



Online Professional Learning

Market Needs Analysis & Learning Design Plan – 2022-2023

Author: Jonathan Kinsey, MBA, MFA

Executive Summary

Through collaboration the SHSU Online Professional Learning Team will leverage internal resources, partnerships, and expertise to create non-academic professional skills training and professional development that will jump-start educational journeys and close educational attainment gaps in the Gulf Coast workforce development region, the State of Texas, and beyond.

The online professional learning (OPL) market is a subset of online education. This mixed learning market provides certifications, professional development, and informal learning. Providers consist of massively open online course platforms (MOOCs), online learning services, internet publishing and media platforms, for-profit institutions, and continuing education units within colleges and universities (Coursera, LinkedIn Learning, Skillshare, Duolingo, and Masterclass).

OPL is a growing ecosystem. Online program management companies and online learning platforms partner with traditional educational institutions to manage their online programs (2U, Wiley, Academic Partnerships). Individuals and independent instructors develop their own courses on revenue sharing online education platforms like Udemy, Udacity, Futurelearn, etc.

The online professional learning landscape is competitive, and competition is increasing. Independent instructors, institutions, and for-profit companies alike compete in this market to create learning opportunities for a variety of consumer learning needs that are differentiated by quality, purpose, and price.

SHSU Online Professional Learning will develop a catalog of 15 professional skills courses that increase in-demand skills within the quickest growing industries and occupations in the Texas Gulf Coast Region, and that complement SHSU academic programs.

To create value for learners, professional skills courses will be developed to provide a high-quality learning experience that is self-paced, accessible, mobile-friendly, leverages partner content and open educational resources, and creates on-ramps for academic programs.

Learning Needs Within the Texas Gulf Coast Regional Labor Market

The Texas Gulf Coast region is rapidly growing and adapting as its population and economic activity have become increasingly diverse over the past two decades. The region's economy composes 26.6% of Texas' real gross domestic product, and 2.5% of the United States' real gross domestic product (*Gross Domestic Product by County and Metro Area*, 2020). The 2020 population within the region was 7.2 million. 37.3% of this population is Hispanic/Latino, 34.1% is white, 17% is Black/African American, 8.1% is Asian, and 3.5% is other (U.S. Census Bureau, 2020).

While the region is one of the most diverse in the country, its population lacks the necessary workforce qualifications to meet the demands of area employers. In fact, a widening gap between the needs of employers and qualifications of the Texas Gulf Coast region's workforce has been an issue of concern for both businesses and the workforce, as natural growth and migration has increased in recent years (Gulf Coast Economic Development District, 2020).

One area of special interest centers on historically underserved Hispanic/Latino populations. Graduation rates among Hispanic students differ significantly in comparison to other student groups. This educational disadvantage reifies inequalities in social mobility, hindering the largest-growing segment of the region's population from attaining marketable skills necessary to meet the needs of employers, and thus securing better jobs for a higher quality of life (Gulf Coast Economic Development District, 2020).

Even though explosive growth in the Texas Gulf Coast region is projected to increase the population and create 460,000 new jobs by 2028, job readiness in the Hispanic/Latino populations lags (Texas Workforce Commission, 2022). If projected growth outpaces the efforts of the Gulf Coast Workforce Board and its partners, the region's businesses will have difficulty finding qualified employees.

Across the Gulf Coast region, educational attainment levels measured by the 2019 one-year American Community Survey indicate the need for addressing educational attainment in today's Gulf Coast workforce as well as educational inequities between white and Hispanic or Latin individuals. The United States Census Bureau estimates that 51.6% of 25-year-old and older citizens, within the region, hold a high school diploma or have some college but no degree (U.S. Census Bureau, 2019). 26.4% of white individuals hold a bachelor's degree or higher, while only 14.8% of individuals of Hispanic or Latin origin hold a bachelor's degree (U.S. Census Bureau, 2019). These statistics enumerate the need for increasing educational attainment, which is in alignment with the Region's Comprehensive Economic Development Strategy, and the Texas Higher Education Coordinating Board's 60X30TX plan (Gulf Coast Economic Development District, 2020; Texas Higher Education Coordinating Board, 2015).

The Texas Workforce Commission projects that service-producing industries in the Gulf Coast region will experience around a 15% increase in employment by 2028 (Texas Workforce Commission, 2022). Professional and technical services, retail trade, educational services, health care and social assistance, wholesale trade, transportation and warehousing, and self-employed workers are industries projected to experience the largest change in employment. Change in employment within these industries represents 31% of the total change in employment within the region (Texas Workforce Commission, 2022).

January 2022 labor market insights provided by LinkedIn provide a picture of top and fastest growing skills among professionals in Texas. The table below shows top skills by demand index. The demand index is a ratio of job postings to professionals, where a higher demand index indicates a greater need for professionals to upskill (*Talent Pool Report: Common Skills Among Texas Professionals, 2022*).

Top 10 Common Skill Groups Among Texas Professionals

Market Skills (Grouped)	Demand Index	Job posts	Professionals
Operations and Manufacturing	0.19	98,566	519,315
Computer Programming Languages	0.09	78,225	826,769
Customer Experience and Satisfaction	0.09	80,772	882,510
Analytical Skills and Data Analysis	0.09	133,742	1,541,649
IT and Databases	0.08	112,010	1,473,091
Sales and Merchandising	0.05	37,031	756,883
Finance, Accounting, Banking	0.05	85,713	1,882,460
Business Process Improvement	0.03	31,092	939,496
Project, Product, and Program Management	0.03	25,561	918,251
Supply Chain and Inventory Management	0.03	18,421	718,518

LinkedIn also provided us with a picture of which skills were developed by professionals the most over the past year. The table below shows skills by one year growth among Texas professionals (*Talent Pool Report: Common Skills Among Texas Professionals, 2022*).

Top 10 Skill Groups That Grew the Most Among Texas Professionals Over the Last Year

Market Skills (Grouped)	1 Year Growth in Professionals	Professionals (January 2021)	Professionals (January 2022)
Analytical Skills and Data Analysis	1,503,119	17,985,885	19,489,004
IT and Databases	1,137,263	16,570,253	17,707,516
Computer Programming Languages	1,083,301	11,700,725	12,784,026
Finance, Accounting, Banking	1,066,801	21,822,615	22,889,416
Operations and Manufacturing	893,498	4,688,296	5,581,794
Customer Experience and Satisfaction	723,466	9,427,396	10,150,862
Project, Product, and Program Management	359,654	12,024,474	12,384,128
Business Process Improvement	298,527	7,398,712	7,697,239
Sales and Merchandising	212,807	7,091,972	7,304,779
Supply Chain and Inventory Management	178,230	5,345,999	5,524,229

Correlation between the high demand index skills and the top growing skills may suggest a high concentration of current upskilling for in-demand skills. What that correlation in and of itself may lack, however, is a greater focus on actual industry needs.

A new team, SHSU Online Professional Learning, aims to address industry needs through enabling professionals to upskill and further their education. The team will develop and foster online professional learning pathways through online courses and certificates that meet labor market needs for in-demand skills, support the learning and development of corporate partners, and lead online professional learners to higher education.

Online Professional Learning (OPL) is an emerging team within an already established leader in online education, SHSU Online. Through collaboration with existing SHSU partners, OPL is leveraging existing resources and expertise to venture into non-academic learning, training, and development for the Gulf Coast workforce development region, the State of Texas, and beyond.

The Online Professional Learning Competitive Landscape

The online professional learning market is a subset of what is referred to as online education or online learning. This mixed learning market consists of several competitive operators. Learning opportunities in this market consist of certifications, professional development training, or learning for leisure and enjoyment.

Rivalry Among Existing Competitors

Direct-to-consumer online professional learning providers consist of massively open online course platforms (MOOCs), online learning services, internet publishing and media platforms, for-profit institutions, and continuing education units within colleges and universities. Examples of competitors operating in this space include EdX, Coursera, LinkedIn Learning, Udemy, Skillshare, Duolingo, Masterclass, and continuing education departments at institutions like Rice University, University of Houston, Texas State University, etc.

According to recent IBISWorld industry reports across three industries operating in this market, the largest companies hold less than a third of the market share. The business certification and IT schools' industry's three largest players are estimated to account for less than 20% of industry revenues in 2021, and concentration is expected to remain stable as ongoing development of online courses will benefit larger players (Le, 2021a). Educational and professional development services within the business coaching industry are mostly offered by small companies operating locally and regionally (Brocker, 2021). The colleges and universities industry also has a low concentration of market share, where the four largest players are estimated to account for less than 10% of the industry revenue in 2021 (Le, 2021b).

Revenues have grown 4.2% for colleges and universities, 2.1% for business certifications and IT schools, and remained the same for business coaching from 2016 to 2021 (Brocker, 2021; Le, 2021a, 2021b). The number of colleges and universities have increased by 0.5%, business coaching companies have increased 2.8%, and business certification and IT schools have decreased by 0.7% during the same period (Brocker, 2021; Le, 2021a, 2021b).

One distinguishing factor between the online professional learning market and online education at large is the difference between academic, for-credit learning and non-academic learning. Academic for-credit learning is subject to much higher standards by accrediting bodies and state and federal legislation when compared to the non-academic nature of online professional learning (Le, 2021a). This distinction is one mark in difference of type and quality that consumers consider when making decisions about which learning pathway will lead them towards their goals.

Competitive Differentiators

Assessment factors are among competitive differentiators in quality, where viewing or consuming content does not equate to demonstrated knowledge. Differences in consumers' motivations are tied to the level at which competitors enhance their product quality through assessment and learning experience. For example, competitors like Masterclass, that are developing learning products for consumers to upskill talents in leisure activities, are less likely to incorporate assessment measures to ensure that learners are demonstrating their new

knowledge or skills (*MasterClass Online Classes*, n.d.). In contrast, competitors like LinkedIn Learning are incorporating quizzes and tests as knowledge checks within courses (LinkedIn, n.d.). These assessment measures allow them to partner with professional organizations, like the National Association of State Boards of Accountancy and the Project Management Institute, to offer professional development credit units towards obtaining or maintaining professional certifications (LinkedIn, n.d.).

The learner's experience with learning content is another differentiator in learning product quality. Accessible course content with high production value (cinematic videos, aesthetically pleasing graphics, and accessible usability) has been serving an increasingly diverse audience of learners (Saçak et al., 2022). Competitors leverage a wide range of learning platforms, learning management systems, and tools which provide a diverse range of digital learning experiences (LinkedIn, n.d.; *MasterClass Online Classes*, n.d.). They also leverage star power or trained presenters to deliver learning content. Masterclass creates courses taught by former presidents, accomplished artists, and top chefs (*MasterClass Online Classes*, n.d.).

The reputation of the institution and instructors are also important for both employers and learners. It can be a decisive factor in partnership opportunities and for those seeking career advancement (Le, 2021a). When it comes to partnering with business and corporate partners, operators in this market compete in the quality, relevance, and variety of training provided to assist in closing skill gaps within workforces.

Threat of New Entrants

Barriers to entry are low for new companies or learning creators in this industry (Le, 2021a). With a growing ecosystem of online program management companies and online learning platforms, it is easy for traditional institutions of learning to partner with private companies like 2U, Wiley, or Academic Partnerships to manage their online programs. Individuals and independent instructors can develop their own courses on revenue sharing online education platforms like Udemy, Udacity, Coursera, Futurelearn, and more. With the rise of robust online learning platforms and tools, developing and scaling online learning is largely accessible for individuals and institutions.

Bargaining Power of Suppliers and Threat of Substitute Products

Access to platforms and their learning libraries is available from several of the major players in the market like LinkedIn Learning, Udemy, EdX, and others. This access is usually sold in the form of "team licensing" for businesses (LinkedIn, n.d.). For example, institutions of higher education across the state and country have licensed LinkedIn Learning as an added benefit at marginal cost to the institution and at no added cost to the student. SHSU Online has purchased LinkedIn Learning and is implementing it in this manner across the institution for the benefit of employees and enrolled students.

As with most other platforms, LinkedIn Learning is a learning management system within itself and can interface with most other learning or development management systems (LinkedIn, n.d.). However, integrations are somewhat limited and primarily involve linking out from one learning management system into another. Intentionally, platforms like LinkedIn Learning limit integrations to ensure that users flock to their platform to consume learning from them. This aggregated approach to delivering partner learning content allows learning partners to maintain control over the content they provide and allow them to independently set pricing for access to

the same content, thus, limiting integration with the purpose of re-selling content. Doing so would force re-selling prices to be set at or below partner pricing.

Competition within the online professional learning landscape is high and increasing. With easy access to technology and tools to prepare, create, and manage online learning, individuals and institutions alike compete within the market for a variety of consumer learning needs. From for-academic learning paths and credentials to professional certificates and skill-based casual learning, this market has a variety of learning products that are differentiated by quality, purpose, and price.

Online Professional Learning Professional Skills Recommendations

Based on the market insights and competitive research, developing new professional skills courses could provide a strategic path forward as the OPL team designs, develops, and launches its first set of learning experiences to market.

1. New professional skills course developments should focus on increasing knowledge in top skills that are in demand for the quickest growing industries and occupations within the Texas Gulf Coast Region.

The following occupations represent 45% of Texas workforce growth in the Gulf Coast region (Texas Workforce Commission, 2022):

- Sales and Related Occupations
- Office and Administrative Support Occupations
- Transportation and Material Moving Occupations
- Management Occupations
- Business and Financial Operations Occupations
- Education, Training, and Library Occupations
- Computer and Mathematical Occupations
- Protective Service Occupations

Within these occupations, LinkedIn Talent Insights reports identify the following skills as in-demand for the fastest growing industries and occupations (*Talent Pool Report: Common Skills Among Texas Professionals, 2022*):

1. Operations and Manufacturing
2. Analytical Skills and Data Analysis
3. IT and Database
4. Sales and Merchandising
5. Customer Experience and Satisfaction
6. Project, Program Management
7. Finance, Accounting, Banking
8. Computer Programming Languages
9. Business Process Improvement
10. Supply Chain and Inventory Management
11. Adobe CC, Illustrator, Photoshop
12. Office 365

2. OPL learning pathways and courses should complement SHSU academic degree programs, creating on-ramps for learners to pursue degree programs.

SHSU has an assortment of online degree programs and certificates at the undergraduate and graduate level that could be considered as natural pathways following OPL coursework in the skills mentioned above.

3. To create value for learners, professional skills courses should have an engaging learning experience, consisting of high-quality primary instructional content that pairs and complements with supplementary partner content and open educational resources.

LinkedIn Learning and open educational resources should be leveraged as supplementary learning content in addition to custom produced learning content to create learning value beyond re-selling partner content.

In addition to collaborating with our SHSU partners to produce quality media and course content, one other key strategy for creating value is establishing assessment practices that are centered around the learner and their goals. Creating pre-course, formative, and summative assessments for OPL courses and learning pathways that empower OPL learners will place the power of learning in the hands of our learners.

Professional Skills Learning Design Plan

Design Objective

The Online Professional Learning team will design and develop a set of courses for adult learners in the Texas Gulf Coast Region to develop in-demand skills and competencies needed for upskilling, reskilling, and meeting projected industry labor needs.

The Adult Learning Audience

The Texas Gulf Coast Region is one of the most diverse regions in the country, with increasing Hispanic and other minority populations that have a variety of sociocultural needs and perspectives. These adult learners are likely balancing jobs, families, hobbies, health, and home (ELM Learning, 2022). They are responsible learners with a high degree of autonomy, motivated to achieve based on their individual needs, enjoy leveraging their life experience as a foundation for learning, appreciate community, can be resistant to change, love to solve problems, and are results-oriented learners (ELM Learning, 2022). Our region's adult learners likely have little time or budget for professional learning. Micro and self-paced learning experiences that are accessible and mobile friendly would be a stronger fit with their busy schedules and unique needs.

OPL Professional Skills Program Objective

Upon successful completion of proposed courses, adult learners in the Texas Gulf Coast Region will increase in-demand skills that align with growing industry workforce needs.

Course Delivery & Format

Courses will be designed for delivery within SHSU's instance of the Blackboard Ultra learning management system. The learning experience will be self-paced, and competency based. Blackboard Ultra is accessible and mobile friendly with an easy-to-use learning interface. Within the courses a common structure and layout will be used to ensure that learners experience uniformity and consistency across courses, should they register for more than one course.

Courses will be structured with an introduction module, topic-centric modules, and a conclusion module. The introduction module will contain a welcome to the course, tips on how to navigate Blackboard and access supplementary learning materials, and where to find assistance should they run into a technical issue. Topic-centric modules will contain primary and secondary learning materials and formative assessments. The conclusion module will contain a brief reflection on the course's topics and a summative course evaluation survey to gather feedback about the learning experience.

Proposed Professional Skills Course Titles & Topics

- Sales
 - Course Topics: Customer Service, Communication, and Customer Relationship Management
- Marketing
 - Course Topics: Digital Marketing, Search Engine Optimization, and Market Research
- Operations
 - Course Topics: Continuous Improvement, Forecasting, and Budgeting
- Analytical Thinking
 - Course Topics: Business Analytics, Critical Thinking, and Data Storytelling
- Creating Thinking
 - Course Topics: Design Thinking, Systems Thinking, and Strategic Thinking
- Curiosity and Lifeline Learning
 - Course Topics: Learning Mindset, Goal Setting, and Personal Development
- Technology Literacy
 - Course Topics: Generative AI, Media Literacy, and Cybersecurity
- Project Management
 - Course Topics: Project Management, Traditional Project Methods, Agile Methods, and Business Analysis
- Conflict Resolution
 - Course Topics: Communication, Negotiation, and Conflict Management
- Data Analysis and SQL Foundations
 - Course Topics: Data Analytics, SQL for Data Analysis, and MySQL Essentials
- IBM SPSS & Quantitative Analysis
 - Course Topics: Quantitative Research, SPSS Statistics, Machine Learning, AI, and Linear Regression
- Introduction to Data Visualization

- Course Topics: Data Visualization, Data Storytelling, and Data Visualization for Business Executives
- Microsoft Excel Basics
 - Course Topics: Excel Basics, Excel Statistics, and Excel Certificate Prep
- Microsoft Power BI Basics
 - Course Topics: Power BI, Dashboards, and Data Visualization
- Tableau Basics
 - Course Topics: Excel, Tableau, and Business Insights

Course Development Timeline

The Online Professional Learning Team plans to design and develop these 15 courses in two development cycles. The first cycle of eight courses will be developed in the spring of 2023 and the remaining seven courses developed in the second cycle during summer of 2023. Upon the completion of a development cycle, courses will be launched within the Genius registration catalog for access by the public.

- *Professional Skills Course Development*
 - Cycle 1 Courses:
 - Sales, Marketing, Operations, Analytical Thinking, Creative Thinking, Curiosity and Lifelong Learning, Technology Literacy, and Project Management
 - Cycle 2 Courses:
 - Conflict Resolution, Data Analysis & SQL Foundations, IBM SPSS & Quantitative Analysis, Introduction to Data Visualization, Microsoft Excel Basics, Microsoft Power BI Basics, Tableau Basics

Designing and developing these 15 in-demand professional skills courses will provide professional learning opportunities for adult learners in the Texas Gulf Coast Region who are seeking to upskill, reskill, and pivot into good jobs within the region.

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EC Demographic Profile