# FACING AND EMBRACING THE FUTURE OF LEARNING

A COLLECTION OF INSIGHTS FROM SURGE 2017
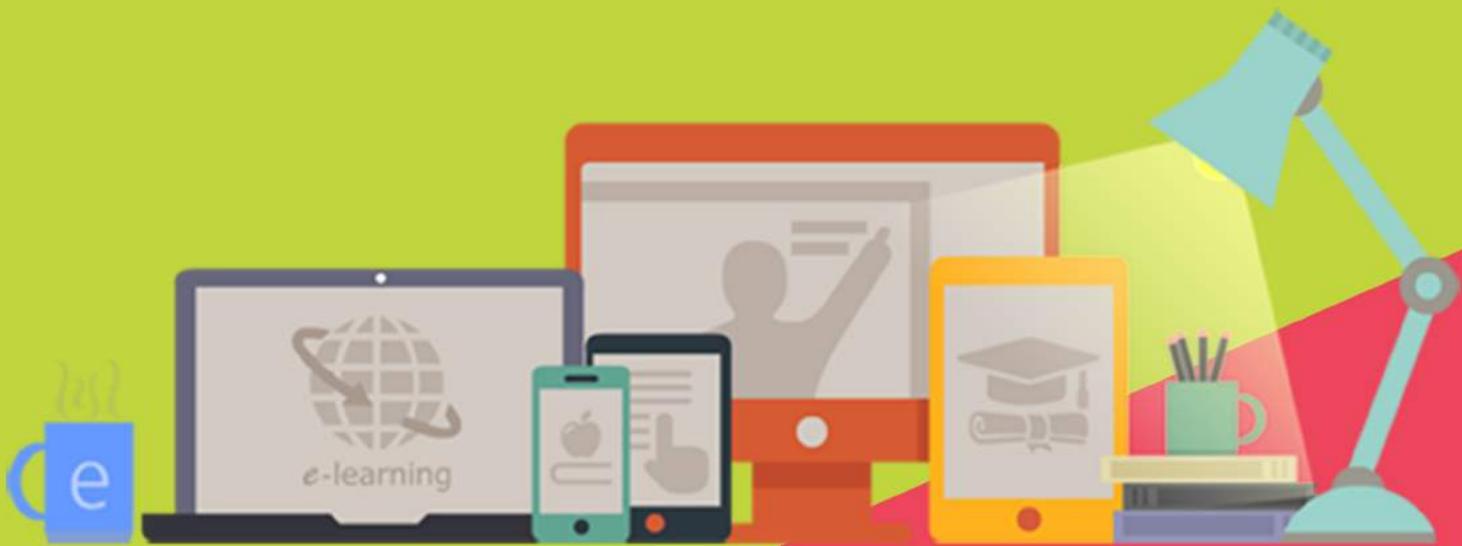
SURGE 2017

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INTRODUCTION

What you're about to read is the result of an experiment in virtual collaboration. SURGE 2017 assembled association professionals from across the globe to harness collective knowledge within a virtual summit of a completely new model.

Attendees could not only hear from speakers, but converse with them in real time and contribute their own ideas. We have now assembled some of the best insights from these conversations into a body of knowledge for the benefit of the entire association community.

This eBook, which is the first of the 12-part SURGE series, delves into the Future of Learning session. It includes themes from the speakers' conversation, snapshots of ideas from guest speakers, contributions from attendees, links to further resources, and more.

Thank you to all who participated – and if you missed it, go to the SURGE 2017 event page to watch all the sessions for free, at your leisure!

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FEATURED SPEAKERS

Amanda Beckner
Vice President of Learning, AVIXA

Amanda Beckner, CTS, is vice president of learning at AVIXA. She is responsible for curriculum development, training, ANSI-accredited certification administration, ANSI-accredited standards development, and knowledge management programs. Amanda is dedicated to supporting a technically competent and creatively confident workforce. She holds a master's degree in communication, culture, and technology from Georgetown University and a bachelor's degree in education studies from The Catholic University of America.

Jeff Cobb
Cofounder, Tagoras

Jeff helps organizations and entrepreneurs in the business of lifelong learning maximize the reach, revenue, and impact of their offerings. He is the author of Leading the Learning Revolution: The Expert's Guide to Capitalizing on the Exploding Lifelong Education Market; co-host of the Leading Learning podcast; a show developed specifically for leaders and aspiring leaders in the business of lifelong learning. He is co-founder of Learning • Technology • Design, a virtual conference for frontline professionals in the business of lifelong learning, and the Leading Learning Symposium, an event designed for senior leaders in the business of lifelong learning.
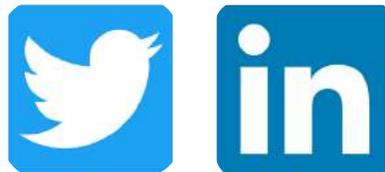
Josh Goldman

**Vice President, Learning,
Ohio Society of CPAs**

Josh is an accomplished association professional with over ten years of experience in directing, managing, designing, and evaluating education and training programs. He has skills in needs assessment, gap analysis, and technology enhanced training and education. His specialities include curriculum design, training program development, education strategy and operations, and technology enhanced training.

Celisa Steele
Cofounder, Tagoras

Through research, writing, speaking, and consulting, Celisa helps organizations in the business of lifelong learning maximize the reach, revenue, and impact of their offerings. She co-founded Learning • Technology • Design, a virtual conference for professionals in the business of lifelong learning, and the Leading Learning Symposium, an event designed for senior leaders in the business of lifelong learning; she co-hosts Tagoras's weekly Leading Learning Podcast; and she writes and presents about the strategic use of learning technologies by trade and professional associations. Her publications include *Association Learning + Technology*, *Association Virtual Events*, *Social Learning Trends in the Association Space*, and other reports and white papers.

Tracy Petrillo
CEO, Academy of Integrative Health and Medicine

Tracy Petrillo, EdD, CAE serves as CEO for the Academy of Integrative Health and Medicine, and as a principle consultant for Entangled Solutions. Dr. Petrillo is a nonprofit executive and thought leader in the areas of adult learning, credentialing, digital educational technologies, and leadership development. Tracy speaks nationally to nonprofits, medical, corporate and higher education audiences - including ASAE, CalSAE, DigitalNow, SxSWedu and Masie's Learning. She advises educational strategies that achieve agile, impactful workforces. A lifelong learner and active volunteer, Tracy recently completed her doctorate in educational leadership with a specialization in human resource development.

Peter Wilkinson
Creative Consultant

Peter spent much of the last 15 years living in China before coming back to his hometown of Montreal, Quebec early last year. Peter worked for years as a Lecturer and Program Director for Interactive Media Design and Visual Communications. Keeping with the changes in technology, Peter also consulted and art directed the release of 2 iPad apps for kids, worked as a Project Leader and Senior Engineer for a Robotics startup, and transitioned into the virtual and augmented reality space; currently working with UNLTD, Osmos Academy, Impact Unified, Les Pieds en Haut and others; set to explore the many sides of the virtual space.

02

MICROLEARNING

What is microlearning?

Microlearning is exactly what it sounds like: education, but designed for and delivered in bite-sized pieces. There are a number of benefits to this incremental approach to learning. It allows busy professionals to stay on top of their game, keep up with changes in their industry, and expand their skillset without significant investment. **Instead, they can integrate small units of learning into their routine.**

This can take many different forms. Sometimes it might be a series of ten-minute video segments to introduce topics, or it might be a short piece delving deeper into a narrow topic. **Microlearning provides skill-based, just-in-time, right-sized, need-based education.**

Many associations offer microlearning programs on a subscription model, so members sign up for continuous education then access materials as they are created and released. This method is particularly useful for industries where professionals must keep up with frequent regulatory changes.

Hot topics from the SURGE chat: Subscription Models of Microlearning

"ACTFL changed their membership model from membership categories (like teacher) to membership levels, based on benefits they receive. Based on the member benefit level, they get subscribed to content - like three virtual learning modules. It was well received. The concern was people would choose the lower benefit tier, but the opposite happened. They also got a better understanding of what benefits are most valued. School districts would pay for the membership but often members had to pay for the activities.

"VLTA moved to a similar mode. The next step was to repackage their entire member benefits structure to allow for purchase of an "all-inclusive" level. This allowed member companies and their entire staff access to the online learning portal with paid membership. They also included other value-add components including a digital magazine and newsletter, an updated website, career center and multi-track events with twice as many educational opportunities. **All these improvements led to a larger membership base with access to paid and free events.** With increased membership at the free events, sponsorship dollars naturally rose, which offset expenses incurred by VLTA."

-Jodi L Ray-

For intrinsically motivated physicians who want to learn about complex topics like congestive heart failure or atrial fibrillation, the best application of microlearning might be five minute case vignettes they can mull over between patients. Microlearning as skills practice might be appropriate. For the same topic, a ten minute video might be totally inappropriate. We find good uptake on 30 to 45 to 60 minute content if it's valuable.

I get frustrated when I hear people talk about microlearning as one thing, and if we all just did this one thing, and had everyone watching ten minute videos, learning will happen. **Microlearning can support longer-format content, and sometimes short-format is best, but the strategy can't be about ending the video before learners find out how bored they are.**

-Nick Marzano-

Want to learn how to host your own virtual event, much like **SURGE 2017 ?**

AssociationSuccess.org is in the process of creating an online course that will walk you through the steps involved in putting on your own interactive virtual summit.

Want to be notified when the course is available?

SIGN UP HERE

03

MICRO-
CREDENTIALING

What are micro-credentials?

To be on the cutting edge of one's industry, continuously seeking educational opportunities is extremely important, and associations are well positioned to provide this to their members. **A micro-credential is a certification or mini-degree focused on a specific topic.** Micro-credentials allow working professionals to become more skilled in their specific profession *while on the job.*

Earning micro-credentials is similar to taking compressed post-secondary courses. Some can be earned online; others can be earned in a classroom setting. There may be a handful of assignments, assessments, or other requirements that learners need in order to gain the certification they're working towards.

Micro-credentials are mostly used to increase competency and employability at any point in a professional's career. These show employers, and future employers, that professionals are up-to-date on the latest technological advances and regulatory changes pertaining to their field. Furthermore, these acknowledgments can also be incorporated into university and college curriculums through partnerships with educational institutions.

Micro-credentialing is incredibly important for professionals, and their employers, to stay relevant in their industry. It allows professionals to continuously grow while benefiting their employers in the long run.

Case Study: AVIXA   *by Amanda Beckner*

At AVIXA, our micro-credential program offers a training pathway for a specific set of skills, virtual access to certified instructors for guidance, and a credential to add to their resume that leads to a portfolio of work, demonstrating competency in that skillset.

Certified professionals at companies are often called upon to work on projects and boost business value where their expertise is precious. In talks with our stakeholders, it became clear that we need to provide more support for those who are certified. Full-blown accreditations take time, money and work. **When a topic is too niche to make such an investment worthwhile, micro-credentials fill the gap.**

Since rolling out the program a few months ago, five people have completed our micro-credential. Now we are working with them to evaluate their user experience and make logistical improvements for future students. Other improvements concern attitude. **We want to emphasize the value of the virtual coaching and portfolio-building aspects of the program.** Initially, we relied on managers to show their new hires that documenting completed exercises in a portfolio and receiving feedback on them from an instructor were key components of the micro-credential. However, we need to build that priority into the course itself.

Our collaboration with universities took off when state institutions contacted us inquiring about our certification programs. The institutions that contacted us were directed by governors through funding bodies to provide education in areas of abundant job opportunities. Now, we have two universities in the US that are building our curriculum into degree programs. Students will graduate those programs with our certifications. **This appeals to institutions, because micro-credentialing programs provide a stepping stone for students working on the material, leading them to internships and connections with future employers.**

Hot topics from the SURGE chat: Partnerships with Educational Institutions

"Many colleges/universities are starting to aggressively get into the lifelong learning business beyond their traditional continuing education programs. Some, like MIT, UCLA, UC Berkeley, and Northeastern, are already partnering with large companies or launching bootcamps to fill skills gaps. Another lifelong learning model that's intriguing higher education leaders is a concept developed by futurists at Stanford: an open loop university. Students receive access to six years of education to distribute across their lives as needed. Associations need to work with member companies to develop professional development programs for their industry so they're the place members turn to first instead of their alma mater."

-Deirdre Reid-

"In regard to reaching schools and the next generation, there are lots of good learning examples from the UK. For example, The Institution of Engineering and Technology (The IET) hosts open house events for schoolkids and the the Chartered Institute of Building (CIOB) has a partnership with Minecraft to encourage learning about building."

-Greg Melia-

04

COMPETENCY BASED EDUCATION

"Competency-based education (CBE) is the inevitable change that awaits education. **CBE changes the structure of learning by focusing on the learner and the time it takes for them to absorb the knowledge they need.** It makes their educational path more suited to their professional needs. It's a large step away from the linearly-structured system most associations have in place.

"As associations, we need to ask ourselves specific questions to the profession we represent in order to successfully streamline CBE. "What are the jobs to be done within the profession? How rapidly do those competencies change?" **As education providers, we must adapt quickly to the needs of every learner.** If a learner needs information pertaining to their profession, then we must provide it to them as soon as we can. We must empower our learners, by providing the knowledge they need when they need it, so that they can apply it to their work."

05

VIRTUAL REALITY

VR, AR, MR: What is it and how can it be useful?

Virtual **Reality** (VR) is a medium that will inevitably be integrated into everyday life. It allows people to interact with all sorts of different events (from conferences to surgeries) in a completely immersive way. Initially, it was only used in universities and other places that were kept away from the private (public) eye. Now, it's becoming readily accessible with face masks (affordable headsets), higher resolution, and the ability to use VR right on your smartphone.

You could find yourself using VR in many settings. **The most simple example for associations would be a conference:** you could set up multiple cameras in various spaces at the conferences. A virtual attendee could then find themselves immersed directly in the space, remotely!

Augmented Reality (AR) allows you to work with VR and then apply two realities together. It overlays content onto the view in front of you. AR allows users to interact, engage, and manipulate the reality that they see. For example, Oculus augmented reality glasses, currently being developed by Facebook, add images and information to your existing environment. Medical students may use AR to perform surgeries, allowing them to use a headset and see inside a patient's body without making any large incisions.

Mixed Reality (MR), sometimes known as hybrid reality, is a mix between VR and AR. It plays in both of these spaces, where you may be in a virtual environment that requires you to move around. It will help you detect objects around you better without the need of creating a completely clean space to do that. So you could just be in an office space or any working space, and still be able to navigate the activity in a virtual environment without bumping into anything.

Hot Topics from the SURGE chat: Virtual Reality

"Virtual Reality setups can be very simple or very complex. **The nice thing about the simple setups is that they are consumer driven, therefore relatively cheap, easy to use, portable and they provide a wealth of features to fit associations.** If you want to wait until VR becomes more standardized in platforms and quality, it shouldn't take too long because money drives the need to get there.

"Either way it opens up an entirely new world of communication/marketing possibilities that allow a user to physically interact with content. Whether it's a spherical photo or video for promotion, to live-streams that let members look around the room, it's likely something your association hasn't done. It's likely to keep a member base interested in your content for a longer time, because it's something they haven't seen often, and they can have an effect on the outcome.

"The programs are simple to work and a lot of them focus on mobile apps, so you do not need to learn a video editing software suite. They are made to get video out in the quickest and simplest way because the consumer market demands it. People want to post to social media simply and instantly. So the tech is made for just that.

"They cater to the lowest common denominator. Anybody should be able to use it, and if they can't, the product won't sell. Same for the cost - if it's not "affordable", it won't sell, meaning a high school kid that works part time at a gas station must be able to afford it."

-Emery Wolfe-

06

TALENT SHORTAGES AND PROFESSIONAL DEVELOPMENT

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Talent shortage occurs when employers cannot find people with the required amount of skills and professional background they want, at exactly the price they'd like to pay for their services. Studies have shown that employers have been struggling to find people fully qualified for jobs in recent years. On-the-job training has been falling, meaning employees are expected to show up to jobs with a wide range of skills already under their belt.

Microlearning and micro-credentials can help bump their current employees to the skills they need while being a cost-effective approach for employers to ensure their needs, as an organization, are met. This also attracts prospective employees to an association based on what they can offer.

Case Study: The Ohio Society of CPAs — by Josh Goldman

Our members tell us there are three things that keep them up at night: regulatory changes, the pace of change of their business, and talent management. **How do employers find qualified talent at all levels? How do they train that talent to be productive and aligned with our company direction?** Many market forces are putting pressure on talent management, such as the disparity between the growing number of accounting graduates and the plateaued rate of those pursuing the CPA credential. Add to that pressures on the educational environment, and many new employees are showing up in positions without certain key skills. **There is an opportunity for micro-learning to fill the gap between formal education and job-readiness.**

Associations can take on the responsibilities of a lifelong learning provider, and bridge the gap between employers and employees. We are on the cusp of a significant change in how associations create value for both their membership base and their employers.

In the accounting world, regulatory changes come thick and fast, and CPAs have to prioritise keeping on top of them. **Micro-learning works well for frequent, just-in-time changes.** We have contracted someone to monitor the regulatory space, so now within twenty-four hours of a new financial standard being issued to the marketplace, we have a micro-learning product created, developed, and ready to go. This responsive model condenses what CPAs need to know into an ongoing stream of small updates, instead of compiling them over time into an hour-long lesson.

Hot topics from the SURGE chat: Professional Development & Soft Skills

I was talking with an association recently that has made very concerted efforts to train current employees rather than looking to bring in specific kinds of talent from elsewhere. This reminds me of the manager who asks, "What if we train our employees and they leave?" The CEO's response: "What if we don't and they stay?"

-Jay Daughtry-

Soft skills development is extremely important, particularly in a landscape that is changing ever so quickly (soft skills are the transferable ones!) This is a major area where associations can be useful to their members: providing soft skill training.

-Lucie Robathan-

07

VALUE RAMP

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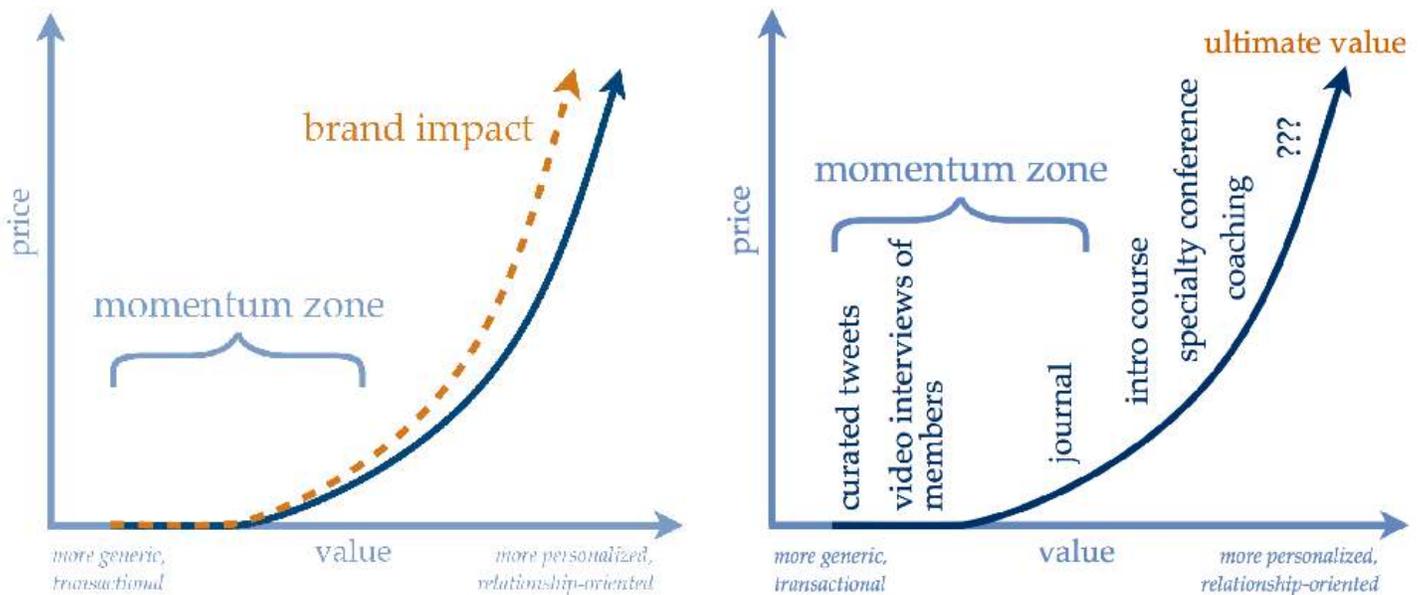
The Value Ramp, presented by Tagoras, is a tool that can help associations tell a logical, rational story about increasing value and price in their educational portfolio.

A few key ideas underpin the Value Ramp:

1. **There is a relationship between price and value when it comes to selling just about any product or service.** Provide more value in the eyes of the potential purchaser, and you can charge more.

2. To get to a higher place (and price), you need momentum. Associations must demonstrate value to members early and consistently. **Often this means providing significant value before you even charge a dime.** Content marketing can appeal to potential members while building the brand of the association.

3. **The impact of brand in the price/value relationship can be dramatic.** If your association's brand is strong, you can build momentum faster, and it can give more power on the price side of the equation, resulting in a steeper Value Ramp.

Microlearning, micro-credentials, and any other type of learning product may fit at any point on an association's Value Ramp and help draw learners in or keep them engaged. **The important thing is for associations to be aware of how their different learning products and offerings fit together and tell a rational, logical story about value and price.**

The Value Ramp helps identify the range and type of products an association offers to members and show any gaps in their offerings. For example, an association may be losing out by focusing too narrowly on mid-ramp, mid-range products, and not building momentum early on with free or low-cost products, and not offering high-value, high-price products at the other end of the ramp.

Hot tip from the chat:

"I have a yellow sticky note in front of me on my desk that says, "First Question: What are you trying to accomplish?" That's true for me and those I'm helping."

-Ann Berg Kreis-

Psst...

This February, Jeff Cobb and Celisa Steele are hosting an extended virtual conference for professionals in the business of lifelong learning.

The goal of **Learning · Technology · Design** is to help attendees find new and better ways of engaging learners and creating lasting impact.

LEARN MORE

08

WORD CLOUD

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What were the most discussed topics in the attendee chat? The more frequently a word was used, the larger it appears in this image!

09

FURTHER RESOURCES

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During the live chat, speakers and attendees alike chipped in with their tips for further reading and resources about the future of learning. We've compiled them into a list here. Keep on learning!

Watch the Full Session:

Microlearning
- The Professional Development Guide to Microlearning

Microcredentialing
- The Credential Engine
- The Benefits of Micro-credentials

Competency Based Learning
- The Value of a Value Proposition Study
- The Tipping Point of Association Learning

The Future and Virtual Reality
- World VR Forum
- Road to VR
- Augmented Reality Surgery

Talent Shortages and Professional Development
- Manpower Talent Shortage survey
- Technology Review on the Skills Gap
- Minecraft School Learning Video
- CIOB Youth Engagement Program
- IET Inspiring Future Engineers school program
- Centre for Education and Workforce

The Value Ramp
- Value Ramp
- More Tagoras resources
- Learning • Technology • Design