and prep before a live online session we’ll hold during lunch time—hence, the brown-bag reference,” says Yeager.

CGP conducted a small-scale research project, consisting primarily of interviews, that revealed a shift in focus to blended giving, which includes both current and deferred commitments in a single gift agreement.

CGP’s initial case for the online learning groups focuses on Buster Mayberry, an 89-year-old donor, and his alma mater, High State. While both Buster and High State are fictitious, CGP developed the case based on real-world scenarios gift planners might encounter.

The High State Fundraisers



Many fundraisers have worked with Buster over the years—most are no longer at High State



Sandy Cooper
Major Gifts Officer,
Buster’s Prospect Manager



Scott Lew
VP of Advancement
Sandy’s and Tia’s Boss

High State Giving Minimums:

- \$20,000 Charitable Gift Annuity
- \$100,000 Scholarship
- \$1 million Endowed Professorship
- \$5 million Naming Gift



Tia Toland
Gift Planning Officer

Current giving hasn't traditionally been a focus for the organization, but it is one CGP plans to embrace in the initial online case-based learning pilot. "We are trying to shift members to the donor's perspective, so they'll think beyond labels we often use, like 'major gifts' and 'planned gifts,'" says Yeager.

While she would love to see the case developed in rich media—"it would be great to set it up in video"—the initial pilot will be low-tech. "We have the case scripted out," says Yeager, "and participants will learn about five aspects of donor action through the case."

One challenge Yeager anticipates is participation. Will the learners complete the requested preparation? "The pre-work is, at most, an hour, but whether they do it will be key to how the discussion and application during the live online session go."

Beyond the pilot, CGP plans to continue offering case-based brown-bag groups in its online community. It will repeat the first case later in 2017, and Yeager intends to repurpose one other case CGP has used in live trainings for the online format in the coming year.

Yeager notes CGP's case-based online group approach is a "pretty high-touch approach," and she hopes the experience might become even more personalized in the future. She would like to develop cases aimed at specific types of organizations and donors, so learners can engage with situations and examples that are highly relevant to their actual work—and, in the process, interact with peers dealing with those same specific challenges and opportunities.

Defining Social Technologies for Learning and Gauging Their Use

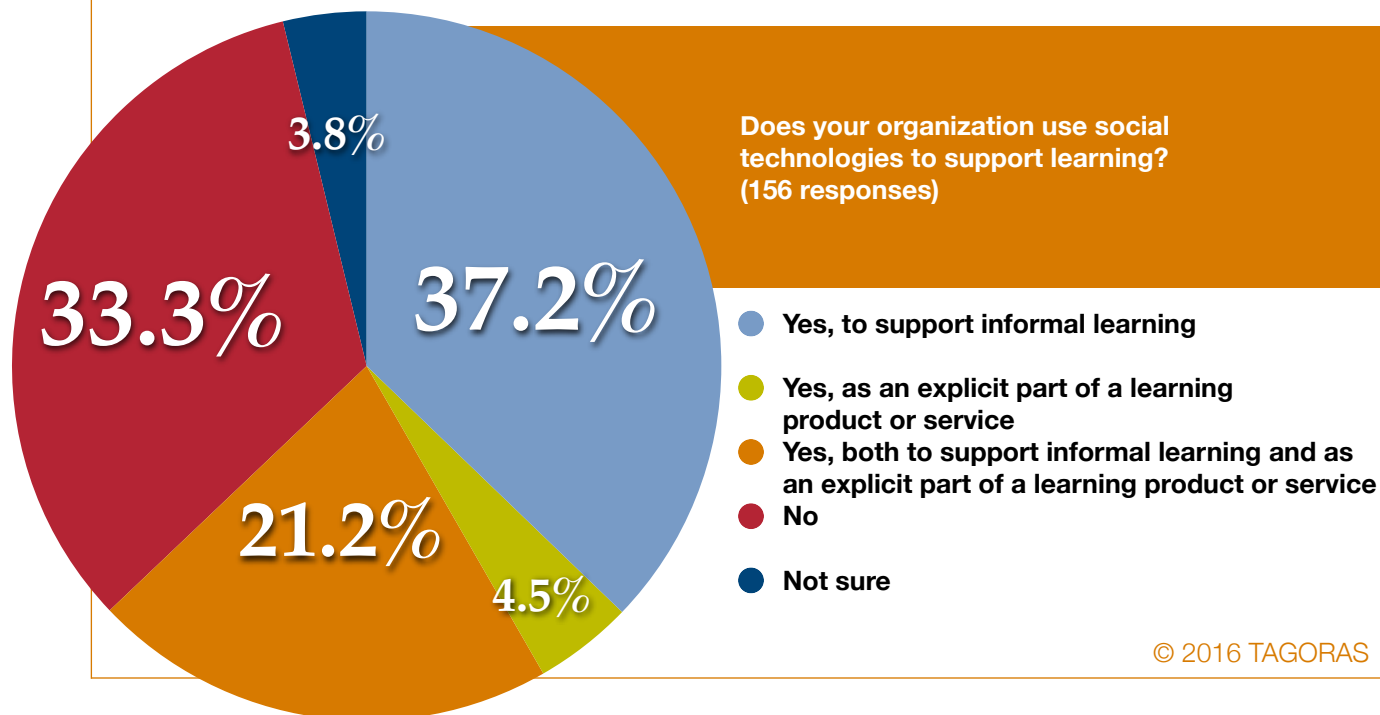
At the core of this report is a non-statistical online survey of membership organizations conducted from October 11 to November 11, 2016, which received 159 qualifying responses. (For demographic data about the survey respondents' organizations, see Appendix A. See Appendix B for the raw survey data, parts of which are cited throughout the report.) We offered this definition of *social technologies* at the beginning of the survey to normalize responses:

For the purposes of this survey, social technologies are any technology that enables users to communicate with each other over the Internet or cellular networks and share text, audio, graphics, video, etc. Popular examples of social technology include, but are not limited to, discussion boards, Twitter, social networks like Facebook and LinkedIn, and private online communities.

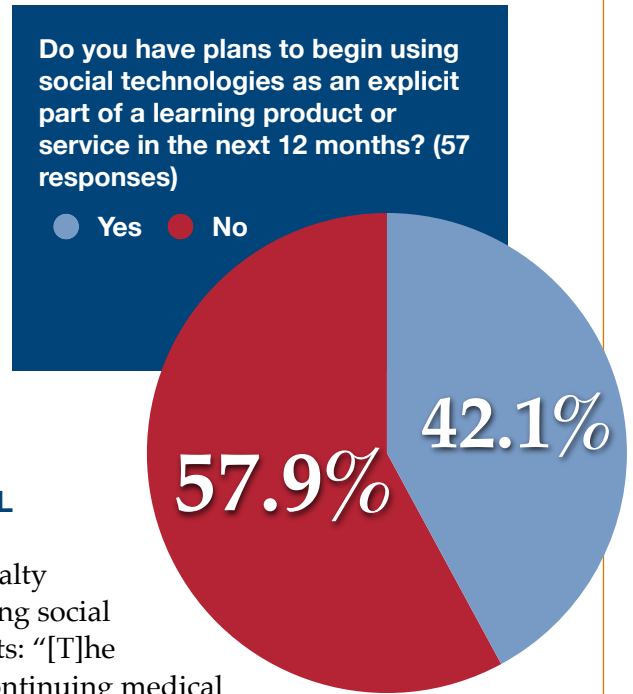
Of the 159 responses, 98.1 percent indicated their organization uses social technologies for some purpose. We then asked respondents who use social technologies in general whether they use social technologies *for learning*. If the organization, for example, has a Twitter account but uses it only for marketing, then that would not be an example of using a social technology for learning.

Only a third (33.3 percent) indicated they did *not* use social technologies for learning. A bit over a third (37.2 percent) indicated they use social technologies to support informal learning only, a tiny slice (4.5 percent) indicated they use social technologies as an explicit part of a learning product or service only, and approximately a fifth (21.2 percent) indicated they use social technologies both to support informal learning and as an explicit part of a learning product or service.

With 62.9 percent of respondents using social technologies to support some type of learning, it seems clear that not only is the old practice of social learning alive and well, but technology is giving it fresh legs.



Respondents who indicated they use social technologies to support informal learning only were not shown the detailed follow-up questions asked of respondents from organizations using the technologies for formal learning products and services. But they were asked if they have plans to begin using social technologies as an explicit part of a learning product or service in the next 12 months, and, while the majority indicated no, 42.1 percent said yes.



ON THE USE (OR NON-USE) OF SOCIAL TECHNOLOGIES FOR LEARNING

A survey respondent from a medical specialty society commented on the difficulty of using social technologies for learning in certain contexts: “[T]he majority of the education we offer is for continuing medical education credit for physicians. The rules and standards for these activities currently make it very difficult to use social media as part of the learning experience.”

Given that, the respondent’s organization has focused its use of social technologies on informal learning for physicians: “We offer discussion boards for informal communication among learners, as well as a private LinkedIn group for peer-to-peer discussion and sharing—separate from our formal education activities.”

The respondent also noted that the organization uses social technologies for learning with other stakeholders, beyond its physician members: “We also have active Facebook and Twitter accounts that are patient-/consumer-focused and get heavy traffic. We use those for informal patient and consumer education.”

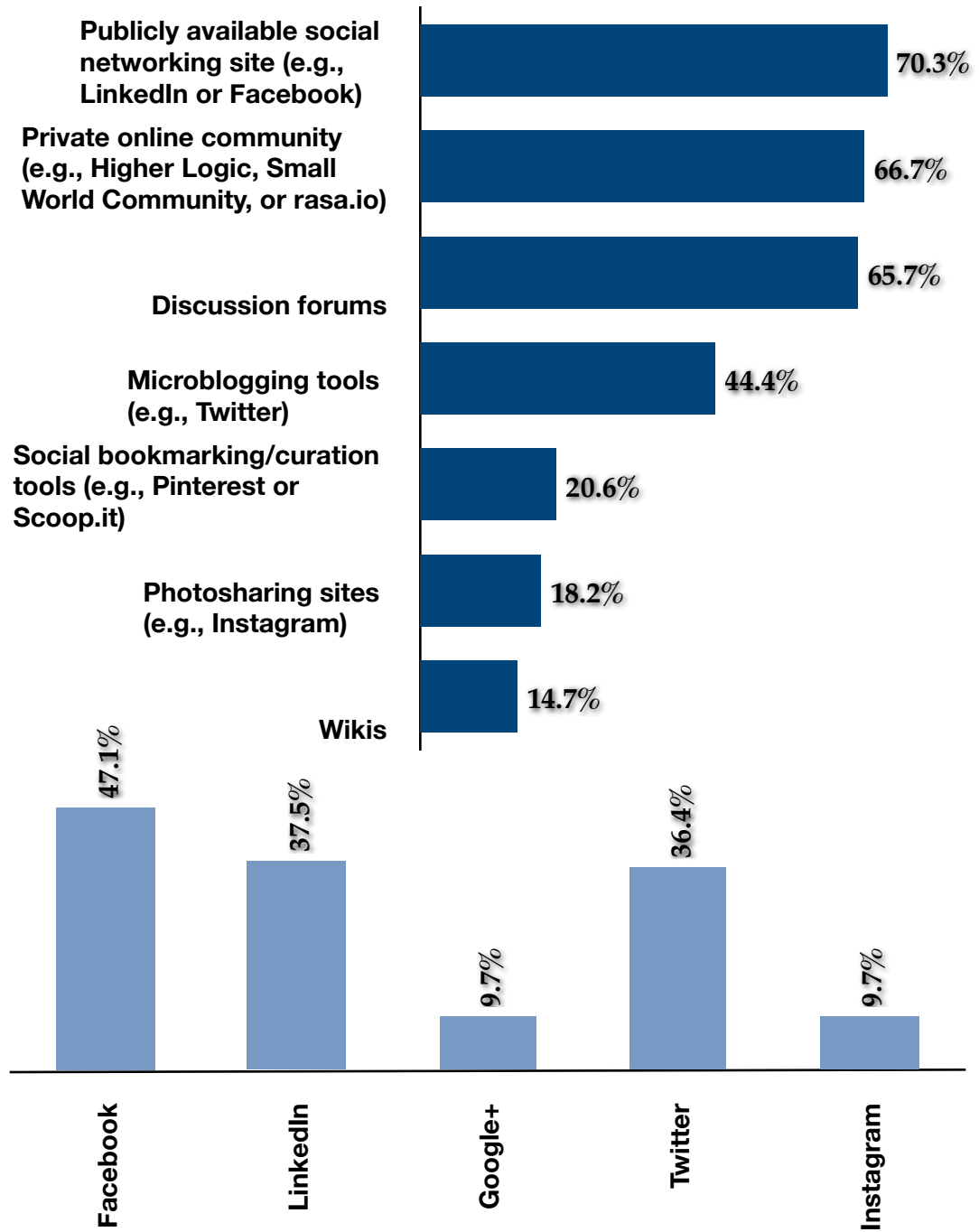
Social Technologies Explicitly As Part of Learning Products or Services

The subset of respondents who reported using social technologies as an explicit part of a learning product or service where asked to select which of seven types of social technologies they use.

Used by 70.3 percent, publicly available social networking sites—such as LinkedIn and Facebook—top the list, followed by private online communities—such as Higher Logic, Small World Community, and rasa.io—used by 66.7 percent, and discussion forums, used by 65.7 percent.

None of the other types of social technologies garners a majority, but microblogging tools (for example, Twitter) are used by 44.4 percent.

Which of the following social technologies does your organization use as part of learning products or services it provides? (37 responses)



Which of these specific social technologies does your organization use as part of its learning products or services? (34 responses)

Social bookmarking and curation tools, like Pinterest and Scoop.it, and photosharing sites, like Instagram, are used by approximately a fifth of respondents (20.6 and 18.2 percent, respectively). Wikis have the poorest showing—only 14.7 percent of respondents make use of them.

The survey also asked about specific social technologies. Just over 47 percent of respondents using social technologies as part of an explicit learning product or service use Facebook specifically. Some 37.5 percent use LinkedIn, and Twitter gets comparable use (36.4 percent). Only 9.7 percent use Google+ and Instagram.

ON CHOOSING SOCIAL TECHNOLOGIES FOR LEARNING

An association professional we interviewed stressed the importance of users and content over technology. “Know your audience—match the platform to your audience. Whatever you’re trying to do, focus on the content and then on what technology is going to help you share that content. Don’t try to take a technology and force the content to fit.”

She oversees the use of social technologies to support learning at two associations, which have made different choices about social platforms precisely because the two audiences are so different. One audience tends to be less tech-savvy, making ease of use and simplicity key factors when choosing platforms.

The other audience works with college students and needs to keep up with the latest technology, so platform decisions are driven by what is trending on campuses. “We might use Snapchat or whatever’s hot,” she noted. For that audience, the social learning serves two purposes: education around the explicit topic and hands-on professional development on the social tools.

How Online Communities Boost Social Learning

by Andy Steggles, president and co-founder, Higher Logic

The survey behind this Tagoras report provides insight into how we can make a stronger impact for our members and organizations through social learning. Findings from the survey show more organizations are implementing online communities to support both informal and formal social learning programs. The connection between bringing people together in an online space and facilitating knowledge sharing and learning is strong, but we still need to find better ways to measure this impact.

THE BIG PICTURE FOR SOCIAL LEARNING

Many organizations apply a learning strategy that consists of attempting to get as many people as possible to attend a live, learning event. Whether an organization is pooling its resources for online learning portals and learning management systems, or it simply wants to provide more value for its in-person education and certification programs, the key component often missing from traditional strategy is **peer-to-peer** learning.

No matter the learning environment, peer-to-peer learning is arguably the most impactful (and overlooked) area. This engagement isn't reserved for in-person events—it can occur and thrive in asynchronous capacities. This type of social learning can be nurtured, leveraged, and measured, and it should be a key part of your overall learning strategy.

An online community builds and nurtures these peer-to-peer connections. This year's survey results show 37.2 percent of respondents use social technologies to support informal learning for their members and organizations.

COMMUNITY INFLUENCE ON SOCIAL LEARNING

Online communities are no longer on the fringe of social technologies—56.3 percent of survey respondents use online communities of practice, 66.7 percent use private online communities, and 65.7 percent use discussion forums.

An online community addresses the four dimensions of social learning as described by Tagoras: immediacy, structure, scale, and transparency (<http://www.tagoras.com/defining-and-designing-social-learning>). These dimensions must work in tandem and be flexible enough to accommodate the community's specific industries, member types, and organizational goals. Social learning is not static, as the article states:

If we assume that, because all learning is social, all we have to do is provide a way for two or more learners to connect—put them in the same room or add them to the same online community and, voilà, social learning—we won't be very effective at designing social learning with this “underthinking” approach.

We can leverage these four dimensions to appeal to the spectrum of social learners within an online community:

- **Immediacy: member interactions**
This doesn't have to equate to face-to-face discussion. The community facilitates easy interaction through discussion forums, private messaging, live chats, and Webinars.
- **Structure: knowledge-sharing programs**
The community is a platform for mentor/mentee programs, volunteer opportunities, and even the simple activity of sharing and editing documents within a resource library. The knowledge is stored and searchable on the Web, creating a dynamic, institutionalized archive.
- **Scale: multilevel relationship building**
The previous two dimensions inherently create a scale for interaction, whether members prefer to chat in a small discussion group or brainstorm and learn with their entire industry (think MOOCs or virtual conferences).
- **Transparency: explicit or implicit learning**
The community builds programs and collects resources based on member feedback. Industry certification may call for a formal online course, while current events might create a new discussion thread among interested individuals. The community supports a variety.

MEASURING IMPACT OF SOCIAL LEARNING STRATEGIES

If you can't track what your members are doing, how can you improve? When asked about measurement, the largest group of respondents (36.7 percent) said they don't measure whether the use of social technologies supports learning.

An online community can provide an organization's members with a platform to reach out to industry peers and learn from one another without having to wait until the next in-person event or formal online course. The community can track and store member data to better understand how social learning programs perform.

About Higher Logic

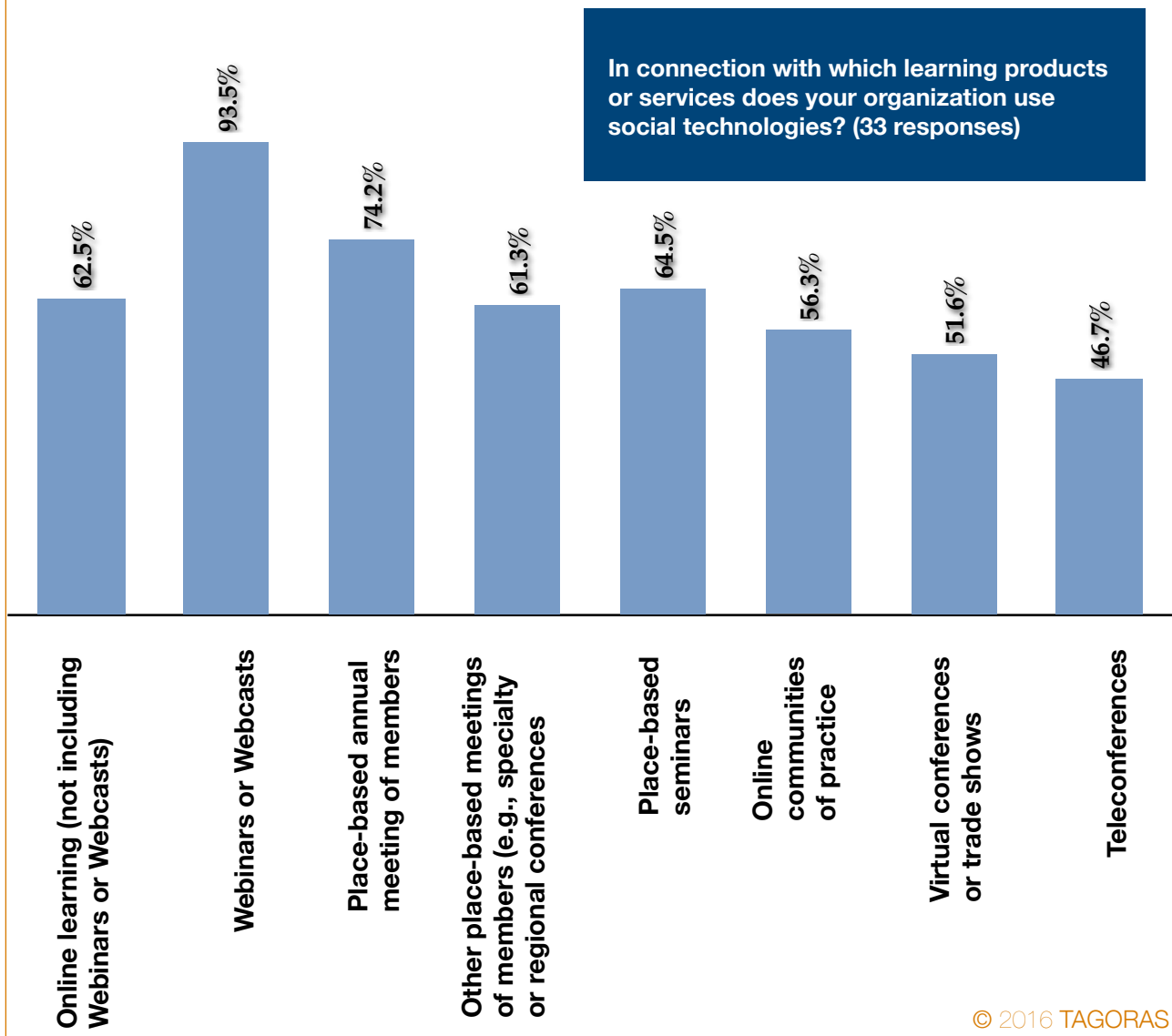
Higher Logic is an industry leader in cloud-based community platforms. Organizations worldwide use Higher Logic to bring people all together, by giving their community a home where they can interact, share ideas, answer questions, and stay connected. Our goal is to help your organization with deeper engagement and meaningful interactions for your members, customers, and prospects. Everything we do—the tools and features in our software, our services, partnerships, best practices—drives our ultimate goal of making your organization successful.

Learning Products and Services Associated with Social Technologies

Cited by 93.5 percent of survey respondents who use social technologies as an explicit part of a learning product or service, Webinars and Webcasts are the number one type of learning product. A place-based annual meeting of members ranks second, cited by 74.2 percent. Social technologies figure into five other learning products and services for the majority of respondents:

- Place-based seminars (64.5 percent)
- Online learning, excluding Webinars and Webcasts (62.5 percent)
- Place-based meetings of members other than an annual conference, such as regional or specialty conferences (61.3 percent)
- Online communities of practice (56.3 percent)
- Virtual conferences and trade shows (51.6 percent)

Only teleconferences miss being cited by a majority—but not by much, as 46.7 percent indicated using social technologies to support learning during calls.





NIGP Focuses on Ease of Use and Motivation in Interactive Courses

When NIGP: The Institute for Public Procurement (NIGP) began expanding its e-learning efforts in 2009, providing participants with ways to collaborate with facilitators and each other emerged as a key part of the learning strategy. So, as NIGP converted a number of its traditional face-to-face offerings into online courses, it emphasized interactivity, making asynchronous discussion an important component.

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

The screenshot displays the myliNk LMS interface for a course titled 'Risk Management in Public Contracting Online'. The main content area is for 'Risk Week 1 Read', featuring a video titled 'Assessing Types of Risk' by Joyce D. Foster, CPPO, CPPB. Below the video is a progress bar and a navigation arrow with four stages: Think About, Read, Complete, and Self-Assess. The right sidebar contains course details, including 'In progress' status, discussion forums, and a course description for 'Risk Management in Public Sector Contracts'.

Each week of NIGP's interactive courses is structured around a Think About > Read > Complete > Self-Assess approach. Links to the discussion forums are available throughout the courses.

To help promote participation and interactivity, students are required to respond to at least one question from the online instructor and to reply to another student post during the course of each week. Additionally, the groups are charged with coming to a consensus around how assignments will be completed, and a different student serves as the project leader for each group project.

One of the early challenges NIGP encountered was a somewhat disjointed online experience for learners. Initially, learners had to go to one platform to access course content and to another platform for the asynchronous discussion. To address this, NIGP made the decision to replace its learning management system.

“Putting social learning as close to content as possible was a very important feature in our selection of a new learning management system,” says Brett Hansen, e-learning program manager at NIGP. “We wanted to provide a one-stop shop for learners.”

In addition to implementing new technology, NIGP has also fine-tuned some design decisions since initial launch of the interactive online courses. “We’ve learned it’s better to have a different discussion forum for each week of the course instead of one large thread,” Hansen explains. Each course now has a main discussion area and then weekly discussion forums, which reflect the new topics and content for that portion of the course.

While NIGP plans to continue refining and improving the interactive online courses, Hansen reports the feedback from the online learners is positive: “Folks say they learned a lot more than they expected—and spent a lot more time in the course than they expected.”

Reflecting on challenges, Hansen cites human nature in general, rather than anything unique to online social learning. “There will always be a percentage of students who hate group work. So we want to work to convey the value of the group work—the benefit of getting multiple viewpoints and hearing from others with various levels of experience in procurement.”

NIGP’s professional development courses are often required for recertification or to satisfy an employer’s requirement for employees to attend a certain number of classes annually. “Some are not there to learn something new, but because they have to be there,” Hansen explains. “NIGP promotes lifelong learning. Learning shouldn’t be a chore. Motivation, especially in online learning, is key.”

Participation in Social Technologies for Learning

The largest segment (53.3 percent) of survey respondents reported that the social technologies used as part of their learning products and services are used by some participants, and 40.0 percent reported the technologies are used by most participants. A satisfyingly small 6.7 percent reported that very few participants make use of the social technologies offered as part of learning products and services, and no respondents indicated that the social technologies are completely ignored by learners.

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

We also expect use to be higher in learning products that tightly integrate social technologies, such as virtual conferences and trade shows and online communities of practice, which typically feature built-in social capabilities whose absence would diminish the overall value of the experience.

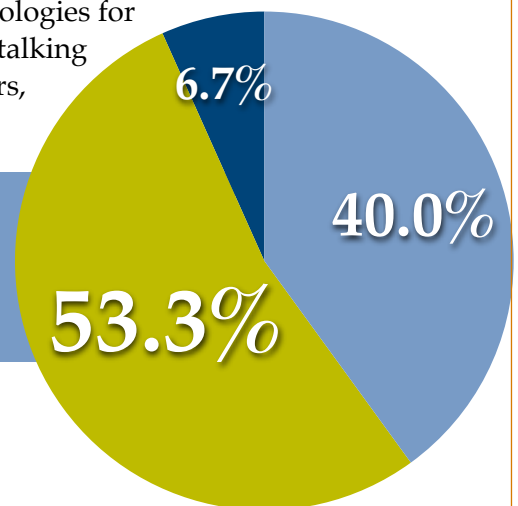
One association professional we interviewed viewed the participation issue from the dual perspective of know-how and confidence. "People are at different places with social technologies—we have a lot of lurkers," she noted.

While getting those who are less savvy up to speed on the technologies can help with participation, that isn't necessarily sufficient. It can be "a challenge to get people to feel comfortable enough to recognize and share their expertise, to see themselves as experts," she added.

Another interviewee, Catherine T. Peglow, director of continuing legal education at the North Carolina Bar Association Foundation, echoed the challenge of working with learners who aren't typically technophiles. "Lawyers aren't known for adopting new technologies quickly," she said (and she is herself a lawyer), so it can be difficult to get programs off the ground now. But she sees at least two benefits to pushing ahead with using social technologies for learning. "The advantages are we get away from talking heads and we do a better job of engaging members, particularly younger lawyers."

Which of the following best characterizes use of social technologies by participants in all your learning products or services that make use of social technologies? (30 responses)

- Used by most participants
- Used by some participants
- Used by very few participants
- Used by no participants





International Foundation Moves Study Groups – and Social Learning – Online

The International Foundation of Employee Benefit Plans has been using social technologies for learning since the early 2000s, though the specific platforms used have changed—and improved—over the years.

The Certified Employee Benefit Specialist (CEBS) online study groups win the prize for the Foundation’s longest-running use of social technologies for learning. CEBS is the Foundation’s college-level designation program, and learners must sit for a proctored exam for each of the eight courses required for the designation.

The online study groups grew out of an in-person offering the Foundation had made available at universities—but participation was waning. The Foundation opted to take the offering online, betting the anytime-anywhere access would make it a viable option for more students while preserving the ability for students to have access to instructors and peers as they prepared for exams. The bet paid off.

Comprised of lectures, quizzes, class discussions, and networking opportunities, the online study groups run spring, summer, and fall for 10 weeks. Because learners pay to participate, the Foundation has focused on how to make the online study groups valuable and has learned in the process that the right instructor is critical. As Barb Pamperin, an instructional technologist at the Foundation, says, “The quality of instructors is what keeps learners coming back.”

The CEBS online study groups grew out of an in-person offering, so preserving peer-to-peer interaction was important from the get-go.


While the importance of consistently good instructors is clear, the value of peer-to-peer interaction is more variable. In the online study groups, students “have different areas for discussion, and one is for networking. We have instructors tell students to introduce themselves there—sometimes that’s a dead zone, and sometimes that takes off,” Pamperin acknowledges. “And I don’t know what makes the difference.”


Even with occasionally lackluster group discussions, the value of the online study groups has been proven out over the years. Pamperin notes that the study groups “motivate students to keep up and stay on the right track as they move through the weekly schedule, as well as provide an opportunity to get questions answered and practice what they are learning.”


Pamperin adds that the online study groups “help bring more people to actually finish the courses and write the exams”—and those higher completion rates and exam rates accrue as a benefit for both learners and the Foundation.


The online study groups include a discussion area for networking, as well as discussion areas related to the course topics.


Topic: Assignment 2 Discussion Questions


 **Mark Dunlop**
09-19-2016 16:27 [1_Design a plan Design a plan by filling in the blanks and give your rationale why the formula...](#)


 **Mark Dunlop**
09-20-2016 00:55 [Anyone want to take a stab? ----- Mark Dunlop CEBS Designed Benefit Incent...](#)


 **Evelyn McCarthy**
09-22-2016 08:52 [Here is a VERY quick stab at it that we can pick apart, to get the conversation started. &...](#)


 **Mark Dunlop**
09-25-2016 22:06 [Great design and practical I ----- Mark Dunlop CEBS Designed Benefit In...](#)


 **Staci Toppin**
09-26-2016 11:42 [_Design a plan Design a plan by filling in the blanks and give your rationale why the formu...](#)


 **Staci Toppin**
09-26-2016 11:43 [I had a typo I meant to STD to 13wks ----- Staci Toppin Modeling Cl...](#)


 **Mark Dunlop**
09-26-2016 14:23 [Nice design. What is of interest is the reference to NRD. This is becoming a intere...](#)


 **Sarah Sherman**
09-22-2016 14:10 [Here is my design, although I did model it after what I have used at previous employers. I do hop...](#)


 **Mark Dunlop**
09-25-2016 22:10 [It is a good design ----- Mark Dunlop CEBS Designed Benefit Incentives ...](#)

 **Ariane Johnson**
10-04-2016 16:27 [_Design a plan Design a plan by filling in the blanks and give your rationale why the formula ...](#)

 **Wynne Dawn**
10-06-2016 15:08 [I am interested in this statement which I don't understand. Sometimes offering 50% post...](#)

 **Michelle Mills**
10-09-2016 22:15 [1_Design a plan Design a plan by filling in the blanks and give your rationale why the formula...](#)

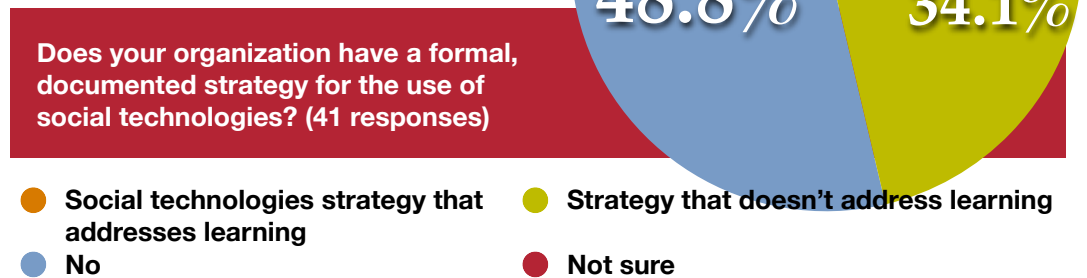
 **Clare Wood**
10-10-2016 20:23 [Good evening. My apologies for the late reply. Please see below for my answer. Short-Term D...](#)

 **Mark Dunlop**
10-14-2016 09:15 [Very practical design, good thought process ----- Mark Dunlop CEBS Desi...](#)

Strategy and Social Technologies for Learning

Only about an eighth (12.2 percent) of respondents who use social technologies as an explicit part of a learning product or service have a formal, documented strategy that addresses the use of social technologies for learning. A little over a third (34.1 percent) have a strategy for social technologies that doesn't cover learning. For them, expanding that strategy would be a logical next step.

A noteworthy 48.8 percent have no strategy at all for social technologies.



While disappointing, that no-strategy figure is not surprising, as the data collected for our 2016 *Association Learning + Technology* report (<http://www.tagoras.com/catalog/association-learning-technology>) shows that only 18.0 percent of associations have a formal, documented strategy for how technology in general will be used to enable or enhance learning. It follows logically that only a subset would have a strategy that specifically addresses social technologies.

Our bias is in favor of strategy. Strategy serves to unite an organization around common goals, contextualize investments (of time and money) in terms of the value expected in return, and provide insight into what to pursue and what to lay aside.

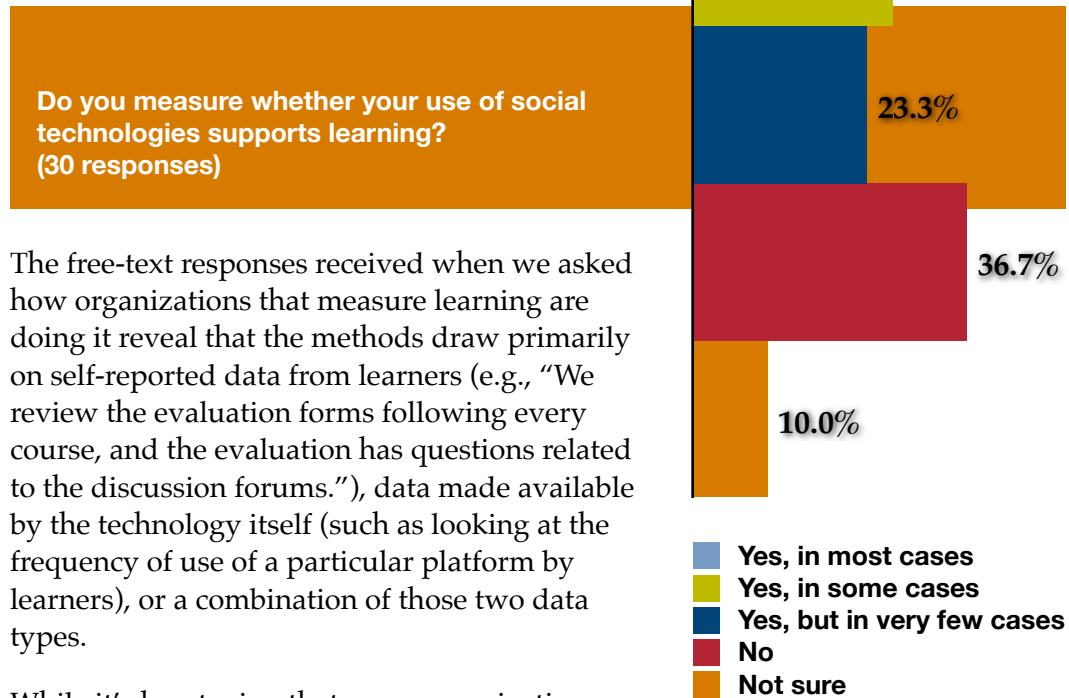
Learning Objectives and Social Technologies

Organizations seem to be more buttoned up at the tactical level than at the strategic level—almost 90 percent of respondents tie their use of social technologies to clearly defined learning objectives at least some of the time, and 38.5 percent reported doing so always.



Measurement of Social Technologies' Support of Learning

Over a third (36.7 percent) of respondents do not measure whether their use of social technologies for learning actually supports learning, but 30.0 percent do in most or some cases. Another 23.3 percent measure in very few cases, and 10.0 percent aren't sure if they measure whether the social technologies support learning.



The free-text responses received when we asked how organizations that measure learning are doing it reveal that the methods draw primarily on self-reported data from learners (e.g., “We review the evaluation forms following every course, and the evaluation has questions related to the discussion forums.”), data made available by the technology itself (such as looking at the frequency of use of a particular platform by learners), or a combination of those two data types.

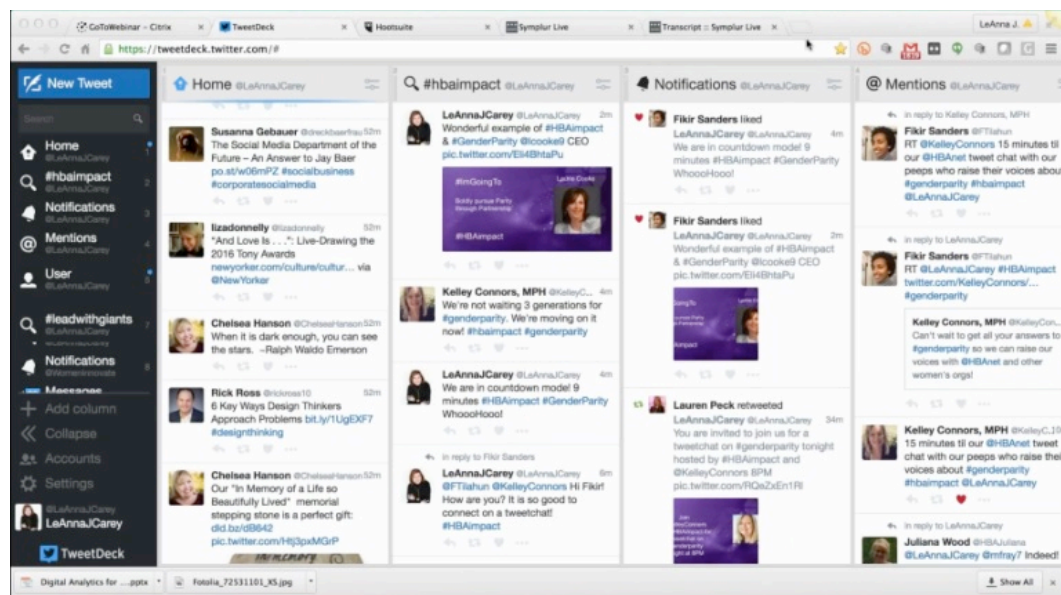
While it’s heartening that some organizations are looking at whether social technologies support learning, there’s room for improvement in the approaches used. But, admittedly, getting solid evidence of learning—i.e., change in behavior over time—is a tough nut for associations to crack, given their more limited access to learners in their day-to-day environment than that afforded corporate trainers.



HBA Experiments with Social Technologies Before Homing In

The Healthcare Businesswomen’s Association (HBA) has its “toe in the shallow end of the pool” when it comes to online social learning, says Juliana Wood, associate director, online learning resources.

Approximately eight months ago, HBA started offering Tweet chats to support its virtual and in-person events. In addition to supplementing existing events, HBA also saw and filled a need related specifically to online social learning. Because members’ comfort with social media is variable—some are mavens; others, neophytes—HBA experimented with running a live Webinar along with a Tweet chat, allowing a presenter to teach in real time how to use Twitter. “We ran a couple of those but haven’t yet offered them broadly,” Wood reports. “We wanted to work with a controlled group on those first ones.”



HBA has held Tweet chats, in conjunction with Webinars, on a variety of topics—from gender parity to how to participate in Tweet chats.

Experimentation is the theme for HBA this year, as the organization looks at integrating a number of technologies to support learning. Approximately six months ago, HBA tried out delivering just-in-time learning in the subject area of leadership via Blab, a live-streaming platform that allows for up to four simultaneous video feeds and audience participation via text comments and questions. “The Blab chats were great,” Wood says, “and they were on leadership topics, which are the cornerstone of what HBA promises its members.”

While the future of the Blab platform is uncertain—a danger inherent in using social media platforms, especially newer ones—HBA plans to continue with similar just-in-time chats. “We’re considering a couple of options at this point,” says Wood.

HBA’s goal is to see its online social learning positively impact membership and revenue numbers. The organization has already seen that the Tweet chats contribute to in-person attendance at its paid Webinars.

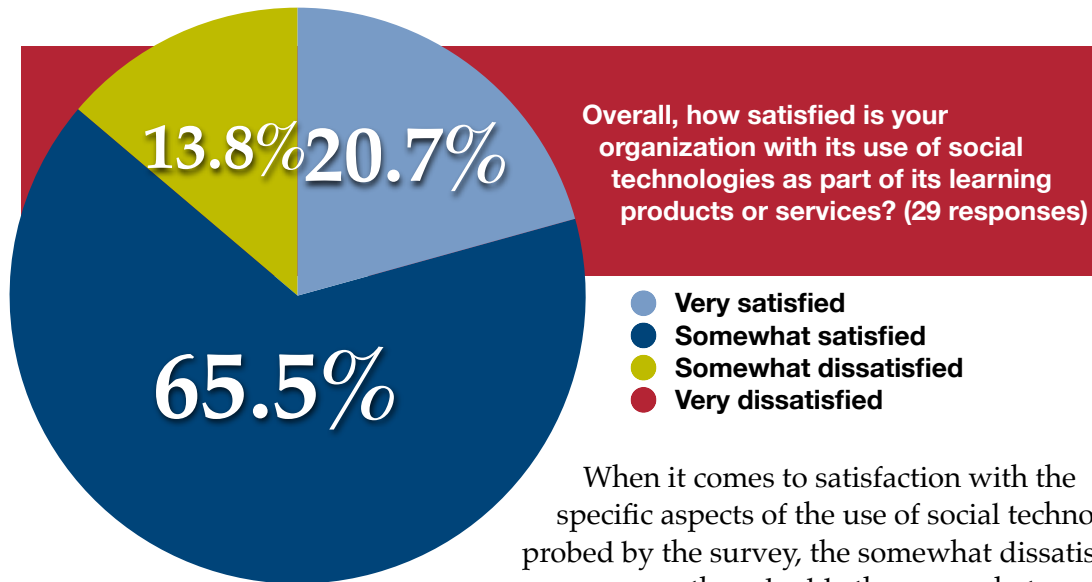
The Blab chats don’t tie directly to revenue, but they serve an important purpose. “Our focus with those is on getting social media attention and attracting folks who aren’t members,” Wood shares. “They bring their network of followers—and those followers could be members. So the chats build awareness that could lead to membership.”

HBA plans to get more formal with its use of social technologies for learning in the year ahead. But the trick will be choosing what to focus on. “It’s human nature—everyone gets excited,” Wood says, “but we have to remember to talk about how what we’re doing ties into the giant context that is HBA, how it aligns with our goals and objectives.”

For HBA, using social technologies for learning is currently a matter of experimenting to find the right mix—the one that balances the excitement and the range of possibilities with meaningful, strategic returns.

Satisfaction with Use of Social Technologies for Learning

We asked respondents how satisfied they are with their use of social learning technologies as part of their learning products and services, and 65.5 percent reported being somewhat satisfied, while a full fifth (20.7 percent) reported being very satisfied.



Overall, how satisfied is your organization with its use of social technologies as part of its learning products or services? (29 responses)

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

When it comes to satisfaction with the specific aspects of the use of social technologies probed by the survey, the somewhat dissatisfied group was more than double the somewhat-dissatisfied-overall group in two areas: usage (e.g., number of participants using the social technologies for learning) and the effort required to maintain or monitor the social technologies that are part of learning products or services.

Organizations would like to see more learners taking part in their the social technologies—but find it hard to sustain their social learning efforts over the long haul.

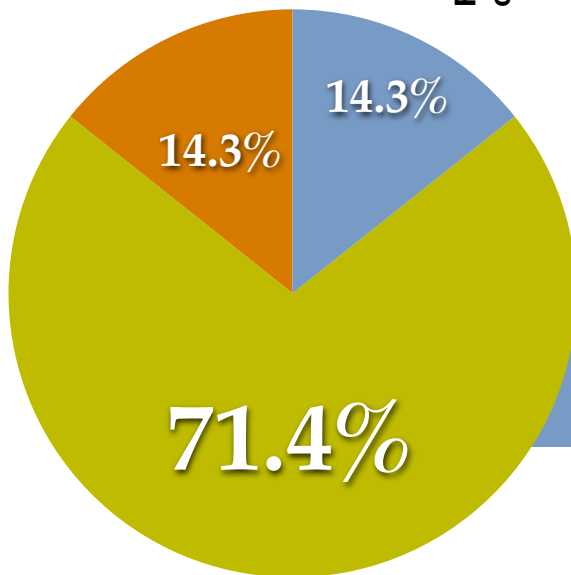
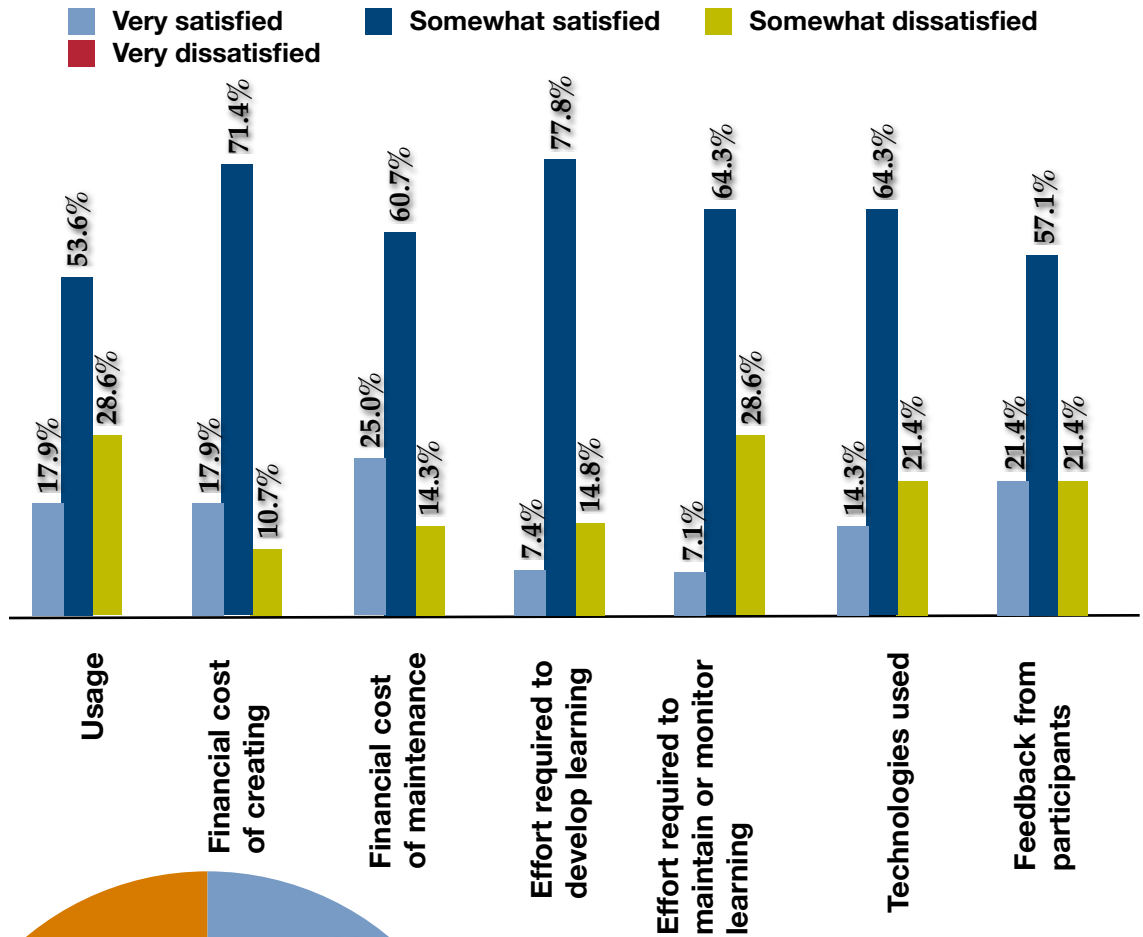
The area of highest satisfaction was the financial cost of supporting and maintaining the social technologies (a full quarter are very satisfied). We suspect that high level of satisfaction stems from the fact that associations may be using no-cost tools like Twitter, Facebook, and LinkedIn.

Success with Use of Social Technologies for Learning

No respondents rated their use of social technologies for learning as very unsuccessful, and only 14.3 percent rated their use as somewhat unsuccessful—the same number as those who characterized their efforts as very successful.

The lion’s share of respondents (71.4 percent) said their efforts are somewhat successful.

Overall, how satisfied or dissatisfied is your organization with its use of social technologies as part of its learning products or services in terms of the specific items below? (28 responses)



Overall, how would you rate the success of your organization's use of social technologies as part of its learning products or services? (28 responses)

- Very successful
- Somewhat successful
- Somewhat unsuccessful
- Very unsuccessful

Social Learning Isn't a Goal But a Given

Whether or not your organization currently uses social technologies as an explicit part of your learning products and services, we bet you have experience with social learning. An association totally devoid of social learning is almost unimaginable—precisely because so much of any association's *raison d'être* derives from the interpersonal connections it facilitates.

Our advice is to build on the social experience that already exists at your organization. Actively explore how social learning—particularly the newer social learning made possible by the explosive growth of social technologies—might factor into realizing your organization's vision of the ideal future.

If your organization hasn't taken a consistent, thought-out approach to social learning, this can be your start. If your organization has been active in and thoughtful about social learning, then this an opportunity to revisit the whys and hows of what you're doing.

James Young, chief learning officer at the Society for College and University Planning (SCUP), echoed this need to link social learning and social technologies with an organization's broader purpose and activities: "Our emphasis over the past two years has been (and will be for the foreseeable future) to solidify our organizational identity and to build capacity to transform the association. Without a doubt, social learning and social media will be a rich part of our future."

You need not set out to find especially innovative ways to harness social learning. If you land on something new and interesting, well and good, but many of the examples of social technologies to support learning cited in this report are straightforward—and arguably all the better for their simplicity. The focus should never be novelty. The focus should be strategic relevance and impact.

Membership organizations exist to connect people with common aims and interests. In that context, social learning isn't a goal, but a given.

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

About Tagoras: Publisher of the Report

This report is published by Tagoras, Inc. (<http://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 created the Learning Business Maturity Model (<http://www.tagoras.com/learning-business-maturity-model>), which articulates the characteristics and practices of a mature learning and education business or line of business, as well as the stages that typically precede full maturity.

Other Tagoras reports include *Association Learning + Technology* and *Association Virtual Events* (<http://www.tagoras.com/catalog>).



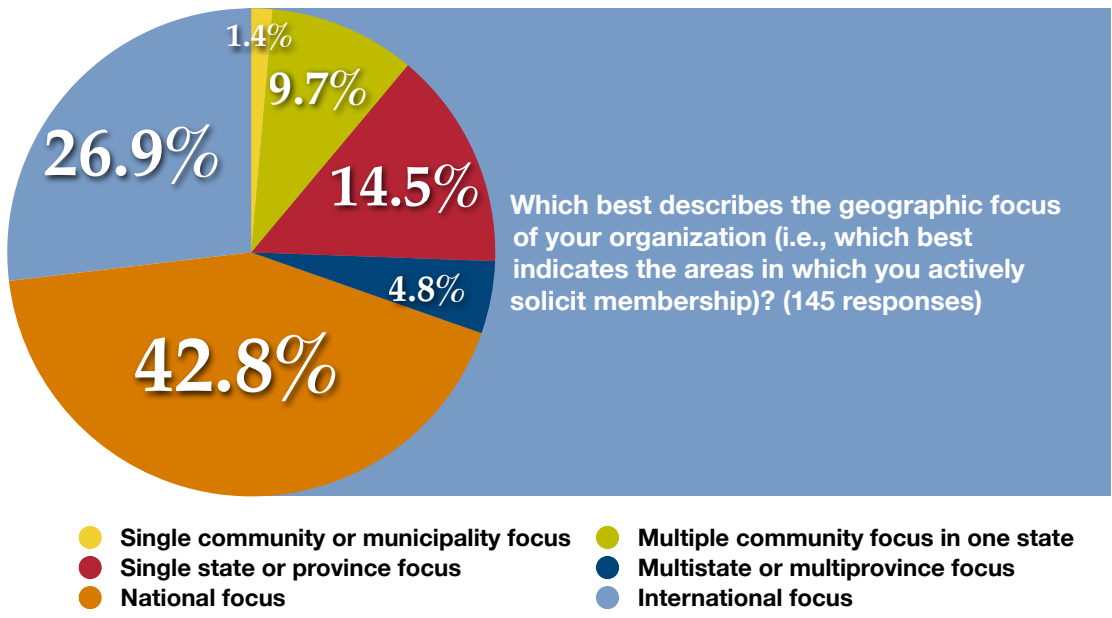
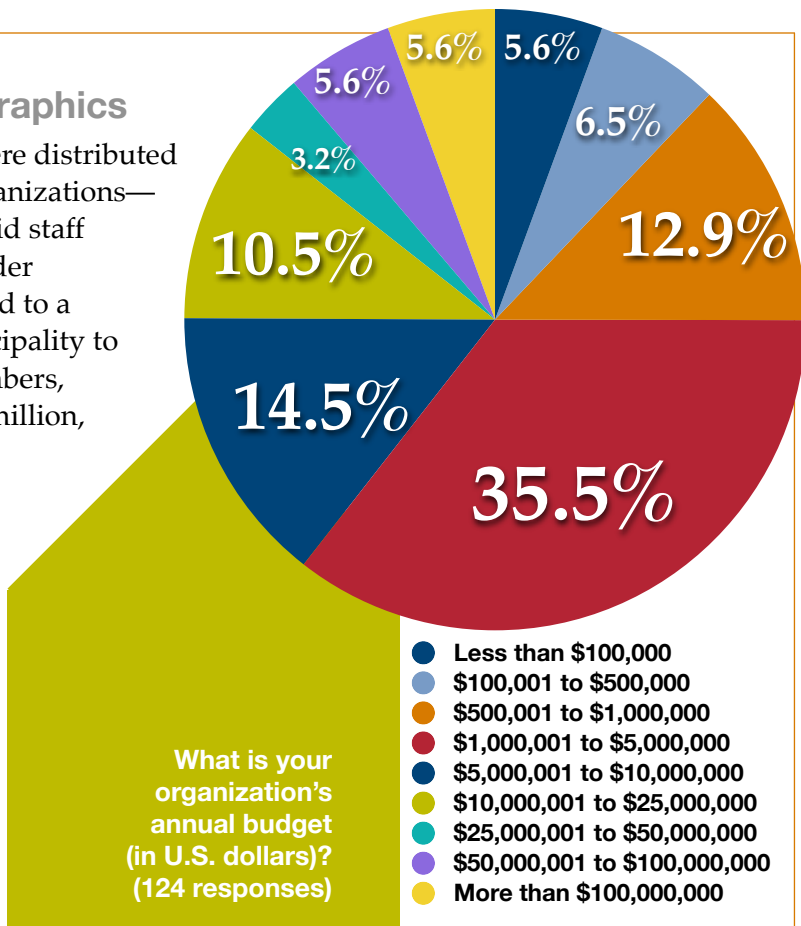
tagorasTM
<inquiry> <insight> <action>

Appendix A: Demographics

Responses to the survey were distributed across a broad range of organizations—from those with a single paid staff person, annual budgets under \$100,000, and a focus limited to a single community or municipality to those with 12,500 staff members, budgets greater than \$100 million, and an international focus.

The survey data shows use of social technologies for learning across an equally broad range of organizations—ones with and without a chief learning officer, those that do and don't provide education in support of a credential, and among smaller organizations, including those reporting budgets under \$100,000 and a single paid staffer.

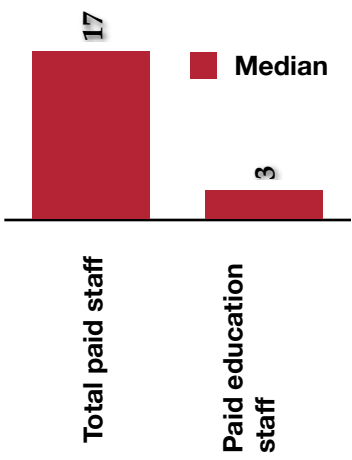
The largest clusters of survey respondents overall were nationally focused organizations (42.8 percent) with annual budgets between \$1 million and \$5 million (35.5 percent). The most common membership size was between 1,001 and 5,000 individuals (26.7 percent).



Respondents averaged 144.6 paid staff, a figure inflated by a single respondent with a very large staff of 12,500. The median is much lower: 17 paid staff. The average number of paid staff who spend more than half their time working in education or professional development (10.0) was again skewed by a single organization with an education staff of 400. The median education staff size is a more modest 3.

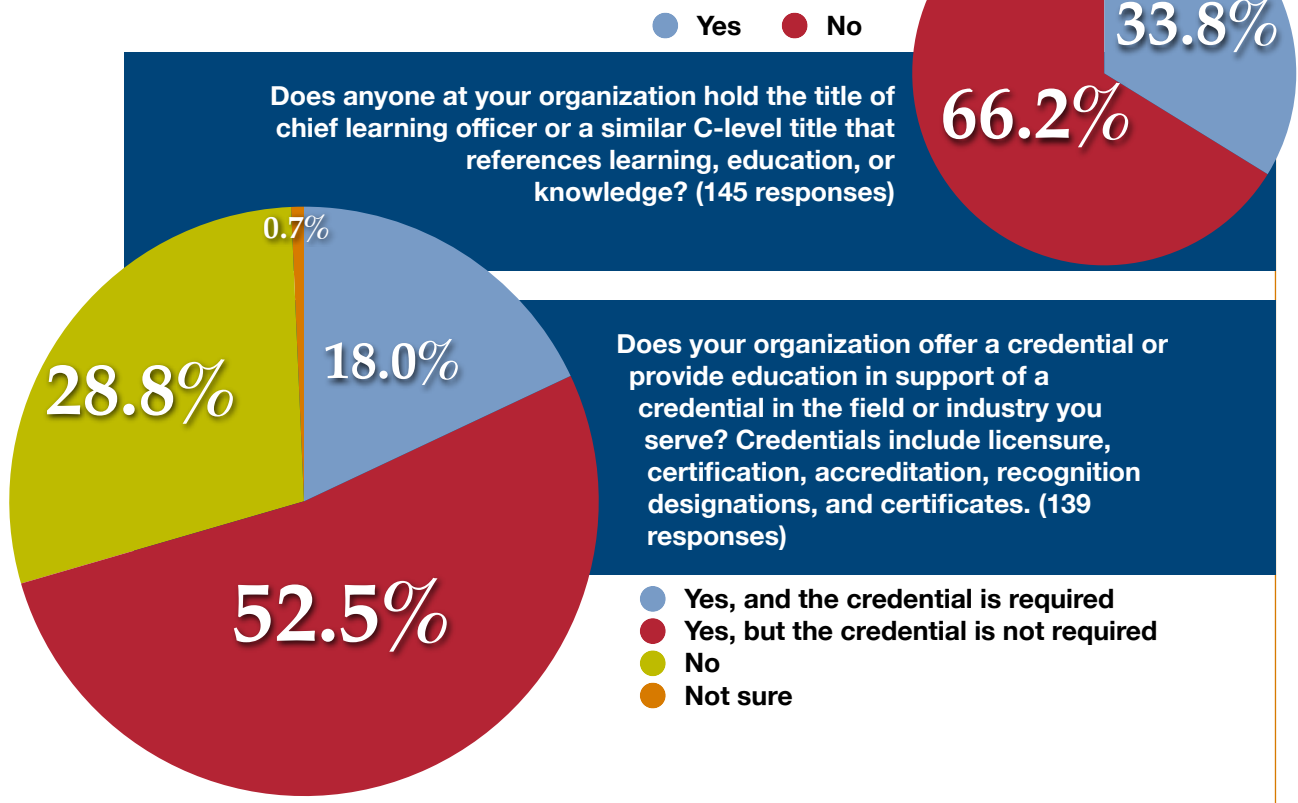
How many paid staff does your organization currently have? (135 responses)

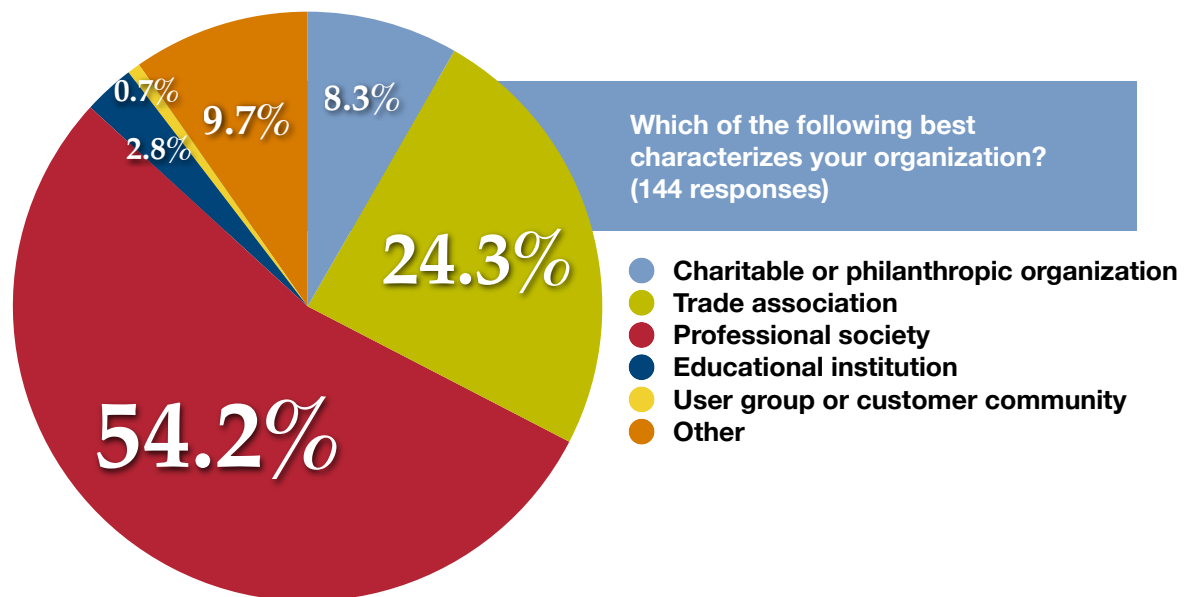
How many paid staff does your organization have who currently spend more than half their time working in education or professional development? (132 responses)



A third (33.8 percent) of respondents reported someone at their organization holds the title of chief learning officer (CLO) or a similar C-level title, but the majority (66.2 percent) do not have CLOs leading learning at their organizations.

Over two-thirds of respondents (70.5 percent) provide education that supports a credential in their field or industry. For 18.0 percent, the credential is required.





Professional societies (54.2 percent) and trade associations (24.3 percent) make up the vast majority of the organizations surveyed.

Survey participants serve a wide variety of audiences. Of nine named options, only non-physician healthcare professionals (15.0 percent) and physicians (10.0 percent) garnered double-digit responses; the other seven options were selected by well under 10 percent, leaving 52.9 percent to select “other.” Audiences reported by those selecting “other” run the gamut from architects, school board members, and personal trainers to those in the jewelry and pets industries.

Physicians	10.0%
Non-physician healthcare professionals	15.0%
Skilled trade professionals	5.7%
Accountants	3.6%
Non-accounting financial professionals	3.6%
Attorneys	3.6%
Association executives	2.9%
K-12 educators	1.4%
College or university educators	1.4%
Other	52.9%

Appendix B: Survey Data

We're grateful to the organizations that responded to the online survey about their use of social technologies between October 11 and November 11, 2016.

ALL RESPONDENTS

The following questions were asked of all respondents.

ASSOCIATION MANAGEMENT COMPANY

Do you work for your association through an association management company? (159 responses)

Yes	11.3%
No	88.7%

USE OF SOCIAL TECHNOLOGIES IN GENERAL

For the purposes of this survey, social technologies are any technology that enables users to communicate with each other over the Internet or cellular networks and share text, audio, graphics, video, etc. Popular examples of social technology include, but are not limited to, discussion boards, Twitter, social networks like Facebook and LinkedIn, and private online communities. Does your organization use social technologies for any purpose? (159 responses)

Yes	98.1%
No	1.9%

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? (145 responses)

Yes	33.8%
No	66.2%

GEOGRAPHIC FOCUS

Which best describes the geographic focus of your organization (i.e., which best indicates the areas in which you actively solicit membership)? (145 responses)

Single-community or municipality focus	1.4%
Multiple-community focus within one state	9.7%
Single-state or province focus	14.5%
Multistate or multiprovince focus	4.8%
National focus	42.8%
International focus	26.9%

TYPE OF ORGANIZATION

Which of the following best characterizes your organization? (144 responses)

Charitable or philanthropic organization	8.3%
Trade association	24.3%
Professional society	54.2%
Educational institution	2.8%
User group or customer community	0.7%
Other	9.7%

AUDIENCE

How do you characterize the primary audience your organization serves? (140 responses)

Physicians	10.0%
Non-physician healthcare professionals	15.0%
Accountants	3.6%
Non-accounting financial professionals (e.g., those working in banking or insurance)	3.6%
Attorneys	3.6%
Skilled trade professionals (e.g., electricians or plumbers)	5.7%
Association executives	2.9%
K-12 educators	1.4%
College or university educators	1.4%
Other	52.9%

EDUCATION IN SUPPORT OF A CREDENTIAL

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. (139 responses)

Yes, and the credential is required	18.0%
Yes, but the credential is not required	52.5%
No	28.8%
Not sure	0.7%

INDIVIDUAL MEMBERSHIP

How many active *individual* members does your organization currently have? (135 responses)

1,000 or less	12.6%
1,001 to 5,000	26.7%
5,001 to 10,000	15.6%
10,001 to 25,000	14.8%
25,001 to 50,000	6.7%
50,001 to 100,000	3.0%
More than 100,000	8.1%
We have only organizational members.	12.6%

ORGANIZATIONAL MEMBERSHIP

How many active *organizational* members does your organization currently have? (136 responses)

Less than 100	14.7%
101 to 200	13.2%
201 to 500	12.5%
501 to 1,000	8.1%
1,001 to 5,000	9.6%
More than 5,000	3.7%
We have only individual members.	38.2%

OVERALL STAFF

How many paid staff does your organization currently have? (135 responses)

Mean	Median
144.6	17.0

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? (132 responses)

Mean	Median
10.0	3.0

BUDGET SIZE

What is your organization’s annual budget (in U.S. dollars)? (124 responses)

Less than \$100,000	5.6%
\$100,001 to \$500,000	6.5%
\$500,001 to \$1,000,000	12.9%
\$1,000,001 to \$5,000,000	35.5%
\$5,000,001 to \$10,000,000	14.5%
\$10,000,001 to \$25,000,000	10.5%
\$25,000,001 to \$50,000,000	3.2%
\$50,000,001 to \$100,000,000	5.6%
More than \$100,000,000	5.6%

RESPONDENTS CURRENTLY USING SOCIAL TECHNOLOGIES

The following question was asked of respondents who indicated their organization uses social technologies for any purpose.

USE OF SOCIAL TECHNOLOGIES FOR LEARNING

You indicated your organization uses social technologies for some purpose. Now we’d like to know if one of the purposes involves learning. If your organization, for example, has a Twitter account but uses it only for marketing, then that would not be an example of using a social technology for learning. Does your organization use social technologies to support learning? (156 responses)

Yes, to support informal learning	37.2%
Yes, as an explicit part of a learning product or service	4.5%
Yes, both to support informal learning and as an explicit part of a learning product or service	21.2%
No	33.3%
Not sure	3.8%

RESPONDENTS CURRENTLY USING SOCIAL TECHNOLOGIES AS AN EXPLICIT PART OF A LEARNING PRODUCT OR SERVICE

The following questions were asked of respondents who indicated their organization uses social technologies as an explicit part of a learning product or service.

STRATEGY FOR USE OF SOCIAL TECHNOLOGIES

Does your organization have a formal, documented strategy for the use of social technologies? (41 responses)

Yes, and it specifically addresses the use of social technologies for learning.	12.2%
Yes, but it does not specifically address the use of social technologies for learning.	34.1%
No	48.8%
Not sure	4.9%

LEARNING OBJECTIVES

When you use a social technology as part of a learning product or service, is the use designed to support clearly defined learning objectives? (39 responses)

Always	38.5%
Frequently	20.5%
Sometimes	30.8%
Never	7.7%
Not sure	2.6%

TYPES OF SOCIAL TECHNOLOGIES FOR LEARNING

Which of the following social technologies does your organization use as part of learning products or services it provides? Please only indicate technologies that are explicitly a part of a learning product or service. For example, if your organization has a Twitter account but uses it only for marketing and informal knowledge-sharing, do not indicate that you use microblogging tools as an explicit part of a learning product or service. (37 responses)

	Yes	No	Not sure
Discussion forums	65.7%	20.0%	14.3%
Microblogging tools (e.g., Twitter)	44.4%	44.4%	11.1%
Photosharing sites (e.g., Instagram)	18.2%	69.7%	12.2%
Private online community (e.g., Higher Logic, Small World Community, or rasa.io)	66.7%	22.2%	11.1%
Publicly available social networking site (e.g., LinkedIn or Facebook)	70.3%	27.0%	2.7%
Social bookmarking / curation tools (e.g., Pinterest or Scoop.it)	20.6%	67.6%	11.8%
Wikis	14.7%	67.6%	17.6%

SPECIFIC SOCIAL TECHNOLOGIES FOR LEARNING

Which of the following specific social technologies does your organization use as part of its learning products or services? Please only indicate technologies that are explicitly a part of a learning product or service. For example, if your organization has a Facebook presence, but does not use it as part of a learning product or service, then select No for Facebook below. (34 responses)

	Yes	No	Not sure
Facebook	47.1%	52.9%	0.0%
LinkedIn	37.5%	62.5%	0.0%
Google+	9.7%	83.9%	6.5%
Twitter	36.4%	60.6%	3.0%
Instagram	9.7%	87.1%	3.2%

TYPES OF LEARNING PRODUCTS AND SERVICES

In connection with which learning products or services does your organization use social technologies? If your organization doesn't offer a particular product or service listed below, please select Not applicable for that item. (33 responses)

	Yes	No	Not sure	Not applicable
Place-based annual meeting of members	74.2%	12.9%	9.7%	3.2%
Other place-based meetings of members (e.g., specialty or regional conferences)	61.3%	19.4%	16.1%	3.2%
Virtual conferences or trade shows	51.6%	29.0%	3.2%	16.1%
Place-based seminars	64.5%	29.0%	6.5%	0.0%
Online communities of practice	56.3%	34.4%	9.4%	0.0%
Online learning (not including Webinars or Webcasts)	62.5%	28.1%	6.3%	3.1%
Webinars or Webcasts	93.5%	3.2%	3.2%	0.0%
Teleconferences	46.7%	33.3%	6.7%	13.3%

PARTICIPATION IN SOCIAL TECHNOLOGIES FOR LEARNING

Which of the following best characterizes use of social technologies by participants in all your learning products or services that make use of social technologies? (30 responses)

Most participants use the social technologies.	40.0%
Some participants use the social technologies.	53.3%
Very few participants use the social technologies.	6.7%
No participants have used the social technologies.	0.0%

MEASURE WHETHER SOCIAL TECHNOLOGIES SUPPORT LEARNING

Do you measure whether your use of social technologies in your learning products or services supports learning? (30 responses)

Yes, in most cases	3.3%
Yes, in some cases	26.7%
Yes, but in very few cases	23.3%
No	36.7%
Not sure	10.0%

OVERALL SATISFACTION WITH SOCIAL TECHNOLOGIES FOR LEARNING

Overall, how satisfied or dissatisfied is your organization with its use of social technologies as part of its learning products or services? (29 responses)

Very satisfied	20.7%
Somewhat satisfied	65.5%
Somewhat dissatisfied	13.8%
Very dissatisfied	0.0%

SATISFACTION IN SPECIFIC AREAS

How satisfied or dissatisfied is your organization with its use of social technologies as part of its learning products or services in terms of the specific items below? (28 responses)

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied	Not applicable
Usage (e.g., number of participants using the social technologies for learning)	24.6%	35.9%	25.4%	12.7%	1.4%
Financial cost of creating or implementing the social technologies for learning	12.1%	32.9%	26.4%	13.6%	15.0%
Financial cost of supporting and maintaining the social technologies	19.7%	35.2%	31.0%	7.7%	6.3%
Effort required to develop learning products or services that use social technologies	19.0%	45.1%	25.4%	7.0%	3.5%

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied	Not applicable
Effort required to maintain or monitor the social technologies that are part of learning products or services	11.3%	42.6%	34.8%	8.5%	2.8%
Technologies used	14.1%	48.6%	28.2%	6.3%	2.8%
Feedback from participants	16.9%	50.7%	23.2%	6.3%	2.8%

SUCCESS WITH SOCIAL TECHNOLOGIES FOR LEARNING

Overall, how would you rate the success of your organization's use of social technologies as part of its learning products or services? (28 responses)

Very successful	14.3%
Somewhat successful	71.4%
Somewhat unsuccessful	14.3%
Very unsuccessful	0.0%

RESPONDENTS NOT CURRENTLY USING SOCIAL TECHNOLOGIES AS AN EXPLICIT PART OF A LEARNING PRODUCT OR SERVICE

The following question was asked of respondents who indicated their organization uses social technologies for informal learning only, not as an explicit part of a learning product or service.

PLANS TO USE SOCIAL TECHNOLOGIES AS PART OF AN EXPLICIT LEARNING PRODUCT OR SERVICE

You indicated your organization uses social technologies to support informal learning but not as an explicit part of a learning product or service. Do you have plans to begin using social technologies as an explicit part of a learning product or service in the next 12 months? (57 responses)

Yes	42.1%
No	57.9%