



# THE CAMPUS COMPUTING PROJECT

www.campuscomputing.net

November, 2009

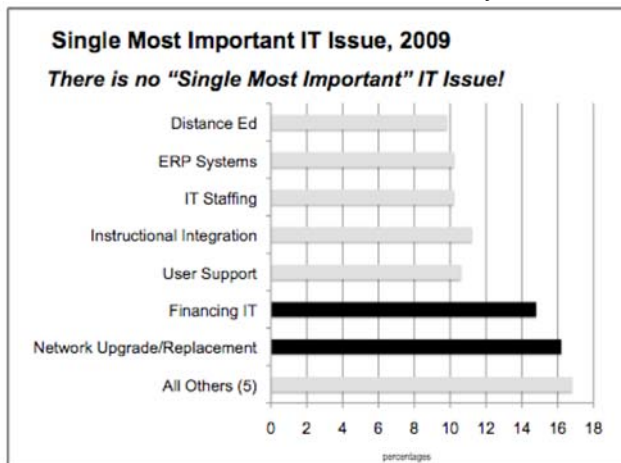
*The 2009 National Survey of Information Technology in American Higher Education*

## IT Budgets Are Down - Again!

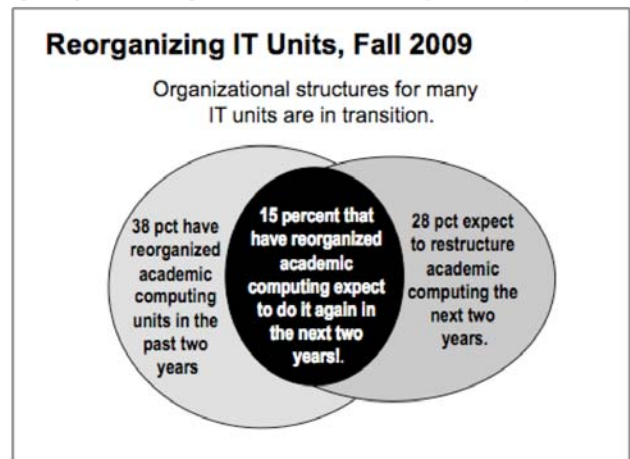
For the second time in the current decade, campus IT officers are struggling to deal with the rising demand for IT resources and services even as their budgets have experienced significant cuts, often followed by mid-year budget recessions. Almost half (48 percent) of the institutions participating in the 2009 Campus Computing Survey report budget cuts for the current academic year, compared to less than a third (30.6 percent) in 2008 and just 13.1 percent in 2007. Concurrently, the proportion of campuses reporting increased funding for central IT services fell from 49 percent in 2008 to 21.4 percent in 2009. Public institutions have been hardest hit by the current cuts: fully two-thirds (67.1 percent) of public universities reported budget cuts for central IT services for 2009, as did almost two-thirds (62.8 percent) of public four-year colleges. In contrast, just over a third (36.9 percent) of community colleges experienced central IT budget cuts this year. Among independent institutions, more than half (56.9 percent) of private research universities and two-fifths (41.9 percent) of private four-year colleges also reported reduced resources for central IT services for the current academic year.

The budget challenges confronting campus IT officers are reflected in the annual polling about the “single most important IT issue confronting my campus over the next two-three years.” In past years the polling provided a clear “leader” - an issue that might garner the votes of a clear plurality of the respondents. In the early part of the decade, survey respondents identified the instructional integration of information technology as the single most important issue confronting their institution over the next two-three years. More recently, IT security concerns emerged as the leading issue among survey respondents. However, in 2009, two issues - financing IT and the replacement/upgrade of the campus network each received about 15 percent of the votes of the survey respondents. And five other issues - supporting online/distance education, upgrading ERP systems, IT staffing, instructional integration, and user support - each polled about 10 percent of the votes.

“The absence of a clear ‘single most important issue’ in the 2009 survey suggests that institutional IT officers are fighting lots of “digital fires” on their campuses,” says Green.



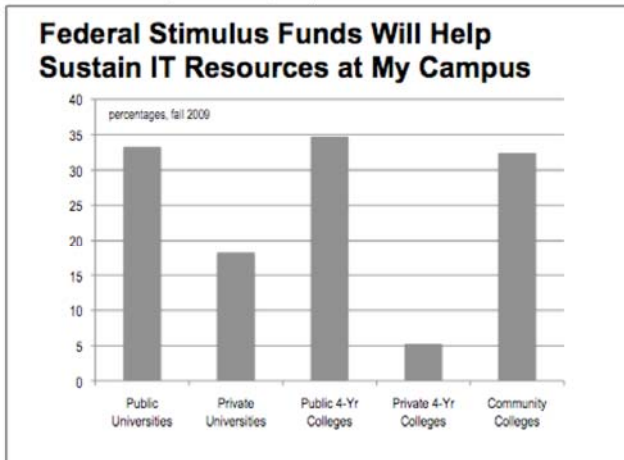
“These budget cuts play havoc with efforts to respond to the rising demand for IT resources and services,” says Kenneth C. Green, founding director of The Campus Computing Project, the nation’s largest continuing study of computing, eLearning, and information technology. “College and university IT units were just beginning to recover from the budget cuts that came early in the decade. No question that the current round of IT budget reductions has consequences for infrastructure, instruction, and support services for students and faculty.”



Budget cuts may also be a catalyst for reorganizing IT units. Almost two-fifths (38.8 percent) of the survey respondents report that their campus has reorganized academic computing in the past two years. Another fourth (25.2 percent) anticipate the reorganization of academic computing in the next 24 months. Moreover, fully a sixth (15.8 percent) of the survey respondents indicate that their campuses did reorganize academic computing in the past two years and expects to do it again in the next two years! The numbers are similar for administrative computing units: 34.4 percent have reorganized, 23.6 percent expect to

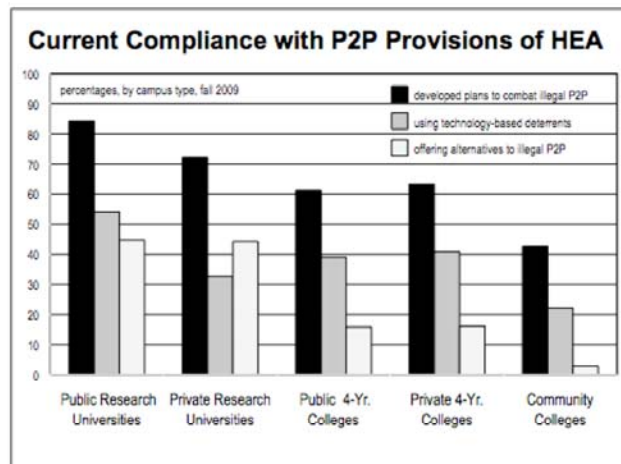
reorganize, and 14.8 percent have done it once and expect to do it again.

Some campuses have found a little relief from budget cuts in the federal stimulus funds. Approximately a third of the survey respondents from public universities, public four-year colleges, and community colleges report that “federal stimulus funds will help sustain IT resources at my campus.” However, their counterparts in the private sector are less sanguine about the benefits of stimulus money: less than a fifth (18 percent) of CIOs in private universities and just 5 percent of IT officers in private four-year colleges report any benefit from stimulus funds. “While the relief is welcomed at many institutions, the short-lived federal stimulus money is not a long-term solution to the need to maintain IT budgets and to retain IT personnel,” says Green.

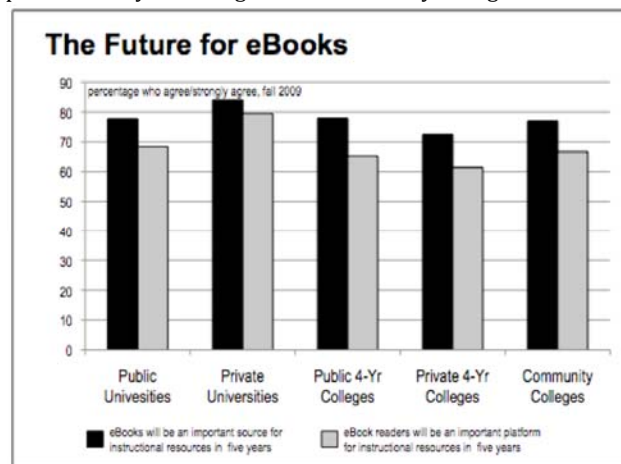


The survey indicates that campuses continue to invest in notification systems. A new item on the 2009 questionnaire reveals that more than four-fifths (83.6 percent) of campuses participating in the survey contract with commercial firms for campus notification services, often software and services that integrate and facilitate concurrent voice, text, and email messages to students, faculty, and staff. Yet as noted in last year’s Campus Computing Report, the effectiveness of these systems is probably limited by the fact that most campuses (73.5 percent) have an “opt-in” registration policy for the notification service, i.e., students, faculty, and staff must register for the service.

The 2009 survey data point to small gains in the number of campuses that are in compliance with the broad terms of the P2P provisions of the Higher Education Act of 2008. For example, 84.2 percent of public universities report that as of fall 2009, they “have developed plans to effectively combat the unauthorized distribution of copyrighted material,” up from 80.0 percent in 2008. But beyond the mandate for plans, campuses may have opted to wait for the recently announced HEA regulations on P2P ahead of developing institutional policies or committing funds in response to actual or inferred federal mandates. In this instance, just a third of private research universities (32.6 percent, up from 23.8 percent in 2008) report that “current campus plans [to stem P2P] include the use of a variety of technology-based deterrents,” as mandated by the HEA legislation. More challenging for most campuses will be the HEA mandate to “offer alternatives to illegal downloading or peer-to-peer distribution of intellectual property” given the demise over the past year of many of the commercial music services that were targeting the campus market and offering institutional



licenses. Moreover, as noted in the 2008 Campus Computing Report, compliance with the P2P mandates costs real dollars: for 2009, public universities estimate that they will spend, on average, more than \$62,000 to address P2P compliance, compared to more than \$78,000 in private universities, \$28,000 in public four-year colleges, and almost \$13,000 in private four-year colleges and community colleges.



Campus IT officers seem somewhat bullish on the future of eBooks, according to the 2009 survey. Fully three-fourths (76.3 percent) agree or strongly agree that “eBook content will be an important source for instructional resources in five years.” Moreover, the survey numbers are fairly consistent across all sectors from community colleges to research universities. However, the survey respondents appear slightly less confident about the role of eBook platforms: just two-thirds (66.0 percent) agree that dedicated “eBook readers will be important platforms for instructional content in five years.”

The 2009 Campus Computing Survey is based on survey data provided by senior campus IT officials, typically, the CIO, CTO, or other senior campus IT officer, representing 500 two- and four-year public and private/non-profit colleges and universities across the United States. Survey respondents completed the questionnaire in October, 2009. Copies of the 2009 Campus Computing Survey will be available on December 10<sup>th</sup> from the Campus Computing Project in Encino, CA (campuscomputing.net). Price: \$37, plus \$2 shipping.

# CAMPUS COMPUTING, 2009

Kenneth C. Green


EDUCAUSE CONFERENCE 2009

## CAMPUS COMPUTING, 2009

The 19th National Survey of Computing and Information Technology in US Higher Education



**Kenneth C Green**  
THE CAMPUS COMPUTING PROJECT  
[www.campuscomputing.net](http://www.campuscomputing.net)

4 November 2009



© Kenneth C. Green, 1990-2009

### Project Sponsors



2009 EDUCAUSE Conference  
4 November 2009 • Denver, CO

© Kenneth C. Green, 1990-2009



# CAMPUS COMPUTING, 2009

Kenneth C. Green

## An Accidental Revolution

- ◆ Unplanned
- ◆ Unprepared
- ◆ Unanticipated

WHAT'S CHANGED?



## Methodology

- ◆ 500 survey respondents
- ◆ Web-based data collection
- ◆ Survey period: late Sept – Oct 2009
- ◆ 79 pct of 2009 campuses participated in the 2008 survey



# CAMPUS COMPUTING, 2009

Kenneth C. Green

## 2009 Survey Sample

Category	Dept of Ed N (adjusted)	Survey N	Participation Rate (pct)
Public Research & Doctoral Universities	168	75	44.6
Private Research & Doctoral Universities	92	44	47.8
Public 4-Year Colleges (Baccalaureate & Masters)	374	95	25.4
Private 4-Year Colleges (Baccalaureate & Masters)	824	174	21.1
Associate Degree/ Public Community Colleges	1018	108	10.6



## 2009 Highlights

- KEY THEMES: budget cuts and competing priorities
- Fed Stim \$\$ provide a little relief for some public campuses
- Continuing transition and reorganization of IT units on many campuses.
- Budget cuts are back
- Open Source LMS gaining traction
- Interesting long-term prospects for eBooks?



# CAMPUS COMPUTING, 2009

Kenneth C. Green

## Single Most Important IT Issue

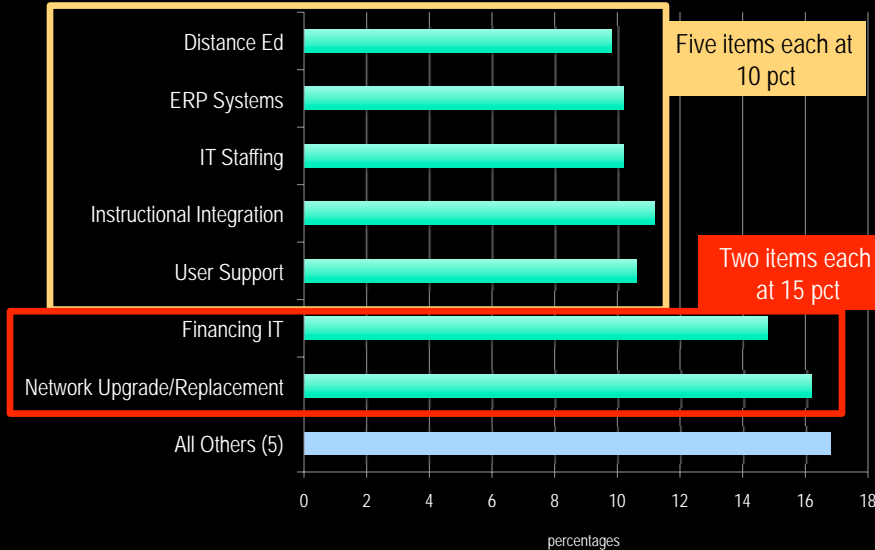
Trends, 2000-2008

2000	2001	2002	2003	2004	2005	2006	2007	2008
Instructional Integration (40.5%)	Instructional Integration (31.5%)	Instructional Integration (24.3%)	Instructional Integration (21.4%)	Network & Data Security (21.1%)	Network & Data Security (30.0%)	Network & Data Security (29.5%)	Network & Data Security (25.5%)	Network & Data Security (20.3%)
User Support (22.3%)	User Support (15.4%)	Upgrade/ Replace ERP (18.9%)	Upgrade/ Replace ERP (17.6%)	Instructional Integration (18.5%)	Instructional Integration (17.9%)	Instructional Integration (17.3%)	Upgrade/ Replace ERP (13.0%)	Hiring/ Retaining IT Staff (16.7%)
Financing IT (14.6%)	Upgrade/ Replace ERP (12.6%)	Financing IT (15.1%)	Financing IT (16.1%)	Upgrade/ Replace ERP (17.2%)	Upgrade/ Replace ERP (16.1%)	Upgrade/ Replace ERP (16.3%)	Hiring/ Retaining IT Staff (12.3%)	Instructional Integration (11.9%)



## Single Most Important IT Issue, 2009

*There is no "Single Most Important" IT Issue!*



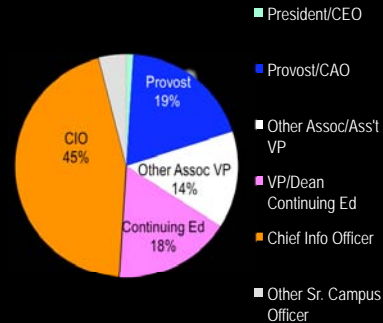
# CAMPUS COMPUTING, 2009

Kenneth C. Green

## Why Is Distance Ed Now a Top CIO Priority?

- Rapidly rising enrollments
- Key role of IT in operational infrastructure of online programs
- *CIOs may be the line managers for online ed at many campuses!*

*The Official Title of the Senior Operating Officer for the Online Program is:*



Source: MANAGING ONLINE EDUCATION 2009 (WCET/Campus Computing Project)



## Reorganizing IT Units, Fall 2009

Organizational structures for many IT units are in transition.

38 pct have reorganized academic computing units in the past two years

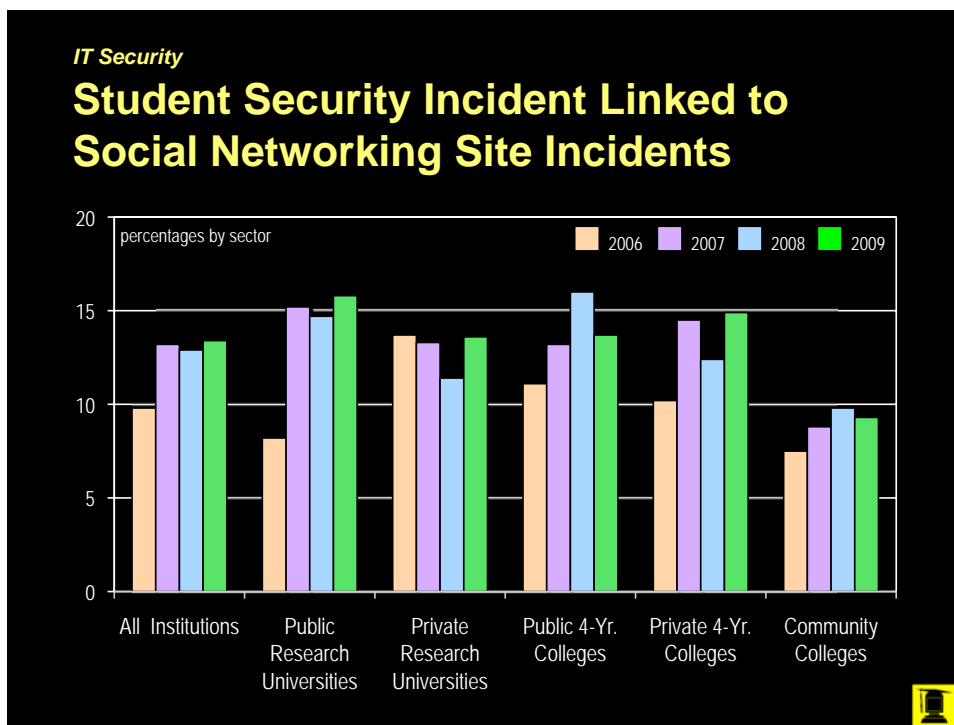
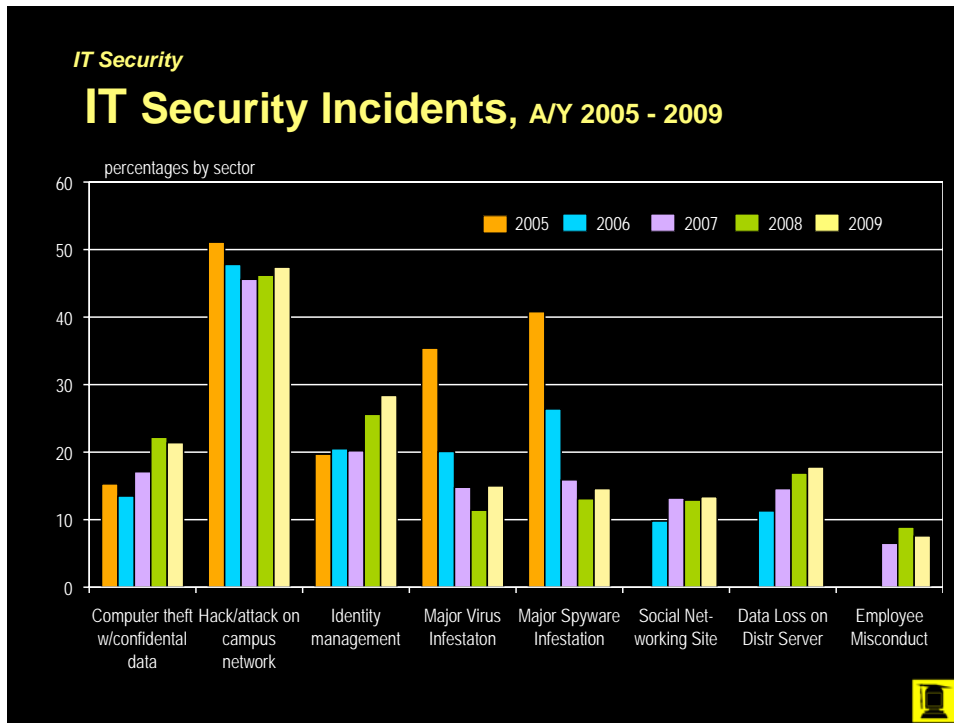
15 percent who have reorganized academic computing expect to do it again in the next two years!

28 pct expect to restructure academic computing the next two years.



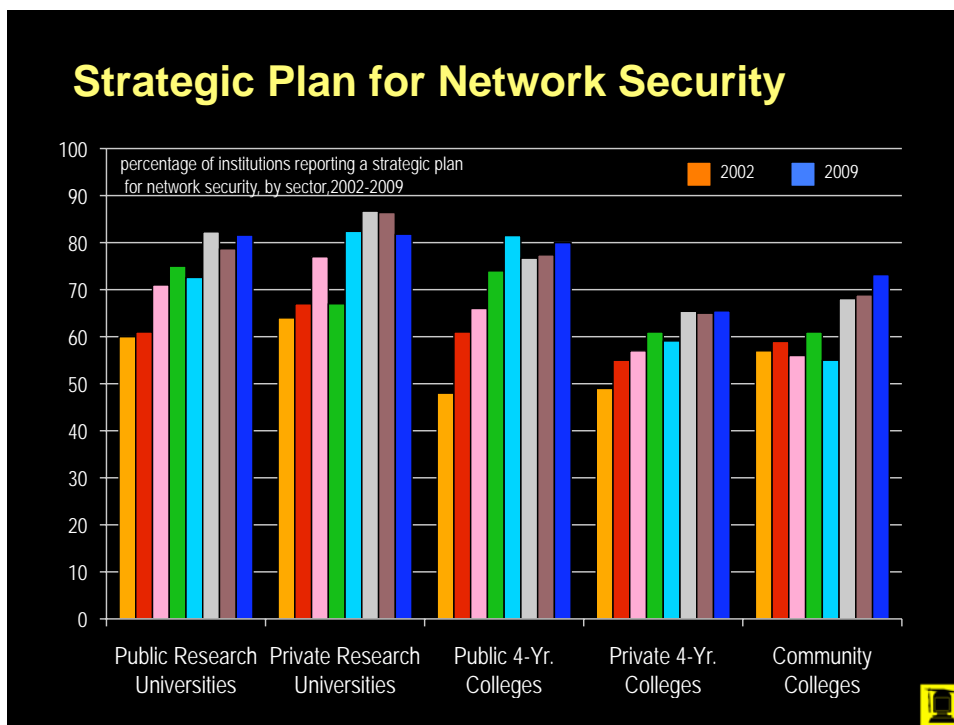
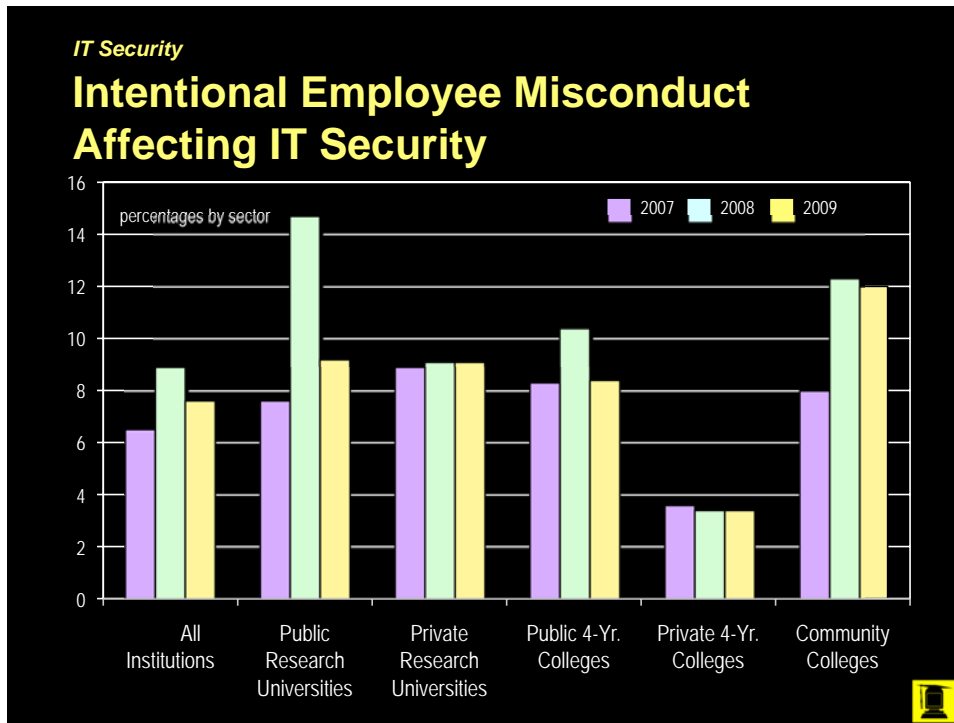
# CAMPUS COMPUTING, 2009

Kenneth C. Green



# CAMPUS COMPUTING, 2009

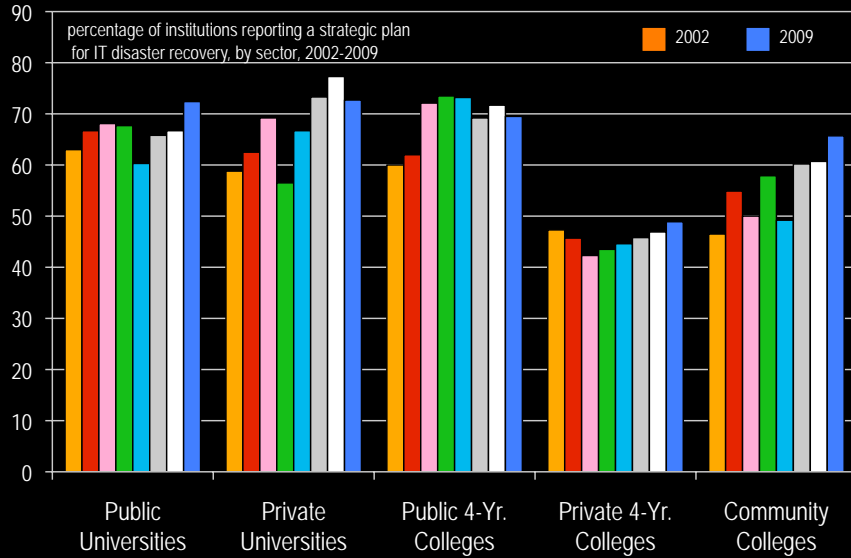
Kenneth C. Green



# CAMPUS COMPUTING, 2009

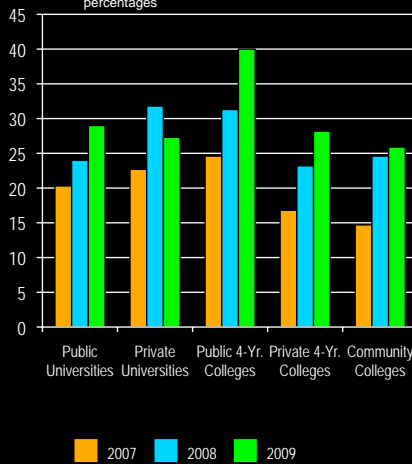
Kenneth C. Green

## Slow Progress on IT Disaster Recovery

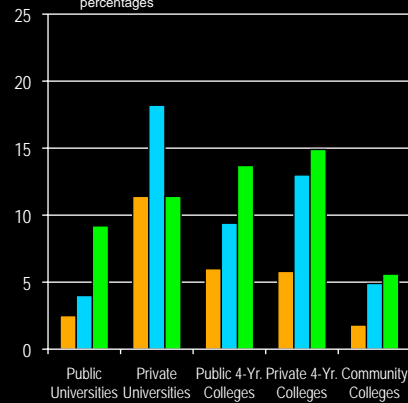


## Strategic Plans Cell Phones and Web 2.0

Cell Phones  
percentages



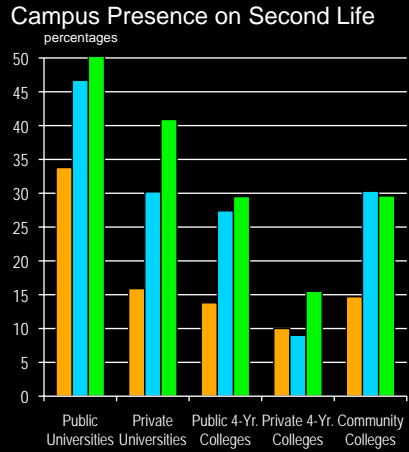
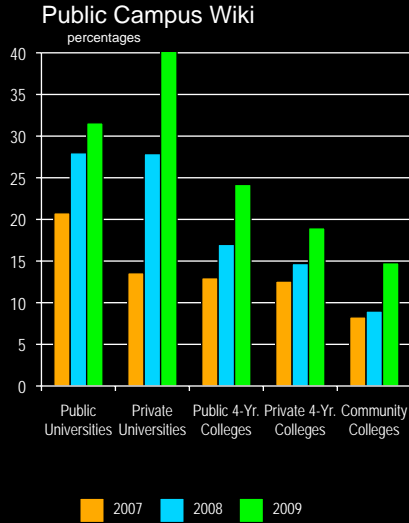
Web 2.0  
percentages



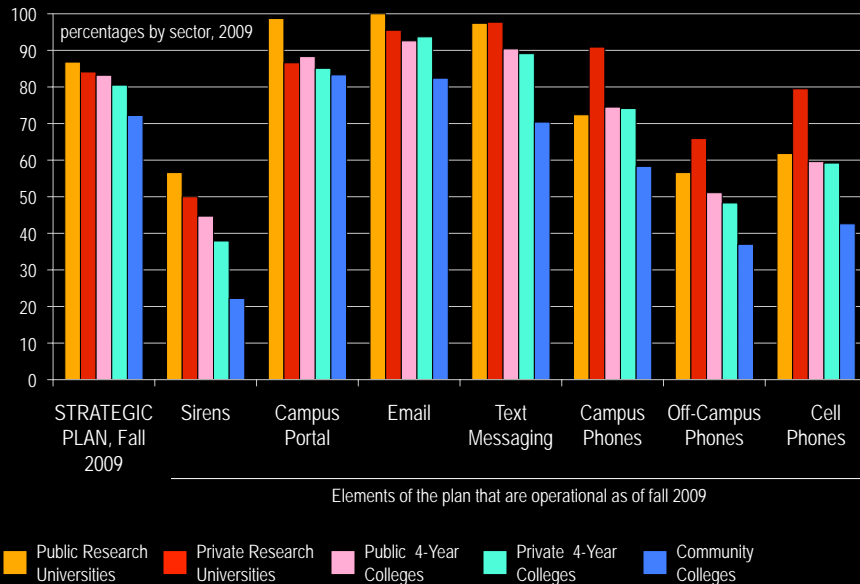
# CAMPUS COMPUTING, 2009

Kenneth C. Green

## Web 2.0 Comes to Campus Campus Wikis and Second Life

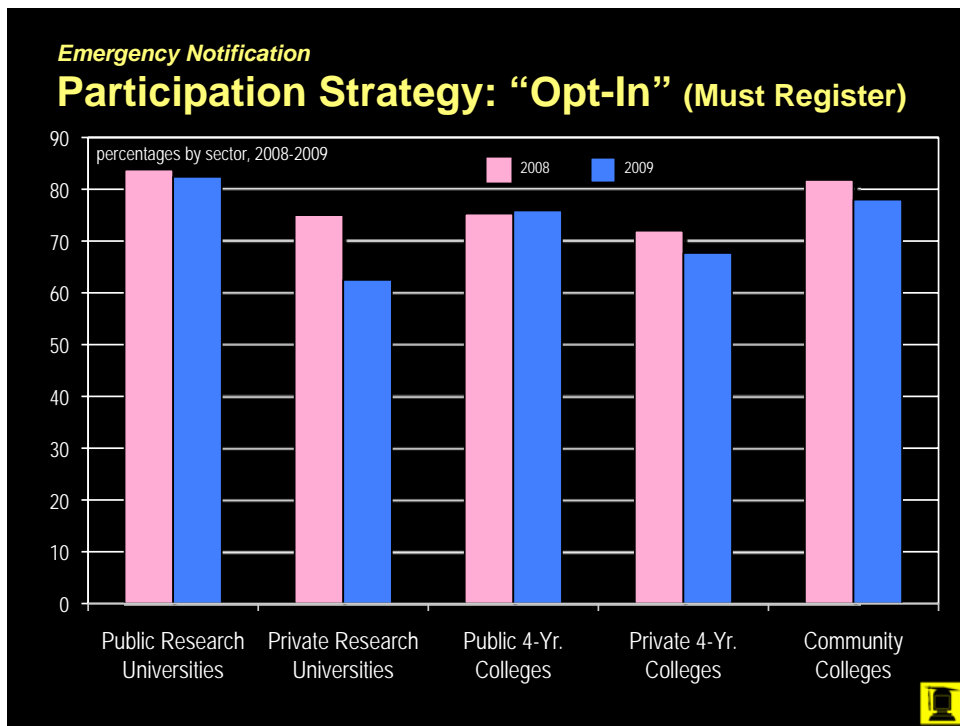
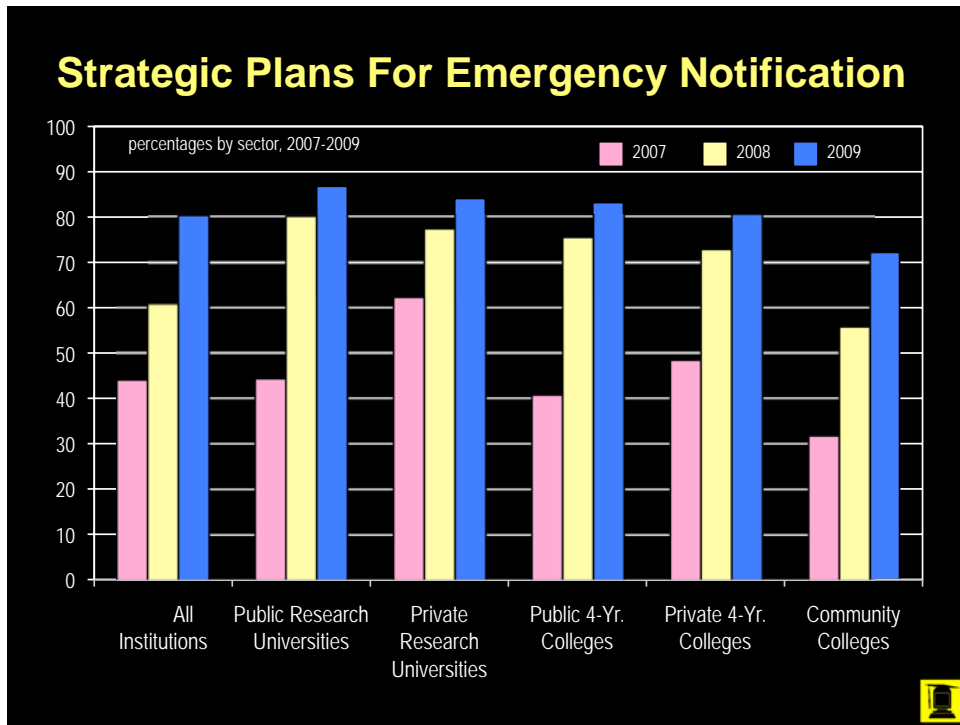


## Emergency Notification Services, 2009



# CAMPUS COMPUTING, 2009

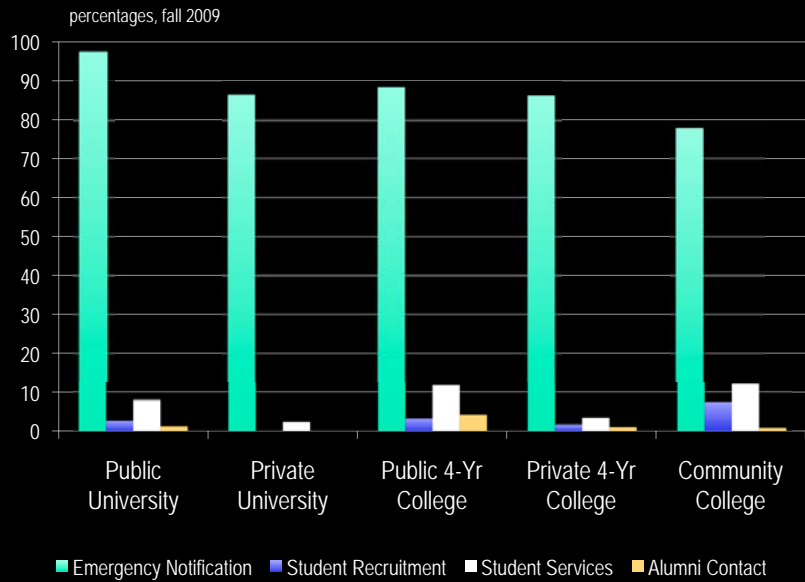
Kenneth C. Green



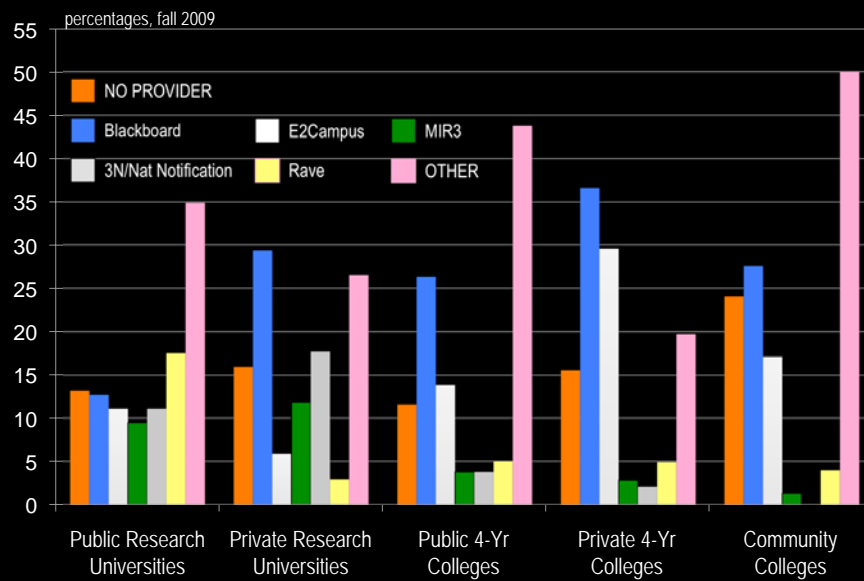
# CAMPUS COMPUTING, 2009

Kenneth C. Green

## Deploying the Notification System

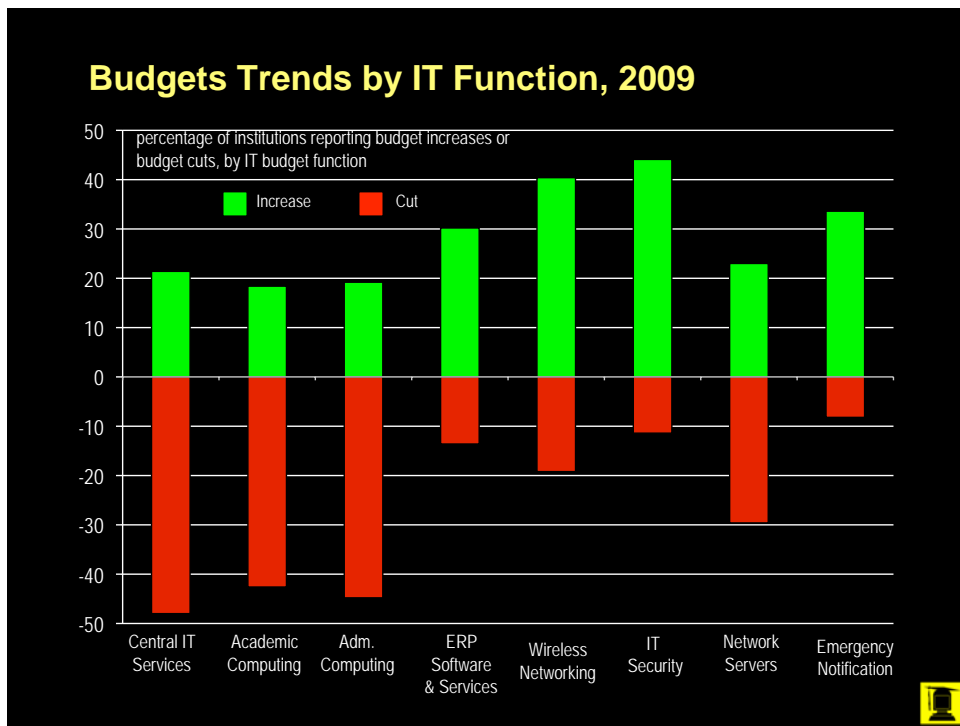
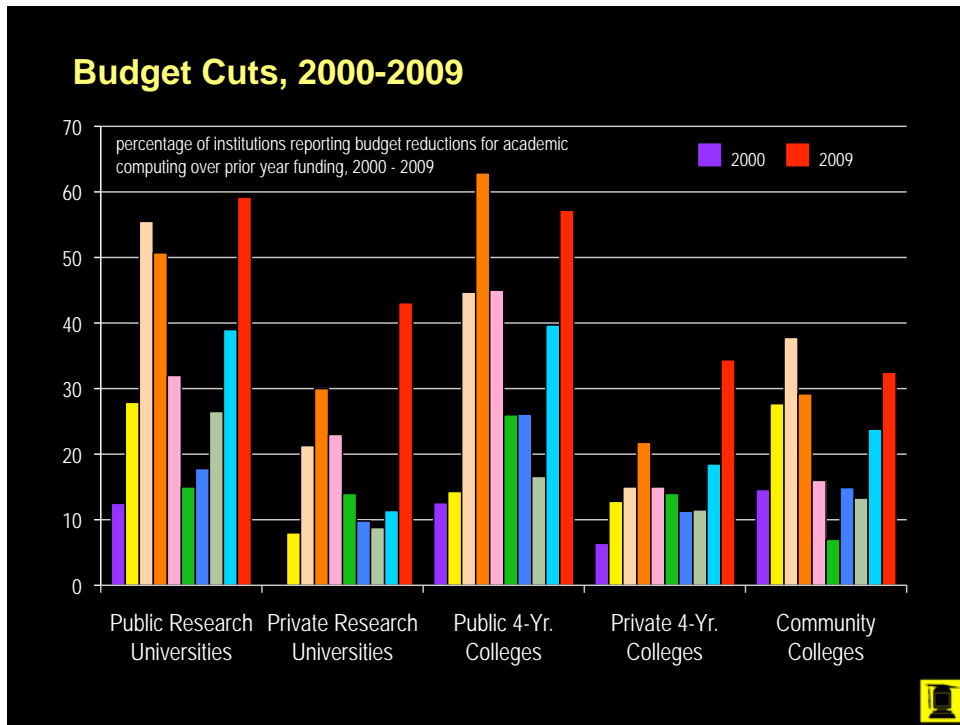


## Third Party Notification Providers



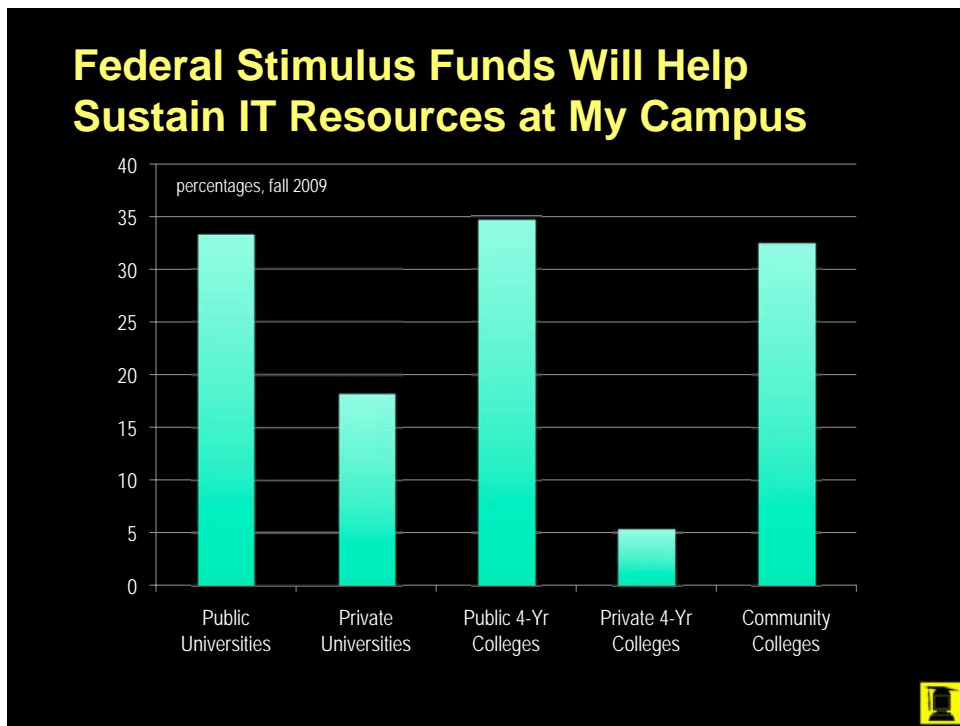
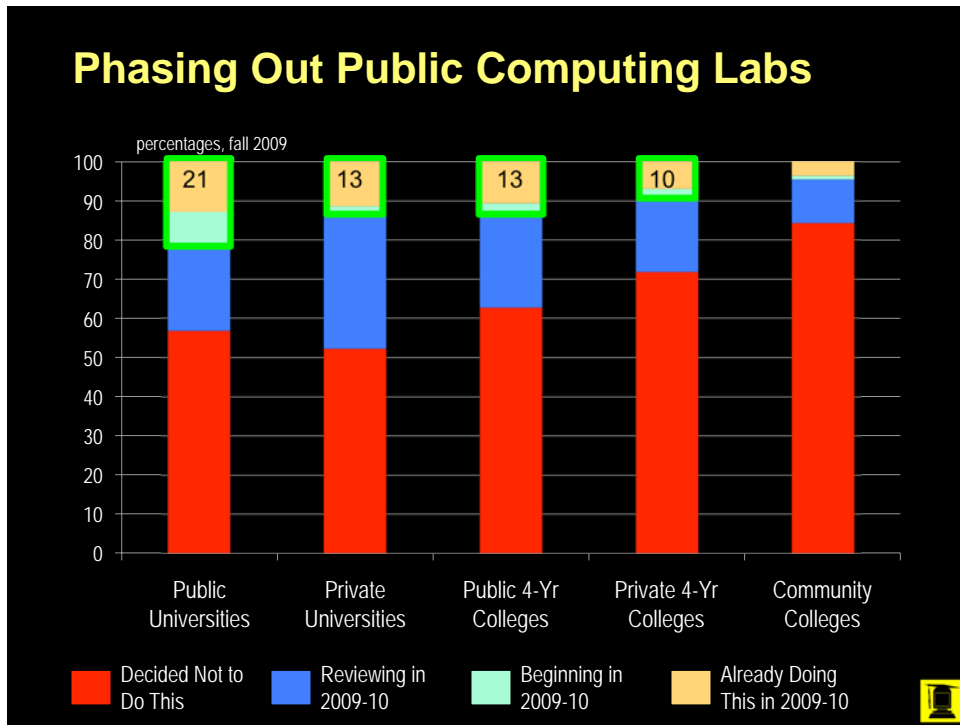
# CAMPUS COMPUTING, 2009

Kenneth C. Green



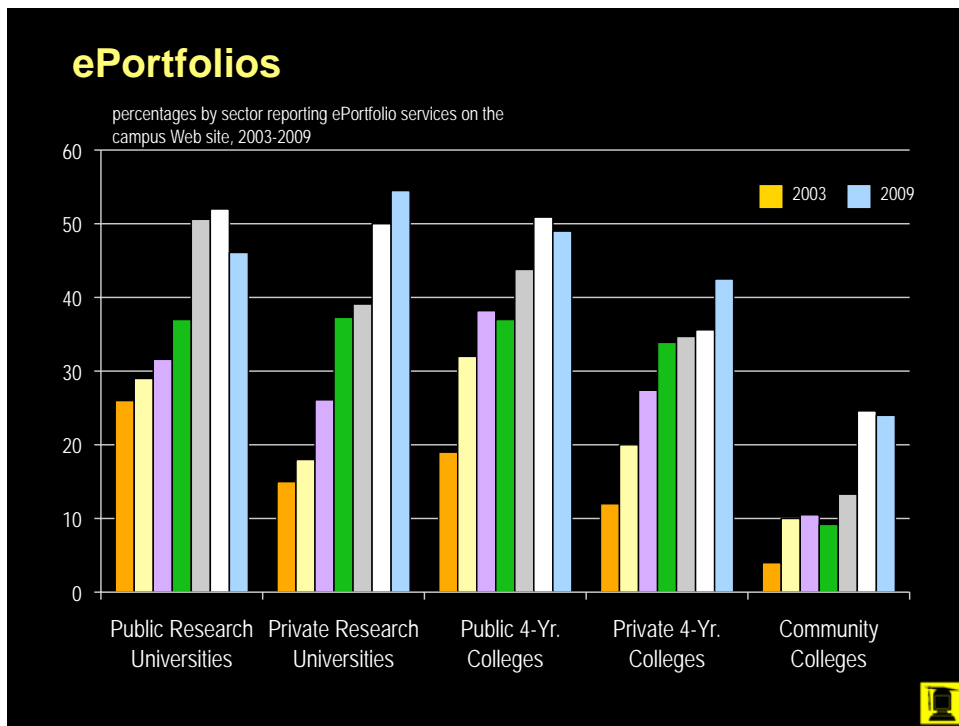
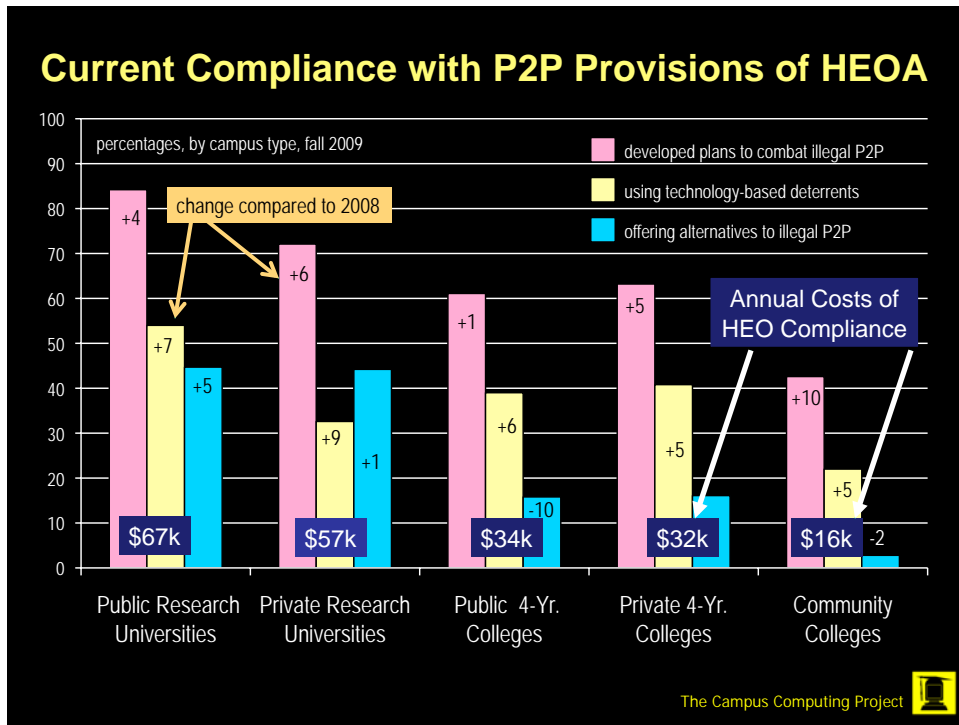
# CAMPUS COMPUTING, 2009

Kenneth C. Green



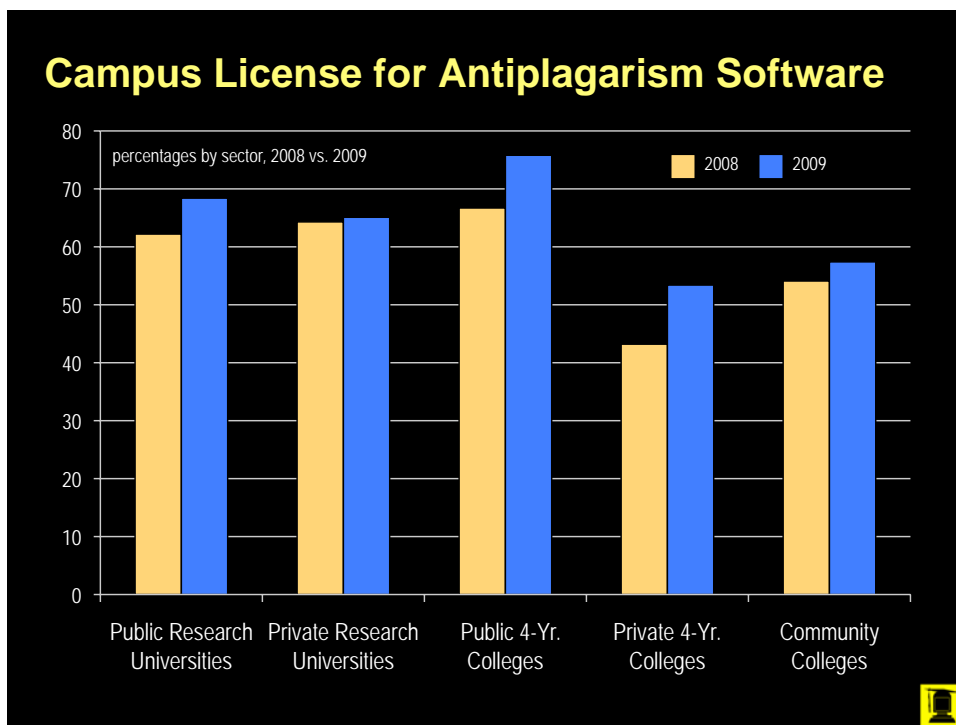
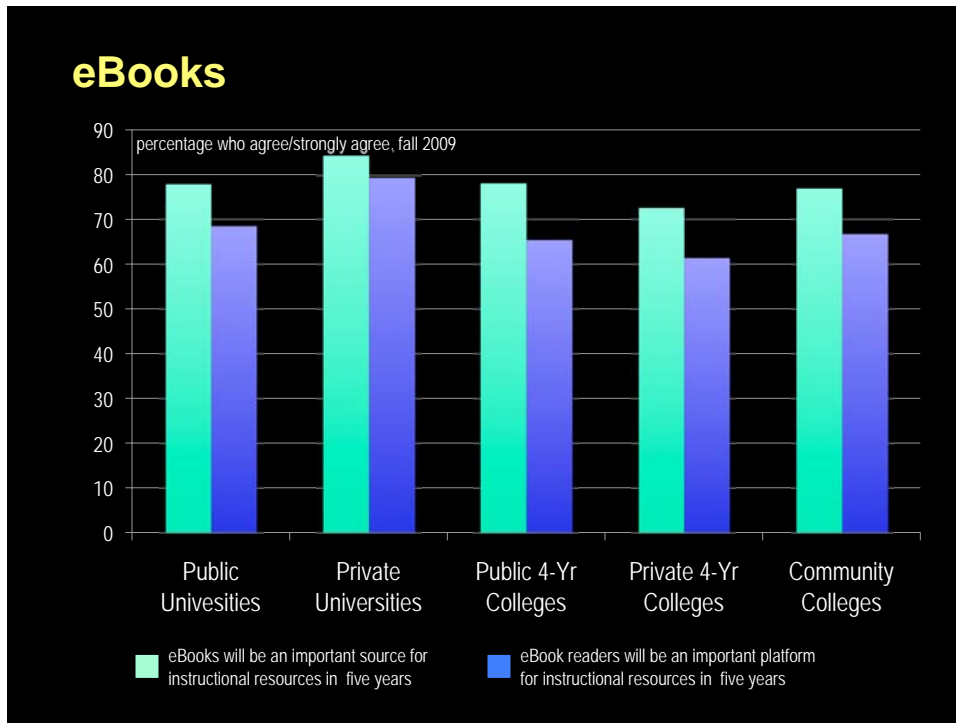
# CAMPUS COMPUTING, 2009

Kenneth C. Green



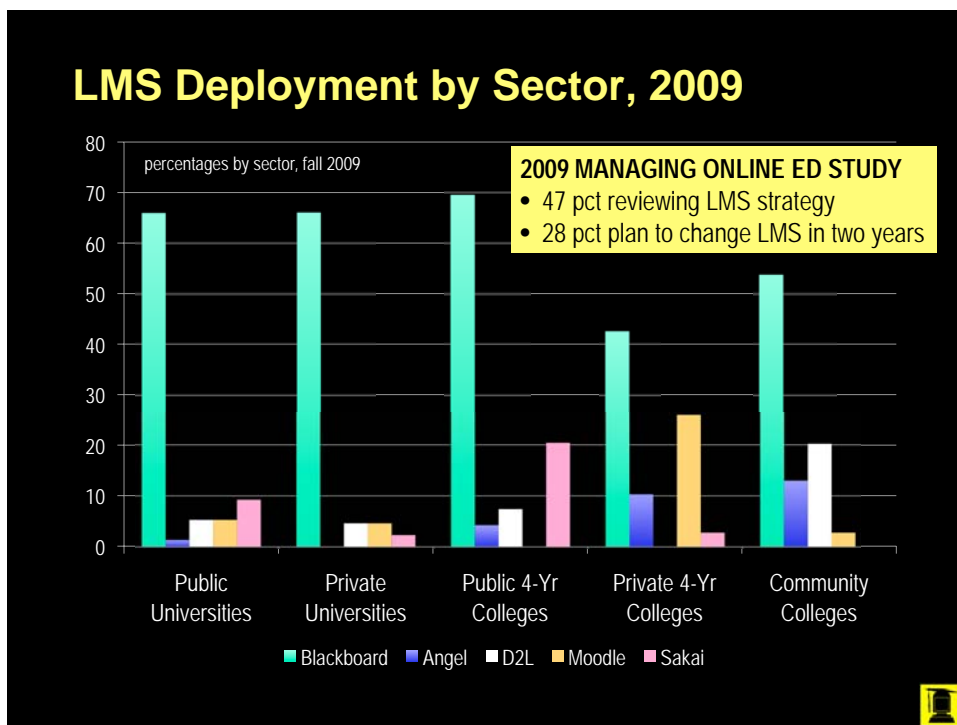
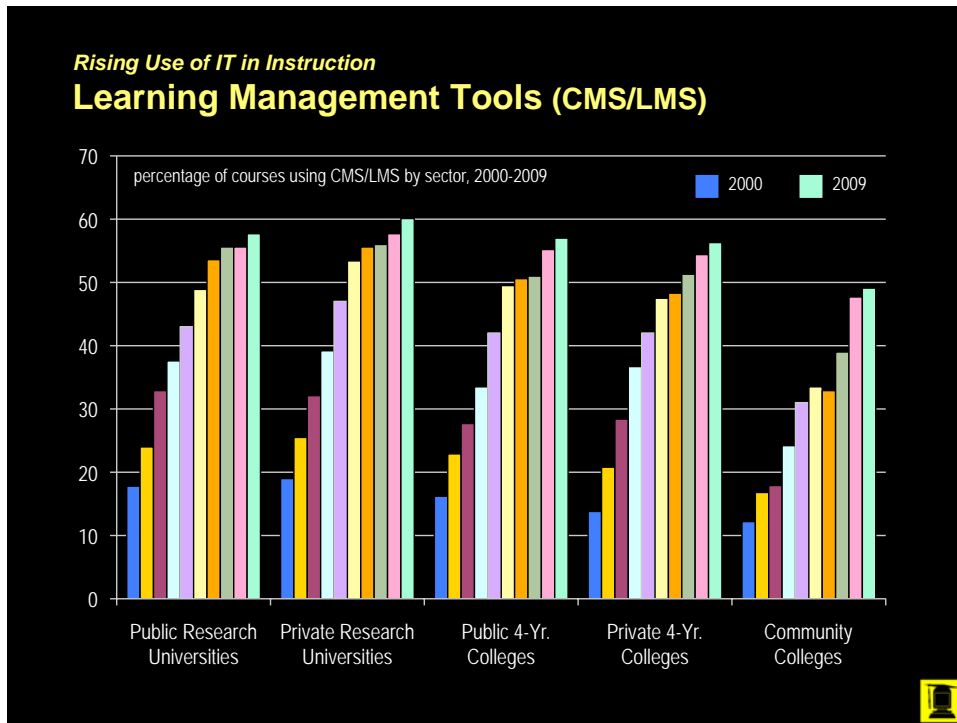
# CAMPUS COMPUTING, 2009

Kenneth C. Green



# CAMPUS COMPUTING, 2009

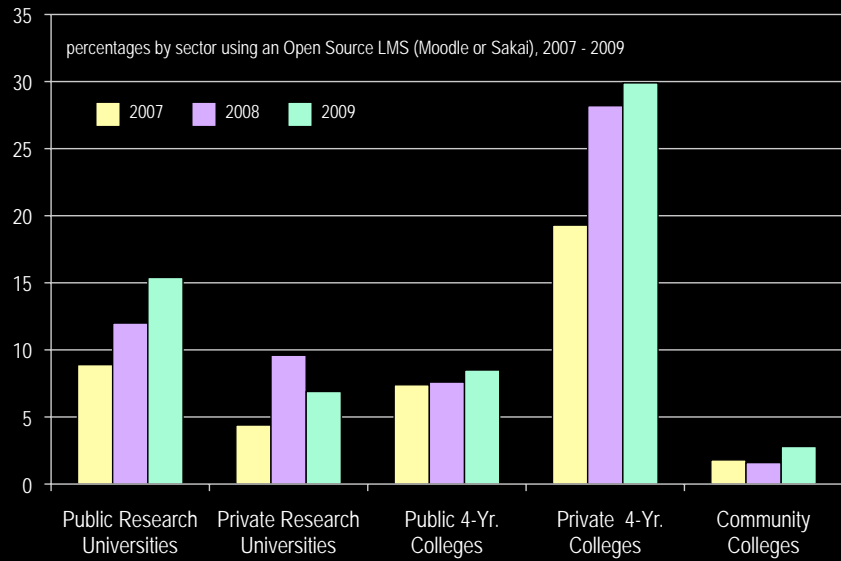
Kenneth C. Green



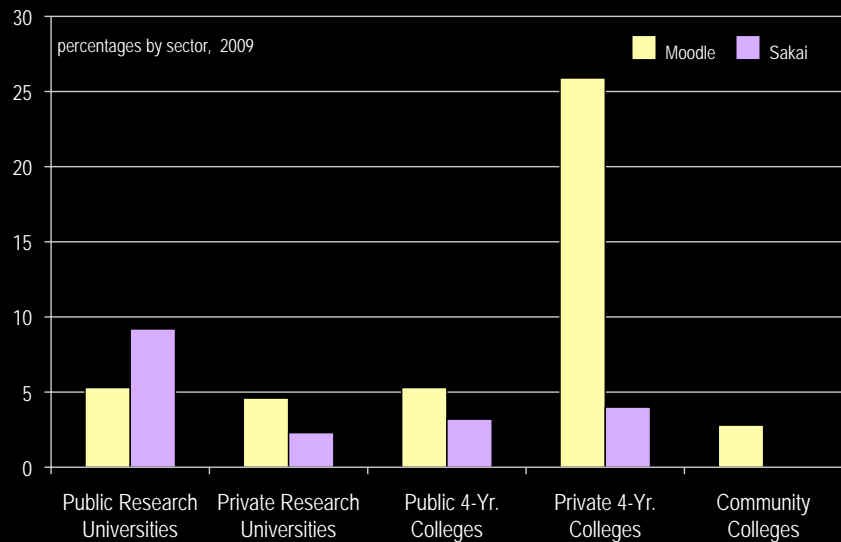
# CAMPUS COMPUTING, 2009

Kenneth C. Green

## Open Source LMS Deployment, 2007-2009

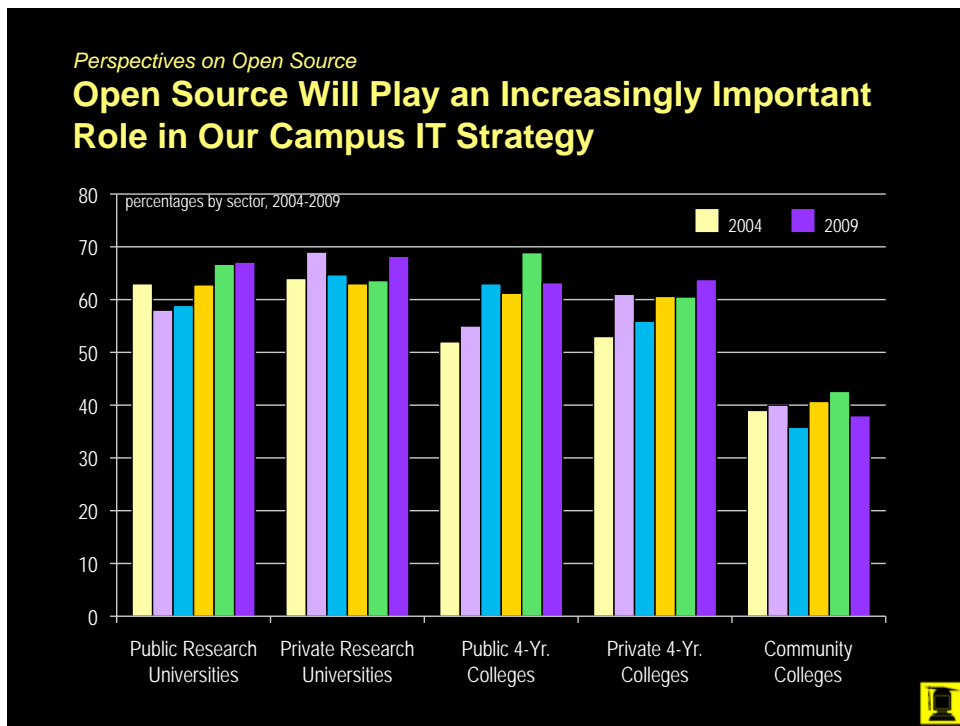
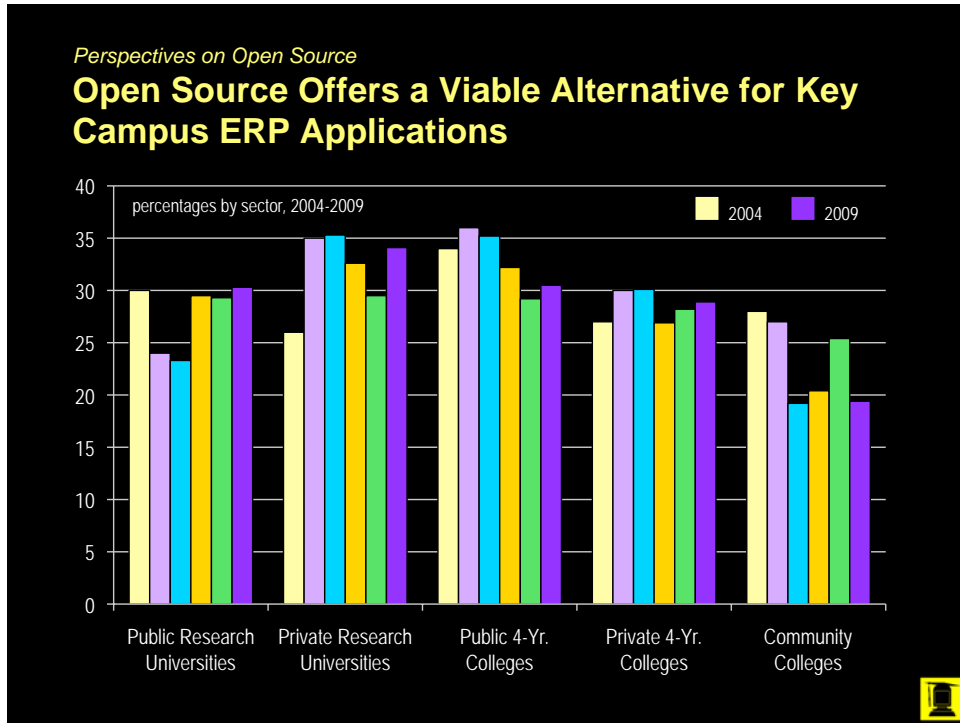


## Moodle vs. Sakai Deployment, 2009



# CAMPUS COMPUTING, 2009

Kenneth C. Green

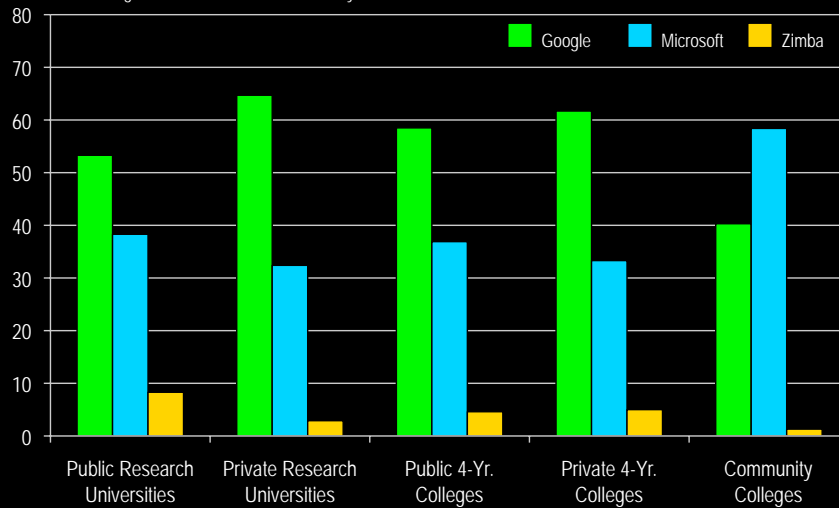


# CAMPUS COMPUTING, 2009

Kenneth C. Green

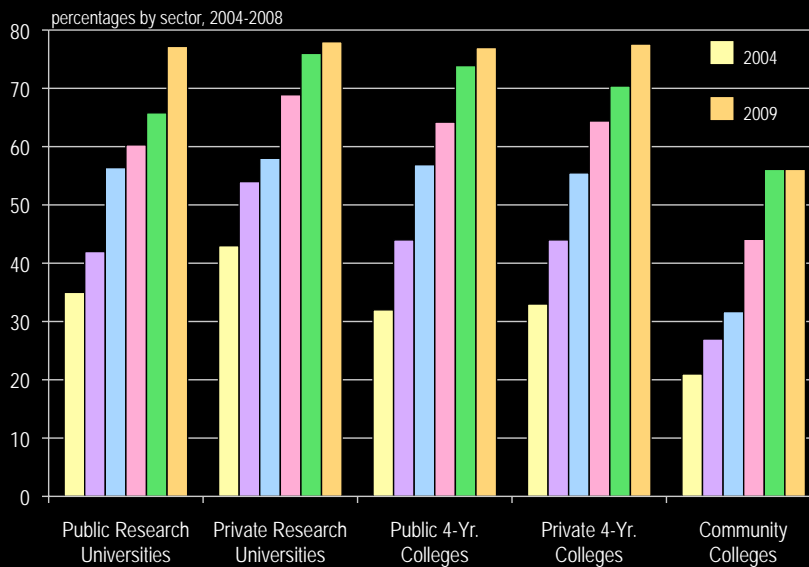
## Outsourcing eMail Service Provider

percentages for institutions reporting that they have or are now converting to outsourced email services, by sector, 2009



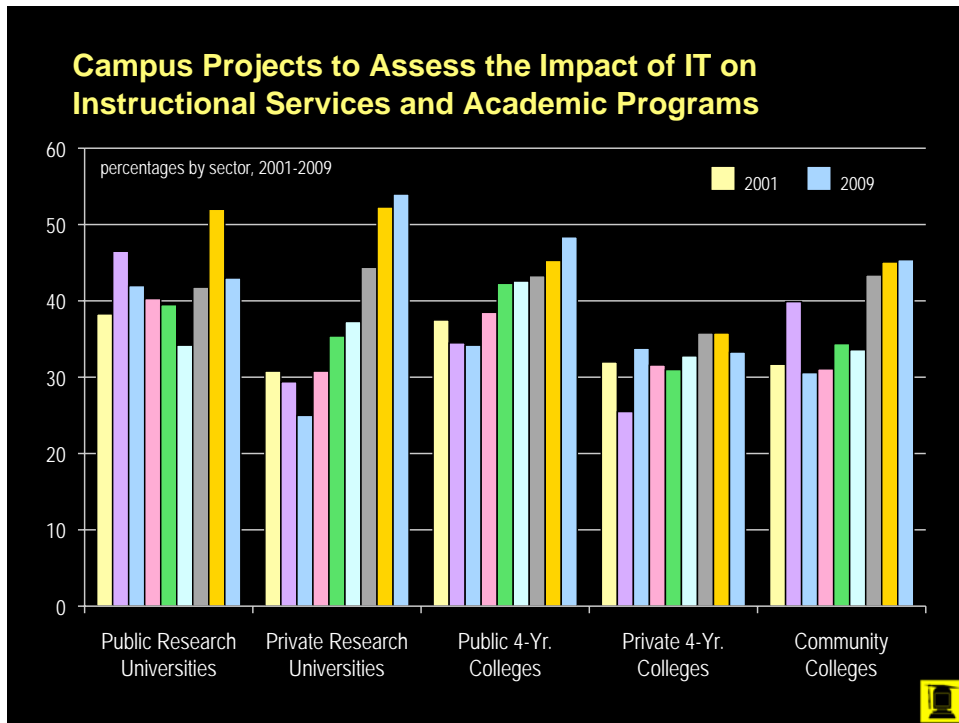
## Wireless Classrooms

percentages by sector, 2004-2008



# CAMPUS COMPUTING, 2009

Kenneth C. Green



## Some Key IT Issues



# CAMPUS COMPUTING, 2009

Kenneth C. Green

## Impact of Budget Cuts

- ◆ No clear top IT priority in 2009
- ◆ Compounding consequences of cuts early in decade, new cuts, plus mid-year cuts.
- ◆ “Drinking from the fire hose”
- ◆ Struggling to meet rising expectations and demand with fewer resources
- ◆ Rising stress on units and individuals



## LMS 3.0

- ◆ The LMS is higher ed’s version of the “supermarket scanner”
- ◆ Transitional period as the LMS migrates from a resource (content and services) to a source (data!)
- ◆ Integration with the ERP



# CAMPUS COMPUTING, 2009

Kenneth C. Green

## eBooks

- ◆ No clear, compelling value statement on eBooks – to date
- ◆ CIOs seem bullish on content, a little less so on platforms.
- ◆ Still very early in the cycle...
  - Platform providers focused on consumer market
  - Educ providers have yet to deliver a compelling resource for students (value, features, cost).



## Managing Online Education

- ◆ New project launched by WCET and The Campus Computing Project
- ◆ Focused on the instructional, organizational, and IT infrastructure for online and distance ed.
- ◆ WCET conference video at: [campuscomputing.net](http://campuscomputing.net)

The screenshot shows a report from WCET titled "MANAGING ONLINE EDUCATION". The main heading is "Online Education Programs Marked by Rising Enrollment, Higher Profits, Organizational Transition, Higher Fees, and Tech Training for Faculty". Below this, there are several paragraphs of text and a bar chart. The bar chart is titled "Enrollment Trends in Online Programs" and shows enrollment growth from 2000 to 2008. The chart is divided into three categories: "All Online Programs", "Distance Education", and "Blended Learning". The enrollment for all online programs shows a steady increase over the period, with a significant jump in 2008. Distance education also shows growth, while blended learning shows a more modest increase.



**CAMPUS COMPUTING, 2009**  
Kenneth C. Green





**AVAILABLE ON 10 DEC 2009** **FAX TO: 818.784.8008**

# THE 2009 CAMPUS COMPUTING REPORT

*Please send me the Campus Computing Reports listed below:* ISSN 1521-1614 *Total*

**The 2009 Campus Computing Report**

- \_\_\_ *Print Copy:* 2009 Campus Computing Report (\$37.00 each copy) \$ \_\_\_\_\_
- \_\_\_ *PDF File:* Campus Computing 2009 (\$75.00 for one PDF file; max 5 users) \_\_\_\_\_
- \_\_\_ *Site License,* Campus Computing 2009 (\$150.00 for one PDF file to be posted on a campus server and restricted to authorized campus users) \_\_\_\_\_

**Campus Computing Reports 2004-2008**

- \_\_\_ copies, Campus Computing 2008 (\$35.00 each print copy) \_\_\_\_\_
- \_\_\_ copies, Campus Computing 2007 (\$35.00 each print copy) \_\_\_\_\_
- \_\_\_ copies, Campus Computing 2006 (\$30.00 each print copy) \_\_\_\_\_
- \_\_\_ copies, Campus Computing 2005 (\$30.00 each print copy) \_\_\_\_\_
- \_\_\_ copies, Campus Computing 2004 (\$30.00 each print copy) \_\_\_\_\_

*Postage and shipping charges:* \$2.00 per order for US/Canada (book rate) addresses and \$10.00 per order for overseas airmail delivery \_\_\_\_\_

*California Sales Tax – for print orders shipped to CA address:* 9.75% \_\_\_\_\_

**BALANCE DUE US \$** \$ \_\_\_\_\_

**Payment option:**     credit card     institutional/company check     institutional purchase order

*Credit Card Information:*     American Express     MasterCard     Visa

*Card Number:*    |\_|\_|\_|\_|    |\_|\_|\_|\_|    |\_|\_|\_|\_|    |\_|\_|\_|\_|

*Exp. Date:*    |\_|\_|\_|\_|    *Security Code:*    |\_|\_|\_|\_|\_|

*Name on Card:* \_\_\_\_\_

**Please ship to:**

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Institution/Org: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

e-mail: \_\_\_\_\_

**Please make checks payable to:**  
Kenneth C. Green / Campus Computing  
PO Box 261242  
Encino, CA • 91426-1242 • USA