E-LEARNING
IN NONPROFITS AND ASSOCIATIONS
2005 NONPROFIT AND ASSOCIATION E-LEARNING SURVEY RESULTS

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N-TEN

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KEY FINDINGS

The 2005 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.[1] In August and September 2005, 481 individuals responded to the survey, offering insights into how nonprofits and associations develop and use e-learning. Thank you to our survey respondents for their help in conducting this research.

SUPPORT PROVIDERS, ASSOCIATIONS LEAD GROWTH OF E-LEARNING

In 2004, more than 54 percent of total respondents indicated that they were either using e-learning or planned to in the next 12 months. In 2005, that number grew to 59 percent. Among respondents from membership associations and management or technical support organizations, the growth was even more significant. Of membership association respondents, 52 percent—as opposed to 39.7 percent in 2004—indicated they already use some form of e-learning. For respondents from organizations that provide management or technical support to nonprofits, the number leapt from 33 percent to 49.2 percent.

CONTINUING SATISFACTION...SOMEWHAT

More than 92 percent of respondents using e-learning indicated they were very or somewhat satisfied with their e-learning programs. The fact that most of these users—65 percent—fell in the "somewhat satisfied" camp, however, suggests that e-learning efforts may not have not quite hit their stride in this market. Notably, among organizations that have been using e-learning the longest, the percentage of respondents who describe themselves as "very satisfied" rises from 27 percent to 34 percent. This rise may reflect successful movement through the change process that e-learning often requires as well as time for adjusting to a new way of delivering training.

INCREASED FOCUS ON SELF-PACED E-LEARNING

Use of most forms of e-learning remained relatively steady from 2004 to 2005, but interest in on-demand, self-paced learning appears to have experienced significant growth. Nearly 68 percent of the respondents to the 2004 survey indicated use or planned use of self-paced e-learning, making it the most common format. In 2005, that number jumped to 75 percent. Among respondents with an active e-learning program, the percentage using a self-paced approach jumped from 66.7 to 81.3 percent.

CONVENIENCE CONTINUES TO REIGN

In keeping with the 2004 numbers, almost 88 percent of 2005 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 74 percent of respondents.

With respect to financial goals, 71 percent of respondents indicated that e-learning must enable them to provide better access to training, and 46 percent specified that it must save

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[1] The 2004 report is available at http://www.isoph.com/pdfs/2004_Nonprofit_E-learning_Survey.pdf.

the organization time and money. Thirty-six percent, however, did not list profitability as a requirement for e-learning.

ROLE OF LEARNING MANAGEMENT SYSTEMS MAY GROW

In 2004, we asked respondents if they were using a learning management system (LMS) to deliver their online learning—or, for that matter, if they even knew what a learning management system was.[2] Not surprisingly, respondents from organizations with an active program were the most likely to use an LMS. Nearly 33 percent had an LMS in place in 2004, but interestingly, another 31 percent did not know what an LMS was. Actual usage of learning management systems by organizations with active programs did not vary much from 2004 to 2005, but the number of these organizations planning to use an LMS rose from 19 percent to 25.1 percent. Perhaps more importantly, the percentage of respondents with active programs who did not know what an LMS was dropped from 30.8 percent to 22.2 percent.

INTEGRATION PERCEIVED TO BE VALUABLE

Two new questions regarding the use of technology were introduced in 2005. First, we asked respondents if they were using any of the more common types of technology designed for nonprofits—association management systems, e-mail marketing applications, and fundraising software. We also asked if the respondents saw potential value in the integration of these systems with a learning management system. More than half—52.5 percent—did see value in such integration. Among respondents at organizations currently using an LMS, this figure rose to 68.2 percent.

Given the rise in e-learning among associations, it is perhaps not surprising that many users of the major association-focused software applications are already using or plan to use an LMS. Among respondents using these systems, the percentage also using an LMS was 50 percent or more in most cases.

LARGEST ORGANIZATIONS STILL LEAD THE PACK

As in 2004, large organizations continue to be the ones most likely to use e-learning. Of respondents with annual budgets greater than $50 million (a budget level not tracked in the 2004 survey), 84 percent currently use e-learning, as do 69 percent of those with annual budgets greater than $10 million. While small organizations are less likely to have active e-learning programs, e-learning is still a viable option. Twenty-four percent of organizations with budgets less than $500,000 reported using e-learning, and, in organizations with budgets between $5 million and $10 million, use of e-learning reported by respondents jumped from 50.9 percent to 68.3 percent. With the growing availability of rapid and lower cost e-learning approaches, we expect budget size to become a less important factor over time.

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

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[2] At the simplest level, a learning management system typically provides for registration of online learners, enrollment into courses, and tracking of the progress and performance of learners in online courses.

e-learning: More than 55 percent of organizations with an international or national focus use e-learning, while only 33 percent with a local focus have an e-learning program.

METHODOLOGY

The survey was conducted from August 22, 2005, through September 26, 2005, 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 a publicity campaign to reach an 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 Shuffle. A total of 481 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 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 combined forces with its longstanding partner, LearnSomething, to create a single company under the LearnSomething name.

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, 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 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, please visit http://www.learnsomething.com.

N-TEN

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?

2004 Responses	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	100%	141

2005 Responses	All respondents		Associations only	
Yes	42.2%	203	52.1%	61
Plan to within the next 6 months	9.4%	45	8.6%	10
Plan to within the next 12 months	7.7%	37	7.7%	9
Interested, but no definite plans	32.6%	157	28.2%	33
Do not see a need at this time	7.5%	36	3.4%	4
No response	0.6%	3	0.0%	0
Total	100%	481	100%	117

SATISFACTION WITH E-LEARNING

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

	2004	2005
Very satisfied	26.3%	27.0%
Somewhat satisfied	61.8%	61.6%
Somewhat dissatisfied	10.2%	8.9%
Very dissatisfied	1.7%	2.5%

TIME USING E-LEARNING

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

	2004	2005
One year or less	33.0%	27.2%
One to two years	28.5%	29.5%
Two or more years	38.5%	43.3%

RESOURCE ALLOCATION FOR ALL TRAINING

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

	2004	2005
The same as this year	49.9%	51.1%
More than this year	43.4%	44.5%
Less than this year	6.7%	4.4%

RESOURCE ALLOCATION FOR E-LEARNING

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

	2004	2005
The same as this year	33.3%	33.8%
More than this year	61.4%	63.0%
Less than this year	5.2%	3.2%

PURPOSE OF E-LEARNING

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

	2004	2005
Training for staff	67.0%	66.1%
Training for affiliated organizations or chapters	34.1%	35.3%
Training for volunteers	34.5%	35.3%
Advocacy and issue education for donors or the general public	24.0%	27.6%
Professional development for clients or members (public training workshops)	52.0%	55.0%
Digital divide or workforce development programs	13.7%	12.4%

FINANCIAL GOALS FOR E-LEARNING

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

	2004	2005
Must be self-sustaining, but profitability is not required	35.5%	35.5%
Must be self-sustaining and profitable	21.2%	23.0%

	2004	2005
Doesn't need to be self-sustaining because costs will be subsidized	17.5%	20.5%
Must save my organization money (e.g., on travel or compared to classroom training programs)	46.4%	46.0%
Must enable us to scale our programs	33.0%	36.4%
Must enable us to provide better access to training	67.6%	71.2%

DEVELOPMENT OF E-LEARNING

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

	2004	2005
Entirely in-house	21.8%	24.3%
Mix of in-house and consultants or vendors	62.3%	59.5%
Totally outsourced	15.9%	16.2%

E-LEARNING FORMATS

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

2004 Results

	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

2005 Results

	All respondents	Those with active program	Those satisfied with program
On-demand, self-paced e-learning	74.9%	81.3%	81.4%
Instructor facilitated, asynchronous e-learning	40.5%	47.3%	47.3%
Live, synchronous e-learning (via a Web conferencing system)	40.3%	45.8%	47.3%
Custom-built courses based on your organization's content	48.4%	52.2%	52.1%
Vendor "off-the-shelf" courses	22.2%	24.1%	25.0%
E-learning programs combined with classroom-based learning (blended learning)	35.7%	43.8%	43.6%
CD or DVD delivery	43.2%	40.4%	41.0%
Other	3.8%	2.5%	1.6%

KEY BENEFITS

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

	2004	2005
Instructional effectiveness versus other modes of training or education	24.6%	26.1%
Cost-effectiveness versus other modes of training or education	72.9%	74.4%
Ability to reach more learners	75.8%	79.9%
Provides learners the opportunity to direct their own learning	64.5%	66.9%
Convenience for learners	87.9%	87.8%
Other	5.8%	3.0%

LEARNING MANAGEMENT SYSTEM

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

	2004 All respondents	2004 Those with active program	2005 All respondents	2005 Those with active program
Yes	14.6%	32.6%	13.3%	29.6%
Not now, but we plan to in the future	18.0%	19.0%	22.0%	25.1%
No, we don't feel we need one	20.6%	17.6%	19.0%	21.7%
What is a learning management system?	46.8%	30.8%	45.7%	22.2%

NONPROFIT SOFTWARE

Which of the following nonprofit software applications does your organization use? Check all that apply.

	All respondents	Respondents currently using an LMS	Percent of cohort using or planning to use LMS*
ASI iMIS	11.2%	9.5%	53.3%
Aptify	1.5%	0.0%	50.0%
Avectra netFORUM	2.6%	1.6%	57.1%
Blackbaud Raiser's Edge	18.2%	6.0%	36.7%
Convio	4.1%	1.6%	27.3%
GetActive	6.3%	7.9%	46.7%
Kintera Sphere	5.2%	3.2%	23.1%
Protech CRM for Members	1.9%	3.2%	33.3%
SusQtech Member Portal	0.7%	0.0%	50.0%
TMA Resources TIMSS	3.3%	6.3%	100.0%
Other	63.2%	49.2%	36.1%

* What percentage of this group already uses or plans to use a learning management system? For example, 53.3 percent of iMIS users currently use or plan to use an LMS.

INTEGRATION

How valuable do you feel it is for data from an online training system to integrate with any of the systems mentioned in the previous question?

	All respondents	Those with LMS
Very valuable	29.9%	54.0%
Somewhat valuable	22.6%	14.2%
Not valuable	6.3%	6.3%
Not sure	41.2%	27.0%

THREE BIGGEST BARRIERS

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

	2004 All respondents	2004 Those with active program	2005 All respondents	2005 Those with active program
Too expensive	27.8%	21.0%	29.5%	20.2%
Worth it, but need funding	41.1%	34.1%	42.9%	38.4%
Concern for effectiveness	30.7%	28.3%	28.2%	24.6%
Concern about end users' technology	34.2%	35.9%	34.9%	38.4%
Staff time	54.0%	48.2%	53.4%	48.8%

	2004	2004	2005	2005
Expertise	35.4%	29.3%	36.0%	29.6%
Need for management buy-in	17.9%	14.5%	11.9%	10.3%
Resistance from trainers or current training program	7.0%	9.4%	5.8%	10.3%
Fear that stakeholders will not use it	28.9%	26.8%	23.9%	20.2%

GEOGRAPHIC FOCUS

What is the geographic focus of your organization?

	2004 Percent of survey respondents	**2004** Percent of cohort using e-learning*	**2005** Percent of survey respondents	**2005** Percent of cohort using e-learning*
Local focus	29.9%	30.8%	30.6%	33.3%
Regional, state, or province focus	35.0%	35.3%	34.8%	36.1%
National focus	35.0%	50.0%	33.5%	55.6%
International focus	16.3%	60.2%	20.2%	62.5%

What percentage of this group is using e-learning? For example, 55.6 percent of nationally focused organizations are using e-learning.

TYPE OF ORGANIZATION

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

	2004 Percent of survey respondents	**2004** Percent of cohort using e-learning*	**2005** Percent of survey respondents	**2005** Percent of cohort using e-learning*
501(c)(3) nonprofit organization	76.0%	35.9%	76.2%	39.8%
Membership association	20.4%	39.7%	24.5%	52.1%
Management support or technical assistance organization	12.7%	33.0%	12.8%	49.2%
Educational institution	14.5%	49.0%	14.6%	53.0%
Umbrella group for a nonprofit network or federated organization	6.1%	42.9%	6.7%	32.0%
Philanthropic foundation	3.9%	37.0%	2.7%	18.2%
Public sector or government agency	5.3%	48.6%	4.8%	54.5%
Religious or faith-based organization	4.2%	31.0%	4.0%	46.7%

For-profit organization	3.9%	70.4%	5.0%	25.0%

* What percentage of this group is using e-learning? For example, 52 percent of the associations responding to the survey are using e-learning.

BUDGET SIZE

What is your organization's annual budget?

	2004 Percent of survey respondents	**2004** Percent of cohort using e-learning*	**2005** Percent of survey respondents	**2005** Percent of cohort using e-learning*
Less than $500k	30.3%	29.6%	30.7%	23.9%
$500k to $2 million	27.0%	27.3%	26.4%	32.8%
$2 million to $5 million	16.2%	43.6%	14.5%	38.8%
$5 million to $10 million	8.4%	50.9%	8.8%	68.3%
More than $10 million	18.1%	65.9%	14.1%	69.2%
More than $50 million	N/A**	N/A**	5.4%	84.0%

* What percentage of this group is using e-learning? For example, 23.9 percent of organizations with budgets less than $500k responding to the 2005 survey are using e-learning.

** This data was not collected in 2004.