

E-LEARNING IN NONPROFITS AND ASSOCIATIONS

2006 NONPROFIT AND ASSOCIATION E-LEARNING SURVEY RESULTS



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GENERAL FINDINGS

The 2006 Nonprofit and Association E-learning Survey represents a continuation of the work begun in 2004 with the first comprehensive survey of e-learning use by associations and other nonprofit organizations. From September through October 2006, 258 individuals responded to the survey, offering insights into how nonprofits and associations develop and use e-learning. Thank you to our survey respondents for your help in conducting this research.

CONTINUED GROWTH GENERALLY AND IN MAJOR SEGMENTS

Responses from 2004 through 2006 indicate a general upward trend in e-learning adoption across all nonprofit organizations and particularly among organizations that identify themselves as 501(c)(3) nonprofits, membership associations, or educational institutions. (Note: Respondents may choose one or all of these categories in indicating the type of organization with which they are affiliated.) From 2004 to 2006, the percentage of all survey respondents indicating current usage of e-learning grew from 40 to 53 percent. Among 501(c)(3) organizations, the percentage grew from 36 to 51 percent; among membership associations, from 40 to 55 percent; and among educational institutions, from 49 to 58 percent. Among other segments tracked in the survey, management and technical services organizations show a decline in usage after a growth spurt last year, but nonetheless show overall growth in usage from 33 to 45 percent between 2004 and 2006.

GREATER RESOURCE ALLOCATION FOR EDUCATION

Slightly more than 56 percent of survey respondents indicated their organization's general budget for training and education will increase in the coming year—nearly a 12 percent jump over 2005. Approximately 4 percent of respondents indicated an increase in spending specific to e-learning in the coming year.

FOCUS ON PROFESSIONAL DEVELOPMENT, AFFILIATE TRAINING, REVENUE

In 2004, when asked about the purpose of e-learning in their organizations, nearly 70 percent of respondents indicated that e-learning would be used for staff training. That percentage has trended downward, reaching 56 percent in 2006. At the same time, the number of respondents indicating that e-learning would be used for professional development for clients or members has risen from 52 to approximately 68 percent, and those indicating that e-learning would be used for affiliate or chapter training has risen from 34 to 41 percent.

With respect to financial goals, an increasing percentage of respondents indicate that e-learning must be self-sustaining and profitable. In 2004, 21 percent of respondents indicated this requirement. By 2006, the number had grown to approximately 32 percent. At the same time, the percentage of respondents indicating that e-learning must save their organizations money declined from approximately 46 percent to 38 percent.

It is important to note that the trends with respect to purpose and financial goals are probably not unrelated. Organizations that focus on training clients and members tend to be

more concerned with revenue generation, while those focused on training staff tend to be focused on cost savings. The significant rise in participation by membership organizations—which tend to focus on providing revenue-generating education and training for members—in the survey since 2004 has most likely contributed to the changes in percentages in these areas.

POTENTIAL GROWTH IN FACILITATED, BLENDED FORMATS

While use or planned use of the most popular e-learning format, self-paced e-learning, continued to grow in 2006, survey responses also indicate rising interest in asynchronous facilitated, live facilitated, and blended (a combination of classroom and online formats) e-learning approaches. The number of respondents indicating they are using or plan to use asynchronous facilitated or live facilitated e-learning rose approximately 7 percent and 6 percent, respectively, from 2005. Those indicating they are using or planning to use a blended learning approach rose approximately 17 percent. It is worth noting, however, that among organizations that have an active e-learning program in place, the percentage of respondents indicating use of facilitated asynchronous and live formats actually declined while those reporting usage of blended approaches rose only 2 percent.

GROWTH IN IMPORTANCE OF LEARNING MANAGEMENT SYSTEMS

Based on what appeared to be a growing awareness of learning management systems (LMS) as well as a general increase in plans to adopt an LMS, we suggested in our 2005 survey report that the importance of learning management systems as a part of nonprofit e-learning initiatives might be on the rise. Responses to the 2006 survey support this suggestion. The percentage of respondents indicating usage of an LMS more than doubled from 2005, and the percentage of respondents indicating that they do not know what an LMS is dropped by nearly 20 percent. Additionally, the number of respondents who indicated that integration between an LMS and other popular types of nonprofit-oriented software would be either highly or somewhat valuable rose from approximately 53 to 67 percent.

POTENTIAL GROWTH AMONG SMALLER AND LOCAL ORGANIZATIONS

We indicated in 2005 that large organizations continued to be the ones most likely to use e-learning. While that continues to be true, 2006 survey responses indicate a rise in e-learning usage of approximately 17 percent among organizations with budgets from \$500,000 to \$2 million. Additionally, among respondents that identified their organization's geographical focus as local, the percentage using e-learning also jumped 17 percent. It is too early to tell if these trends will hold, but it may be that the increasing ease of implementation and decreasing costs associated with e-learning are opening the doors to adoption by a broader group of organizations.

M E T H O D O L O G Y

The survey was conducted from September 5, 2006, through October 31, 2006, using a Web-based survey form. During this time, the survey was open to any potential respondent. To generate as many responses as possible, the Nonprofit Technology Enterprise Network (N-TEN) and LearnSomething (formerly Isoph), the sponsoring organizations, conducted publicity and e-mail campaigns to reach an array of potential nonprofit and association respondents. In addition, to provide an incentive for completing the survey, the sponsoring organizations held a drawing, in which one randomly chosen respondent received a copy of Rapid E-learning Studio from Articulate. A total of 258 responses to the survey were received, excluding any duplicates or submissions in which no questions were answered.

It is important to note that the results of an Internet-based survey will have a bias towards those organizations that already have access to and are comfortable with Internet technologies. Likewise, we can also assume that organizations with an interest in e-learning were more likely to notice and complete the survey. Finally, while we attempt to attract a representative cross-section of the nonprofit community with respect to organizational size and geographic focus, there has been a discernible trend since the introduction of the survey in 2004 towards greater response from larger, national and international organizations. We plan to increase efforts to reach smaller regional and local organizations in the next iteration of the survey.

Since this survey was not conducted with a random sample, readers should not focus on the exact percentages found in the responses. However, given the size of the sampling, we are confident in the overall direction and broad findings presented in this report.

SPONSORING ORGANIZATIONS

ISOPH AND LEARNSOMETHING

Isoph has been a pioneer in working with nonprofits, associations, and other mission-based organizations to develop successful, sustainable online learning programs. In late 2005, the company became an operating division of its longstanding partner, LearnSomething.

LearnSomething offers its nonprofit and association clients a comprehensive set of tools and services to drive non-dues revenue and member satisfaction through e-learning. Key to typical initiatives is Isoph Blue™, a hosted database-driven e-learning platform designed for seamless connectivity with major association management systems. Clients use Isoph Blue to deliver custom e-learning content, continuing education and certification programs, and focused off-the-shelf courses to their diverse stakeholders.

LearnSomething's clients include the Society for Human Resource Management, the American Nurses Credentialing Center, the American College of Radiology, the Food Marketing Institute, the National Association of Chain Drug Stores, the American Pharmacists Association, the American Correctional Association, the American Red Cross, America's Second Harvest, the National Wildlife Federation, and WebJunction, a project of the Bill & Melinda Gates Foundation.

To learn more about LearnSomething, visit <http://www.learnsomething.com>. To learn more about its Isoph division, visit <http://www.isoph.com>.

N - T E N

The Nonprofit Technology Enterprise Network is a membership association that works to support the diverse people and organizations who help nonprofits understand and employ technology effectively.

N-TEN programs include the annual Nonprofit Technology Conference, a series of regional conferences throughout North America, TechFinder (an online directory of technology service providers for nonprofits), 501 Tech Clubs (nonprofit technology networking groups) in a number of communities, and a range of online resources to help nonprofits make more effective use of technology.

To learn more about N-TEN, visit <http://www.nten.org>

For a copy of the full survey results, send an e-mail to
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