The budget cuts that have wrecked havoc on college and university IT units and resources in recent years may be abating. New data from institutions participating in the 21st annual Campus Computing Survey reveal that two-fifths (41.6 percent) of colleges and universities experienced a budget cut in central IT services for the current academic year (2010-11), down from fully half (50.0 percent) last year.

Private/non-profit institutions generally fared better than their public counterparts: the proportion of private universities reporting IT budget cuts fell by more half this past year, from 56.9 percent in 2009 to 24.4 percent in 2010. Among private four-year colleges, the proportion experiencing IT budget reductions dropped from 41.9 percent last year to 31.9 percent this fall.

Although the proportion of public four-year colleges and universities reporting IT budget cuts also declined compared to 2009, the numbers actually went up for community colleges. Almost half (46.2 percent) of community colleges experienced reductions affecting central IT budgets this fall, compared to 38.0 percent in 2009. In contrast, fewer public universities suffered IT budget reductions this year than last (39.8 percent, compared to 67.1 percent in 2009), as did fewer public four-year colleges (46.6 percent this fall compared to 62.8 percent in fall 2009).

“The new survey data provide a modicum of good news about money: fewer institutions experienced budget cuts this year than last,” says Kenneth C. Green, founding director of The Campus Computing Project, the largest continuing study of eLearning and information technology in American higher education. “But the ongoing financial pressures confronting campus IT budgets continue to play havoc with the efforts of campus IT leaders to respond to the rising demand for IT resources and services.” Green notes that the current round of budget reductions arrived just as campuses were beginning to recover from the significant budget cuts that came early in the decade.

The 2010 survey highlights the continuing transition in the higher education market for Learning Management Systems (LMS). The proportion of campus CIOs and senior IT officials reporting that their institution uses Blackboard as the campus-standard LMS has dropped from 71.0 percent in 2006 to 57.1 percent in 2010. Concurrently, Blackboard’s major competitors have all gained market share during this period. The numbers for Desire 2Learn are up fivefold, from 2.0 percent in 2006 to 10.1 percent in 2010. Moodle, an Open Source LMS, has also registered big gains during this period, rising from 4.2 percent in 2006 to 16.4 percent this fall. And the numbers for Sakai, another Open Source LMS deployed primarily in universities, have grown from 3.0 percent in 2006 to 4.6 percent in 2010.

“The LMS market is a textbook example of a mature market with immature, or evolving, technologies, and that’s a recipe for volatility,” says Green. “Blackboard’s announced plans to terminate support for its legacy LMS applications has served as a catalyst for many institutions to review the campus LMS strategy. This is now a very competitive market for LMS providers.”
Linked to the campus LMS strategy, more than two-thirds (70.3 percent) of the survey participants agree/strongly agree that “mobile [LMS] apps are an important part of our campus plan to enhance instructional resources and campus services.” However, the survey data indicate that mobile LMS apps are in the early phase of campus deployment: as of fall 2010, just over an eighth (13.1 percent) of campuses have activated mobile LMS apps; another tenth (10.1 percent) report that mobile LMS apps are scheduled to go live at their institutions during the coming academic year, while a quarter (24.8 percent) indicate that the campus mobile app strategy is currently under review.

“The campus movement towards mobile apps reflects trends in the consumer market,” says Green. He cites Student Monitor’s spring 2010 survey indicating that 98 percent of full-time undergraduates in four-year colleges own mobile phones and almost half own smart phones: “students expect their institutions to provide the kinds of resources and services they enjoy as consumers. Mobile apps provide easy, anytime access to instructional resources and campus services from the screen of your smart phone.”

The survey data reveal that student activities on social networks can pose social problems for colleges and universities. Almost a sixth (15.4 percent) of the campuses participating in the 2010 survey report a past year student “incident” (cyberstalking; cyberbullying, etc.) linked to social networking sites, up from 8.6 percent in 2006. Moreover, the incident numbers jumped in some sectors this past year, rising from 15.8 percent in 2009 to 27.3 percent in 2010 for public universities and up from 13.6 percent to 20.8 percent in 2010 in public four-year colleges.

“These numbers suggest it will be difficult for campus officials to ignore the consequences of student behavior on social networks,” says Green. “Although Facebook and other social sites are not sponsored or supported by colleges and universities, the activities of individual students can have institutional consequences. Many campuses are likely to expand their student education initiatives to address this issue.”

Senior campus IT officials appear bullish on the future of eBooks in academic. Well over four-fifths (86.5 percent) of the survey participants agree/strongly agree that “eBook content will be an important source for instructional resources in five years,” up from 73.6 percent in 2009. Additionally, more than three-fourths (78.6 percent, up from 66.0 percent in 2009) agree/strongly agree that “eBook readers [hardware] will be important platforms for instructional content in five years.”

“eBooks remain a much wished for, ‘ever-arriving’ technology in higher education,” says Green. “The platform options, market opportunities, and enabling technologies continue to improve. But Green notes that for most students, eBooks do not yet offer a price-competitive alternative to used textbooks: “eText development and pricing strategies are still evolving. Publishers still develop primarily for print and then port print content into electronic formats. Consequently, eBooks and eTextbooks do not - yet - offer a compelling value proposition for most students.”

Campus IT officials also seem bullish on the future of lecture capture technology to serve both on-campus and online students. Fully three-fifths (60.5 percent) of the survey participants agree/strongly agree that “lecture capture is an important part of our campus plan for developing and delivering instructional context.” Yet as with mobile apps, lecture capture is in the early phase of what will probably be broader campus deployment. As of fall 2010, just 4.4 percent of classes make use of lecture capture technologies, up from 3.1 percent in 2008. The deployment numbers are highest in research universities (6.8 percent of classes in fall 2010, up from 4.6 percent in 2008) and lowest in private four-year colleges (3.2 percent of classes in 2010, compared to 2.1 percent in 2008).

The 2010 Campus Computing Report is based on survey data provided by senior campus IT officers, typically the CIO, CTO, or other senior campus IT officials representing 523 two- and four-year public and private colleges and universities across the United States. Survey participants completed the questionnaire in September and early October, 2010.

Copies of the 2010 Campus Computing Report are available from The Campus Computing Project. Price: $37.00 plus $2.00 for shipping and handling for a print copy. Electronic (PDF) copies and site licenses are also available. Please contact Campus Computing for additional information.

THE 2010 CAMPUS COMPUTING SURVEY

Begun 1990, The Campus Computing Project is the largest continuing study of the role of computing, eLearning, and information technology in American higher education. The project’s national studies draw on qualitative and quantitative data to help inform campus IT leaders, college faculty and administrators, policy-makers, and others interested in a wide array of information technology planning and policy issues that affect colleges and universities.

CAMPUS COMPUTING, 2010

The 21st National Survey of Computing and Information Technology in US Higher Education

Kenneth C. Green
THE CAMPUS COMPUTING PROJECT
www.campuscomputing.net

14 October 2010
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Project Sponsors
Methodology

- 523 survey respondents
- Web-based data collection
- Survey period: early Sept – 6 Oct, 2010
- 76% of 2010 campuses participated in the 2009 survey

2010 Survey Participants

<table>
<thead>
<tr>
<th>Category</th>
<th>Dept of Ed N (adjusted)</th>
<th>Survey N</th>
<th>Participation Rate (pct)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Research &amp; Doctoral Universities</td>
<td>168</td>
<td>77</td>
<td>46%</td>
</tr>
<tr>
<td>Private Research &amp; Doctoral Universities</td>
<td>92</td>
<td>45</td>
<td>49%</td>
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<td>Public 4-Year Colleges</td>
<td>374</td>
<td>101</td>
<td>27%</td>
</tr>
<tr>
<td>(Baccalaureate &amp; Masters)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private 4-Year Colleges</td>
<td>824</td>
<td>179</td>
<td>21%</td>
</tr>
<tr>
<td>(Baccalaureate &amp; Masters)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associate Degree/ Public Community Colleges</td>
<td>1018</td>
<td>121</td>
<td>12%</td>
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</tbody>
</table>
2010 Highlights

- Budget cuts abating, but more so for private than public institutions
- Transitions in the LMS market: D2L, Moodle and Sakai gaining share
- Significant interest in mobile LMS apps and lecture capture, but deployment numbers are low
- Social networks are creating social problems

Single Most Important IT Issue, 2000-2008
Single Most Important IT Issue, 2010

There is no “Single Most Important” IT Issue!

- Mobile computing
- Cloud computing
- Upgrading campus network
- Upgrading/replacing ERP systems
- Providing online/distance ed
- Providing adequate user support
- Network & data security
- Instructional integration of IT
- Financing/replacing aging hardware/software
- Hiring/retaining qualified staff

Single Most Important Issue – By Sector, 2010

- All Campuses
  - Hiring/Retaining IT Staff (14.3%)
  - Financing Replacing of Aging IT (14.1%)
  - Instructional Integration of Info Tech. (12.4%)
- Public Universities
  - Hiring/Retaining Staff (18.2%)
  - Upgrading/Replacing the Campus Network (13.0%)
  - Upgrading/Replacing of Aging IT (13.3%)
- Private Universities
  - Data & Network Security (17.8%)
  - Instructional Integration of Info. Tech. (14.9%)
  - Instructional Integration of Info Tech. (12.4%)
- Public 4-Yr. Colleges
  - Hiring/Retaining Staff (14.9%)
  - Online/Distance Ed (15.6%)
  - Instructional Integration of Info Tech. (13.9%)
- Private 4-Yr. Colleges
  - Instructional Integration of Info. Tech. (17.3%)
  - Upgrading the Campus Network & Instructional Integration (13.9%)
  - Financing Replacing of Aging IT & User Support (13.3%)
- Community Colleges
  - Providing Adequate User Support (18.2%)
  - Hiring/Retaining IT Staff (11.6%)
  - Upgrading/Replacing the Campus Network (13.0%)
  - Financing Replacing of Aging IT (13.3%)
  - Instructional Integration of Info. Tech. (13.9%)
  - Financing Replacing of Aging IT & User Support (13.3%)
Why Is Distance Ed Now a CIO Priority?

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

<table>
<thead>
<tr>
<th>Title of the Sr. Campus Officer for Online Ed</th>
<th>pct</th>
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</thead>
<tbody>
<tr>
<td>CIO</td>
<td>44.5</td>
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<tr>
<td>Provost</td>
<td>19.2</td>
</tr>
<tr>
<td>VP/Dean Continuing Ed</td>
<td>17.6</td>
</tr>
<tr>
<td>Assoc/Ass’t VP</td>
<td>13.7</td>
</tr>
<tr>
<td>Other Campus Officer</td>
<td>4.4</td>
</tr>
</tbody>
</table>

Source: Managing Online Education 2009, WCET & The Campus Computing Project

Budget Cuts, 2006-2010

- Budget cuts abating
- Privates fare better than publics
- Community colleges suffer still more cuts
Budgets Trends by IT Function, 2010

-50 -40 -30 -20 -10 0 10 20 30 40 50

percentage of institutions reporting budget increases or budget cuts, by IT budget function

Increase  Cut


Reorganizing IT Units, Fall 2010

Organizational structures for many IT units are in transition.

34 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!

29 pct expect to restructure academic computing the next two years.
IT Security

IT Security Incidents, A/Y 2005 - 2010

percentages by sector

- Computer theft w/confidential data
- Hack/attack on campus network
- Identity issues
- Major virus infestation
- Major spyware infestation
- Student incident linked to social networking
- Data loss on a distr. server
- Employee malfeasance

The Campus Computing Project

Student Security Incident Linked to a Social Networking Site

percentages by sector

- Public Universities
- Private Universities
- Public 4-Yr. Colleges
- Private 4-Yr. Colleges
- Community Colleges

The Campus Computing Project
IT Security

Intentional Employee Misconduct Affecting IT Security

percentages by sector

2007  2008  2009  2010

Public Universities  Private Universities  Public 4-Yr. Colleges  Private 4-Yr. Colleges  Community Colleges

Slow Progress on IT Disaster Recovery

percentage of institutions reporting a strategic plan for IT disaster recovery, by sector, 2002-2010

2002  2010

Public Universities  Private Universities  Public 4-Yr. Colleges  Private 4-Yr. Colleges  Community Colleges
Web 2.0 Comes to Campus

Campus Wikis and Second Life

Emergency Notification Services, 2010
Elements of the Notification Plan that are Operational as of fall 2010
Emergency Notification
Participation Strategy: “Opt-In” (Must Register)

Downward trend is a good sign: a movement from “opt-in” to “opt-out” strategy for notification

Addressing Budget Issues by:
Phasing Out Public Computer Labs?

More Campuses Closing Labs in 2010?
- Private Univ.: +1.8%
- Public 4-Yr.: +6.2%
- Pvt. 4-Yr.: +2.0%
“Lecture Capture is an Important Part of Our Campus Plan for Developing & Delivering Instructional Content”

percentage who agree/strongly agree, fall 2010

Lecture Capture and Podcasting

Rising Use of Lecture Capture
(percentage of classes by sector, 2006-2010)

Steady Gains in Podcasting
(percentage of classes by sector, 2007-2010)
Outsourced eMail Services

percentages, by campus type, fall 2010

- About 60 pct. of campuses now outsource student email vs. 15 pct. for faculty email

Campus Compliance with the P2P Provisions of HEOA

percentages, by campus type, fall 2010

change compared to 2008

- Have a campus plan to combat illegal P2P
- Deploying technology-based deterrents
- Offering alternatives to illegal P2P
ePortfolios

percentages by sector reporting ePortfolio services on the campus Web site, 2003-2010

The Future Bodes Well for eBooks!

eBooks Will be an Important Source for Instructional Resources in Five Years
(pct who agree/strongly agree, 2009 vs. 2010)

eBooks Readers be an Important Platform for Instructional Resources in Five Years
(pct who agree/strongly agree, 2009 vs. 2010)
Rising Use of IT in Instruction

Learning Management Tools (CMS/LMS)

percentage of courses using CMS/LMS by sector, 2000-2010

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2010</th>
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<tbody>
<tr>
<td>Public Universities</td>
<td>50.0</td>
<td>60.0</td>
</tr>
<tr>
<td>Private Universities</td>
<td>40.0</td>
<td>50.0</td>
</tr>
<tr>
<td>Public 4-Yr. Colleges</td>
<td>30.0</td>
<td>40.0</td>
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<tr>
<td>Private 4-Yr. Colleges</td>
<td>20.0</td>
<td>30.0</td>
</tr>
<tr>
<td>Community Colleges</td>
<td>10.0</td>
<td>20.0</td>
</tr>
</tbody>
</table>

A Profile of the LMS Market, Fall 2010

Does your campus have a single standard [campus-wide] LMS?

(Percentages, all institutions)

<table>
<thead>
<tr>
<th>% by sector</th>
<th>Bb</th>
<th>D2L</th>
<th>Moodle</th>
<th>Sakai</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Univ.</td>
<td>68.8</td>
<td>5.2</td>
<td>5.2</td>
<td>10.4</td>
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<tr>
<td>Pvt. Univ.</td>
<td>60.0</td>
<td>4.4</td>
<td>8.9</td>
<td>6.7</td>
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<tr>
<td>Public 4-Yr.</td>
<td>64.4</td>
<td>14.9</td>
<td>7.9</td>
<td>2.0</td>
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<tr>
<td>Private 4-Yr.</td>
<td>47.8</td>
<td>---</td>
<td>34.8</td>
<td>5.6</td>
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<tr>
<td>Comm. Colleges</td>
<td>57.0</td>
<td>26.5</td>
<td>5.8</td>
<td>0.8</td>
</tr>
</tbody>
</table>
Transitions in the LMS Market: 2006-2010
percentages for campuses reporting a single, campus-wide LMS standard

Add 7 pct for the Angel clients acquired in 2009

“Mobile Apps are an Important Part of Our Campus Plan to Enhance Instr. Resources & Campus Services”
percentage who agree/strongly agree, fall 2010
Campus License for Antiplagiarism Software

percentages by sector, 2008-2010

Campus Projects to Assess the Impact of IT on Instructional Services and Academic Programs

percentages by sector, 2001-2010
Some Key IT Issues

Continuing Impact of Budget Cuts

- Impact on resources, services, and infrastructure
- Compounding consequences of cuts early in decade, new cuts, plus mid-year cuts.
- Struggling to meet rising expectations and demand with fewer resources
- Rising stress on units and individuals
2010 Digital Puck Awards

- **Mobile Apps**: from bookmarks on browsers to buttons on smart phones
- **eBooks**: an ever-arriving but soon to be here technology
- **Lecture Capture**: what are we gonna do with all this stuff?

“skate to where the puck is going, not to where is it…”

Transitions in the LMS Market

- “a mature market with immature technology. . .”
- More campuses using hosted services
- Time certain termination of legacy Blackboard LMS applications a catalyst for review
- Unclear impact of increasing competition on LMS Mobility Services
eBooks

◆ CIO’s bullish on content and platforms

◆ No clear, compelling value statement on eBooks – to date

◆ Still very early in the cycle…

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.

◆ 2009 WCET conference video at: campuscomputing.net
The 2010 Campus Computing Report

Please send me the Campus Computing Reports listed below:

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<tr>
<th>The 2010 Campus Computing Report</th>
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<tbody>
<tr>
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<tr>
<td>___ PDF File: Campus Computing 2010 ($75.00 for one PDF file; max. 5 users)</td>
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<tr>
<td>___ Site License, Campus Computing 2010 ($150.00 for one PDF file to be posted on a campus server and restricted to authorized campus users)</td>
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Postage and shipping charges: $2.00 per order for US/Canada (book rate) addresses and $15.00 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: |__|__|__|__|

Name on Card: ___________________________________________________________________________________

Please ship to:

Name: _______________________________________________________________________________________

Title: _______________________________________________________________________________________

Institution/Org: _____________________________________________________________________________

Address: ___________________________________________________________________________________

City: __________________________ STATE: ______ ZIP: __________________

Phone: __________________________ Fax: __________________________

e-mail: __________________________

Please make checks payable to:

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