

The Future of Learning Management Systems (LMS):

Where did we come from and where are we going?

June 9, 2020

Slides: <http://bit.ly/cnhill20>

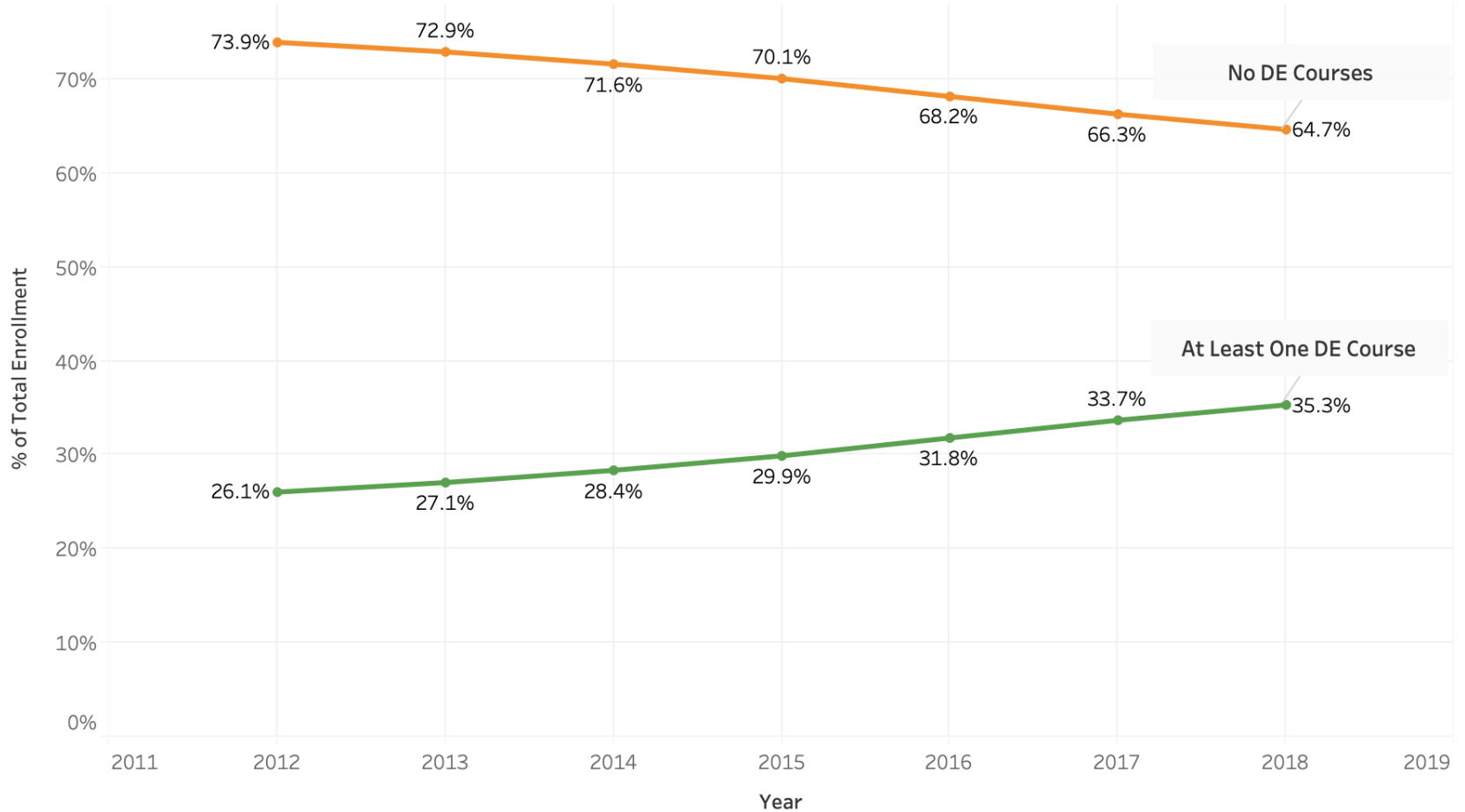
Images: <https://mindwires.com/free-resources/>

Phil Hill (@PhilOnEdTech)

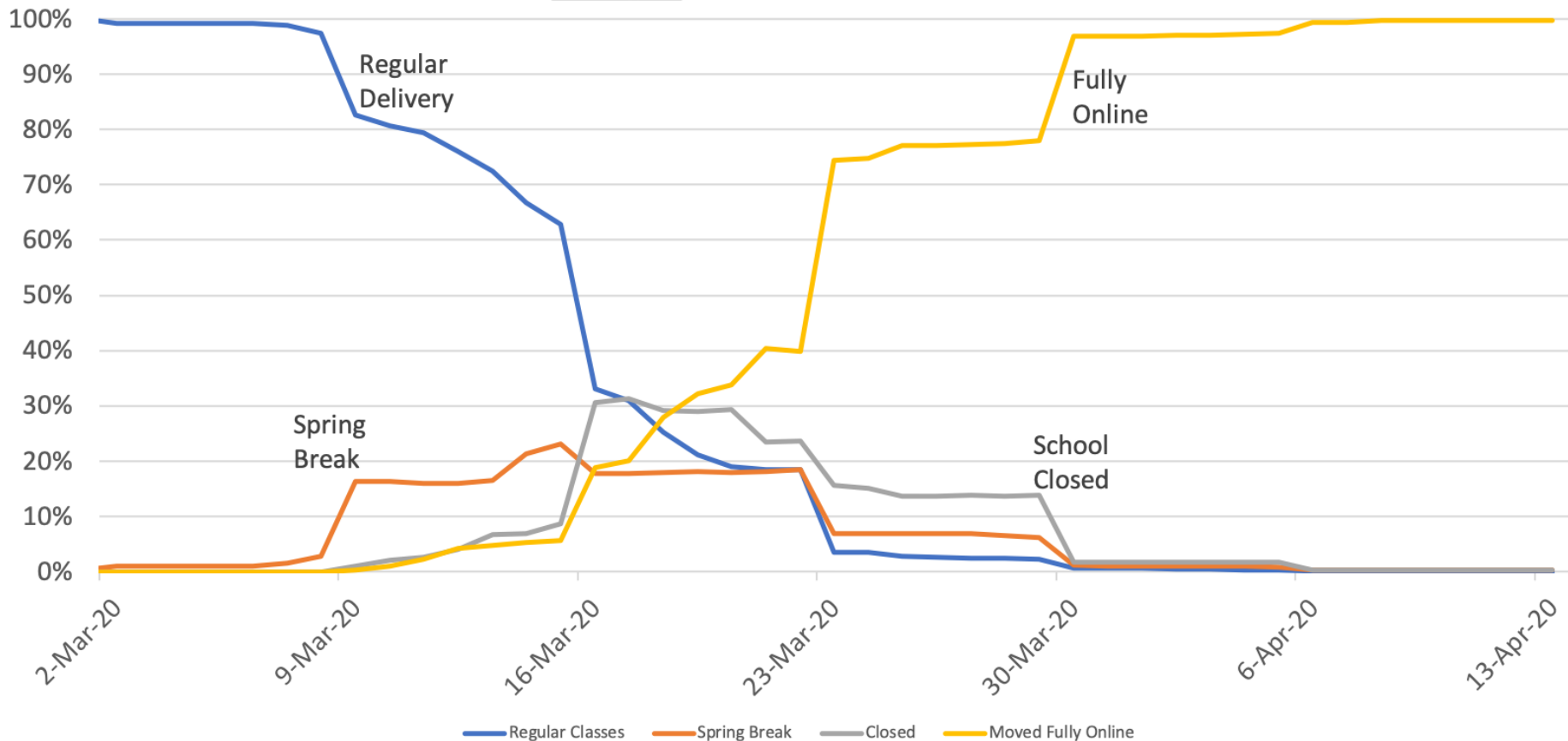
% of US Higher Ed Enrollment 2012 - 2018 For Students Taking At Least One Online Course

Degree-granting Title IV 2-year and 4-year+ Institutions, Grad+Undergrad

Source: IPEDS database



Percentage of US Higher Ed Institutions Moving to Fully Online Delivery of Traditional Face-to-Face Courses During COVID-19 Crisis (not including institutions already fully online)



Source: <https://philonedtech.com/us-higher-ed-set-to-go-fully-online-in-just-four-weeks-due-to-covid-19/>

Fall 2020 COVID Transition Planning: Different Methods to Combine Face-to-Face and Virtual Models

Virtual



Face-to-Face

Fully Online

The default method of Fall 2020 instruction takes place in virtual environment, with only very small number of exceptions, similar to current Spring environment.

Hybrid Calendar

Rotate smaller groups of students on campus for two-week periods.

Discipline

Programs requiring in-person methods meet in small classes face-to-face, the rest delivered virtually.

Hybrid Courses

Some course components delivered virtually, some delivered face-to-face; **HyFlex** allows students to choose for each class meeting whether to attend virtually or in person

Curricular

Most course activities delivered virtually, with small-group exceptions, while most extracurricular experiences available as face-to-face

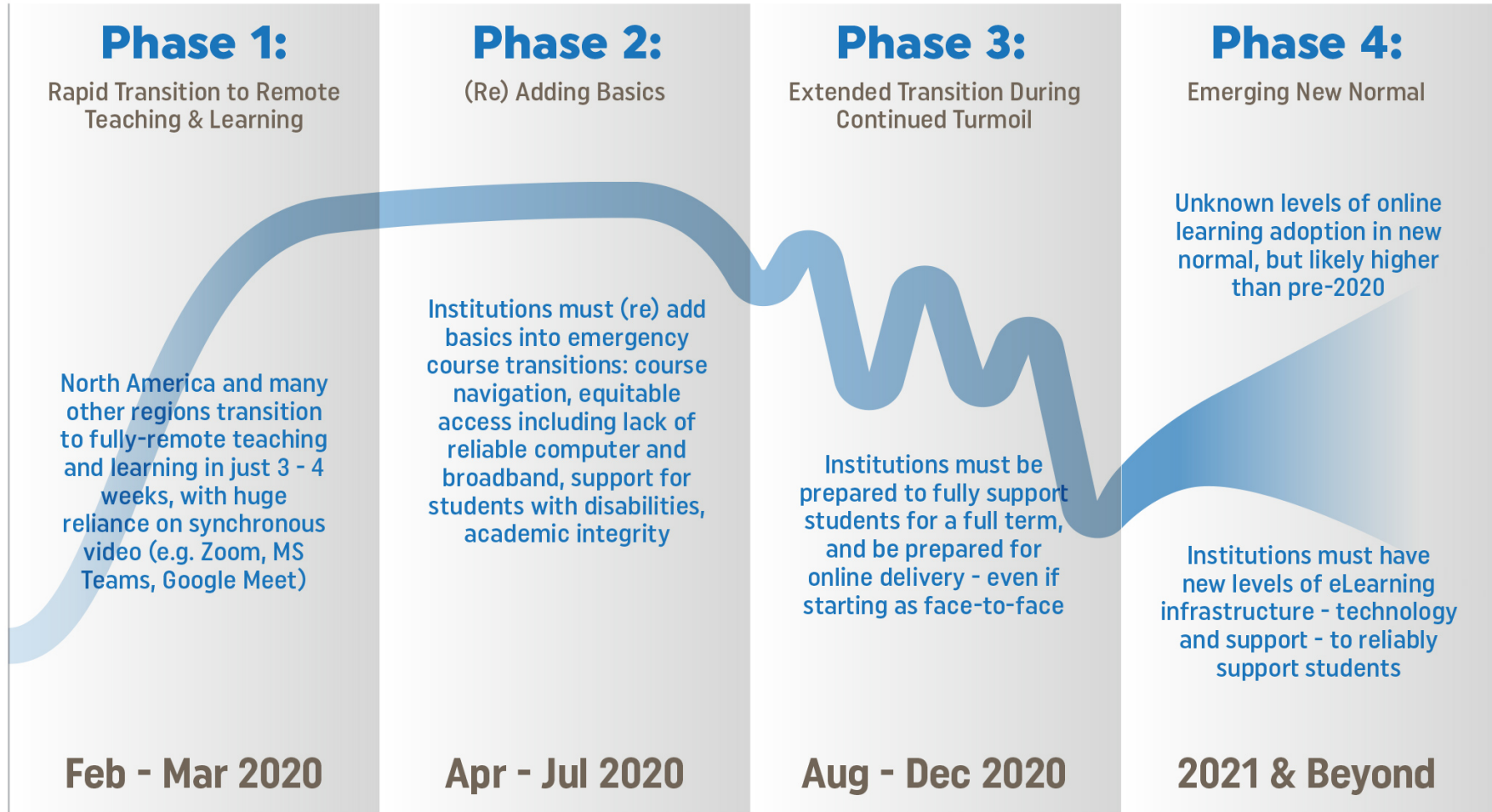
Class Size

Large-lecture classes delivered online, with smaller sections mixed virtual and face-to-face, and most upper-division courses face-to-face.



Multiple Phases of Higher Education Response to COVID-19

Online Learning Adoption



Outlook as of end of March, 2020

MINDWIRES

Source: <https://philonedtech.com/revised-outlook-for-higher-eds-online-response-to-covid-19/>

Multiple Phases of Higher Education Response to COVID-19

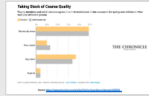
Online Learning Adoption

Phase 1:

Rapid Transition to Remote Teaching & Learning



North America and many other regions transition to fully-remote teaching and learning in just 3 - 4 weeks, with huge reliance on synchronous video (e.g. Zoom, MS Teams, Google Meet)



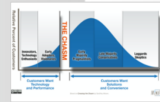
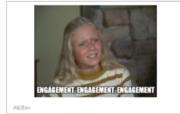
Feb - Mar 2020

Phase 2:

(Re) Adding Basics



Institutions must (re) add basics into emergency course transitions: course navigation, equitable access including lack of reliable computer and broadband, support for students with disabilities, academic integrity



Apr - Jul 2020

Phase 3:

Extended Transition During Continued Turmoil



Institutions must be prepared to fully support students for a full term, and be prepared for online delivery - even if starting as face-to-face

Aug - Dec 2020

Phase 4:

Emerging New Normal

Unknown levels of online learning adoption in new normal, but likely higher than pre-2020



We are in the midst of an inflection point in higher education driven by mainstream adoption, different platform designs, moving beyond the digitization of traditional classroom, and (unfortunately) Covid-19. The LMS is best positioned to tie the pieces together: a Virtual Learning Environment.

Institutions must have new levels of eLearning infrastructure - technology and support - to reliably support students

2021 & Beyond

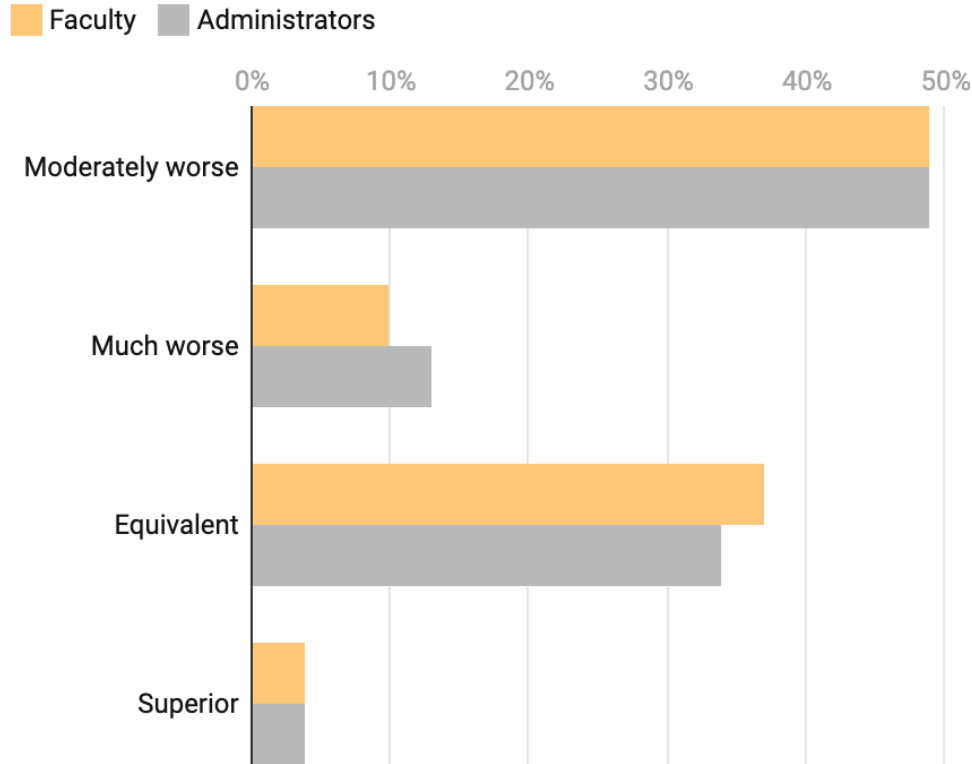


Outlook as of end of March, 2020

MINDWIRES

Taking Stock of Course Quality

Faculty members and administrators agreed that their institutions' online courses in the spring were inferior to what had been offered in person.



THE CHRONICLE
of Higher Education

Chart: Audrey Williams June • Source: Chronicle survey • [Get the data](#) • Created with [Datawrapper](#)

Source: <https://www.chronicle.com/article/Did-the-Scramble-to-Remote/248928>

Something to Build On

About two-thirds of professors said their experience teaching remotely this spring was positive.

Mostly positive Somewhat positive Somewhat negative Mostly negative



[Get the data](#) • Created with [Datawrapper](#)

Nearly three-quarters of them are confident about teaching entirely or mostly online this fall.

Very confident Somewhat confident Not very confident Not at all confident

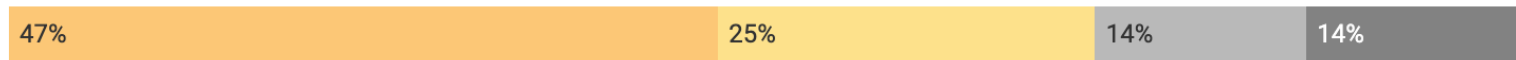


Chart: Audrey Williams June • Source: Chronicle survey • [Get the data](#) • Created with [Datawrapper](#)

Mixed Emotions About the Fall

Almost three out of four professors "strongly" or "somewhat" agree they're looking forward to returning to in-person teaching in the fall.

Strongly agree Somewhat agree Somewhat disagree Strongly disagree



[Get the data](#) • Created with [Datawrapper](#)

Students give low marks on the abrupt switch to online learning.

For most, the rapid transition to online learning hasn't been great.

- 68% of higher ed students feel the emergency online instruction they are now receiving is worse than the in-person instruction they received at their school
- 28% have experienced difficulty navigating/using online learning tools
- 22% have experienced difficulty accessing online learning materials

And it's affecting their study habits.

50%
are spending less time on coursework



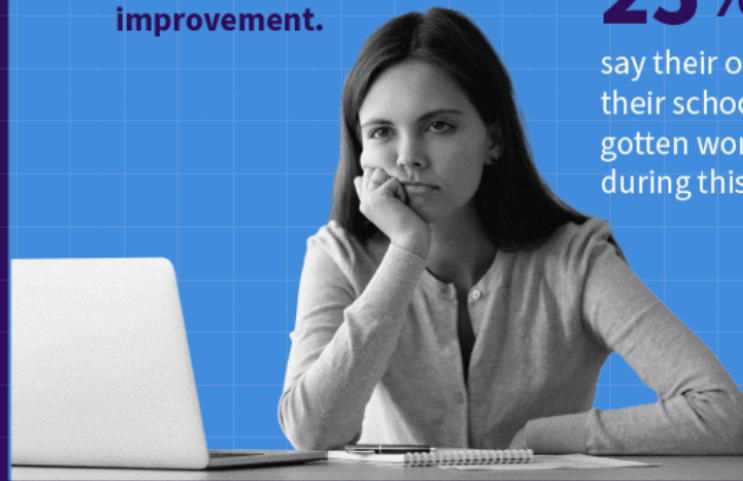
They have empathy for the plight of their colleges and professors.

Despite the challenges, students recognize the hard work of their institutions and faculty in responding to the pandemic.

- 70% rated their schools' response as good or excellent
- 66% rated their profs' response as good or excellent

However, there is room for improvement.

25%
say their opinion of their school has gotten worse during this crisis

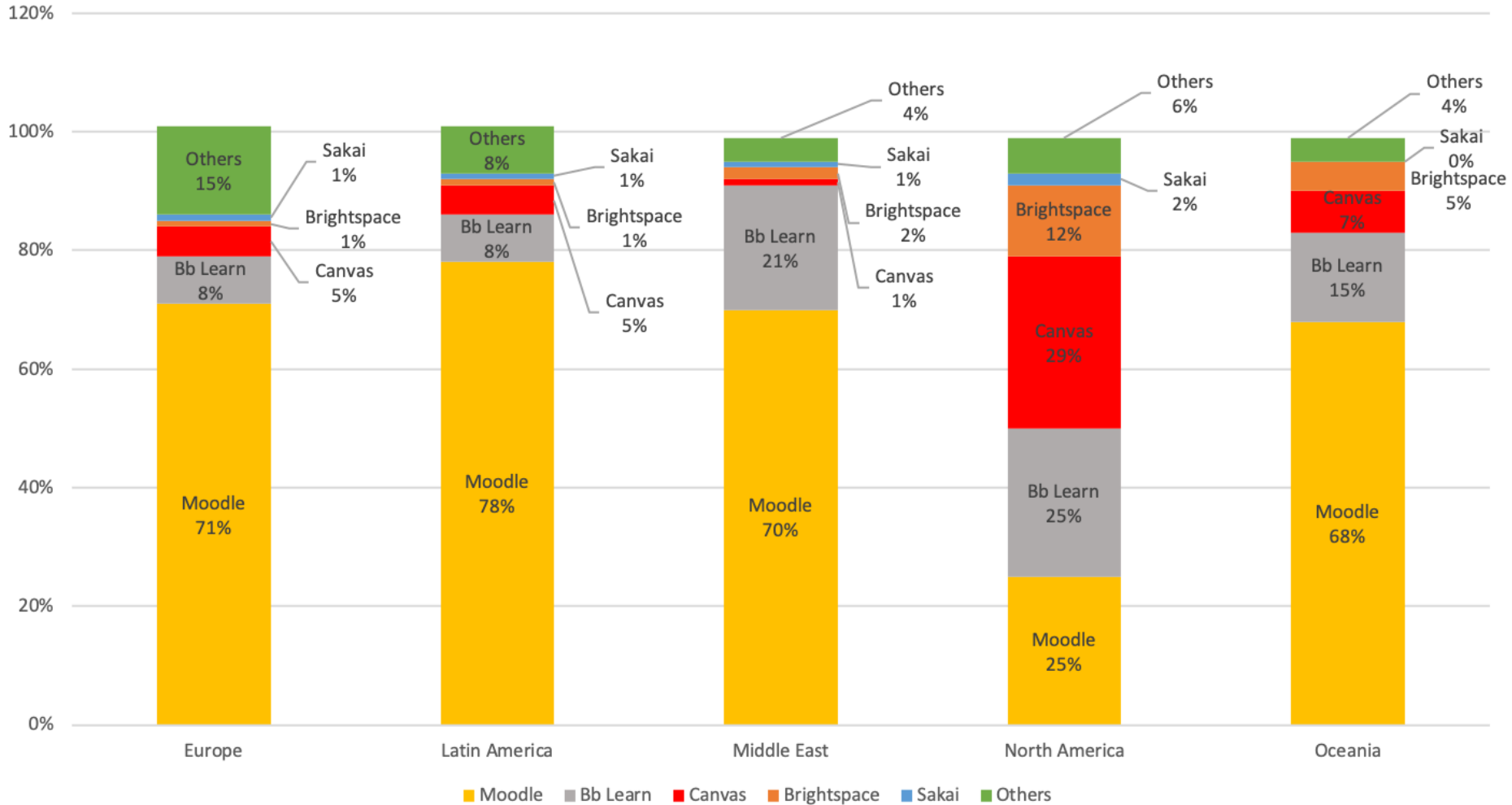


TOP HAT

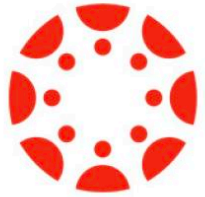
March 2020 Academic LMS Market Share Per Global Region

All Postsecondary Types

Source: MindWires LMS Market Analysis



The Big Four



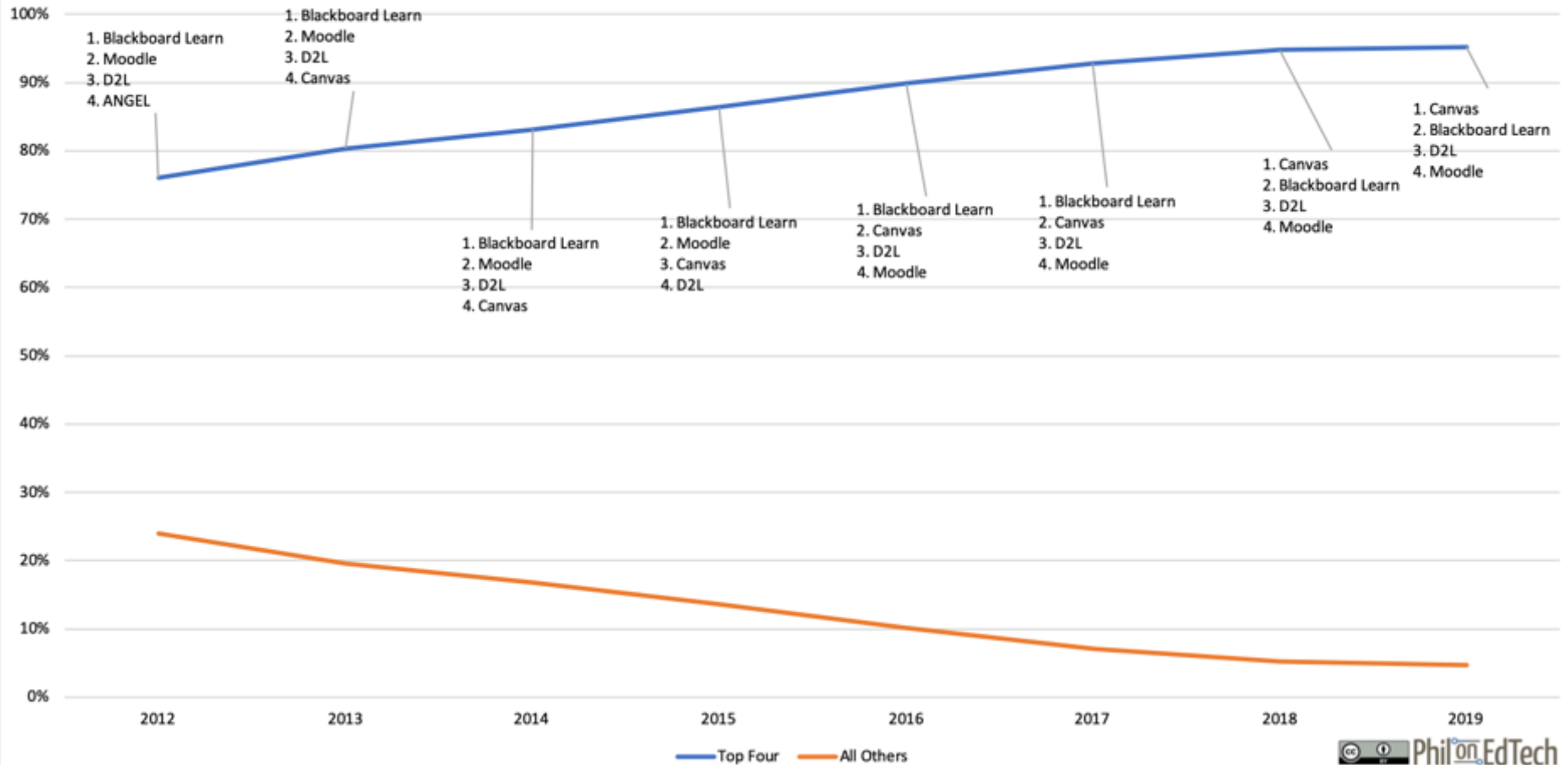
canvas



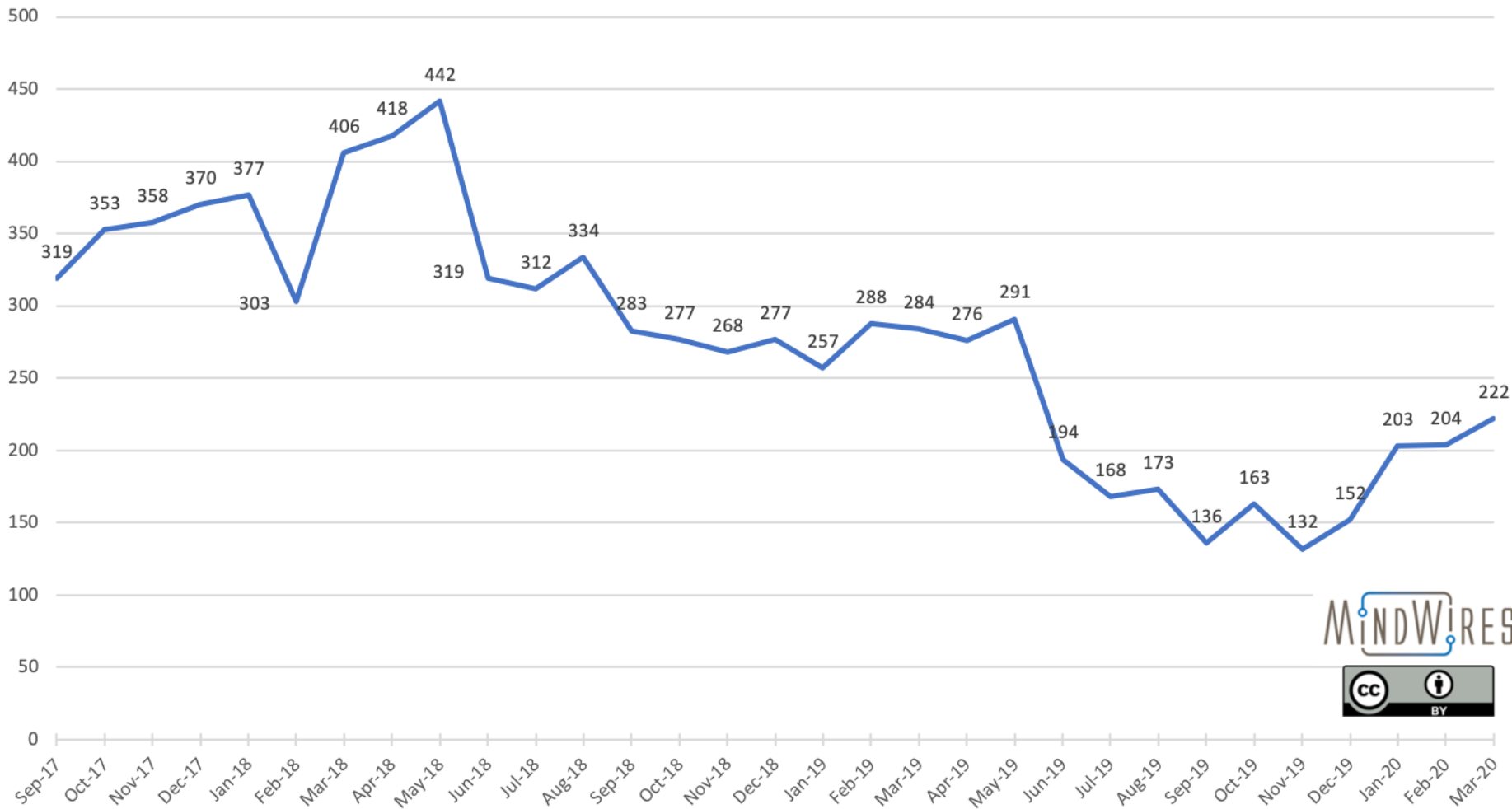
brightspace
by D2L

Blackboard[®]
LEARN[™]

Market Share Top Four LMS vs All Others North American Higher Education by Enrollment



Trailing 12 Months of New Implementations for Higher Ed LMS Market Across Four Global Regions



MINDWIRES



Update on Academic LMS Market Slowdown

JULY 1, 2019 / BY PHIL HILL

"Hopefully this data description of market activity hasn't been too tedious, but there are strong arguments that company financial health in 2018 / 19 for the providers will continue to have an outsized impact on the future of LMS offerings."

Source: <https://philonedtech.com/update-on-academic-lms-market-slowdown/>

Secondary Players

Long-term



schoolology®



Medium-term



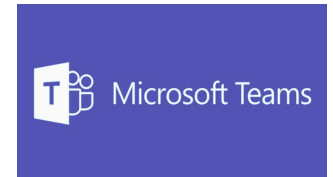
New(ish) or not-an-LMS



notebowl



Google Classroom



Enterprise LMS Choices

WebCT Prometheus

Bb Blackboard eCollege
A Pearson Company

Sakai

OpenClass™ moodle

canvas BY INSTRUCTURE Desire2Learn

Bb Blackboard eCollege
A Pearson Company

New World of Available Technologies and Consumer Expectations

Late 1990s

Present

Google Blogger

Google Blogger WIKIPEDIA The Free Encyclopedia

flickr vimeo KLOUT

LinkedIn skype Picasa

digg WORDPRESS Facebook

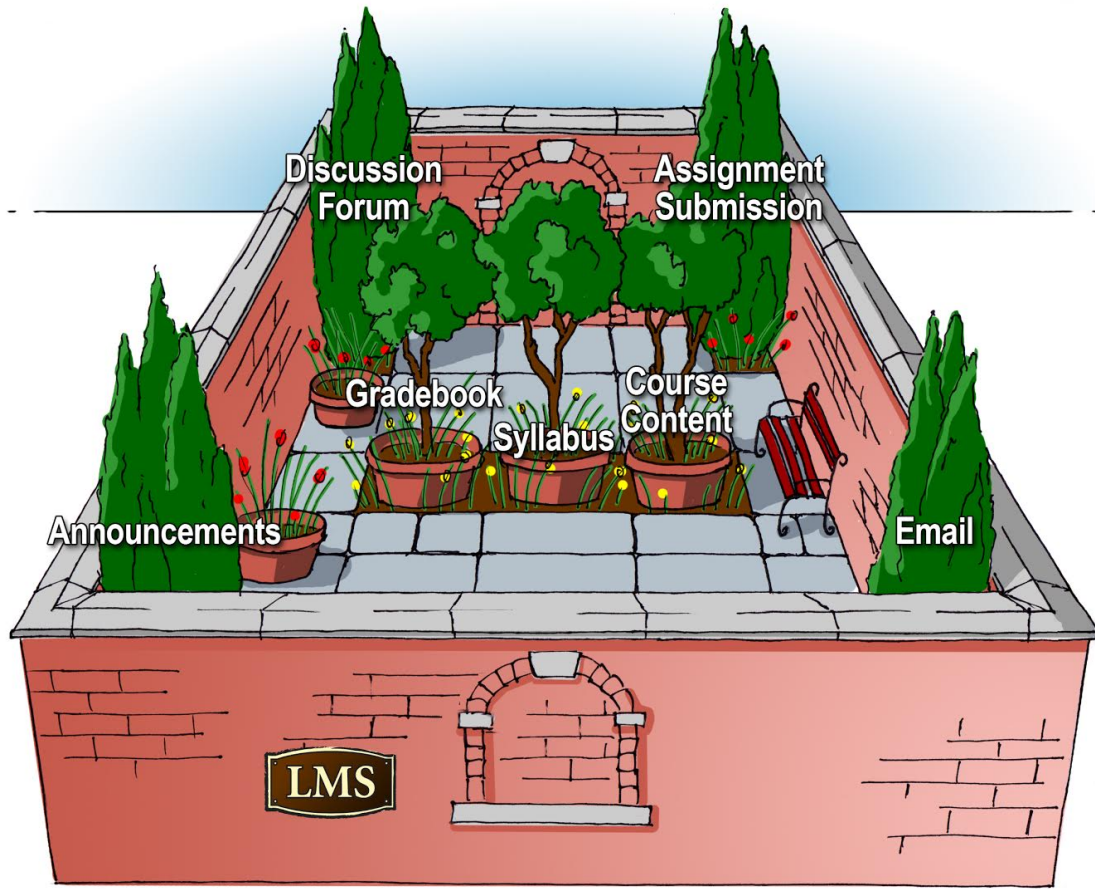
twitter YouTube Dropbox

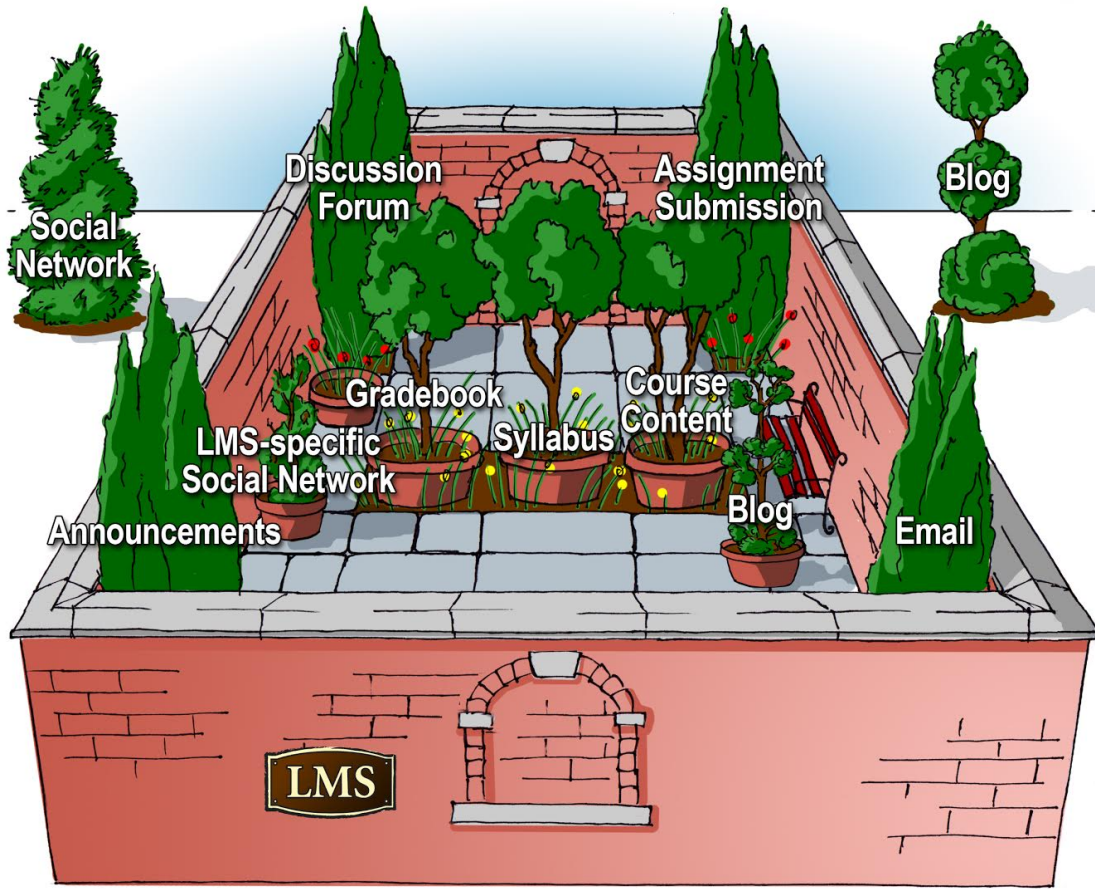
box NING piazza

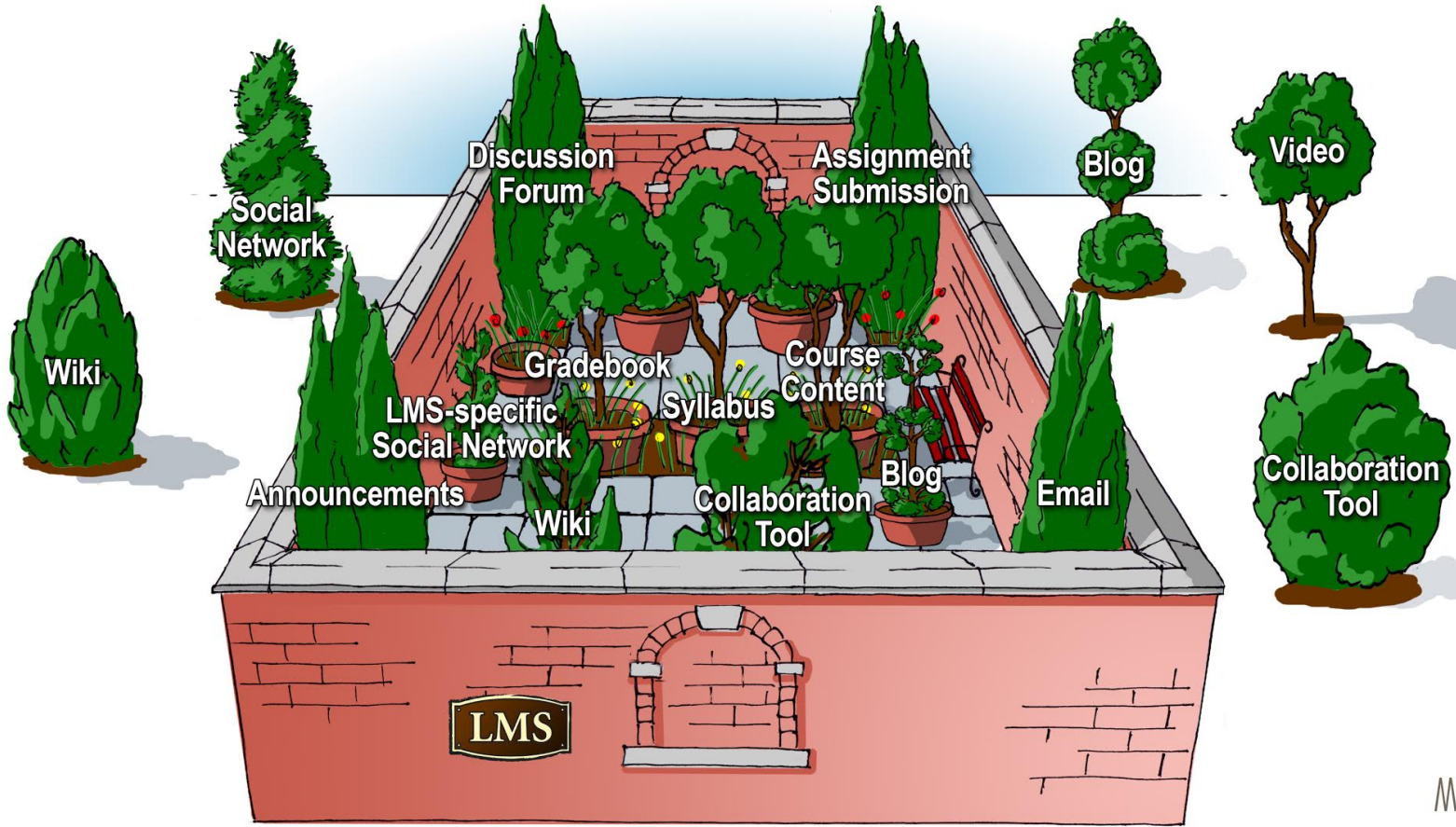
Google+ Instagram Pinterest

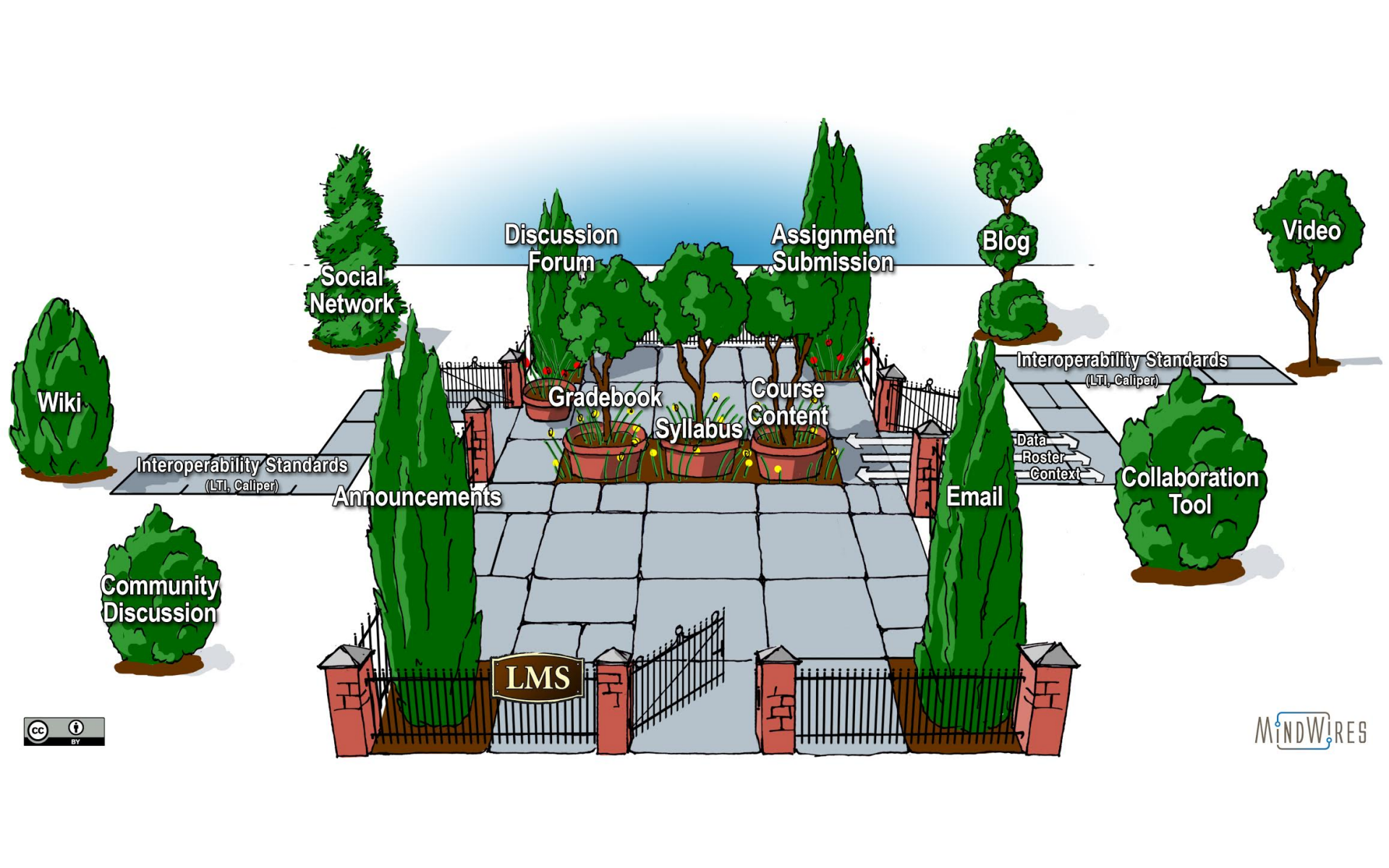
slideshare Google Drive

Free Applications for an Enhanced Social and Education Experience

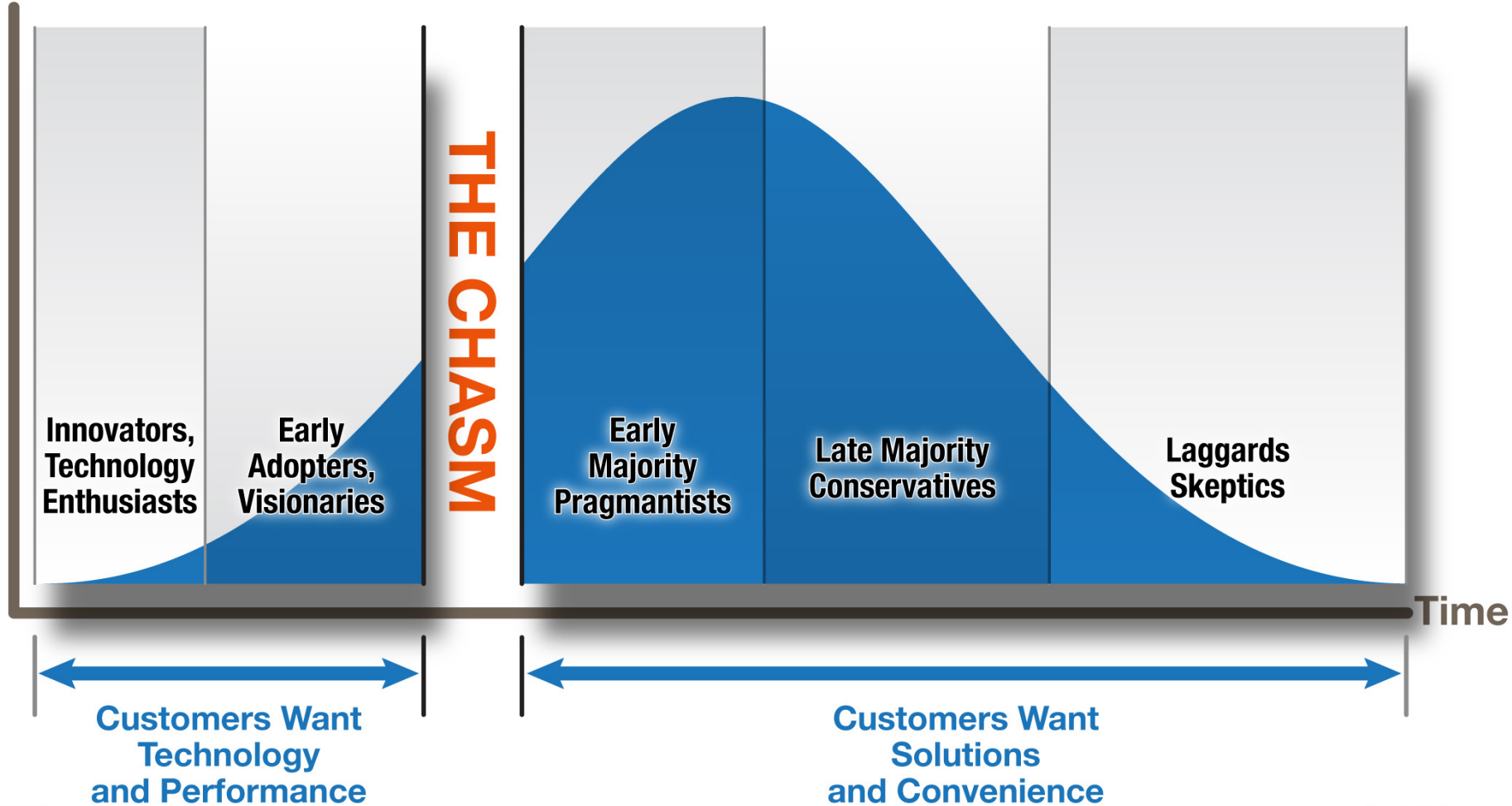








Relative Percent of Customers



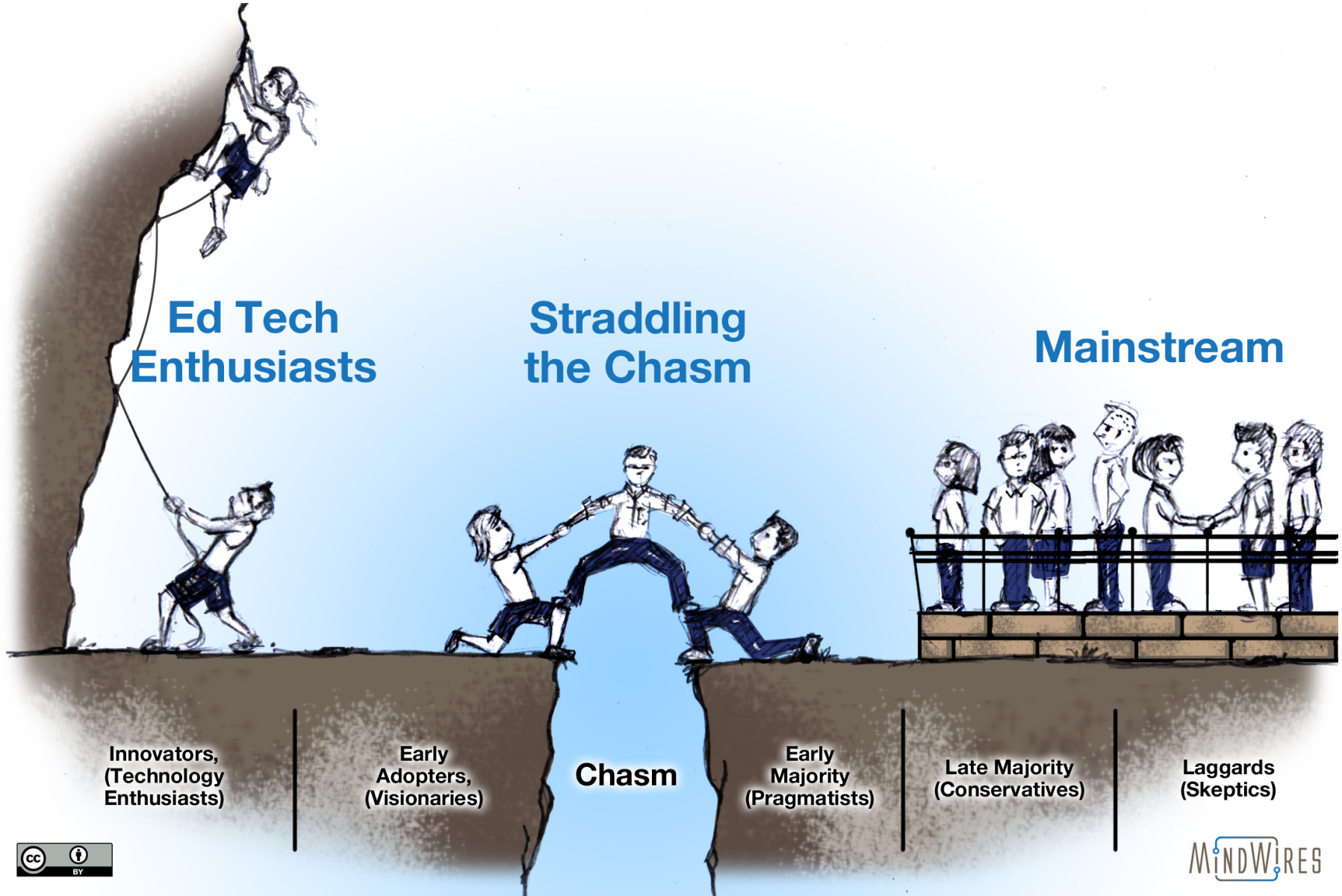
Based on *Crossing the Chasm* by Geoffrey Moore.



**Ed Tech
Enthusiasts**

**Straddling
the Chasm**

Mainstream



**Innovators,
(Technology
Enthusiasts)**

**Early
Adopters,
(Visionaries)**

Chasm

**Early
Majority
(Pragmatists)**

**Late Majority
(Conservatives)**

**Laggards
(Skeptics)**



Net Effect, design

- Even further increasing the importance:
 - Intuitive LMS design – pleasing to use, little training required
 - Scalable hosting (i.e. cloud hosting)
- Challenges:
 - Balance simple & intuitive with rich & configurable
 - Afford to stay in business
 - Do better than threaded discussion board



Students are missing out on classroom engagement.

Engagement plays a major role in ensuring students feel like they are deriving value from their education.

Spending time with faculty and fellow students is important to them as well.

78% say the online class experience is unengaging



75% miss face-to-face interaction with faculty and students



Of these students:

- 53% are spending less time on coursework
- 39% don't enjoy or see the value in real-time online learning
- 75% think online instruction is worse than in-person instruction

Of these students:

- 52% are spending less time on coursework
- 38% don't enjoy or see the value in real-time online learning
- 76% think online instruction is worse than in-person instruction

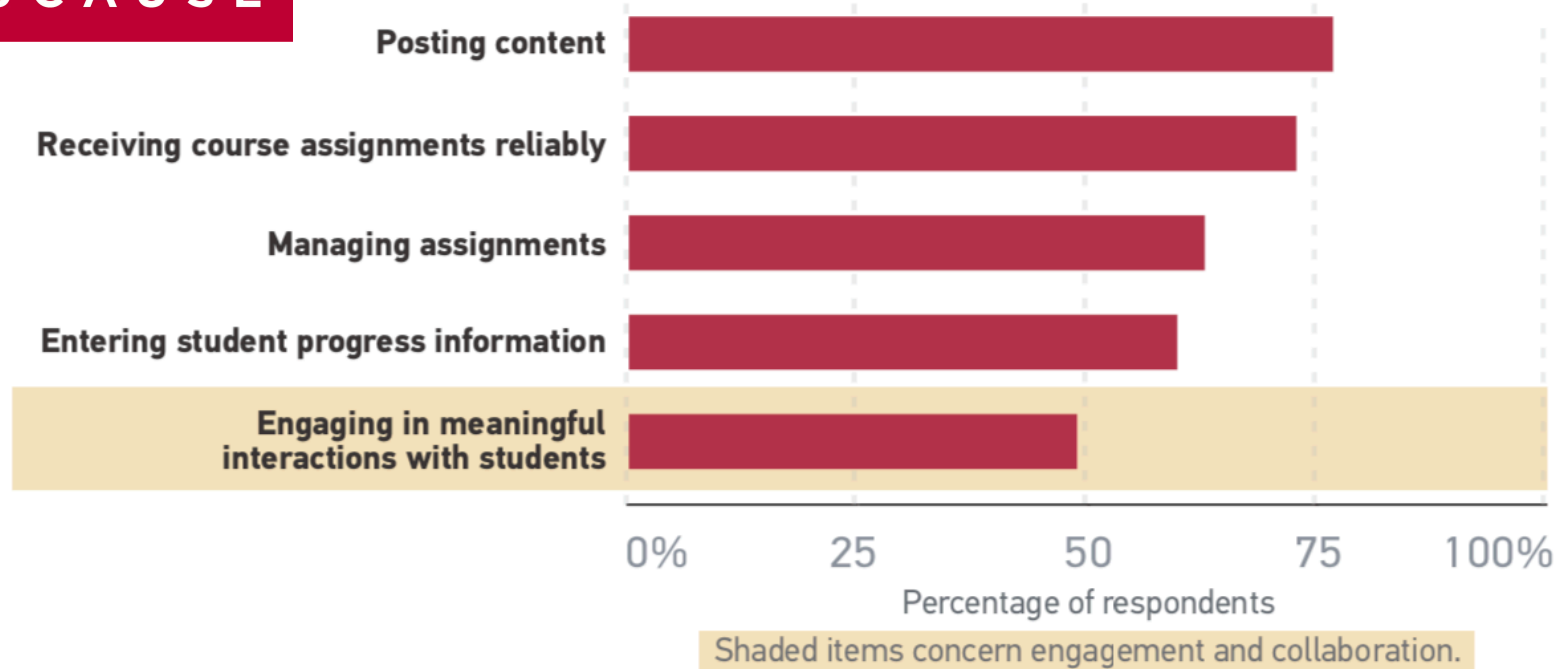


Figure 7. Overview of faculty satisfaction with LMS features

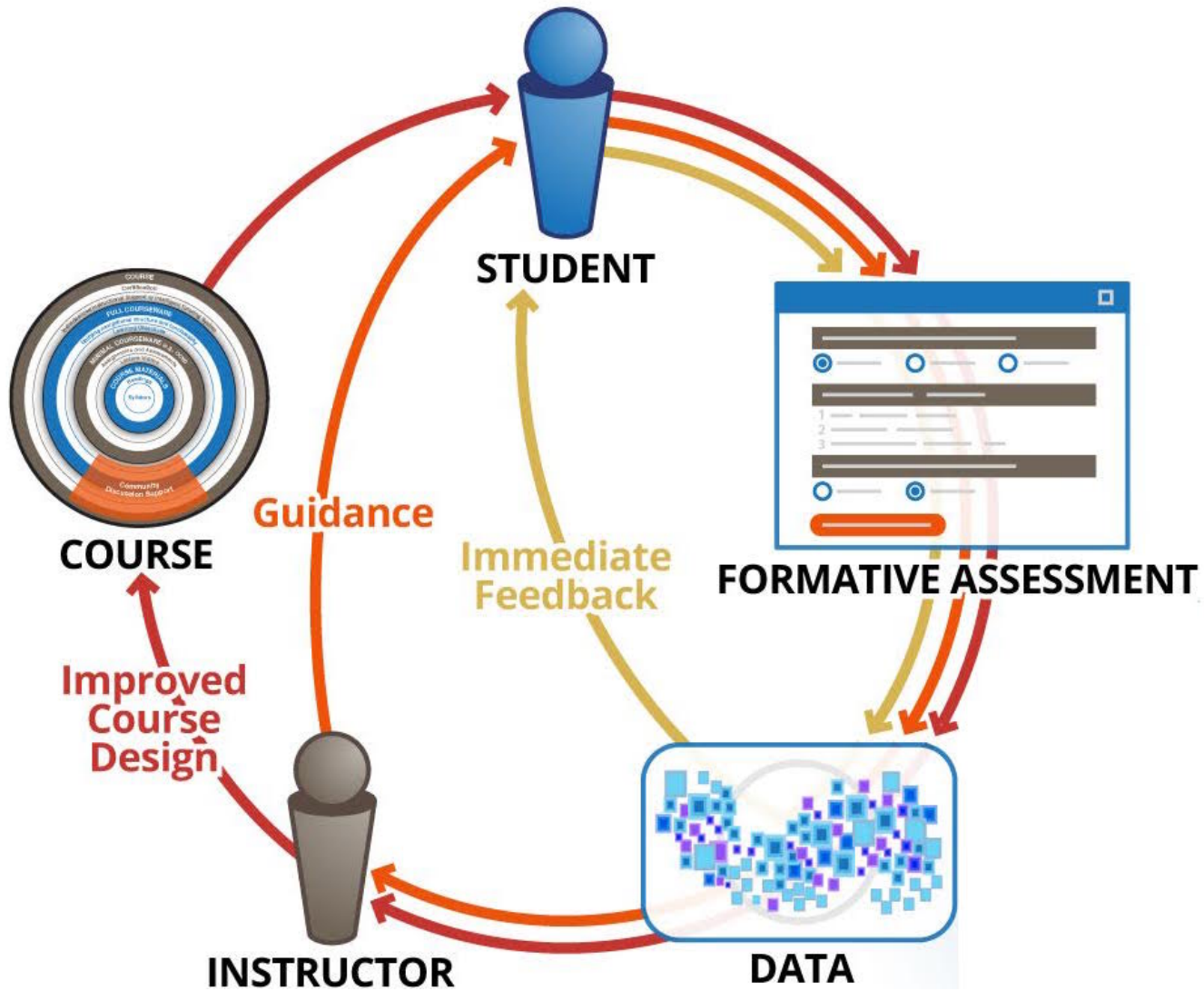
Source: <https://library.educause.edu/resources/2014/9/the-current-ecosystem-of-learning-management-systems-in-higher-education-student-faculty-and-it-perspectives>



imgflip.com



Source: Robin Wilson <http://blog.rtwilson.com/john-snows-cholera-data-in-more-formats/>



TEACH BETTER

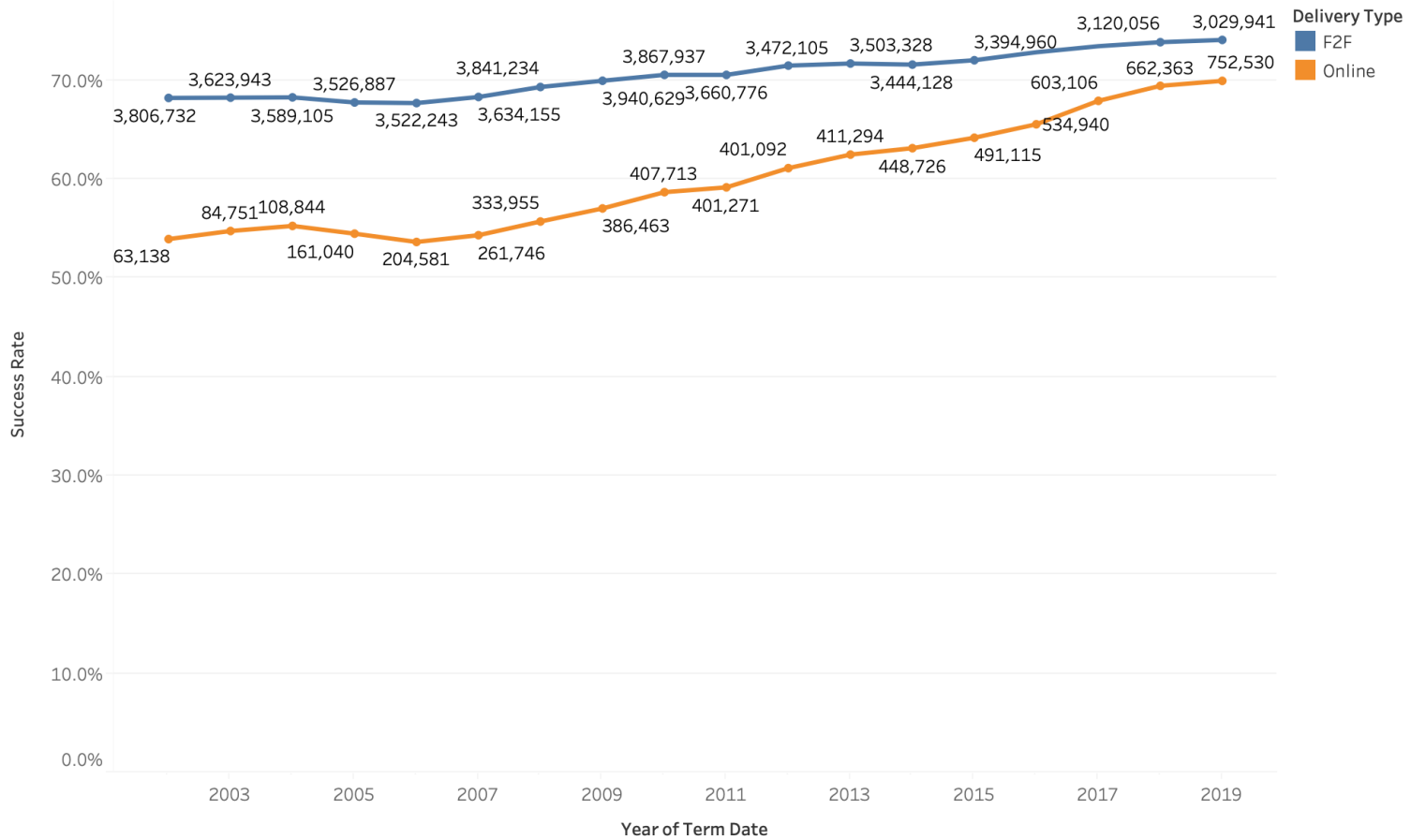


The Dangers of Mixing Student Data and Machine Learning

2019, APR 05

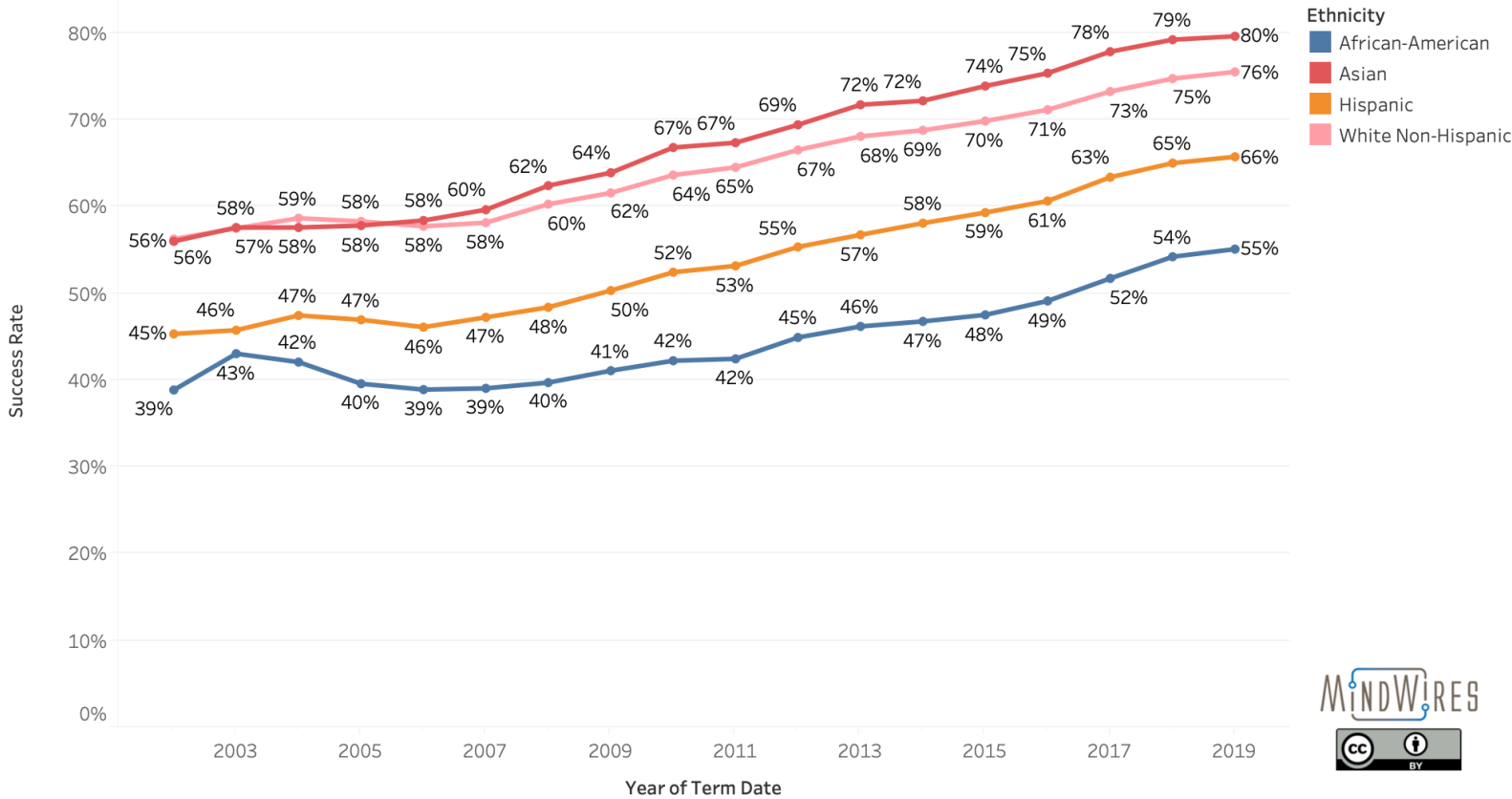
source: <http://teachbetter.co/blog/2019/04/05/dangers/>

CCCS Success Rate by Delivery Type



Source: <http://californiacommunitycolleges.cccco.edu>

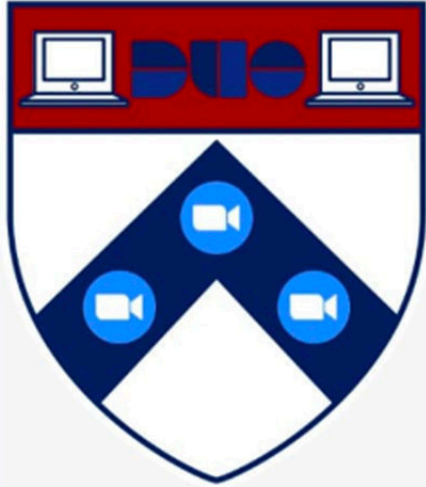
CCCS Success Rate by Ethnicity for Online Only



Source: <http://californiacommunitycolleges.cccco.edu>



University of zoomsylvania



Zoom

I PAID TOO MUCH *for* THIS EDUCATION



THE GEORGE
WASHINGTON
UNIVERSITY
WASHINGTON, DC

Search Define Make Translate

FBI 5212 - Emergency Management & Crisis
Objectives

Continuity of Operations

Resilient Emergency Response Coordination

Communication Aids, etc.

Communication Transactions

- Messages
- Updates
- SITREPs
- New data, maps, information
- Requirements, problems, new issues
- Validation or clarification
- Advisories and warnings
- Official statements



Planning for Resilience, Not Resistance

APRIL 28, 2020 / 10 COMMENTS / BY STEPHANIE MOORE, PHIL HILL

*"What we have learned from such a large research effort is that no one medium is better than another – because it's not the medium itself that accounts for differences. **What makes a difference is the design – specifically the application of an intentional instructional design process and the implementation of effective instructional methods or strategies.** The design process and effective instructional methods and strategies can be employed in any medium (or not)."*

Source: <https://philonedtech.com/planning-for-resilience-not-resistance/>

We are in the midst of an inflection point in higher education driven by mainstream adoption, different platform designs, moving beyond the digitization of traditional classroom, and (unfortunately) Covid-19.

The LMS is best positioned to tie the pieces together; a Virtual Learning Environment.

phil@mindwires.com

[@PhilOnEdTech](#)
philonedtech.com
mindwires.com