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StarChart™: 2024 Teaching and Learning Series – Learning Management Systems

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INTRODUCTION AND REPORT SUMMARY

The Tambellini Group, the leading analyst and advisory firm focused on higher education, is pleased to present the *Tambellini StarChart™: 2024 Teaching and Learning Series – Learning Management Systems*. As institutions navigate unprecedented change associated with societal forces and economic factors, a StarChart™ is designed to help higher education institutions visually navigate their current technology landscape through the lens of usability and innovation—which Tambellini research shows are the two biggest drivers to how institutions make technology investments.

StarCharts are part of Tambellini’s multifaceted approach to helping institutions achieve their best technological state, while also leveraging Tambellini’s Future Campus™ framework. Tambellini’s Future Campus framework compliments the StarCharts, providing additional clarity on an institution’s needs and requirements, and ultimately helping to inform and guide modernization initiatives. The Future Campus is Tambellini’s vision of where innovation and cutting-edge technology converge to create a sustainable, leading higher education institution.

This groundbreaking approach builds on more than 20 years of higher education research and proven success providing relevant and timely contextualized information. Tambellini’s proprietary methodology leverages input from hundreds of higher education institutions, Tambellini analysts and strategic advisors, vendors, implementation partners, and more.

To include a learning management system (LMS) in the 2024 StarChart, Tambellini analysts evaluated systems based on a specific set of criteria. In evaluating learning management systems, Tambellini included solutions that are actively being sold and in use in the US higher education market. *Tambellini StarChart: 2024 Teaching and Learning Series – Learning Management Systems* shows how each learning management solution scored against a matrix of usability and innovation criteria. The scoring is developed to help guide institutions in their journey to identify the best-fit solution to suit their needs.

It is important to note that placement on the StarChart does not necessarily mean a solution is the best fit for every institution. In fact, the underlying innovation in the approach proves that depending on the orientation of the institution, the same solution can appear stronger to one institution than another.

The learning management systems evaluated include:

- Blackboard by Anthology
- D2L Brightspace
- Instructure Canvas
- Jenzabar eLearning
- Moodle
- Populi Teach

FUTURE CAMPUS IMPACTS

The [Future Campus Framework](#) is Tambellini’s innovative tool for generating strategic-level conversations and action for appropriate investments and divestments across the four key pillars of people, process, data, and technology.

The Framework is scored across ten key higher education workspaces. Learning Management Systems can affect the following Future Campus workspaces:

Outcomes

Learning management systems can improve students’ academic performance.

Retain

Learning management systems can provide students with personalized features to enable them to perform their best, which will improve retention.

Operations

Utilizing cloud-native learning management systems can modernize an institution’s operations.

Innovate

Learning management systems that incorporate innovative features, including chatbots and generative AI, improve the user experience.

NAVIGATING THE TAMBELLINI STARCHART

On the right side of the StarChart, institutions should expect to see the most complete and usable learning management systems that have been proven to support institutions of all types and sizes. However, as you might expect, that usability comes at a cost, possibly making these solutions cost-prohibitive for some institutions. The learning management systems positioned on the left side of the StarChart support less functionality that is typically needed by large and complex institutions, and they have not demonstrated scalability in these larger segments. However, solutions on the left side are more affordable and have been proven to support the needs of small- to mid-market institutions, depending on their requirements.

Usability is evaluated based on the following factors:

- User satisfaction survey results
- Vendor usability evaluation (customer support, software release cadence, implementation, training)
- Functional solution breadth
- US higher education market presence (demonstrated scalability in the market)
- Presence of 2024 market usability differentiators (subscription cost, implementation cost, implementation effort, resources required to maintain, and minimal need for 3rd party solutions).

At the top of the Tambellini StarChart, institutions should expect to see products that both demonstrate innovation and possess the capacity for sustained and future innovation. The products on the bottom of the Tambellini StarChart generally have less embedded innovative features and may not have the ability to innovate and sustain that innovation at scale.

Innovation is evaluated based on the following factors:

- Vendor capacity for future and sustained innovation
- Innovative functionality within core features
- Presence of 2024 market innovation differentiators (generative AI for content creation, accessibility, assessment creation, and student use of AI, as well as overall student experience, non-credit and certificate program support, and learning analytics).

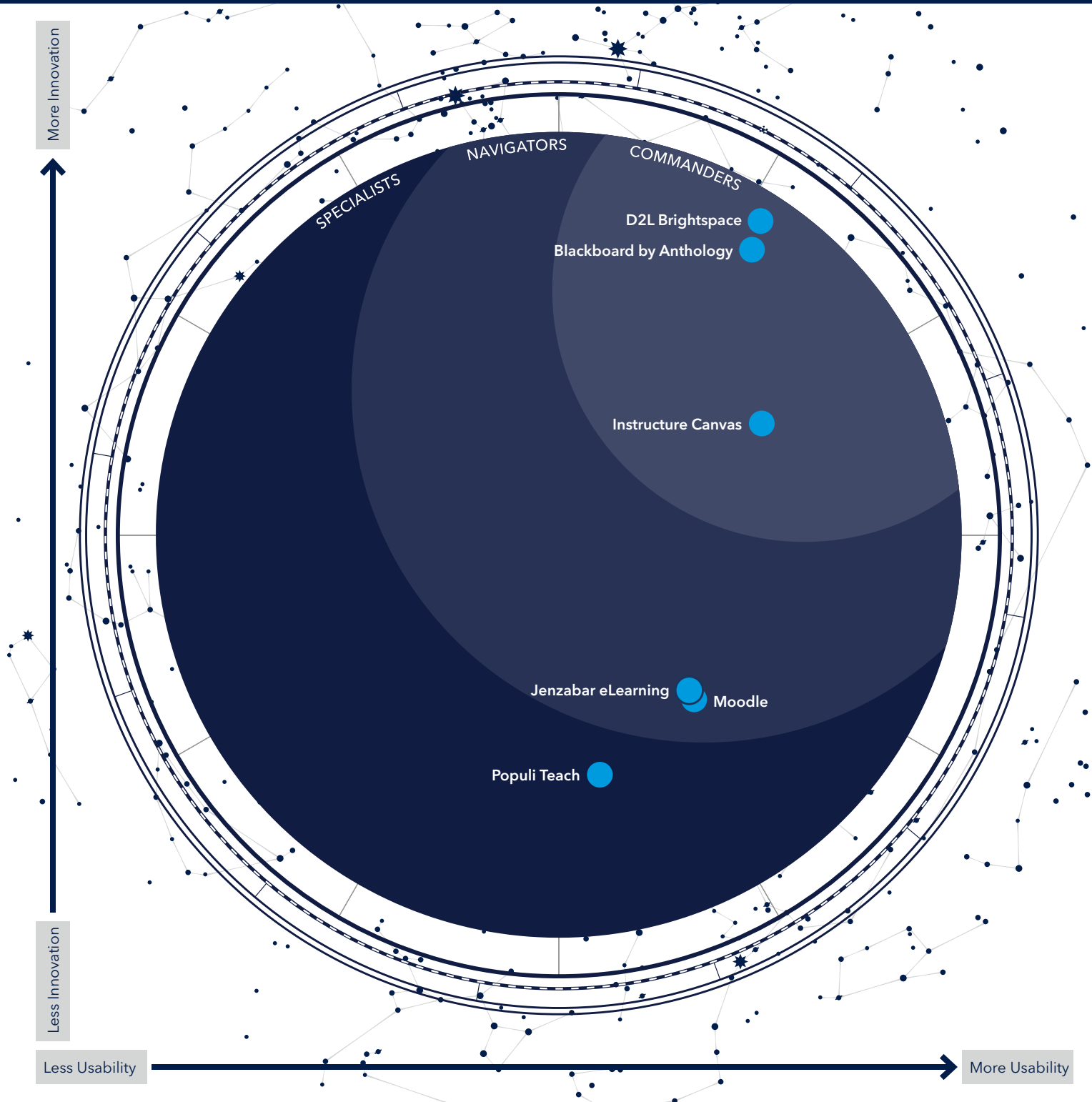
Tambellini StarChart Orbits further segment vendor solutions into three categories on the StarChart. The **Commander** category is the outermost orbit located in the top right corner of the StarChart. Institutions should anticipate that solutions in the **Commander** Orbit are market leaders with highly innovative and user-centric designs that set the benchmark for what is possible. The **Navigator** category is located in the middle orbit. Solutions in this orbit demonstrate a balance of innovation and usability with more comprehensive

and adaptable capabilities beyond niche specialization. The **Specialist** category is the innermost orbit. Solutions in this orbit represent niche offerings that are more narrowly focused on specific technology and functional needs, providing high-value to its clients and meeting focused market demands.

An important consideration is that no position on the StarChart is either “good” or “bad” for all institutions. Those institutions with more complex needs and resources are likely to focus on one area of the StarChart, while other institutions with fewer resources and complexity may opt to focus on another area. The StarChart is not aimed at being the sole resource to make a final decision, but rather it provides a point of navigation to help make sense of the market, and down-select to a more manageable number of products to take that next step.

For a more nuanced understanding of the chart and the particular vendor solutions, please contact your Tambellini Client Success Associate to arrange a meeting with a Tambellini Analyst.

StarChart™: 2024 Teaching and Learning Series – Learning Management Systems



KEY: ● Non-Core Systems

Usability measures the degree of ease in using a system and the degree of breadth in suitability for users to accomplish objectives.

Innovation measures the degree of addressing unique challenges and requirements with novel and/or advanced capabilities.

Forming Systems are in development but not generally available. Their positions are a projection.

BLACKBOARD BY ANTHOLOGY DIFFERENTIATORS AND STARCHART POSITIONING

Blackboard is a leading LMS that incorporates artificial intelligence (AI) capabilities throughout its solution. Blackboard by Anthology is one of Anthology's main product offerings, alongside Anthology Student (Student System) and Anthology Reach (CRM). Blackboard is a mature learning management system (LMS) with broad functionality across its core modules, including assessment, analytics, reporting, content creation, course design, competency-based education, and continuing education.

Blackboard includes a variety of AI capabilities included as part of the core license, including:

- **AI Conversations:** This feature allows students to interact with generative AI to complete activities and engage with AI. Anthology released this feature in September 2024.
- **AI Design Assistant:** Released in 2023, this tool enables instructors to create test questions, rubrics, and course content more efficiently.
- **Authentic Assessments:** Delivered in December 2023, this tool helps instructors create prompts and assessments that align with Bloom's Taxonomy, allowing students to apply knowledge and skills in real-life scenarios.

These AI features are included in a standard Blackboard license at no additional cost.

Blackboard boasts strong analytics and reporting capabilities, including:

- Assessment performance reports
- Communication analytics for insight into student participation
- Visualizations of students' grade distributions

Blackboard also scored well in usability. Features include:

- Blackboard Mastery Learning for personalized programs.
- A customizable interface with institutional branding and color theme options.
- Responsive design for access from mobile devices, tablets, or desktops.
- Support for more than 30 languages.
- A student preview feature for instructional designers and instructors to review course materials.

Looking ahead, Blackboard's roadmap includes self-paced asynchronous learning and custom learning pathways, which are expected to be completed in early 2025. Adaptive learning and individualized learning plans are also on the roadmap, with delivery expected in the next 12 to 24 months.

BLACKBOARD BY ANTHOLOGY MARKET ALIGNMENT

Blackboard aligns with market demands due partly to its usability and innovative features, demonstrating Anthology's understanding of the market's needs. Blackboard attracts customers globally and can scale regardless of institution sector or size. In the United States, it has a market presence in private, not-for-profit, public, two-year, and public, four-year institutions of various enrollment sizes. Blackboard is present in public and private, not-for-profit institutions of all enrollment sizes in Canada. In addition to North America, Blackboard customers reside in Europe, Asia, the Middle East, Africa, Latin America, and the Caribbean.

BLACKBOARD BY ANTHOLOGY MARKET OUTLOOK

Blackboard is a comprehensive LMS with robust core modules and user-friendly, innovative, built-in functionality. Its detailed roadmap indicates that cutting-edge features are on the way, displaying Anthology's awareness of its current customer base's needs. The market will be watching to see if Blackboard executes on its roadmap and develops the innovative features it promises.

EVALUATION AND METHODOLOGY SUMMARY

Vendor solutions are positioned on the StarChart based on a proprietary algorithm that leverages usability and innovation data points. Usability data points include institutional usability surveys, functional breadth, segment presence, and demonstrated scalability. Innovation data points benchmark each solution's ability to address unique functional and operational requirements and the vendor's ability to sustain the innovation at scale.

Tambellini conducts proprietary, original research, and information used in the StarChart is derived from System Usability Scale (SUS) survey results, vendor surveys, interviews, selection data, and other information sourced from Tambellini Analysts, Advisors, and the Research team as appropriate. Usability is evaluated across criteria categories, including cost, implementation, US market segment presence, functional solution breadth, customer support, software release cadence, implementation, training, and customer experience. Innovation is evaluated across criteria categories, including vendor company and resource profiles, functional solution breadth, integrations, security, partnerships, and capacity for future and sustained innovation.

In 2024, Tambellini introduced three orbits as part of its StarCharts, including Commanders, Navigators, and Specialists. Orbits in this framework represent the path and reach of a solution's innovation and usability in the technological universe. The concept of an orbit allows us to visualize how closely aligned a vendor is with core market needs, as well as the extent to which they impact and are interconnected with the broader ecosystem.

- **Commanders** stand at the forefront of innovation and usability, leading the industry with groundbreaking technologies and user-centric designs. Solutions in this orbit command the highest category, distinguished by their visionary approach and the transformative impact of their solutions. Commanders set the benchmarks for what is possible, pushing the boundaries of technology and usability to new heights. Their leadership is characterized by a consistent track record of excellence, significant market influence, and the ability to anticipate and shape future trends. Commanders not only excel in their offerings but also drive the industry forward, inspiring change and innovation across the technology landscape.
- **Navigators** demonstrate a balanced blend of innovation and usability, guiding their customers through the complexities of the technology landscape with reliable and forward-thinking solutions. Positioned in the middle category, Navigators have successfully expanded their capabilities beyond niche specialization to offer more comprehensive and adaptable technologies. Solutions in this orbit are marked by their ability to steer development and adoption in promising directions, leveraging emerging trends and customer insights to navigate the market effectively. Navigators represent a critical bridge between focused expertise and broader market leadership, offering versatile and evolving solutions.
- **Specialists** represent vendor solutions designed to operate in a specific niche or aspect of technology. While they may not yet showcase broad innovation or high

usability across a wide range of criteria, their focused, targeted solutions carve out significant value within their domain. Specialists are recognized for their deep understanding and capabilities in particular areas, making them valuable partners for specific needs. Their concentrated approach allows for specialized offerings that meet distinct market demands.

Tambellini's proprietary algorithm uses more than a hundred data points to position solutions on the StarChart, including information from surveys, vendor briefings, industry knowledge, institutional interviews, and more. All vendor solutions in each StarChart are evaluated using the exact same methodology and algorithm based on institutional criteria deemed most important by higher education. Additionally, Tambellini applies proprietary weighting to every StarChart, to ensure institutional criteria deemed most important in the current year's market, according to our research, has an appropriate impact on the final score. This weighting is applied consistently across all vendors and products in each StarChart. Incomplete information provided by vendors lowers the usability and innovation scores for their products. Tambellini reviews vendor survey responses against our body of research to ensure accuracy.

THE FUTURE CAMPUS

Tambellini's Future Campus framework complements the StarCharts, providing additional clarity on an institution's needs and requirements, and ultimately helping to inform and guide their modernization. Tambellini analysts have identified that resilient institutions prepared to thrive through the changing digital landscape need to address a core set of problems—such as offering in-demand programs and experiences with proven employment outcomes, attracting and enrolling the right students, delivering the right experiences to retain and graduate students, modernizing operations, and right-sizing technical debt—to name a few.

Solving these problems requires a focus on people, process, data, and technology in parallel to propel institutions to the next state—their future campus. The Future Campus is Tambellini's vision and framework where innovation and cutting-edge technology converge to create a sustainable, leading higher education technology ecosystem. Not every institution will successfully make the transition. We are living through a pivotal turning point, forcing institutions to modernize at an unprecedented pace in order to remain competitive.