

Government Survey Questions

1. Which of the following statements is true about your organization:

- We create the learning content that is used inside our enterprise for our own training and elearning programs.
- We create elearning content for use by our own enterprise as well as for customers, channel and partner organizations.
- We outsource the authoring of our elearning content.
- We don't currently have any training or elearning programs.
- Other

2. What are the ways in which your organization uses training and elearning?

- Onboarding and new employee orientation
- Compliance and regulatory training
- Professional development
- New product training for channel partners and customers
- Other
- Not applicable

3. What kinds of training and elearning delivery mechanisms do you currently use?

- Web conferencing
- Tests and assessments
- Online courses and virtual classrooms
- Social media (wikis, blogs, IM)
- Games and simulations
- Other
- Not applicable

4. What authoring tools do you use to create training and elearning content?

- Authorware
- Lectora
- Toolbook
- Designer's Edge
- Other
- Not applicable

5. What web development and application tools do you use for creating training and elearning content?

- GoLive
- Flash
- Dreamweaver
- FrontPage
- Other
- Not applicable

6. What rapid elearning tools do you use for creating training and elearning content?

- Captivate
- Articulate
- Camptasia
- Acrobat Connect Professional (formerly known as Breeze)
- FireFly
- Other
- Not applicable

7. What do you use for web conferencing and distributed meetings?

- WebEx
- Acrobat Connect Professional (formerly known as Breeze)
- Live Meeting
- Centra
- MeetingPlace
- Other
- Not applicable

Executive Summary

Nowadays, a large cross section of government personnel participate in some kind of elearning, and nearly 45% of those surveyed by Federal Computer Week Online this fall said they create elearning content in-house.

As a solution to deliver online learning, elearning has evolved from being viewed as an add-on to traditional training operations to being a mission-critical component of organizational education.

Interestingly, there appears to be a blurring of the elements that comprise elearning, because of the 259 government and industry officials surveyed, 41% reported they have no such programs in place, while in a separate question, only 17% reported no specific uses of elearning tools. Survey respondents were best able to confirm their participation in elearning and training when given concrete examples, such as employee orientation or product training.

Elearning was most often identified as the means for professional development by 74%, followed by 68% who use it for compliance and regulatory training. Another 59% use elearning for new employee orientation, or to train channel partners and customers. Percentages may not add up to 100 because respondents were asked to select all that apply.

Most respondents (73%) identified online courses, tests and web conferencing as key delivery mechanisms for elearning and training, although 12% also had used games and simulations and 10% used social media such as blogs and wikis.

The survey created by Adobe and conducted by FCW Research Online was designed to gain a better understanding of federal sector knowledge and acceptance of elearning tools, practices and delivery mechanisms.

In this survey, about 75% of respondents were government employees. About half were from federal defense agencies, while 23% were from civilian agencies, state and local government. Another 22% were from either private industry or other government-focused organizations. The largest percentage, 27% worked in computer, communications or network management, followed by 21% who worked in agency or operations management. In all, about a third of the respondents had purchasing power over \$1 million. Some of the more interesting findings include:

- While nearly half of respondents didn't recognize the software used for development, the most often mentioned tool was Dreamweaver, followed closely by FrontPage and Flash.
- More than 40% of respondents didn't recognize specific tools used to create content for training and elearning. Of those who could identify such an application, the most familiar was Live Meeting, cited by 25% of respondents.
- Several comments from respondents noted that traditional classrooms are still the preferred delivery mechanism for training.

SURVEY RESULTS

Government Turns to eLearning

Once viewed as an add-on to traditional training processes, elearning is evolving into a mission-critical component of training and education programs, delivering online, blended and face-to-face learning regardless of physical location, time of day or distribution device.

Increasingly, organizations in corporate, government and education settings are taking advantage of elearning technologies to provide training opportunities beyond the time and place constraints of traditional classrooms.

In government, for example, elearning and training support are used for first responders and those involved in homeland security and emergency services.

Government audiences typically face two additional pressures – the growth of online self-service and the growth of centralized constituent service centers. The long anticipated retirements of “Boomer” generation workers is also forcing organizations to actively seek ways to capture expertise before it walks out the door.

As the Federal Computer Week survey proves, government customers may not always fully recognize the elearning tools and technologies used to create training or other learning experiences. “That’s primarily because there is no such thing as a single elearning product or platform,” said Dr. Ellen Wagner, Director, Worldwide eLearning for Adobe Systems.

Instead, she continued, elearning is evolving into a practice for reaching people, using whatever tools are necessary to engage, captivate and connect them with the information they need, when they need it. In this mostly connected, always switched-on world, elearning gives everyone who needs to learn a new skill, prepare for a new job or pursue a new career the opportunity to complete training, get a certificate or earn a degree without moving or leaving current employment. “By extending the reach of campus or organizational learning centers, elearning provides learners with more ways to participate in education, training and professional development, increasingly on their own terms,” she explained.

According to a recent report by Learnframe, the global education and training opportunity is a total available market of \$2 trillion. Earlier this year, IDC noted that the market for education and training is projected to grow by 10-15% annually.

Driving demand for elearning today are simulation-based, games-based and mobile learning solutions. Mobile learning, for example, builds on the availability of networks and portable

digital devices, including notebook computers, PDAs, game consoles, MP3 players and mobile phones, and takes advantage of place-independent flexibility to connect informal learning experiences that occur naturally throughout the day with formal learning experiences, such as those encountered in the virtual classroom model. As worker mobility increases, Wagner explains, the need to support performance at the point of need is accelerating interest in mobile learning and decision support tools, interactive checklists, podcasts and VOD (video on-demand) casts.

What Sets Adobe Apart

Common tools for producing mobile learning content include Flash Professional, and Flash Lite, streamed using Flash Media Server. Adobe tools, which have long been the de facto standard for creating interactive digital learning content, include familiar products such as Flash Professional, Dreamweaver, Photoshop CS, Illustrator CS, Adobe Premiere Pro, Adobe Contribute and Adobe Captivate 2, to name a few. The trend toward integrating dynamic, modular learning content, or learning objects, in face-to-face and elearning programs is expected to drive greater demand for solutions built on the Adobe Flex and LiveCycle platforms.

Perhaps this is why so many government organizations have already turned to Adobe for solutions to aid in elearning projects, including the Defense Acquisition University, the Department of Defense’s Advanced Distributed Learning laboratory (ADL), the Social Security Administration and the Department of Veterans’ Affairs.

Adobe’s solutions can help any government organization create and extend engaging learning processes that connect learners and instructors using tools for rich content creation, distribution and management to effectively enhance all kinds of elearning experiences.



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