

E-LEARNING IN NONPROFITS AND ASSOCIATIONS

2004 NONPROFIT AND ASSOCIATION E-LEARNING SURVEY RESULTS



IsophTM
learning *to change the world*

<http://www.isoph.com>

info@isoph.com

866.969.9260



<http://www.nten.org>

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KEY FINDINGS

The 2004 Nonprofit and Association E-learning Survey provides the most complete data to date on mission-based organizations' use of e-learning technologies. In August and September 2004, 697 individuals responded to the survey, offering a number of important insights into how nonprofits and associations are developing and using e-learning. Thank you to our survey respondents for their help in conducting this research.

WIDESPREAD USE OF E-LEARNING

Overall, the survey shows wide and growing adoption of e-learning among nonprofit organizations and associations. More than 54 percent of total respondents either use e-learning or plan to in the next 12 months. Another 36 percent of respondents indicate interest in e-learning, but have no definite plans to implement a program.

VAST MAJORITY OF ORGANIZATIONS SATISFIED

More than 88 percent of respondents indicated they were very or somewhat satisfied with their e-learning programs. Another 10 percent reported that they were somewhat dissatisfied, while only 2 percent were very dissatisfied with their e-learning programs.

WIDE VARIETY OF E-LEARNING USES

Reflective of their diverse stakeholders, nonprofits and associations use e-learning for multiple purposes and audiences:

- 67 percent use e-learning for staff training.
- 52 percent use e-learning for public workshops.
- 34 percent use e-learning for volunteer training.
- 34 percent use e-learning for training for affiliated organizations or chapters.
- 24 percent use e-learning for advocacy and issue education for donors or the general public.

SELF-PACED E-LEARNING MOST COMMON

While on-demand, self-paced e-learning is the most common e-learning format, most organizations use a variety of formats. Among respondents reporting they use e-learning:

- 67 percent use on-demand, self-paced e-learning.
- 50 percent use custom-built courses based on their organization's content.
- 50 percent use instructor-facilitated, asynchronous e-learning.
- 47 percent use live, synchronous e-learning.
- 29 percent use e-learning programs combined with classroom-based learning.

CONVENIENCE, ACCESS, AND COST-EFFECTIVENESS KEY BENEFITS

Almost 88 percent of respondents listed “convenience for learners” as a key benefit of e-learning. “Cost effectiveness” and “ability to reach more learners” were also chosen as key benefits by over 70 percent of respondents.

STAFF TIME BIGGEST BARRIER

When asked to report the three biggest barriers for their organization in developing e-learning, “staff time” was the only choice listed by a majority of respondents (54 percent). “Funding,” “expertise,” “concern about end users’ technology,” and “concern for effectiveness” were all listed as barriers by at least 30 percent of respondents.

LARGEST ORGANIZATIONS MOST RAPID ADOPTERS

Not surprisingly, the largest organizations are the most rapid adopters of online learning. Of respondents with annual budgets greater than \$10 million, 66 percent currently use e-learning, and 61.4 percent expect to increase resources for e-learning in the next year. While small organizations are less likely to have active e-learning programs, e-learning is still a viable option. Almost 30 percent of organizations with budgets less than \$500,000 reported using e-learning.

Organizational budget size is not the only characteristic associated with e-learning adoption. Organizations with a wide geographic focus, regardless of budget size, are more likely to use e-learning: More than 50 percent of organizations with an international or national focus use e-learning, while only 30 percent with a local focus have an e-learning program.

MIX OF INTERNAL AND EXTERNAL DEVELOPMENT

Asked how they develop, or plan to develop, their e-learning program, a large majority (62 percent) of respondents indicated they use a mix of in-house resources and consultants and vendors. A small percentage of respondents (22 percent) develop e-learning entirely in-house, and a smaller percentage (16 percent) completely outsource e-learning development.

M E T H O D O L O G Y

The survey was conducted from August 24, 2004, through September 15, 2004, 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 sponsoring organizations conducted a publicity campaign to reach a broad array of potential nonprofit and association respondents. In addition, the sponsoring organizations held a drawing, in which one randomly chosen respondent received an Apple iPod. A total of 697 valid responses to the survey were received.

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. 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 large number of responses, we are confident in the overall direction and broad findings presented in this report.

SPONSORING ORGANIZATIONS

ISOPH

Isoph works specifically with nonprofits, associations, public agencies, and other mission-based organizations to develop successful, sustainable online learning programs. We offer our clients a suite of integrated learning and communications applications, including a flexible learning management and content authoring system, along with instructional design and course development services. Our mission is to sustain organizations in integrating learning technologies and practices into their daily lives, enabling them to better fulfill their missions, extend their reach, and achieve long-lasting impact in the communities they serve.

Isoph's experience in supporting successful Web-based learning and education initiatives is unrivaled. Most of our core leadership team comes from Quisic, a winner of more than 50 industry awards as a high-quality developer of e-learning for Global 3000 corporations and major universities. Our staff members are recognized as leading experts in the use of online learning and are frequent speakers at national conferences and contributors to learning and technology publications. We are co-authors of the only comprehensive guidebook on nonprofit online learning, *Making E-learning Work in the Nonprofit Sector*, published by brandon-hall.com.

Isoph understands the unique challenges and opportunities of developing learning programs to serve a diverse base of staff persons, members, practitioners, volunteers, and other stakeholders. Isoph's clients include five of the largest nonprofit organizations in the United States—the American Red Cross, Gifts in Kind International, the Planned Parenthood Federation of America, America's Second Harvest, and the National Wildlife Federation.

To learn more about Isoph, please 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, please visit <http://www.nten.org>.

SURVEY DATA

USE OF E-LEARNING

E-learning, sometimes referred to as computer-based training or online distance education, refers to structured, computer-enabled learning carried out by individuals or groups outside of a physical classroom, over the Internet or an internal network. Is your organization currently using e-learning?

	All respondents		Associations only	
Yes	39.6%	276	39.7%	56
Plan to within the next 6 months	7.7%	54	9.9%	14
Plan to within the next 12 months	7.0%	49	9.9%	14
Interested, but no definite plans	36.7%	256	35.5%	50
Do not see a need at this time	8.9%	62	5.0%	7
Total	100%	697		141

SATISFACTION WITH E-LEARNING

If your organization is currently using e-learning, how satisfied are you with your current e-learning program?

Very satisfied	26.3%
Somewhat satisfied	61.8%
Somewhat dissatisfied	10.2%
Very dissatisfied	1.7%

TIME USING E-LEARNING

If your organization is currently using e-learning, how long has your organization been using e-learning?

One year or less	33.0%
One to two years	28.5%
Two or more years	38.5%

RESOURCE ALLOCATION FOR ALL TRAINING

At what level do you plan to allocate resources for all training and education programs in the coming year?

The same as this year	49.9%
More than this year	43.4%
Less than this year	6.7%

RESOURCE ALLOCATION FOR E-LEARNING

At what level do you plan to allocate resources for all training and education programs in the coming year?

The same as this year	33.3%
More than this year	61.4%
Less than this year	5.2%

PURPOSE OF E-LEARNING

For what purposes does your organization use (or plan to use) e-learning? Please check all that apply.

Training for staff	67.0%
Training for affiliated organizations or chapters	34.1%
Training for volunteers	34.5%
Advocacy and issue education for donors or the general public	24.0%
Professional development for clients or members (public training workshops)	52.0%
Digital divide or workforce development programs	13.7%

FINANCIAL GOALS FOR E-LEARNING

Which of the following statements describes your financial goals for your e-learning offerings? Please check all that apply.

Must be self-sustaining, but profitability is not required	35.5%
Must be self-sustaining and profitable	21.2%
Doesn't need to be self-sustaining because costs will be subsidized	17.5%
Must save my organization money (e.g., on travel or compared to classroom training programs)	46.4%
Must enable us to scale our programs	33.0%
Must enable us to provide better access to training	67.6%

DEVELOPMENT OF E-LEARNING

How are you developing or planning to develop your e-learning program?

Entirely in-house	21.8%
Mix of in-house and consultants or vendors	62.3%
Totally outsourced	15.9%

E-LEARNING FORMATS

Which of the following are components of your current or planned e-learning program? Please check all that apply.

	All respondents	Those with active program	Those satisfied with program
On-demand, self-paced e-learning	67.6%	66.7%	66.4%
Instructor facilitated, asynchronous e-learning	39.5%	50.0%	50.0%
Live, synchronous e-learning (via a Web conferencing system)	39.9%	46.7%	46.7%
Custom-built courses based on your organization's content	46.9%	49.6%	49.2%
Vendor "off-the-shelf" courses	24.2%	27.9%	25.8%
E-learning programs combined with classroom-based learning (blended learning)	34.1%	28.6%	29.9%
CD or DVD delivery	40.4%	31.5%	30.7%
Other	4.7%	4.0%	N/A

KEY BENEFITS

In your view, what are the key benefits associated with e-learning? Please check all that apply.

Instructional effectiveness versus other modes of training or education	24.6%
Cost-effectiveness versus other modes of training or education	72.9%
Ability to reach more learners	75.8%
Provides learners the opportunity to direct their own learning	64.5%
Convenience for learners	87.9%
Other	5.8%

LEARNING MANAGEMENT SYSTEM

Does your organization use a learning management system (LMS) for delivery and tracking of e-learning?

	All respondents	Those with active program
Yes	14.6%	32.6%
Not now, but we plan to in the future	18.0%	19.0%
No, we don't feel we need one	20.6%	17.6%
What is a learning management system?	46.8%	30.8%

THREE BIGGEST BARRIERS

What are the three biggest barriers for your organization in developing e-learning? Please check no more than three.

	All respondents	Those with active program
Too expensive	27.8%	21.0%
Worth it, but need funding	41.1%	34.1%
Concern for effectiveness	30.7%	28.3%
Concern about end users' technology	34.2%	35.9%
Staff time	54.0%	48.2%
Expertise	35.4%	29.3%
Need for management buy-in	17.9%	14.5%
Resistance from trainers or current training program	7.0%	9.4%
Fear that stakeholders will not use it	28.9%	26.8%

GEOGRAPHIC FOCUS

What is the geographic focus of your organization?

	Percent of survey respondents	Percent of cohort using e-learning*
Local focus	29.9%	30.8%
Regional, state, or province focus	35.0%	35.3%
National focus	35.0%	50.0%
International focus	16.3%	60.2%

*What percentage of this group is using e-learning? For example, 30.8 percent of locally focused organizations are using e-learning.

TYPE OF ORGANIZATION

What type of organization do you represent? Please check all that apply.

	Percent of survey respondents	Percent of cohort using e-learning*
501(c)(3) nonprofit organization	76.0%	35.9%
Membership association	20.4%	39.7%
Management support or technical assistance organization	12.7%	33.0%
Educational institution	14.5%	49.0%
Umbrella group for a nonprofit network or federated organization	6.1%	42.9%
Philanthropic foundation	3.9%	37.0%
Public sector or government agency	5.3%	48.6%
Religious or faith-based organization	4.2%	31.0%
For-profit organization	3.9%	70.4%

*What percentage of this group is using e-learning? For example, 35.9 percent of 501(c)(3) organizations responding to the survey are using e-learning.

BUDGET SIZE

What is your organization's annual budget?

	Percent of survey respondents	Percent of cohort using e-learning*
Less than \$500k	30.3%	29.6%
\$500k to \$2 million	27.0%	27.3%
\$2 million to \$5 million	16.2%	43.6%
\$5 million to \$10 million	8.4%	50.9%
More than \$10 million	18.1%	65.9%

*What percentage of this group is using e-learning? For example, 29.6 percent of organizations with budgets less than \$500,000 responding to the survey are using e-learning.