ASSOCIATION LEARNING +TECHNOLOGY

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The Fine Print

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Executive Summary

This report continues the work of four prior publications—*Association Learning + Technology 2016*, *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 it 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 non-statistical survey. Of the 237 survey responses recorded between May 2 and May 31, 2017, 203 qualified and are included in the results presented here.

The Overview

Of the qualifying responses to the survey, 92.6 percent are from individuals whose organizations currently offer technology-enabled or technology-enhanced learning. An additional 6.9 percent of respondents indicate they plan to start using technology to enable or enhance learning in the coming 12 months, leaving only 0.5 percent not using technology for learning and with no plans to start in the coming year.

The extensive use of technology to deliver and enhance learning means organizations of all sizes and kinds are taking part.

Of qualified respondents, 92.6 percent use technology for learning.

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 91.4 percent of respondents currently using technology for learning, and 90.0 percent offer real-time ones. Self-paced online courses, tutorials, and presentations come in third (offered by 72.8 percent) and are the only other offering of the five types we asked about to garner a majority. Facilitated learning comes in last, offered by only a third (33.9 percent) of respondents.

We also asked about five emerging types of learning: massive open online courses (MOOCs), flipped classes, gamified learning, microcredentials (like digital badges), and microlearning. Microlearning shows the highest rate of adoption, offered by just under a third (30.1 percent) of respondents using technology for learning; that number is notably higher than the 18.1 percent who reported offering microlearning in the survey at the core of *Association Learning + Technology 2016*. In addition, over a third (36.1 percent) of this year's respondents report plans for microlearning in the coming year.

Digital badges are offered by 14.8 percent and, like microlearning, seem poised for significant growth with a quarter (25.3 percent) of respondents reporting plans to add digital badges in the year ahead. Flipped classes are offered by 13.3 percent of respondents, and gamified learning and MOOCs are currently offered by under a tenth of respondents using technology for learning.

Among nine named technology tools, YouTube is the most common in associations' learning programs (used by 30.7 percent of respondents). Facebook (18.3 percent) and Twitter (17.9 percent) rank next most popular, and LinkedIn is used by 11.2 percent of respondents as an explicit part of a learning initiative. Few respondents report using Google+ (5.6 percent), Skype (4.4 percent), SlideShare (2.5 percent), Instagram (2.5 percent), or Pinterest (1.3 percent) for learning.

Half (49.7 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 (25.7 percent), and it's clear m-learning is becoming a staple among associations.

Only 16.2 percent of associations currently using technology for learning offer a virtual conference, and just 12.3 percent plan to offer one in the coming year.

With 27.5 percent of respondents reporting they do it, live streaming from place-based conferences is notably more popular than virtual conferences. Another 14.0 percent report plans to live stream in the next 12 months, but the majority (53.4 percent) have no near-term plans to live stream.

A third (33.7 percent) of organizations currently using technology for learning use it specifically to repeat, reinforce, or sustain learning after participants complete an educational product or service, and another 27.2 percent 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 technology platforms we asked about—a whopping 91.8 percent use one, and another 2.4 percent plan to begin using one in the next 12 months, which means we're essentially at saturation for Webinar and Webcast platforms.

Learning management systems (LMSes) are the second most popular technology platform, used by 66.9 percent of respondents currently offering technology-enabled or technology-enhanced learning.

In the data collected for the 2016 report, 21.7 percent of respondents said they had a learning community platform, and 20.2 percent reported plans for using such a platform in the following 12 months. Those plans have played out; in the current survey, 37.4 percent use a private online community platform, and 14.7 plan to use one in the year ahead.

Neither of the other platforms we asked about—virtual conference platforms and learning content management systems (LCMSes)—is used by even a quarter of respondents.

Not quite half (47.1 percent) of organizations using technology for learning integrate 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. But a full 30.0 percent don't integrate their data, leaving room for improvement.

There's also room for improvement in what organizations do with the data they collect in their learning technology platforms. Only 14.9 percent report always using that data to make decisions about current and future educational products and services. Another 30.4 percent report using the data frequently for that purpose. But 35.7 percent use it only sometimes, and 4.8 say they never use the data to inform their portfolio decisions.

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

The Business Perspective

Almost half (48.1 percent) of associations that use technology for learning have increased net revenue from educational offerings, but well over half (69.6 percent) don't have a formal, documented strategy for how technology will be used to enable or enhance learning.

This year for the first time the survey asks respondents whether they have a formal, documented strategy for their learning and education business (as opposed to a strategy focused on the use of technology for learning), and a majority (57.1 percent) don't, with another 5.1 unsure if they have one.

Two-thirds (66.0 percent) of respondents' organization doesn't have a formal, documented product development process that includes its technology-enabled and technology-enhanced education products, and 59.7 percent 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, 59.2 percent use professional instructional designers.

The survey asked all 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. A full third (33.3 percent) of respondents say yes. Organizations with a CLO or similar position are more likely to have a strategy for their learning and education business than organizations without someone in that role (56.9 percent versus 28.4 percent).

Whether to offer a formal credential is an important decision operationally and strategically for an organization. Among the respondents, 70.0 percent offer or

provide education to support a credential (16.8 percent for a credential required in their field or industry and 53.2 percent for an optional credential).

The Performance Perspective

Two survey questions probe how organizations measure the impact of their learning. The first asks respondents if they measure whether learning occurs as a result of participation in their technology-enabled or technology-enhanced educational products and services. Some 40.0 percent report always measuring whether learning happens, but over a third do it only sometimes (26.1 percent) or never (8.9 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 79.5 percent). Post-participation assessments or follow-ups are the only other approach used by the majority (56.5 percent).

When asked if they're satisfied overall with their current technology-enabled and technology-enhanced learning initiatives, 69.0 percent of associations said they were either somewhat (56.5 percent) or very (12.5 percent) satisfied.

For specific aspects of technology-enabled and technology-enhanced learning, the biggest area of dissatisfaction is revenue; only 43.5 percent are very or somewhat satisfied with revenue. The area of highest satisfaction is feedback from participants (67.5 percent are very or somewhat satisfied).

While 58.6 percent of respondents rate themselves as somewhat successful with their use of technology for learning, a more modest 18.5 percent characterize their use of technology for learning as very successful. We found organizations that consider themselves very successful are significantly more likely than all respondents using technology to enable or enhance learning to do the following:

- Report increased net revenue from their education offerings as a result of their use of technology for learning (76.7 percent versus 48.1 percent).
- Offer self-paced online courses (93.3 percent versus 72.8 percent), facilitated online courses (53.3 percent versus 33.9 percent), and at least some mobile learning (66.7 percent versus 49.7 percent).
- Make use of professional instructional designers (76.7 percent versus 59.2 percent).
- Integrate data they collect in the technology platforms for learning with data from other technology platforms they use (63.3 percent versus 47.1 percent), and always or frequently use the data they collect in their learning technology platform to make decisions about current and future educational products and services (66.7 percent versus 45.3).
- Have a formal, documented strategy for their learning and education business (60.0 percent versus 37.7 percent of all survey respondents) and a strategy for how technology will be used to enable or enhance learning (37.9 percent versus 23.0 percent of respondents using technology for learning).

- Have a product development process (53.3 percent versus 30.2 percent) and a process for setting prices (40.0 percent versus 23.3 percent) that include their technology-enabled and technology-enhanced education products.

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 is unlikely to slow. This creates a clear opportunity for technology to become an even more significant, strategic part of the education and professional development associations provide. As this transition occurs, it's likely to be accompanied by the following:

- Growth in the implementation of learning platforms and their integration with other key systems, like association management systems
- An emphasis on measuring whether and how learning occurs as a result of a learning activity
- A continued focus on professional instructional design to help ensure educational products are effective
- Competition that drives 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 learning and education businesses

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

Introduction

Building on the work of *Association Learning + Technology 2016*, *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.

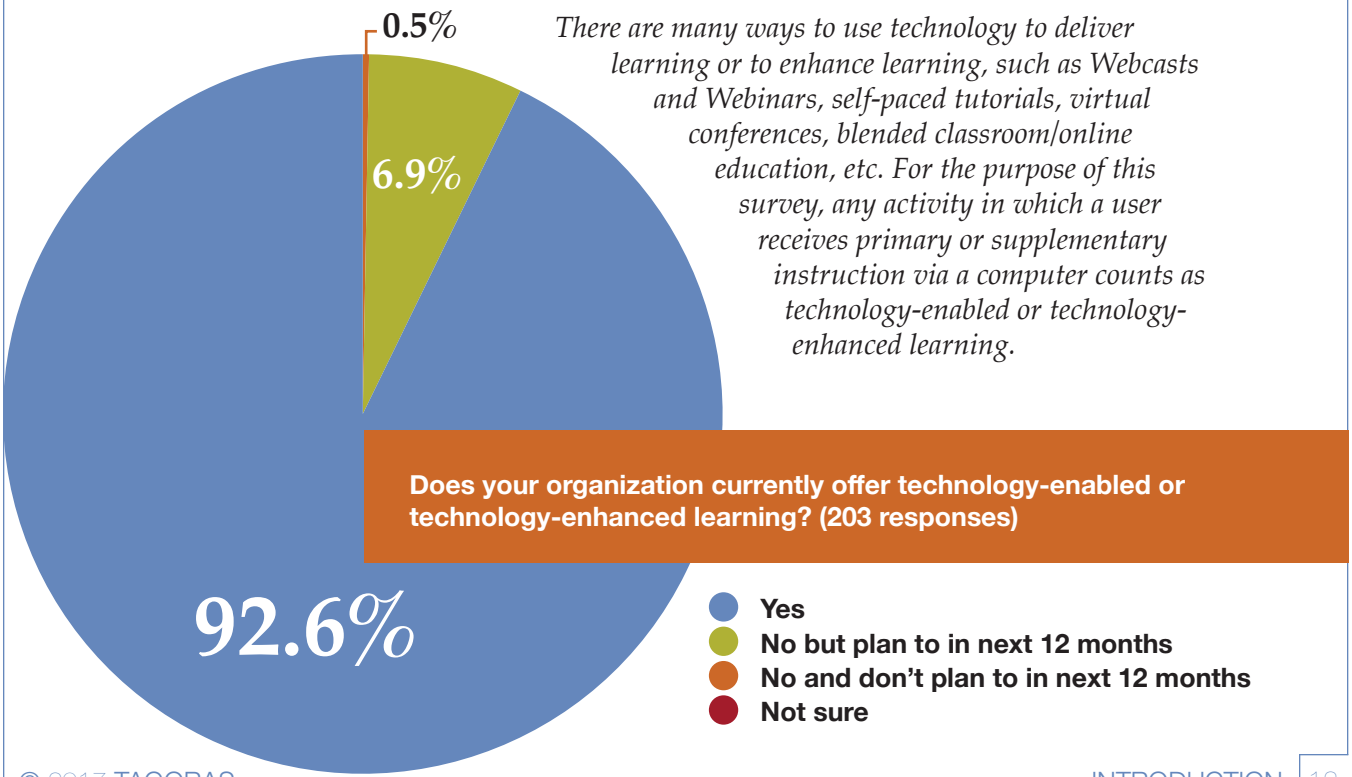
At the core of the report is a survey of membership organizations conducted from May 2 to May 31, 2017.

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 237 responses to this survey, of which 203 qualified and are included in this report. Of the 203 qualifying responses, 92.6 percent indicate their organization currently offers technology-enabled or technology-enhanced learning.

While that number is impressively high, our definition of technology-enabled and technology-enhanced learning is broad:

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.



An additional 6.9 percent of respondents indicate they plan to start using technology to enable or enhance learning in the coming 12 months, leaving only 0.5 percent not using technology with learning and with no plans to start in the coming year.

Changes to the Survey

The survey behind this report is essentially the same as the survey used for the last report, issued in 2016, though we added one new question and modified three others.

This year for the first time the survey asks whether respondents' organizations have a formal, documented strategy for their learning and education business. This question complements a more specific question we've asked in the past (and ask again this year) about whether organizations have a formal, documented strategy for how technology will be used to enable or enhance learning.

The added question is broader in scope—asking about a strategy for the learning and education business overall rather than focusing on a strategy that covers the use of technology for learning—and allows us to collect information about more organizations because it is asked of all respondents, while the older question is asked only of those currently using technology to enable or enhance learning. This new question gives us a better sense of the prevalence of learning strategy.

In the question that asks about specific platforms and tools (such as YouTube) used to support learning, we added Instagram and Google+ and rephrased to remove mention of "social media" from the question, instead positioning the nine platforms mentioned more generally as simply "technologies."

In the question that asks about types of platforms used to support learning, we changed "learning community platform" to "private online community platform" to reflect the terminology we hear most in our work.

Lastly, in the demographic question that asks respondents how they characterize the primary audience their organization serves, we added two choices to the provided options: "non-accounting financial professionals (e.g., those working in banking or insurance)" and "skilled trade professionals (e.g., electricians or plumbers)."

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 formats 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 Community Brands, who is sponsoring this report so it can be made free of charge to you, and a thought-leader contribution from Tristan Jordan, executive vice president and general manager for Careers & Education at Community Brands
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 you and to associations as they assess their use of technology for learning and determine their next steps.

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Thinking Strategically About Learning and Professional Education

Thoughts from Community Brands' Tristan Jordan

More and more, we're seeing the emergence of the chief learning officer (CLO) as a strategic role at associations, with a greater emphasis on professional education and online learning across the entire organization. This year's *Association Learning + Technology* report found one-third of survey respondents have a CLO or similar C-level executive at their organization, and those organizations that have a CLO are more likely to have a strategy for their learning and education business. What this tells us is that more organizations are making the deliberate decision to make professional education and learning a strategic initiative, at the core of their value proposition.

Learning programs can provide a steady non-dues revenue stream, but they also can be one of an organization's most attractive benefits and play a key role in member retention. It's not just about pulling together sessions for an annual conference or the occasional Webinar. Associations need to think about how learning and professional education can deepen member loyalty by creating thoughtful and engaging programs that give learners a clear path towards career advancement.

There's a growing amount of free and low-cost continuing education options, validating why associations—now more than ever—need a strategic professional education plan, technology to support the strategy, and content that's engaging and relevant to members and nonmembers alike. Technology can play an important role in not only delivering learning content but also in identifying how learning contributes to member loyalty and retention. With the power of connected systems, you can segment your membership based on their interaction with your learning programs to identify trends around what's working and opportunities for increased engagement.

However, it doesn't happen overnight. If an organization is ready to prioritize professional education and learning, I would suggest starting with documenting the learning strategy. This gives not only the team a clear road map but also lays out how the learning program supports overall business objectives. As we see in this report's findings, organizations that have a formal, documented education business strategy were more likely to consider their use of technology to support learning as very successful.

It's not enough to just have the technology; an organization needs to understand how its tools support delivering a seamless experience for learners and staff. It's concerning to see that only 14.9 percent of respondents report they always use data to make decisions about current and future educational products and services. This data is invaluable to show what's resonating with members and how an organization can improve its current offerings. Data found in learning systems, especially when connected to other platforms such as an association management system, can also give real insight into understanding various needs of members depending on where they are in their career journey.

Before an organization can deliver an engaging learning program, it needs to understand what's important to its members, where are their pain points, and then how the organization can meet them where they are with the content they value. The goal is to have a technology set that not only delivers a seamless learner experience but also empowers staff to make informed, strategic decisions about the future of the professional education strategy.

Tristan Jordan, Executive Vice President and General Manager, Careers & Education, Community Brands

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Demographics

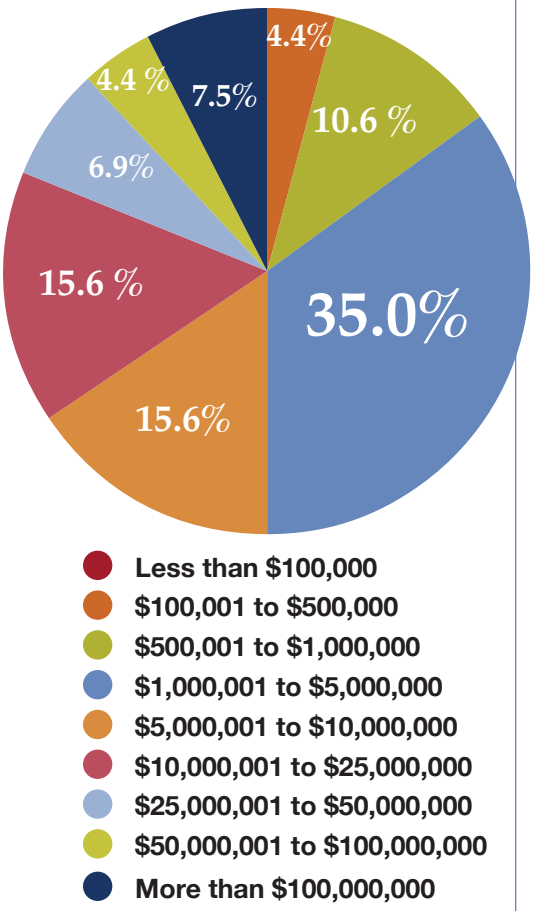
Responses to the survey come from a broad range of organizations—from those with no paid staff and annual budgets under $500,000 to those with 6,700 paid staff and budgets greater than $100 million.

The largest clusters of survey respondents overall are nationally focused organizations (46.6 percent) with annual budgets between $1 million and $5 million (35.0 percent). The most common membership size is between 1,001 and 5,000 individuals (26.2 percent).

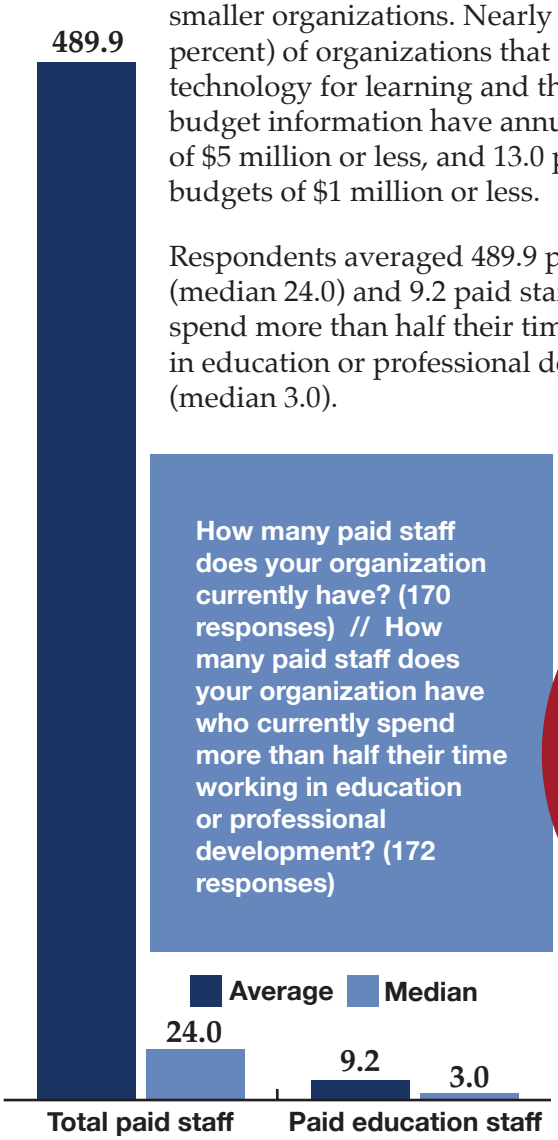
There is significant use of technology to deliver and enhance learning even among smaller organizations. Nearly half (47.9 percent) of organizations that report using technology for learning and that shared budget information have annual budgets of $5 million or less, and 13.0 percent have budgets of $1 million or less.

Respondents averaged 489.9 paid staff (median 24.0) and 9.2 paid staff who spend more than half their time working in education or professional development (median 3.0).

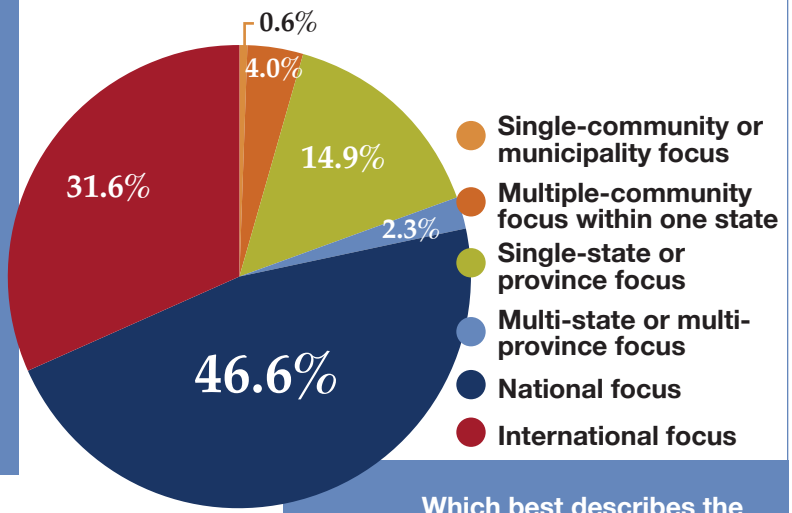
What is your organization's annual budget (in U.S. dollars)? (160 responses)

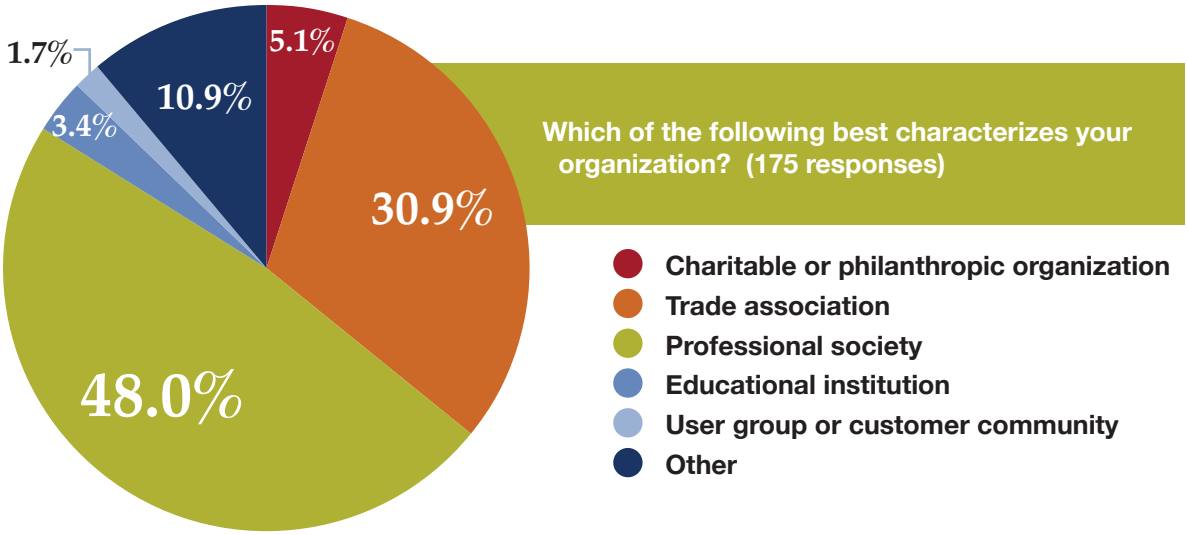


How many paid staff does your organization currently have? (170 responses) // How many paid staff does your organization have who currently spend more than half their time working in education or professional development? (172 responses)



Which best describes the geographic focus of your organization (i.e., which best indicates the areas in which you actively solicit membership)? (174 responses)





Professional societies (48.0 percent) and trade associations (30.9 percent) make up the lion's share of the organizations surveyed.

Survey participants serve a wide variety of audiences. Of nine named options, only non-physician healthcare professionals and physicians garnered a double-digit response (15.7 and 11.0 percent, respectively). The other seven options were selected by under 10 percent, leaving 48.8 percent to select "other." Audiences reported by those selecting "other" run a wide gamut, from retailers and distributors to librarians, craft distillers, and urban foresters.

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

How do you characterize the primary audience your organization serves? (172 responses)	
Non-physician healthcare professionals	15.7%
Physicians	11.0%
Skilled trade professionals (e.g., electricians or plumbers)	5.2%
Non-accounting financial professionals (e.g., those working in banking or insurance)	4.1%
College or university educators	4.1%
Attorneys	3.5%
Accountants	2.9%
Association executives	2.9%
K-12 educators	1.7%
Other	48.8%

The Operational Perspective

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

Products and Offerings

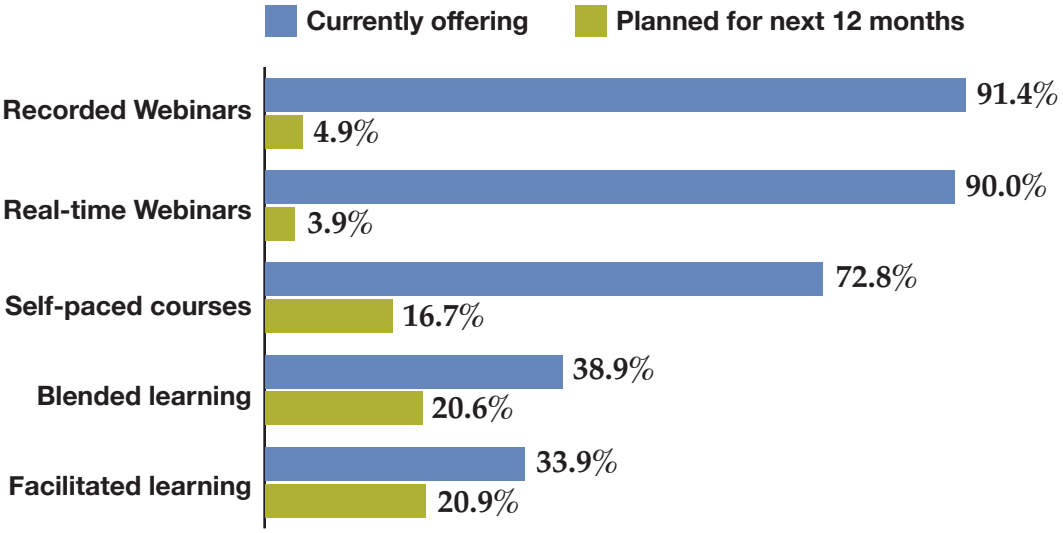
In the online survey, organizations currently using technology to deliver or enhance learning provided information about which types of products and services they offer or plan to offer.

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 91.4 percent of respondents currently using technology for learning, and 90.0 percent offer real-time ones.

Self-paced online courses, tutorials, or presentations come in third and are the only other offering to garner a majority: 72.8 percent of organizations currently using technology for learning offer self-paced online courses, and another 16.7 percent plan to begin offering them in the next year.

For organizations currently using technology for learning and with annual budgets of more than $5 million, one offering—self-paced online courses—shows a sizable jump. Among the bigger-budget organizations using technology for learning, 88.2 percent have self-paced offerings, compared with 72.8 percent of all respondents using technology for learning and only 56.1 percent of organizations using technology for learning with budgets of $5 million or less.

Which of the following does your association provide or plan to provide? (185 responses)

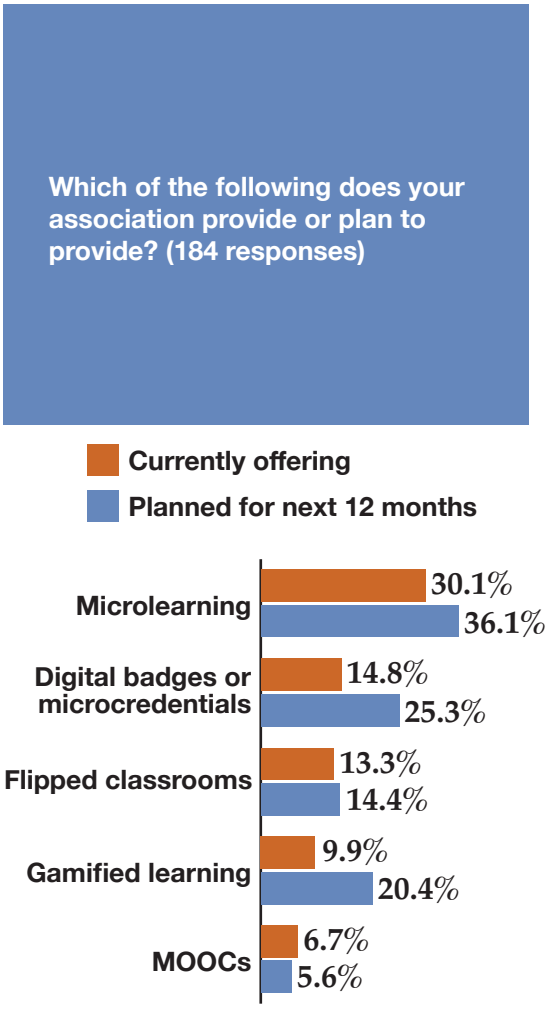


The greater use of self-paced courses among bigger-budget organizations may be explained by the typically higher development costs for self-paced courses when compared to Webinars. We should note, though, that saying self-paced courses are more expensive is a generalization and subject to exceptions. 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, the slower adoption may tie to comfort. Teachers who cut their teeth in the classroom may not be comfortable moving their bag of facilitation tricks online, leaving facilitated learning relegated predominantly 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 fifth of respondents currently using technology for learning plan to begin offering each of these formats in the next year. If those plans play out, both blended learning and facilitated learning will hit above-50-percent adoption in the coming year.



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

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 and 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 shows the highest rate of adoption but is still offered by under a

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) and edX (https://www.edx.org).

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" (https://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 https://openbadges.org.

Digital badges are the primary example of microcredentialing—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). ▸

third of respondents using technology for learning (30.1 percent). But that figure is noticeably higher than the 18.1 percent who reported using microlearning in the survey behind the 2016 report. Additionally, over a third (36.1 percent) of the 2017 respondents have plans for microlearning in the coming year. The growth in current use and the 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.

Digital badges and microcredentials, offered by 14.8 percent, are the second most popular of these emerging types. Plans for the coming year show growing interest; a full quarter (25.3 percent) say their organizations will do something with digital badges or 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, offered by 13.3 percent, rank third among these emerging types of learning. Plans for the coming year are more conservative than for microlearning and badging—only 14.4 percent say their organizations will add flipped learning in the 12 months ahead.

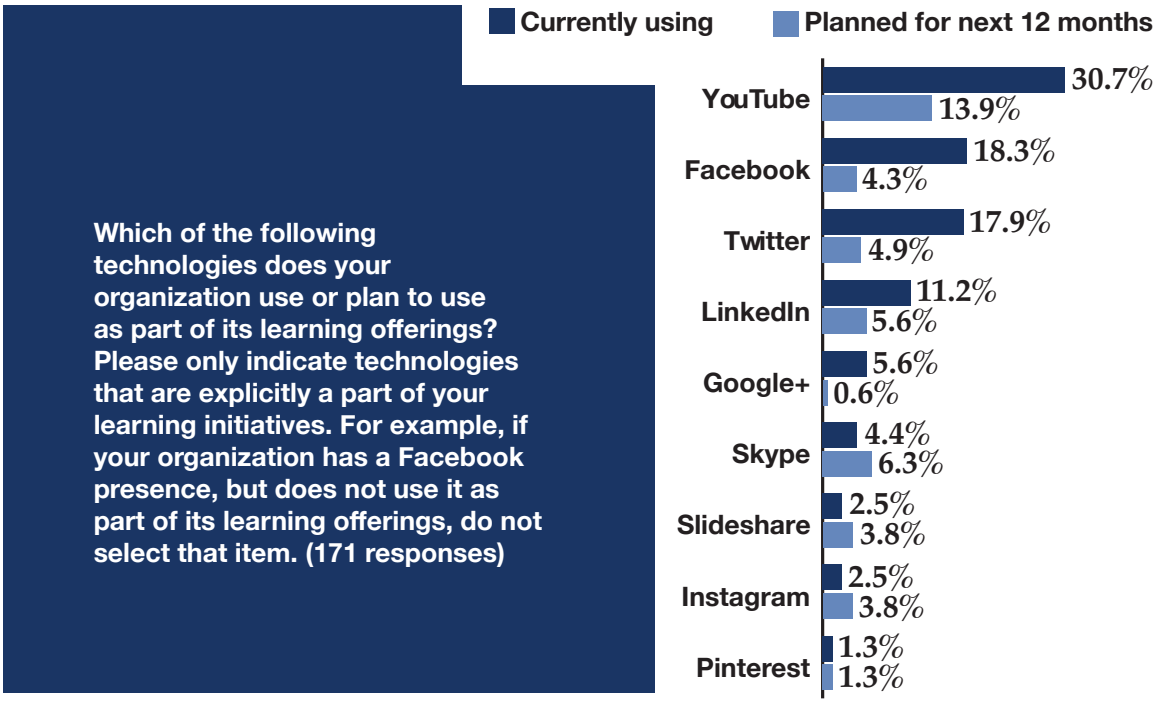
We see significant potential for flipped classes, especially when applied beyond traditional classrooms to conferences, seminars, and workshops. With flipped learning, learners do work in advance so they come together with a shared baseline of knowledge. People today are time-strapped, and it only makes sense that learners want to make the best use of time spent together with peers, teachers, and facilitators.

The other two offerings—gamified learning and MOOCs—are currently offered by under 10 percent of respondents using technology for learning. For gamification, the future looks rosier than the present. A fifth (20.4 percent) of respondents report plans for gamified learning in the near future.

Of the five emerging types of learning asked about, MOOCs are the one offering where projected adoption in the year ahead is smaller than current adoption—a meager 6.7 percent of respondents offer a MOOCs, and only 5.6 percent plan to offer one in the future. While MOOCs may never be a boom for associations, we think this massive business model has potential for associations that have content that is valuable to broad swaths of the profession or industry they serve.

YOUTUBE TOPS FOR LEARNING

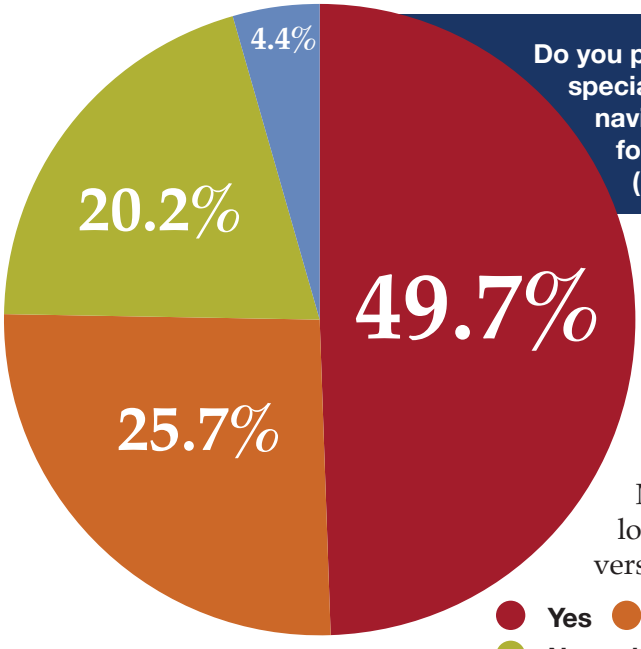
Among the range of specific tools and platforms currently used by associations as an explicit part of a learning initiative, YouTube comes out on top, used by 30.7 percent of respondents. Facebook (18.3 percent) and Twitter (17.9 percent) rank second and third. LinkedIn (used by 11.2 percent) is the only other of the nine named technologies to see usage above 10 percent.



Very few respondents report using Google+ (5.6 percent), Skype (4.4 percent), SlideShare (2.5 percent), Instagram (2.5 percent), or Pinterest (1.3 percent).

One explanation for the generally low usage is that these technologies weren't built with learning in mind. While they can be, and are being, leveraged for learning, such use takes creativity and may involve working out shared ownership of particular tools and platforms with marketing or other functions—efforts that may discourage organizations from using or even experimenting with these technologies for learning.

MOBILE LEARNING HITS TIPPING POINT



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? (183 responses)

Half (49.7 percent) of respondents currently using technology for learning provide a mobile version of at least some of their content. Another quarter (25.7 percent) plan to offer a mobile version in the next 12 months.

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

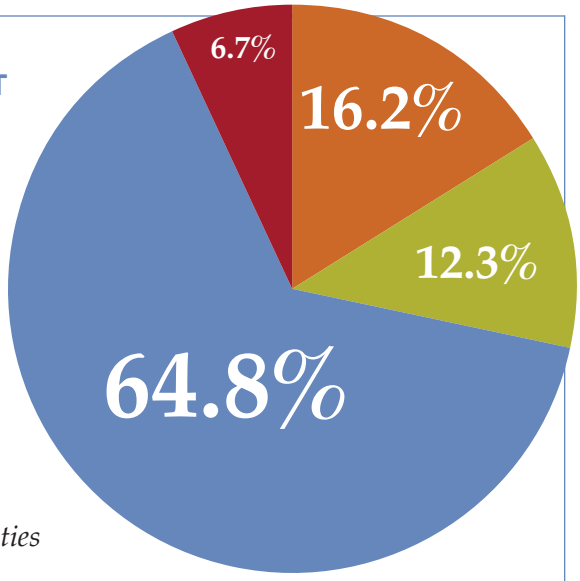
Yes · No but plan to in next 12 months · No and don't plan to in next 12 months · Not sure

VIRTUAL CONFERENCES STILL NASCENT

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

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

This definition encompasses both standalone conferences—ones that don't include any type of in-person contact—as well as hybrid conferences—ones that are offered in tandem with and as an extension of a place-based event. It also allows for a wide range of delivery technologies and methods—from Webinars to 3D environments to intensive, social media-driven interactions.



Does your organization offer a virtual conference? (179 responses)
While 16.2 percent offer a virtual conference, 64.8 percent don't plan to in the coming year.

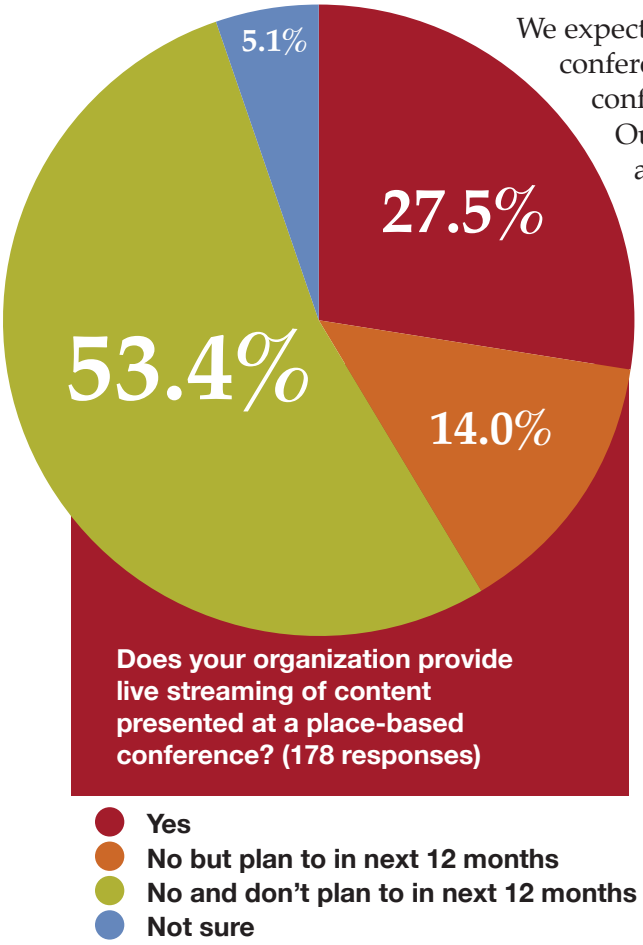
Only 16.2 percent of associations currently using technology for learning offer a virtual conference, and only 12.3 percent plan to offer one in the coming year. Some 64.8 percent don't offer a virtual conference and don't plan to in the near future. These percentages are substantially the same as those from our last two reports, suggesting virtual conferences are a slow-growing area. But they are an area we expect to benefit from the rise of virtual reality experiences and tools.

Cannibalization can be a concern, but, in our experience, it's a specter, not a real phenomenon. Few organizations get more than a third 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 27.5 percent of respondents reporting they do it, live streaming from a place-based conference is notably more popular than virtual conferences (offered by only 16.2 percent). Another 14.0 percent report plans to live stream in the next 12 months. But the majority (53.4 percent) have no near-term plans to live stream.



We expect technology will play a role in evolving conferences, whether or not the labels "virtual conference" or "live streaming" survive. Our hope 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.

But technology-driven options like live streaming and virtual conferences may well be part of how conferences become better learning opportunities.

SUSTAINING LEARNING

Organizations currently using technology for learning were asked if they use it to repeat, reinforce, or sustain learning after participants complete an educational product or service.

A third (33.7 percent) say they do use technology for sustaining learning, and over a quarter (27.2 percent) say they plan to in the coming year.

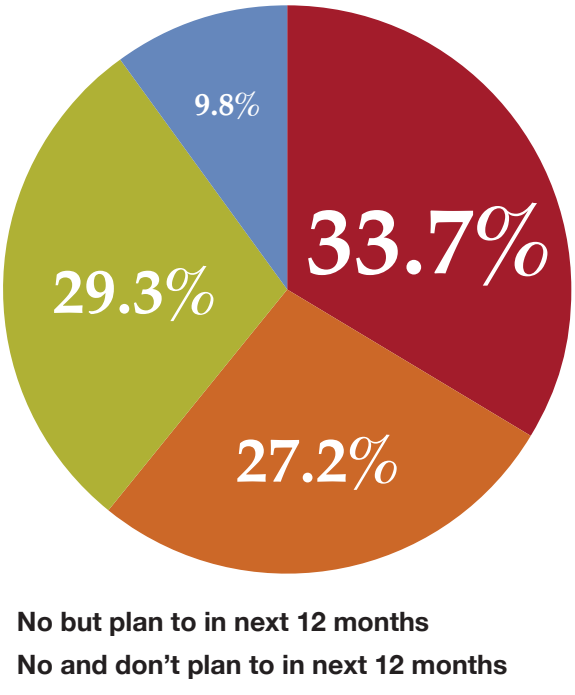
The comments from those who said they are using or plan to use technology to reinforce learning cover a spectrum of activities that includes systematic efforts built in dedicated applications to more ad-hoc and basic options that make use of existing technology investments:

- An app where learners can go for refresher information and updates
- A "30-day challenge" following a national conference, that uses social media and other digital tools to encourage attendees to reflect on their learning and take next steps in their learning, networking, and professional growth
- Triggered e-mails and learning activities tracked with the Experience API (xAPI)
- Automated e-mails sent to workshop participants that include a scenario-based question that reinforces a key learning point and provides learners, once they answer the question, with feedback, additional context, and ideas for applying concepts in the workplace

- Spaced learning modules that "drip" to learners' mobile devices
- Recordings of live conference sessions to remind meeting attendees of what they learned
- Scheduled replays of sessions held at the organization's place-based annual conference with a live question-and-answer session immediately following
- Facebook groups or private online community portals for learners to continue conversations from courses
- Commitment-to-change processes automated through a learning management system to provide reminders of self-described learning applications and to provide longer-term feedback on learner success at applying what they've learned
- Follow-up surveys designed to reinforce learning, reassess knowledge gained, and suggest applications to practice
- Video-based microlearning that reinforces key messages taught during the course

Using technology for reinforcing learning has 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 much broader adoption of reinforcement techniques, particularly approaches that provide structure and substance beyond making resources, such recordings or an online community, available to learners.

Are you using technology to repeat, reinforce, or sustain learning after participants complete an educational product or service? (184 responses)
A third (33.7 percent) currently use technology to reinforce learning.

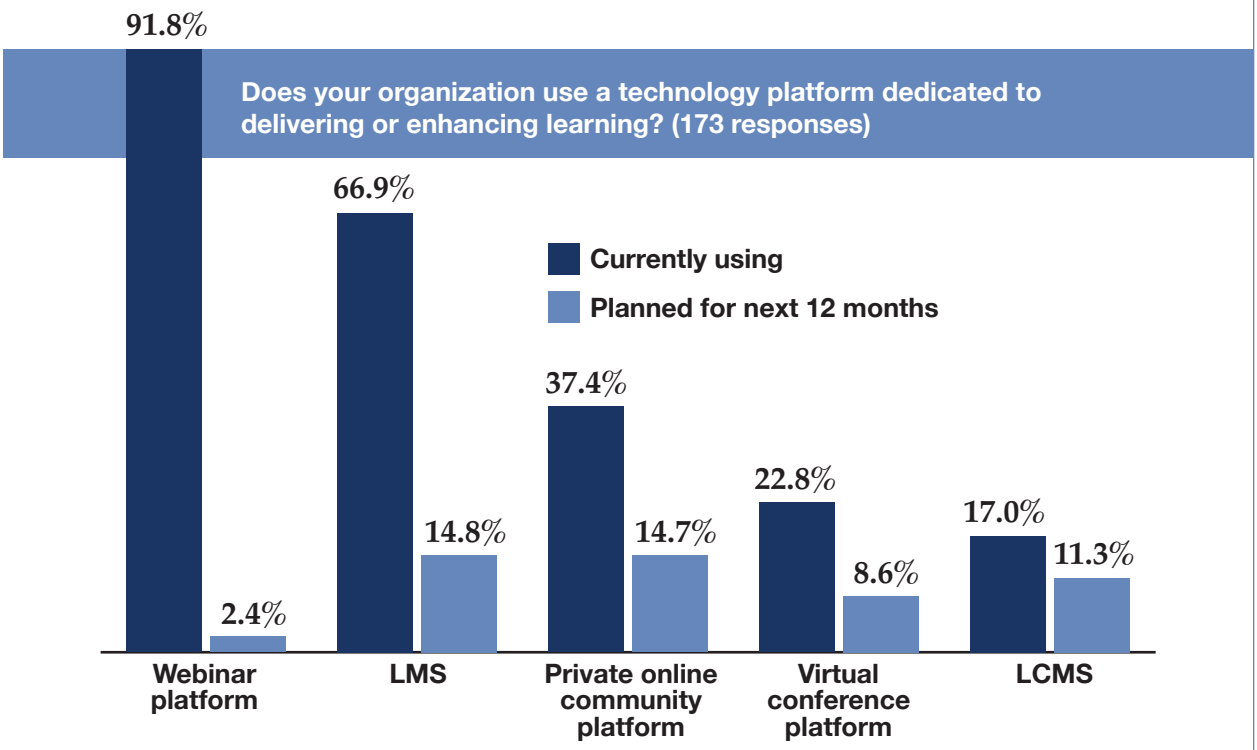


Learning Technology Platforms

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 AT THE POINT 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 91.8 percent use one. As we noted in the 2016 version of this report (when that figure was 90.2 percent), we are essentially at saturation for Webinar and Webcast technologies.



LMSES SECOND MOST POPULAR TYPE OF TECHNOLOGY

Learning management systems (LMSes) are the second most popular type of technology platform, used by 66.9 percent of respondents currently offering technology-enabled or technology-enhanced learning. That's only a small increase over the 61.1 percent we reported in 2016, but it is up noticeably from 51.0 percent of respondents in the 2014 report and 32.6 percent in 2011.

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.

PRIVATE ONLINE COMMUNITY PLATFORMS ON THE RISE

In the data collected for the 2016 report, 21.7 percent of respondents currently using technology for learning said they had a learning community platform, and 20.2 percent reported plans for using such a platform in the following 12 months. Those plans have played out; in the current survey, 37.4 percent use a private online community platform, and 14.7 percent plan to use one in the year ahead.

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.

USE OF OTHER PLATFORMS MODEST

Neither of the other platforms we asked about—virtual conference platforms and learning content management systems (LCMSes)—is used by even a quarter of respondents, and projected use for the year ahead is more modest.

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. These platforms rank last out of the types we asked about—not surprising, given 64.8 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.

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 will note two tendencies.

- Organizations that offer credentials (licensure, certification, accreditation, recognition designations, certificates, etc.) or education in support of credentials, compared to those that don't, are more likely to use all

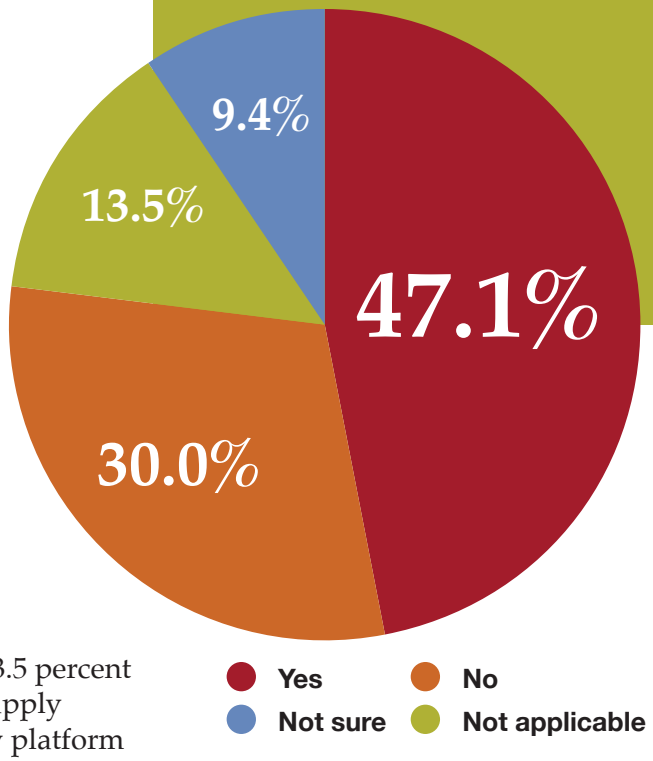
platform types asked about in the survey with the exception of private online community platforms.

- Organizations that report they have a formal, documented strategy for how technology is used to enable or enhance learning are more likely than those without such a strategy to use all platform types asked about in the survey with the exception Webinar platforms, where use is about the same between the two 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. 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.

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)? (170 responses)



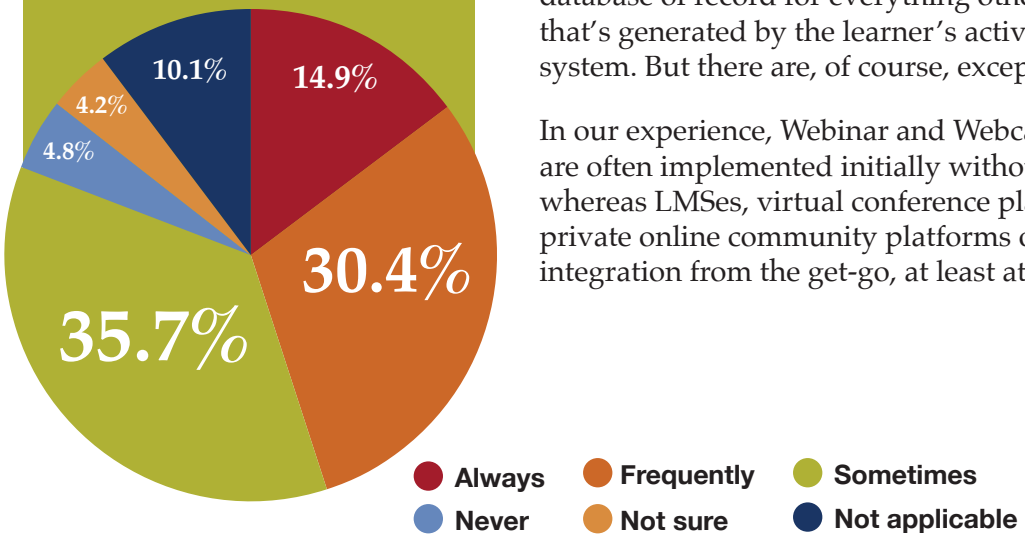
Close to half (47.1 percent) of organizations integrate (whether manually or through automation) the data they collect in their learning technology platforms with the data from other technology platforms they use, such as a membership management database or association management system. But there's still room for improvement in data integration, as 30.0 percent don't do any data integration, and another 9.4 percent aren't sure. For 13.5 percent of respondents the question doesn't apply because they don't have a technology platform dedicated to delivering or enhancing learning in place.

Data integration can provide organizations with new and improved opportunities for serving learners as staff 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.

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? (168 responses)



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 there are, of course, exceptions.

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

UNDER HALF USE DATA CONSISTENTLY FOR PRODUCT DECISIONS

Some 45.3 percent of respondents report always (14.9 percent) or frequently (30.4 percent) using the data they collect in their learning technology platforms to make decisions about the current and future educational products and services they offer. Just over a third (35.7 percent) report making use of such date only sometimes.

This is another area where we hope to see growth in the future—not using such data always or frequently to inform decision-making is a lost opportunity.

Summary

Product offerings, ranging from the familiar (Webinars) to the emerging (digital badges), and the technology platforms used to support them were the focus of this section.

We'll conclude this part of the report with some trends and opportunities we see and questions to ask of your organization as you plan your use of technology for learning.

Microlearning will continue to burgeon.

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, though MOOCs have the most limited applicability and therefore will see the slowest growth. Microlearning will continue to burgeon.

We expect virtual conferences to grow, albeit slowly, as advances in technologies improve the user experience and as conference designers learn how best to capitalize on virtual's ability to transcend some inherent drawbacks of one-and-done place-based events.

This year 92.6 percent of respondents report using technology to deliver or enhance learning. The diverse range of organizations doing so proves that 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 some way.

We expect to see adoption of private online community platforms and learning management systems approach Webinar platform levels, though it may take a decade.

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 might not otherwise interact with each other.
2. Should you branch into new products? Which emerging options, like microlearning or microcredentials, might provide more value to your learners or improve learning outcomes?

3. How might existing, publicly available technologies, such as YouTube and Twitter, enhance the value of your learning offerings? Are there new pricing models or business models these technologies 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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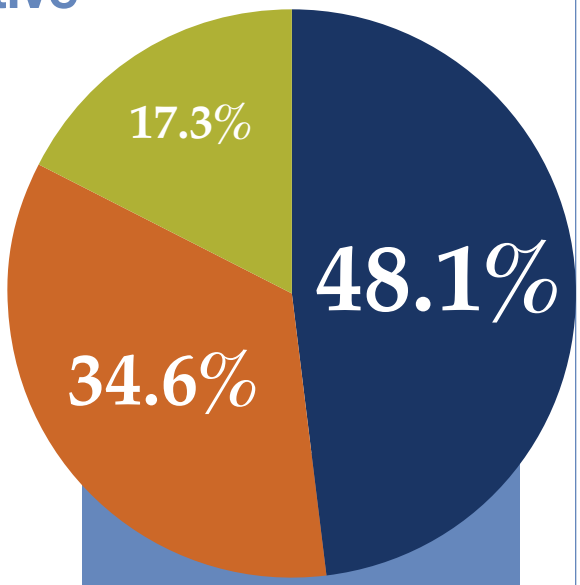
The Business Perspective

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 learning and education business and its use of technology for learning, product development and pricing processes, the role of a chief learning officer, the use of professional instructional designers, and the role of credentials.

Increased Net Revenue for Almost Half

One key way 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. 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.



Has the use of technology to enable or enhance learning increased your organization's net revenue from educational offerings? (162 responses)

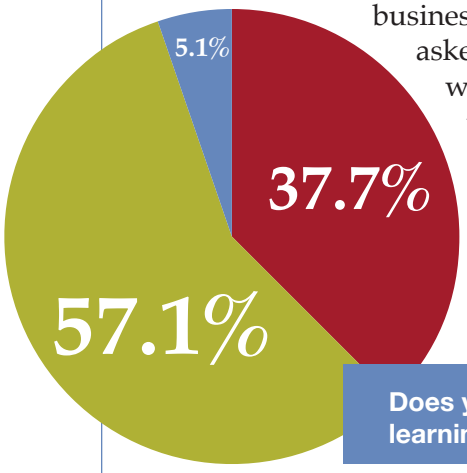
- Increased net revenue
- Didn't increase net revenue
- Not sure

Just under half (48.1 percent) of associations that use technology for learning say it's increased their organization's net revenue from educational offerings. Over half either didn't see an increase (34.6 percent) or aren't sure of the impact of their use of technology for learning on the organization's net revenue (17.3 percent).

Strategy Unpopular

This year for the first time the survey asked all respondents whether their organization has a formal, documented strategy for their learning and education business. The broad scope of this new question complements a question, asked only of organizations that use technology for learning, about whether they have a formal, documented strategy for how technology will be used for that purpose.

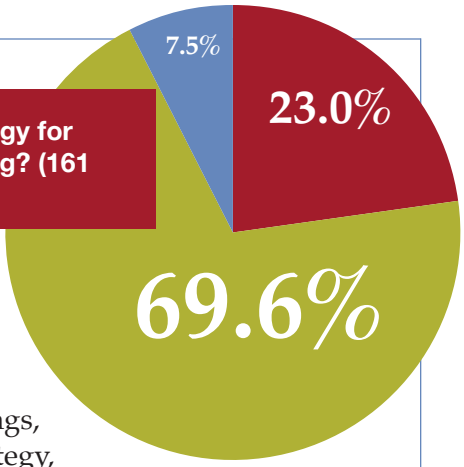
In both the broad case and the more specific, strategy is the exception, not the rule. Some 57.1 percent of survey respondents have no formal strategy in place to guide their learning and education business, and 69.6 percent have no formal strategy to govern how technology will be used to enable or enhance learning.



Does your organization have a formal, documented strategy for its learning and education business? (175 responses)

- Formal strategy
- No formal strategy
- Not sure

Does your organization have a formal, documented strategy for how technology will be used to enable or enhance learning? (161 responses)



Formal strategy No formal strategy Not sure

Strategy is associated with increased revenue—58.7 percent of organizations with a general strategy for their learning and education business report that technology has increased the net revenue of their educational offerings, compared to 42.7 percent of those without a general strategy, and 62.2 percent of those with a strategy that addresses the use of technology to support learning report that technology has increased net revenue versus only 44.6 percent of those without such a strategy.

Organizations that offer a credential or education in support of a credential (whether required or not) are somewhat more likely than those that don't offer education in support of a credential to have a strategy that addresses the use of technology to support learning (24.3 percent versus 17.1 percent) and significantly more likely to have a general strategy for their learning and education business (43.8 percent versus 22.7 percent).

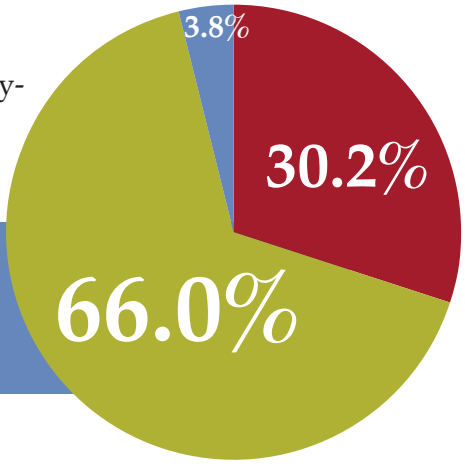
That only a slice of associations are deliberate and formal about strategy for both their learning and education business overall and their use of technology for learning points to a huge opportunity for growth. That those that offer education in support of a credential are much more likely to have a strategy for their learning business points to the value of a strategy in higher-stakes education.

Strategy should start broadly and cascade down to ensure that more specific applications fit with the overarching context. Given that, we expect to see strategies for learning and education businesses grow before we see growth in strategies aimed at the use of technology for learning. But we think the more granular strategy will increase in importance in the years ahead as technology as part of learning becomes expected. Organizations will have to pursue the use of technology for learning and conduct their learning and education business more strategically or risk losing learners—and members—to competition that sees the opportunity in educational products delivered or enhanced by technology.

Like Strategy, Processes Unpopular

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

Does your organization have a formal, documented product development process that includes its technology-enabled and technology-enhanced education products? (159 responses)



Yes No Not sure

TWO-THIRDS HAVE NO FORMAL 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. Two-thirds (66.0 percent) of respondents' organizations don't have a formal, documented product development process that includes technology-enabled and technology-enhanced education products.

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 from important stakeholders, that input may be biased if committees or the board don't represent the full range of learners the organization can reach. And staff tend to hear from squeaky-wheel members, whose opinions may wind up overemphasized.

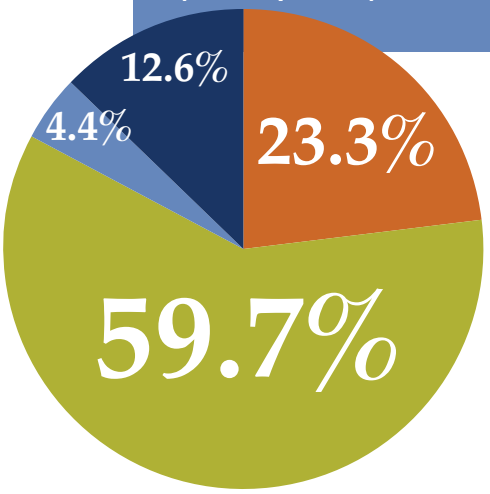
Some organizations mine evaluation data collected from current learners and survey the membership base to gauge interest in particular educational offerings or topics. While such feedback comes from the horse's mouth, it still has limitations—the biggest being the gulf between what people say they'll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

With over half (59.7 percent) of respondents lacking a formal, documented process for setting prices that includes their technology-enabled and technology-enhanced education products, pricing is ripe for improvement.

Does your organization have a formal, documented process for setting prices that includes its technology-enabled and technology-enhanced education products? (159 responses)



Yes · No · Not sure · Not applicable

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.

Modest Uptick in Professional Instructional Design

For organizations currently using technology for learning, 59.2 percent use professional instructional designers—a notch up but in the same ballpark as the previous two reports (52.9 percent in 2016 and 52.0 in 2014). While we're pleased to see a modest uptick, it remains concerning (if not surprising) to us that more organizations don't make use of professionals.

Having a strategy for the learning and education business in place correlates to a higher use of professional instructional designers—79.4 percent of organizations with a strategy for their education business use professional instructional designers compared to 46.7 percent of those without such a strategy.

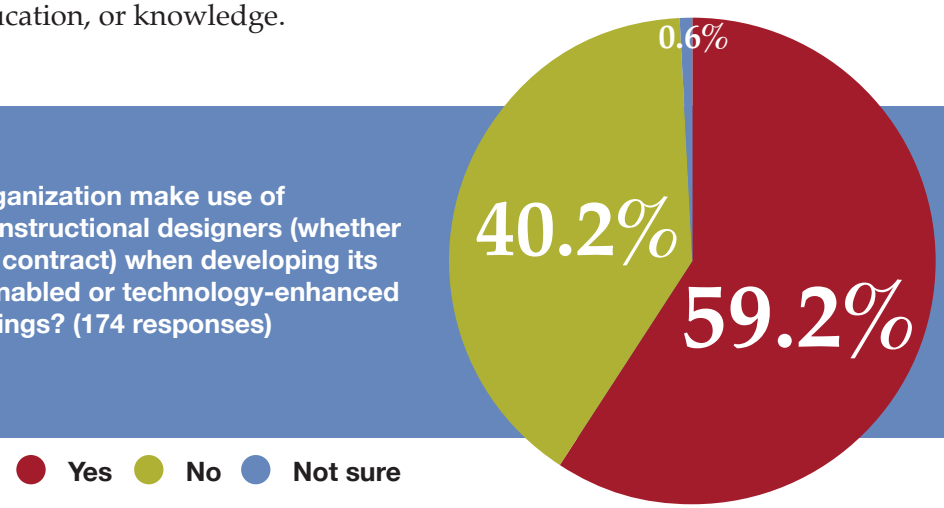
Organizations that rate their use of technology for learning as very successful are more likely to use professional instructional designers (76.7 percent versus the 59.2 percent across all respondents using technology for learning), and organizations with a chief learning officer or a similar position are more likely to make use of professional instruction designers than those without a CLO (72.2 percent compared to 56.2 percent).

And, perhaps not surprisingly, organizations with bigger budgets are more likely to invest in professional instructional designers (72.4 percent of organizations with annual budgets over $5 million compared to 50.0 percent of organizations with budgets of $5 million or less).

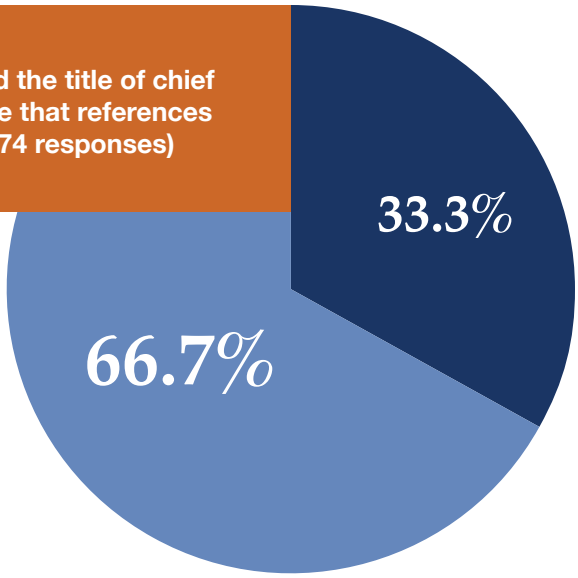
Organizations with CLOs More Likely to Have a Learning and Education Strategy

A full third (33.3 percent) of respondents say someone at their organization holds the title of chief learning officer (CLO) or a similar C-level title that references learning, education, or knowledge.

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? (174 responses)



Does anyone at your organization hold the title of chief learning officer or a similar C-level title that references learning, education, or knowledge? (174 responses)



This is a solid showing but leaves ample room for more top-level education staff at organizations where learning and education factor heavily into the mission and vision.

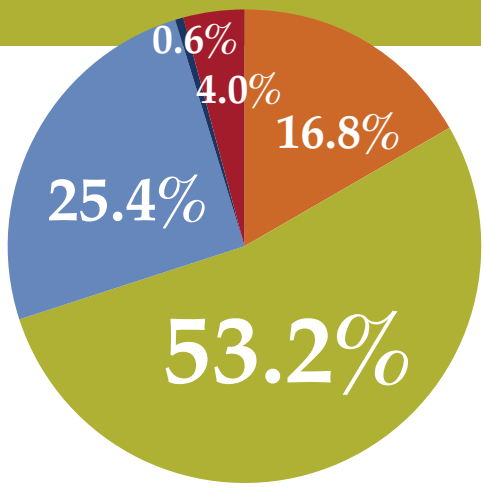
Organizations with a CLO or similar position are significantly more likely to have a strategy for their learning and education business than organizations without someone in that role (56.9 percent versus 28.4 percent).

This correlation makes sense, though we're left to wonder if CLOs push the adoption of strategy or if strategy reveals the need for a CLO to lead the learning and education business. Whatever the answer to this chicken-or-egg question, we hope to see both more CLOs and more strategic and learning-centered decisions in organizations.

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

Does your organization offer a credential or provide education in support of a credential in the field or industry you serve? (173 responses)
Credentials include licensure, certification, accreditation, recognition designations, and certificates.



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 the market value of credentials ahead of whatever operational burdens the support of credentials may create. Among the respondents to our survey, 70.0 percent offer a credential or provide education to support a credential (16.8 percent for a credential required in their field or industry and 53.2 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 overarching and specific strategies 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 plan your use of technology for learning.

Under a quarter 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 process to guide their learning and education business—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. Currently, the 59.2 percent of organizations that use professional instructional designers can claim that as a differentiator, but we believe the use of professional designers, whether as in-house staff or contract workers, will become increasingly common 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-—and where it doesn't exist now, it will appear. Credentials can be a way 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 third 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 not, what's making learning technology a cost, rather than a revenue, center?
2. Do you have a formal strategy for your learning and education business and one that covers 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 hope to see more associations develop and implement strategies to guide their learning and education business and their use of technology for learning. Gut-level governance can work, but more consistent approaches will reap bigger benefits.

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Platform requirements for trade and professional associations differ from those of corporations, and the vast majority of platform vendors simply don't understand or meet these requirements.

We've done the work to find the ones that do and assembled them into the free Tagoras Platform Directory for Learning Businesses™.

Access the directory to save time—and gain peace of mind.

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The Performance Perspective

Even given the level of statistical error that may be present in a non-probability survey, the combined survey results behind this report and the four previous versions make it clear that technology-enabled and technology-enhanced learning has grown over the years and now can truly be seen as a mainstay in the sector, where it is 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.

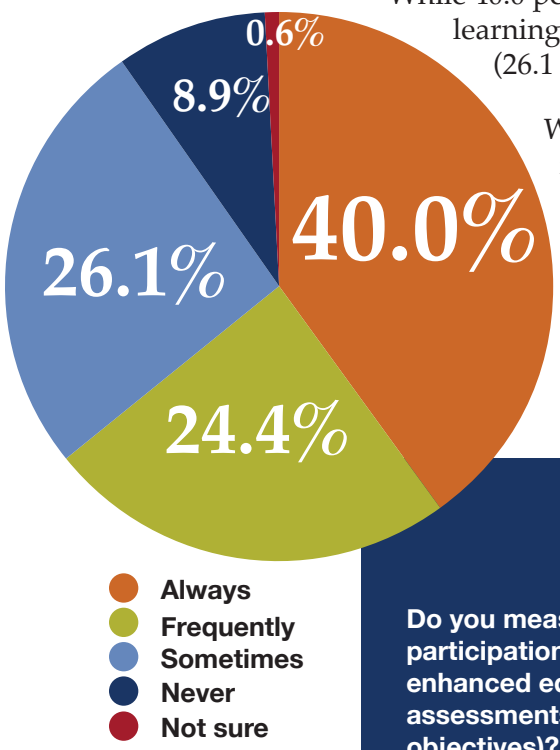
In this section, we look at organizations' measurement of impact, their self-reported success and satisfaction, and what they have to say about the future of learning.

Learning Not Measured Often—or Long—Enough

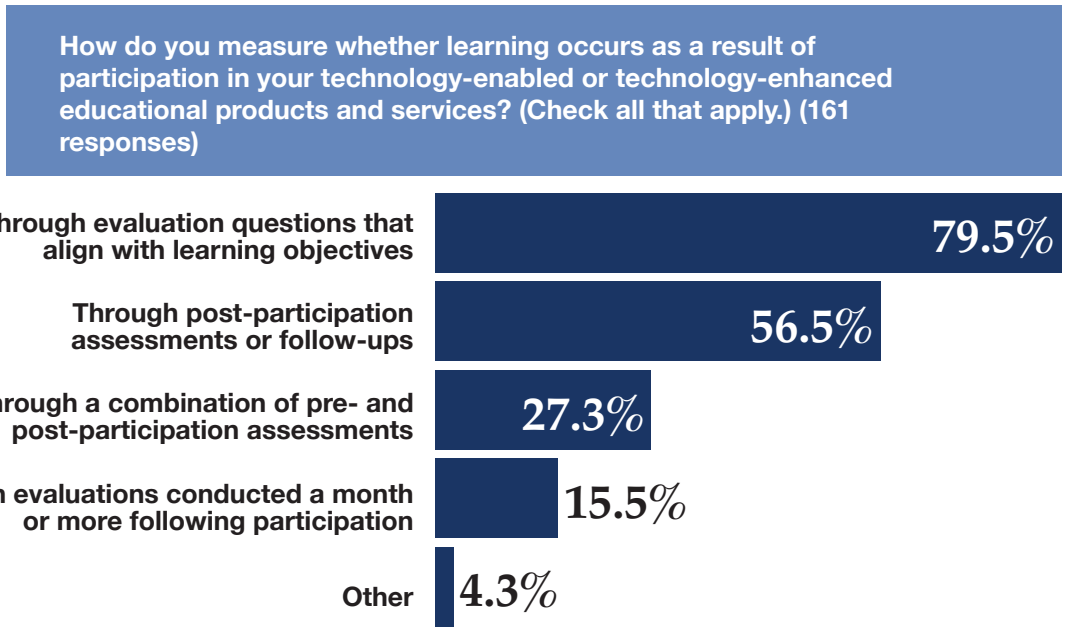
The survey asked respondents if they measure whether learning occurs as a result of participation in their technology-enabled or technology-enhanced educational products and services.

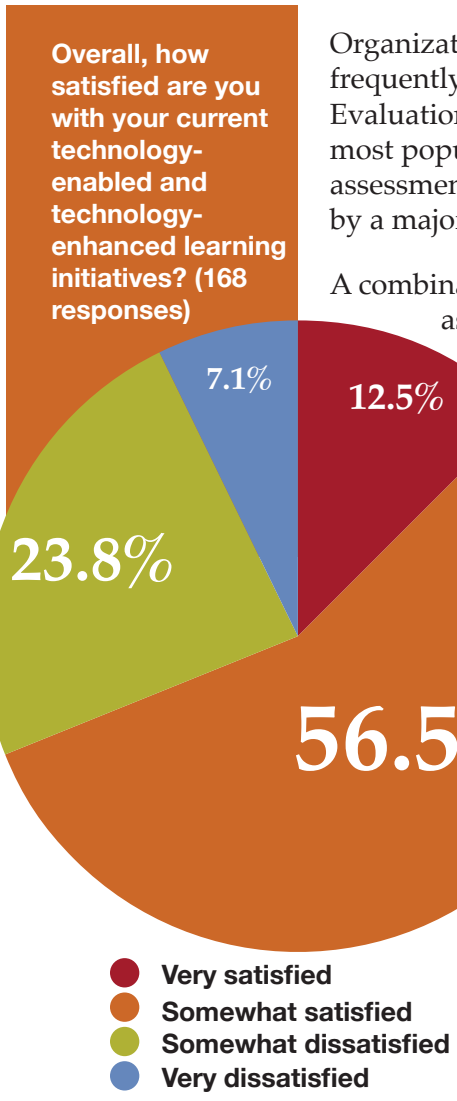
While 40.0 percent report always measuring whether learning happens, over a third do it only sometimes (26.1 percent) or never (8.9 percent).

We hope to see the percentage of organizations frequently, if not always, measuring learning grow. Such measurement is 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.



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)? (180 responses)
Over a third measure whether learning happens only sometimes or never.



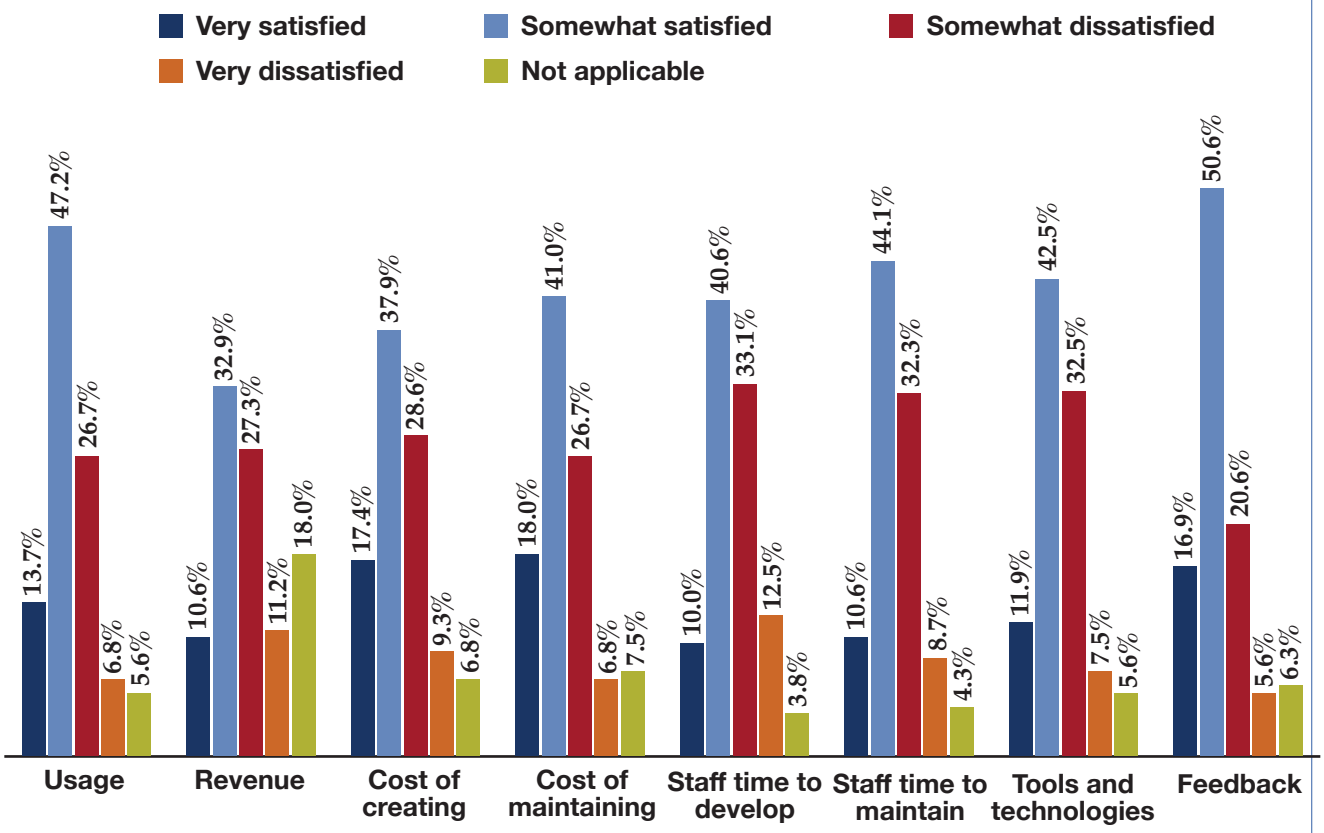


Organizations indicating they measure learning sometimes, frequently, and always were asked how they measure learning. Evaluation questions that align with learning objectives are the most popular method (used by 79.5 percent). Post-participation assessments or follow-ups were the only other approach used by a majority (56.5 percent).

A combination of pre-participation and post-participation assessments (think pre-tests and post-tests, for example) are used by 27.3 percent of respondents. Only 15.5 percent make use of evaluations conducted a month or more following participation—this despite the fact that many educational opportunities offered by associations gun for long-term changes in behavior and the chance of forgetting learning if it's not reinforced periodically is near certain.

Satisfied With Most Aspects Except Revenue

We asked associations whether they're satisfied overall with their current technology-enabled and technology-enhanced learning initiatives, and 69.0 percent report being either somewhat (56.5 percent) or very (12.5 percent) satisfied.



Overall, how satisfied or dissatisfied are you with your current technology-enabled or technology-enhanced learning initiatives in terms of these specific items? (162 responses)
Respondents are most satisfied with the feedback from participants and least satisfied with revenue.

However, when it comes to specific aspects of technology-enabled and technology-enhanced learning, the numbers of the very and somewhat satisfied are at least slightly lower across the board. Revenue, the biggest area of dissatisfaction, is the only area in which a majority aren't satisfied with their technology-enabled and technology-enhanced learning initiatives; only 43.5 percent of respondents are very or somewhat satisfied with revenue.

The area of highest satisfaction is feedback from participants (67.5 percent are very or somewhat satisfied). Usage, such number of course enrollments, ranks second in satisfaction (60.9 percent are very or somewhat satisfied), and the financial cost of supporting and maintaining the initiatives follows not far behind (59.0 percent are very or somewhat satisfied).

In general, these results show that technology for learning is well received and well used by members and customers, but many organizations still struggle to get the desired revenue out of the offerings.

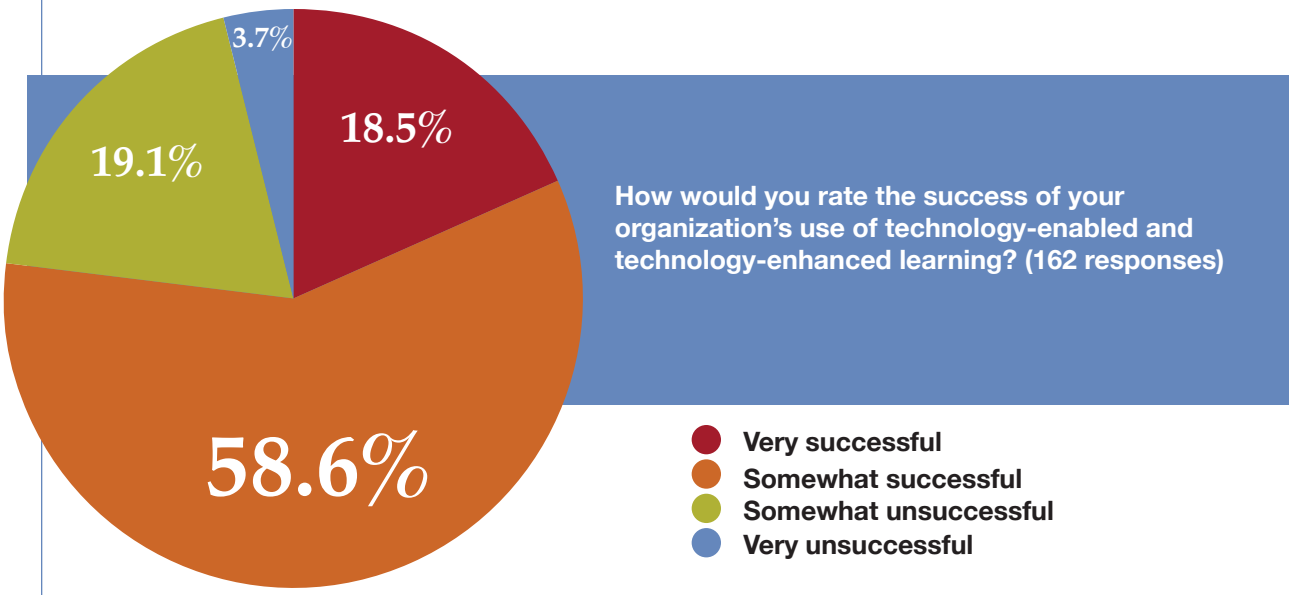
Portrait of Success

Respondents rate themselves more successful than satisfied—77.1 percent characterize their organization's use of technology-enabled and technology-enhanced learning as somewhat (58.6 percent) or very (18.5 percent) successful.

We found organizations that consider themselves very successful are significantly more likely than all respondents using technology to enable or enhance learning to do these things.

- Report increased net revenue from their education offerings as a result of their use of technology for learning (76.7 percent versus 48.1 percent).
- Offer self-paced online courses (93.3 percent versus 72.8 percent), facilitated online courses (53.3 percent versus 33.9 percent), and at least some mobile learning (66.7 percent versus 49.7 percent).
- Make use of professional instructional designers (76.7 percent versus 59.2 percent).
- Integrate data they collect in the technology platforms for learning with data from other technology platforms they use (63.3 percent versus 47.1 percent), and always or frequently use the data they collect in their learning technology platform to make decisions about current and future educational products and services (66.7 percent versus 45.3).
- Have a formal, documented strategy for their learning and education business (60.0 percent versus 37.7 percent of all survey respondents) and a strategy for how technology will be used to enable or enhance learning (37.9 percent versus 23.0 percent of respondents using technology for learning).
- Have a product development process (53.3 percent versus 30.2 percent) and a process for setting prices (40.0 percent versus 23.3 percent) that include their technology-enabled and technology-enhanced education products.

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 is likely to continue to increase. In these fast-paced times, we believe a few core characteristics will distinguish the truly successful from the rest.

- A commitment to listening continually to members and customers 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 thought of themselves
- 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 organization'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 that they plan to begin doing in the next 12 months. The 126 responses are varied. Here we offer a sampling of what's on tap for the coming year in the words of survey respondents.

Some responses focus on new ***technology*** investments or revamping existing platforms:

- "We are developing requirements and a RFP [request for proposal] for a new LMS."
- "We are planning to develop and offer a mobile app so that [our members] can learn and reinforce learning while on the run (trains, buses, home taking a bath, etc.)."
- "Update the look for the LMS...and make all mobile responsive."

Other responses focus on implementing or improving ***strategy and process***:

- "We are currently developing a strategic plan/theory of change for our continuing education initiatives, which...will inform future efforts."
- "We are embarking on a revised content strategy and product development strategy that will help us develop more impactful offerings more rapidly and more profitably."
- "Creating documented processes for the development cycle."

Plans for developing new or improved ***products and services*** figure in other comments:

- "We will be rolling out two microlearning courses that result in a credential or badge. We are also looking at increased use of video for certain microlearnings."

- "Offering self-paced courses for professionals in lower- and middle-income countries through a new LMS."
- "Provide content-rich products that create return customers, which leads to membership."

Some responses touch on ***marketing***, both big-picture and more tactical concerns:

- "Harvest user data to make more informed decisions."
- "Building virtual offerings for members via partnerships with other groups/organizations. We're too small to build on our own and are looking for organizations to collaborate with."
- "Developing a better marketing plan."
- "Subscription-based learning products. Increasing B2B [business-to-business] products and sales strategies."
- "Follow-up with learners to gather Level 3 evaluation data and potentially Level 4." (In the Kirkpatrick Model for evaluating the effectiveness of a learning experience, Level 3 Behavior looks at whether learners apply what they learned on the job, and Level 4 Results studies the broader impact of the learning experience, often on the organization that employs the learners.)

Amid the many mentions of specific initiatives and plans are comments that highlight the ***uncertainty and challenges*** some organizations face.

- "We have many ideas, but the sales revenue needs to pick up before we can implement any more ideas."
- "Unsure [about our plans for technology for learning]—we still need to work out how we are managing what we have now."
- "There is no real direction due to limited staff."
- "We are working to make the business case for an LMS/LCMS to support both technology-enabled and technology-enhanced learning. Without this investment, it is hard to be able to do more than we currently are with our hotchpotch of systems and manual processes."
- "We are not thinking of the future. We only consider what is needed now, and the methods we choose to deliver content are too traditional. There's no formal discussion on developing microlearning or mobile courses."

Other organizations see exciting ***possibilities and opportunities***, even if capitalizing on them takes time.

- "After we get our legacy [classroom] courses up and running properly as e-learning courses, we'll get into digital badging, microlearning, flipped classrooms, video, virtual conferences, and many of the other exciting opportunities now available."
- "Change is slow, but we are on the right path to move forward."

While there's room for improvement in associations' use of technology for learning and while change may be slow, many organizations clearly are on the right path, moving forward in their use of technology, leading learning in the fields and professions they serve, and, in doing so, shaping the world in which we all live.

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 Virtual Events* and *Social Learning Trends in the Association Space*.

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, 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 served as the poet laureate of Carrboro, North Carolina, from 2013 to 2016.

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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Through two world-class online learning platforms, CrowdWisdom™ and Freestone™, Community Brands enables live and on-demand education allowing you to deliver content when and where it's needed, track completions and certificates, and provide seamless, personalized educational experiences to organizations and learners. CrowdWisdom is an adaptive and intuitive full-service Enterprise LMS platform designed for professional education and tailored content delivery. Freestone empowers associations to deliver interactive and online webinars, webcasts, and on-demand courses as part of a comprehensive continuing education program.

Appendix: Survey Data

We're grateful to the hundreds of organizations that took the time between May 2 and May 31, 2017, to participate in the online survey of association learning and technology. Of the 237 survey responses recorded, 203 qualified and are included in the results presented in this appendix. Note that is a non-statistical survey.

All Respondents

The following questions were asked of all respondents.

ASSOCIATION MANAGEMENT COMPANY

Do you work for your association through an association management company? (203 responses)

Yes	10.8%
No	89.2%

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? (203 responses)

Yes	92.6%
No, but plan to in the next 12 months	6.9%
No, and don't plan to in the next 12 months	0.5%
Not sure	0.0%

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? (174 responses)

Yes	33.3%
No	66.7%

STRATEGY FOR LEARNING BUSINESS

Does your organization have a formal, documented strategy for its learning and education business? (175 responses)

Yes	37.7%
No	57.1%
Not sure	5.1%

GEOGRAPHIC FOCUS

Which best describes the geographic focus of your organization (i.e., which best indicates the areas in which you actively solicit membership)? (174 responses)

Single-community or municipality focus	0.6%
Multiple-community focus within one state	4.0%
Single-state or province focus	14.9%
Multi-state or multi-province focus	2.3%
National focus	46.6%
International focus	31.6%

TYPE OF ORGANIZATION

Which of the following best characterizes your organization? (175 responses)

Charitable or philanthropic organization	5.1%
Trade association	30.9%
Professional society	48.0%
Educational institution	3.4%
User group or customer community	1.7%
Other	10.9%

AUDIENCE

How do you characterize the primary audience your organization serves? (172 responses)

Physicians	11.0%
Non-physician healthcare professionals	15.7%
Accountants	2.9%
Non-accounting financial professionals (e.g., those working in banking or insurance)	4.1%
Attorneys	3.5%
Skilled trade professionals (e.g., electricians or plumbers)	5.2%
Association executives	2.9%
K-12 educators	1.7%
College or university educators	4.1%
Other	48.8%

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. (173 responses)

Yes, and the credential is required	16.8%
Yes, but the credential is not required	53.2%
No	25.4%
Not sure	0.6%
Other	4.0%

INDIVIDUAL MEMBERSHIP

How many active individual members does your organization currently have? (172 responses)

1,000 or less	9.9%
1,001 to 5,000	26.2%
5,001 to 10,000	16.3%
10,001 to 25,000	13.4%
25,001 to 50,000	9.9%
50,001 to 100,000	5.2%
More than 100,000	5.8%
We have only organizational members.	13.4%

ORGANIZATIONAL MEMBERSHIP

How many active organizational members does your organization currently have? (173 responses)

Less than 100	15.0%
101 to 200	14.5%
201 to 500	11.6%
501 to 1,000	11.6%
1,001 to 5,000	9.8%
More than 5,000	6.9%
We have only individual members.	30.6%

OVERALL STAFF

How many paid staff does your organization currently have? (170 responses)

Mean	489.9
Median	24.0

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? (172 responses)

Mean	9.2
Median	3.0

BUDGET SIZE

What is your organization's annual budget (in U.S. dollars)? (160 responses)

Less than $100,000	0.0%
$100,001 to $500,000	4.4%
$500,001 to $1,000,000	10.6%
$1,000,001 to $5,000,000	35.0%
$5,000,001 to $10,000,000	15.6%
$10,000,001 to $25,000,000	15.6%
$25,000,001 to $50,000,000	6.9%
$50,000,001 to $100,000,000	4.4%
More than $100,000,000	7.5%

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? (185 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)	72.8%	16.7%	9.4%	1.1%
Facilitated online courses (excluding Webcasts or Webinars)	33.9%	20.9%	37.3%	7.9%
Real-time Webcasts or Webinars	90.0%	3.9%	5.0%	1.1%
Recorded or on-demand Webcasts or Webinars	91.4%	4.9%	3.2%	0.5%
Blended learning (e.g., technology-based programs combined with classroom-based learning)	38.9%	20.6%	33.7%	6.9%

EMERGING TECHNOLOGY-ENABLED AND TECHNOLOGY-ENHANCED PRODUCTS

Which of the following does your association provide or plan to provide? (184 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)	6.7%	5.6%	73.3%	14.4%
Flipped classes	13.3%	14.4%	46.7%	25.6%
Gamified learning	9.9%	20.4%	56.4%	13.3%
Digital badges or microcredentials	14.8%	25.3%	42.9%	17.0%
Microlearning (i.e., very brief learning experiences)	30.1%	36.1%	26.2%	7.7%

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? (183 responses)

Yes	49.7%
No, but plan to in the next 12 months	25.7%
No, and don't plan to in the next 12 months	20.2%
Not sure	4.4%

SUSTAINING LEARNING

Are you using technology to repeat, reinforce, or sustain learning after participants complete an educational product or service? (184 responses)

Yes	33.7%
No, but plan to in the next 12 months	27.2%
No, and don't plan to in the next 12 months	29.3%
Not sure	9.8%

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? (179 responses)

Yes	16.2%
No, but plan to in the next 12 months	12.3%
No, and don't plan to in the next 12 months	64.8%
Not sure	6.7%

LIVE STREAMING

Does your organization provide live streaming of content presented at a place-based conference? (178 responses)

Yes	27.5%
No, but plan to in the next 12 months	14.0%
No, and don't plan to in the next 12 months	53.4%
Not sure	5.1%

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)? (180 responses)

Always	40.0%
Frequently	24.4%
Sometimes	26.1%
Never	8.9%
Not sure	0.6%

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.) (161 responses)

Through evaluation questions that align with learning objectives	79.5%
Through post-participation assessments or follow-ups	56.5%
Through a combination of pre-participation and post-participation assessments	27.3%
Through evaluations conducted a month or more following participation	15.5%
Other	4.3%

USE OF SPECIFIC TECHNOLOGIES FOR LEARNING

Which of the following technologies does your organization use or plan to use as part of its learning offerings? Please only indicate technologies that are explicitly a part of your learning initiatives. For example, if your organization has a Facebook presence, but does not use it as part of its learning offerings, do not select that item. (171 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	11.2%	5.6%	75.2%	8.1%
Facebook	18.3%	4.3%	70.7%	6.7%
Google+	5.6%	0.6%	86.3%	7.5%
Twitter	17.9%	4.9%	71.6%	5.6%
Skype	4.4%	6.3%	78.6%	10.7%
YouTube	30.7%	13.9%	47.6%	7.8%
SlideShare	2.5%	3.8%	81.8%	11.9%
Pinterest	1.3%	1.3%	88.7%	8.8%
Instagram	2.5%	3.8%	84.3%	9.4%

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? (174 responses)

Yes	59.2%
No	40.2%
Not sure	0.6%

TECHNOLOGY PLATFORMS FOR LEARNING

Does your organization use a technology platform dedicated to delivering or enhancing learning? (173 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)	66.9%	14.8%	15.4%	3.0%
Learning content management system (LCMS)	17.0%	11.3%	59.7%	11.9%
Webinar or Webcast platform	91.8%	2.4%	3.5%	2.4%
Virtual conference platform	22.8%	8.6%	61.1%	7.4%
Private online community platform	37.4%	14.7%	39.9%	8.0%

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)? (170 responses)

Yes	47.1%
No	30.0%
Not sure	9.4%
Not applicable (we don't have a technology platform dedicated to delivering or enhancing learning)	13.5%

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? (168 responses)

Always	14.9%
Frequently	30.4%
Sometimes	35.7%
Never	4.8%
Not sure	4.2%
Not applicable (we don't have a technology platform dedicated to delivering or enhancing learning)	10.1%

OVERALL SATISFACTION WITH TECHNOLOGY-BASED LEARNING

Overall, how satisfied are you with your current technology-enabled and technology-enhanced learning initiatives? (168 responses)

Very satisfied	12.5%
Somewhat satisfied	56.5%
Somewhat dissatisfied	23.8%
Very dissatisfied	7.1%

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? (162 responses)

	Very satisfied	Somewhat satisfied	Somewhat dissatisfied	Very dissatisfied	Not applicable
Usage (e.g., number of course enrollments)	13.7%	47.2%	26.7%	6.8%	5.6%
Revenue (e.g., from course sales)	10.6%	32.9%	27.3%	11.2%	18.0%
Financial cost of creating the initiatives	17.4%	37.9%	28.6%	9.3%	6.8%
Financial cost of supporting and maintaining the initiatives	18.0%	41.0%	26.7%	6.8%	7.5%
Staff time required to develop the initiatives	10.0%	40.6%	33.1%	12.5%	3.8%
Staff time required to maintain the initiatives	10.6%	44.1%	32.3%	8.7%	4.3%
Tools and technologies used to develop and maintain the initiatives	11.9%	42.5%	32.5%	7.5%	5.6%
Feedback from participants in the initiatives	16.9%	50.6%	20.6%	5.6%	6.3%

SUCCESS WITH TECHNOLOGY-BASED LEARNING

How would you rate the success of your organization's use of technology-enabled and technology-enhanced learning? (162 responses)

Very successful	18.5%
Somewhat successful	58.6%
Somewhat unsuccessful	19.1%
Very unsuccessful	3.7%

INCREASED NET REVENUE

Has the use of technology to enable or enhance learning increased your organization's net revenue from educational offerings? (162 responses)

Yes	48.1%
No	34.6%
Not sure	17.3%

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? (161 responses)

Yes	23.0%
No	69.6%
Not sure	7.5%

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? (159 responses)

Yes	30.2%
No	66.0%
Not sure	3.8%

PRODUCT PRICING PROCESS

Does your organization have a formal, documented process for setting prices that includes its technology-enabled and technology-enhanced education products? (159 responses)

Yes	23.3%
No	59.7%
Not sure	4.4%
Not applicable (we don't charge for technology-enabled and technology-enhanced offerings)	12.6%