The State of Learning Management in Higher Education Systems

August 11, 2009
Webinar Outline

• Introduction
• California State University Project Update
• LMS Market
  • Status of market
  • What does it mean
• Peer System Information
  • What is happening at each system
• Major Trends
• Q&A
What will you learn in this session?

• Gain an understanding of the LMS profiles of peer systems
• Gain insight on the current state of the LMS vendor market
• Discuss key issues faced by state-wide systems

• What you won’t learn:
  • Magic to solving all your LMS institutional issues
  • No crystal ball on the future of the next generation LMS
  • Getting all campuses in one system to agree on one LMS
California State University
LMS Future Project Update
California State University
- Largest HE System in the World

• 23 campuses throughout California
  • Bachelors and Masters degrees
  • Residential and Commuter and Polytechnic and Maritime and…
  • Large and Small
  • No two campuses are structured the same
• Students: 450,000
• Faculty and Staff: 47,000
What are the CSU LMS System-wide Initiatives?

• #1 Vendor Relationship and Contract Management
  • System-wide LMS RFP
  • Ongoing discussions with Vendors
  • LMS Sandboxes

• #2 Moodle Consortium

• #3 Integration
  • SIS Integration
  • IMS Integration

• #4 LMS Best Practices
  • Rubric for Online Instruction
  • Transforming Course Design
“LMS Futures” Group

• 4 CIOs, 4 Provosts, Chancellor’s Office staff
  • Met bi-weekly online from January to June

• Creating a Roadmap to the future
  • LMS Services
  • LMS Environment

• Investigating System-wide Strategies

• Laying out options

• Determine Communications Plan

• Make recommendations to the CSU campuses

• Gather feedback
LMS Market Update
## LMS Adoption by Year
(source: Campus Computing Project)

<table>
<thead>
<tr>
<th>All Institutions (US)</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Open Source</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Moodle</td>
<td>NA</td>
<td>4.2%</td>
<td>7.8%</td>
<td>10.0%</td>
</tr>
<tr>
<td>Sakai</td>
<td>NA</td>
<td>3.0%</td>
<td>2.5%</td>
<td>3.8%</td>
</tr>
<tr>
<td><strong>Total Open Source</strong></td>
<td>NA</td>
<td>7.2%</td>
<td>10.3%</td>
<td>13.8%</td>
</tr>
<tr>
<td><strong>Proprietary</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Angel</td>
<td>NA</td>
<td>2.4%</td>
<td>4.1%</td>
<td>7.0%</td>
</tr>
<tr>
<td>Blackboard (and WebCT)</td>
<td>75.3%</td>
<td>71.0%</td>
<td>66.3%</td>
<td>56.8%</td>
</tr>
<tr>
<td>Desire2Learn</td>
<td>2.2%</td>
<td>2.0%</td>
<td>3.2%</td>
<td>7.4%</td>
</tr>
<tr>
<td>eCollege</td>
<td>1.4%</td>
<td>1.3%</td>
<td>1.6%</td>
<td>1.3%</td>
</tr>
<tr>
<td><strong>Total Proprietary</strong></td>
<td>NA</td>
<td>76.7%</td>
<td>75.2%</td>
<td>72.5%</td>
</tr>
<tr>
<td><strong>No Campus Standard</strong></td>
<td>9.6%</td>
<td>9.6%</td>
<td>9.9%</td>
<td>9.3%</td>
</tr>
</tbody>
</table>
Higher Education Peer System Status
Criteria for Selecting Systems to Research

- Cross-section of governance models
  - totally centralized; selectively centralized; consortial clusters; totally local
- Cross-section of open source and proprietary
- Diversity similar to the CSU system
  - faculty & students; curricular; geographical; campus culture
Sources of Information

- System web sites
- Interviews with System users, administrators
- NCHEMS – referred to WCET (Edutools)
- AASCU Members List
- SHEEO State Quick Facts
  - [http://www.sheeo.org/sqf/sqf.htm](http://www.sheeo.org/sqf/sqf.htm)
- Educause CIO listserv responses
Holistic View of LMS Decisions
Trends
Trends

• No one model for balance between central / local services supporting the LMS
  • Each reflects the culture & history of the system
  • Often includes combination of centralized services for smaller campuses, with local services for larger campuses
  • Maintaining flexibility for services is important
  • Integration of LMS with ERP and other systems is critical (class rosters, grades, identification, etc.) for adoption
Trends

• Changing definition of “centralization”
  • Started out as one LMS, one instance for all
  • Increasing usage leading to multiple instances
    - Infrastructure & performance needs
    - Specialized content/discipline needs (math symbols, foreign language interfaces, campus culture)
  • No existing LMS can scale to this size with one instance
Trends

• Major disruption driven externally by LMS vendors, not educational institutions or needs
  • Raises concern about impact on institutions
  • Leading to renewed discussions about open source solutions
  • Rethinking roles of various systems and how to organize services
    - Course management system
    - Content management system
    - Integration with Student Information Systems
LMS Market Trends to Watch

• Open source movement will grow, but not a panacea
• Managed and hosted services will grow, but not a panacea
• Big players (SIS and Publishers) will continue to try to enter market, but will not rush in
• Market will not change unless customer behavior changes
  • These are not typical market dynamics at play
  • Consortiums and open source providing most change
Follow-up

- Opportunities to continue networking/sharing among HE systems
  - Educause
  - Updates from CSU process

- Website
  - Share status information, contact information
  - Raise/discuss issues special to HE systems
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