



THE CAMPUS COMPUTING PROJECT

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October, 2008

The 2008 National Survey of Information Technology in U.S. Higher Education

Campuses Invest in Emergency Notification

Colleges and universities across the United States have made significant efforts to expand and enhance emergency notification capacity over the past year. Data from the 2008 Campus Computing Survey reveal that the proportion of institutions reporting that they *do not* have an “operational emergency notification system” as of fall 2008 fell to 5.5 percent, down from 25.0 percent in fall 2007.

While the numbers show major gains in notification planning and capacity, the survey data document some important variations across sectors. For example, 13.1 percent of community colleges report that they do not have an operational notification system, compared to 5.1 percent for private four-year colleges, 2.8 percent for public four-year colleges, and 2.3 percent private universities. In contrast, all the public universities participating in this year’s survey report operational notification systems as of fall 2008.

Additionally, the operational elements of campus notification plans showed major gains between fall 2007 and 2008. For example, the proportion of campuses reporting sirens as part of their plans jumped from 23.4 percent last year to 34.8 percent in fall 2008. Similarly, the proportion of campuses reporting notification capac-

ity utilizing email grew by almost a third, from 66.4 percent in 2007 to 86.6 percent in 2008, while voice mail to campus phones increased almost by half to 65.5 percent, up from 44.6 in 2007; text messaging rose by three-fourths, from 43.3 percent in 2007 to 75.6 percent in fall 2008. The percent-

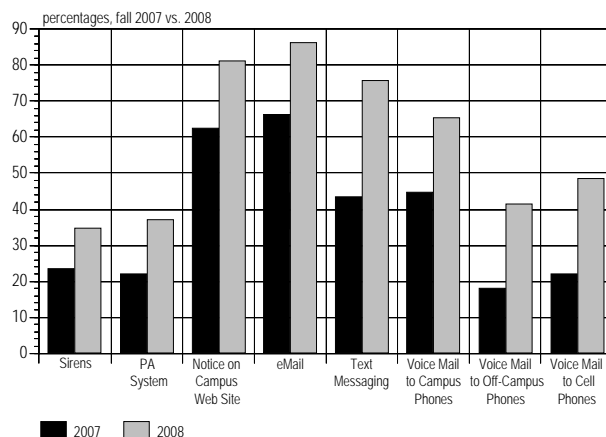
age of campuses reporting voice mail notification to off-campus phones and cell phones more than doubled from 2007 to 2008, from 18.0 to 41.1 percent for “wired” phones and from 22.5 to 48.5 percent for mobile phones.

“These dramatic gains reflect significant institutional concern about notification capacity,” says Kenneth C. Green, founding director of The Campus Computing Project. “Given recent campus tragedies and natural disasters, campus officials have come to recognize that technology is an essential component of a comprehensive institutional crisis management strategy.”

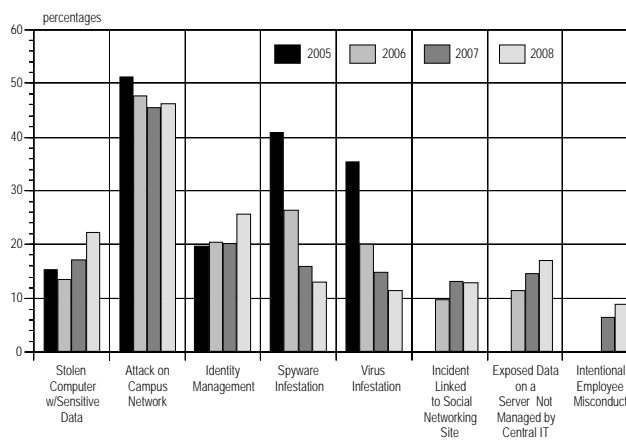
Yet Green cautions that “technology is the easy part” of campus notification efforts,” noting that careful planning, campus promotion, and system testing, plus thoughtful assessment, are essential. He cites the “opt-in” issue as one example: “if only a third of students register for the system, the benefits and effectiveness are clearly limited.” (Data from the 2008 survey indicate that three-fourths - 76.6 percent - of campuses have an “opt-in” policy.)

The campus investment in notification resources comes as colleges and universities report the beginning of what appears to be a new wave of IT budget cuts. The 2008 survey data confirm that the downturn affecting financial markets and state budgets

Components of Campus Notification Systems



IT Security Incidents, 2005-2008



has also hit college and university budgets. More than two-fifths of public universities (45.4 percent) report cuts in the central IT budget for fall 2008, up from just 16.3 percent in 2007. Similarly, 44.4 percent of public four-year colleges report central IT budget cuts this fall, compared to 16.7 percent last year. Other sectors also report reduced IT funding from last year to this, but the numbers are smaller: 22.8 percent for private universities, 23.5 percent for private four-year colleges, and 24.6 for community colleges.

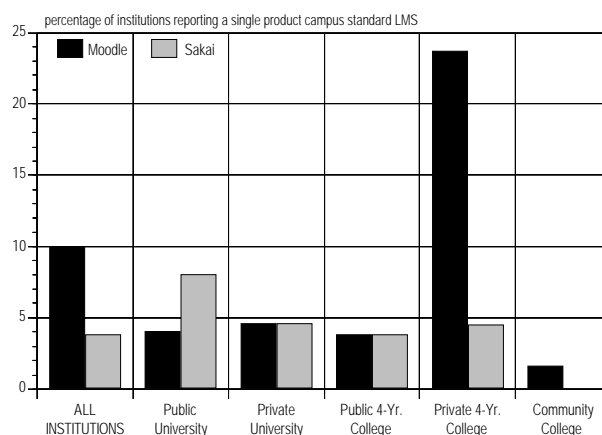
"These new IT budget reductions come just as many institutions are beginning to recover from the budget cuts that marked the economic downturn during the first years of the current decade," says Green. "The demand for technology resources and services continues to rise, even as the dollars supporting these resources, services, and IT staff are cut from institutional budgets."

The 2008 data document continuing challenges involving IT security. The survey reveals increases in the proportion of institutions reporting the theft of campus computers with sensitive data (22.2 percent in fall 2008, compared to 17.1 percent last year), network attacks (up slightly from 45.6 percent to 46.2 percent), and identity management issues (25.6 percent, compared to 20.2 percent in 2007). The proportion of campuses reporting employee misconduct affecting IT security rose to 8.9 percent in 2008 compared to 6.5 percent in 2007.

Although security issues pose continuing challenges for campus IT officials, the proportion who identify IT security as the "single most important IT issue confronting my institution over the next two-three years" declined in 2008 to 20.5 percent, down from 25.5 percent in 2007 and 30 percent in both 2005 and 2006. Ranked second in 2008 is "hiring/retaining IT staff" at 16.7 percent, up from 12.3 percent last year. Tied for third in 2008 are "assisting faculty with the instructional integra-

tion of IT" (11.9 percent, compared to 11.2 percent in 2007 and 40.5 percent in 2000), and "financing the replacement of aging hardware and software" (11.2 percent, compared to 10.3 percent in 2007). Upgrading/replacing administrative IT/ERP systems, which

Open Source LMS Deployment, 2008



was second in 2007 (13.0 percent) is ranked fifth in 2008 (10.0 percent).

"These data reflect the clustering of major IT priorities over the past few years," says Green. "Rather than the one clear IT priority we saw in 2000 - instructional integration at 40 percent - the 2008 data reflect competing, yet critical priorities: IT security, retaining IT staff, and financing IT - all competing for limited budget resources."

A new item on the 2008 survey asked respondents about the likelihood that their institutions will migrate to Software as a Service (SaaS) or Open Source administrative applications within five years, by 2013. About a fourth (24.4 percent) of the survey respondents report a high likelihood that their institution would migrate to an Open Source Learning Management System (LMS) by 2013. About one in six (15.3 percent) report likely migration to an Open Source content management system and about an eighth (12.9 percent) anticipate migrating to an Open Source ePortfolio application. Far fewer respondents - less than five percent - predict migration to Open Source ERP applications such as student information, financial, HR, or research/grant management systems by 2013.

Similarly, about a fifth (18.0 percent) of the 2008 survey respondents predict that their campuses might migrate to a SaaS-based LMS, and an eighth anticipate moving to a SaaS-based content management (12.2 percent) or ePortfolio (11.1 percent) in the next five years.

Yet even as respondents seem wary of migrating to Open Source, the sur-

THE CAMPUS COMPUTING PROJECT

Begun in 1990, The Campus Computing Project is the largest continuing study of the role of computing, information technology, and eLearning in American higher education. The project's national studies draw on qualitative and quantitative data to help inform faculty, campus officials, policy-makers, and others interested in a wide array of information technology planning and po universities in the United States.

The 2008 Campus Computing Survey was supported, in part, by the following sponsors: Adobe Systems, Amazon, Apple, BearingPoint, Blackboard, Blackboard Connect, Campus Management, Cengage Learning, Center for Digital Education, Cisco Systems, Datatel, Dell, EDUCAUSE, Follett Higher Education Group, Google, Hewlett Packard, Houghton Mifflin Company, IBM Higher Education, Jenzabar, Lenovo, Longsight Group, McGraw-Hill Higher Education, Microsoft, Moodlerooms, Nuance Communications, Oracle, Pearson Education, PerceptIS, Presidium Learning, rSmart Group, SAS, SunGard Higher Education, Sun Microsystems, and TouchNet Information Systems.

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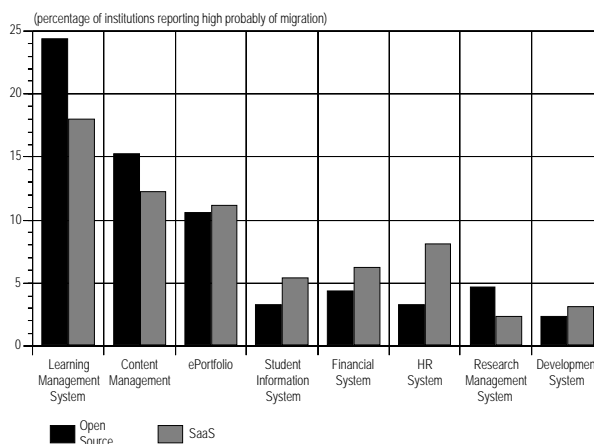
vey data document the rising deployment of Open Source LMS applications. For example, Blackboard remains the dominant LMS provider in higher education: 56.8 percent of the campuses in the 2008 survey identified Blackboard as the single product campus LMS standard, down from 66.3 percent in 2007. But one campus in seven (13.8 percent) that participated in the 2008 survey identified an Open Source LMS - either Moodle or Sakai - as the campus standard LMS, up from 10.3 percent in 2007 and 7.2 percent in 2006. As of fall 2008, almost a fourth (23.7 percent) of private four-year colleges identified Moodle as the campus standard LMS, compared to 17.2 percent in 2007.

Across all sectors the percentage of college classrooms that have access to wireless networks continues to rise. Overall, about two-thirds (67.6 percent) of classrooms have access to wireless, up from 60.1 percent in 2007 and 31.0 percent in 2004). Classroom wireless access is highest in private universities (76.0 percent, up from 68.9 percent in 2007) and lowest in community colleges (56.1 percent, up from 44.1 percent in 2007).

The survey data reveal that many colleges and universities are carefully assessing options to outsource student email and other IT services. Fully two-fifths (42.4 percent) of institutions participating in this year's survey report that they have migrated or are about to migrate to an outsourced student email service; three in ten (28.3 percent) are reviewing institutional options for outsourcing student email during the current academic year. In contrast, just 14.8 percent of institutions have migrated to outsourced email services for faculty. The majority of campuses outsourcing student email have

opted for Google (56.5 percent), while two-fifths (38.4 percent) are using Microsoft and 4.8 percent are using Zimbra.

Migration to Open Source or SaaS by 2013



A new item on the 2008 survey reveals the wide deployment of antiplagiarism software. More than half (54.7 percent) of institutions report a site license for an antiplagiarism product. Licensing agreements are highest in public four-year colleges (66.7 per-

cent) and 'accidental' plagiarism among undergraduates," says Green. "Some students simply don't know or don't attend to the established rules for citing sources in their papers, while others intentionally clip and copy material from the Internet and other sources. Unfortunately, campus licenses for anti-plagiarism products are an additional institutional expense in times of stressed campus budgets."

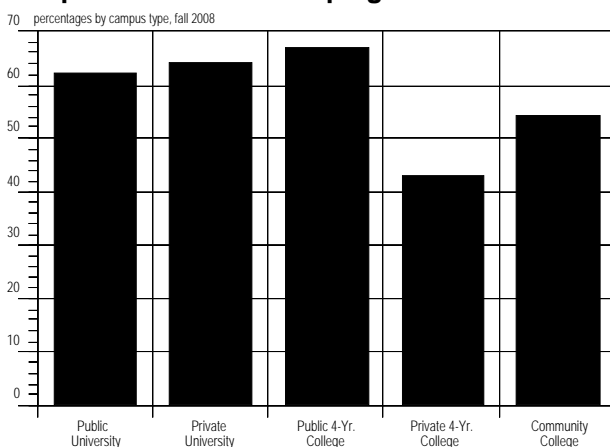
The survey data document the rising use of classroom clickers across all sectors. Although the overall numbers are generally low - about seven percent in public and private universities and public four-year colleges, five percent in private four-year colleges, and four percent in

community colleges - the proportion of classes using clickers has almost doubled since the 2005 survey. Moreover, because clickers are almost exclusively found in (often large) lower-division undergraduate classes, the gains reflected in the survey data may

actually understate the significance of the rising deployment of clickers and classroom response systems as a technology resource to support instruction.

The 2008 Campus Computing Survey is based on data provided by senior campus IT officials, typically the CIO, CTO, or other ranking campus IT officer, representing 531 two- and four-year public and private colleges and universities across the United States. Survey respondents completed the online questionnaire during September and October, 2008.

Campus License for Antiplagiarism Software



cent), followed by private universities (64.3 percent), public universities (62.2 percent), private four-year colleges (43.2 percent), and community colleges (54.1 percent).

"The wide deployment of antiplagiarism software reflects the growing concern about both intentional

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