

THE CAMPUS COMPUTING PROJECT

www.campuscomputing.net

November, 2009

The 2009 National Survey of Information Technology in U.S. Higher Education

IT Budgets Are Down - Again!

For the second time in the current decade, campus technology officials are struggling with significant IT budget cuts against the rising demand for IT resources and services. Fully half (50 percent) of the institutions participating in the 2009 Campus Computing Survey report budget cuts affecting central IT services 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 half (49 percent) in 2008 to a fifth (21.4 percent) in 2009.

Public institutions have been hardest hit by the current IT budget cuts: fully two-thirds (67.1 percent) of public universities reported budget cuts affecting 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.

"These new budget cuts will play havoc with institutional 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

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. There is no question that the current round of budget reductions will have consequences that affect IT infrastructure, instructional resources, and user support services.

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.

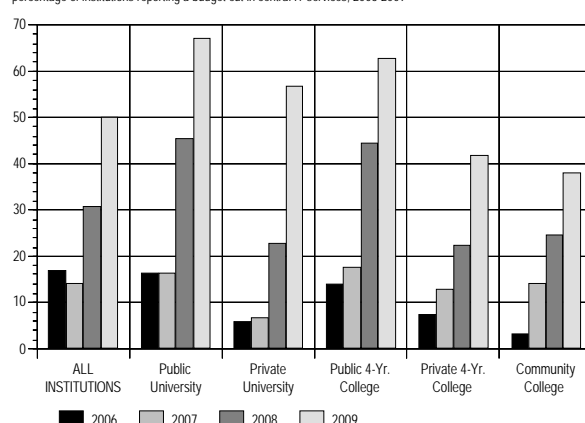
In the early part of the decade, a majority of survey participants identified the instructional integration of information technology as the single most important issue confronting their institution over the next two-three years. More recently, IT security concerns emerged as the leading issue among a plurality of survey participants. However, in 2009, two issues - network/data security and IT financing 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.

The current round of 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 reorgan-

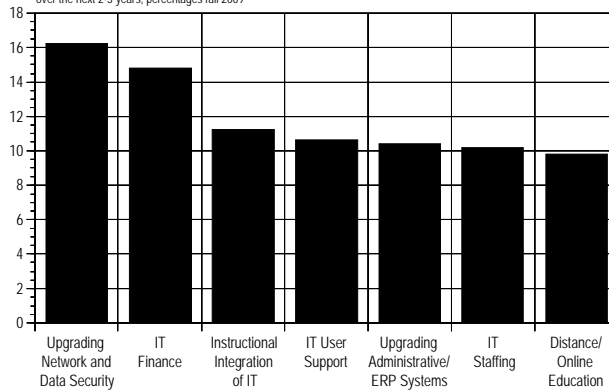
IT Budget Cuts, 2006-2009

percentage of institutions reporting a budget cut in central IT services, 2006-2009



Single Most Important IT Issue, Fall 2009

*single most important IT issue affecting my campuses over the next 2-3 years, percentages fall 2009



ization of academic computing in the next 24 months. Moreover, fully a sixth (15.8 percent) of the survey respondents indicate that their campuses reorganized academic computing in the past two years and will probably 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 recently and expect to do it again very soon.

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 challenges confronting IT budgets and the need to retain IT personnel,” says Green.

Budget cuts notwithstanding, 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.

Campus IT officers seem somewhat bullish on the future of eBooks, according to the 2009 survey. Fully three-fourths (76.3 percent) agree/strongly agree that “eBook content will be an important source for instructional content in five years.”

Moreover, the survey numbers on the coming role of eBook content 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

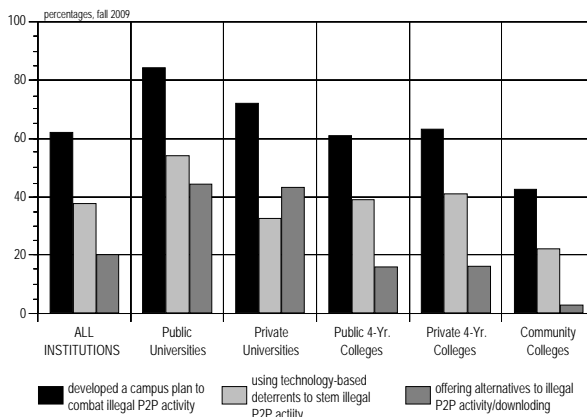
cation regulations on P2P ahead of modifying institutional policies or committing funds in response to actual or inferred federal mandates. More challenging for most institutions will be the HEOA mandate “to offer alternatives to illegal downloading or peer-to-peer distribution of intellectual property” given the demise

over the past year of the few commercial music services that were targeting the higher education market and offering institutional site licenses. The survey data also reveal that the costs of complying the HEOA mandates on P2P can be significant, averaging \$67,353 for public universities, \$56,795 for private universities, \$34,308 for public four-year colleges, \$31,671 for private four-year colleges, and \$16,017 for community colleges.

The 2009 Campus Computing Report is based on survey data provided by senior campus IT officers, typically the CIO, CTO, or other senior campus IT official representing 500 two- and four-year public and private colleges and universities across the United States. Survey participants completed the questionnaire in October 2009.

Copies of the 2009 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.

Campus Compliance with the P2P Provisions of the HEOA 2008



readers will be important platforms for instructional content in five years.”

The 2009 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 Opportunity Act (HEOA) of 2008. For example, more than four-fifths (84.2 percent) of public universities report that they “have developed plans to effectively combat the unauthorized distribution of copyrighted material,” up from 80.0 percent in 2008. But beyond the HEOA mandate for campuses to address illegal P2P activity on campus networks, many institutions may have opted to wait for the recently announced Dept. of Edu-

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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.

The 2009 Campus Computing Survey was supported, in part, by the following sponsors: Adobe Systems, Amazon, Apple, Blackboard, Blackboard Connect, Campus Management, The Center for Digital Education, Datatel, Dell, Follett Higher Education Group, Google, IBM Higher Education, Jenzabar, Lenovo, Longsight Group, McGraw-Hill Higher Education, Microsoft, Oracle, Pearson Education, Perceptis, Presidium Learning, rSmart Group, SAS, SunGard Higher Education, Sonic Foundry, SONY, Touchnet Information Systems, Turnitin, and Verba Software.

For additional information, please contact:

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The 19th National Survey of Computing and
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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



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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?



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Single Most Important IT Issue

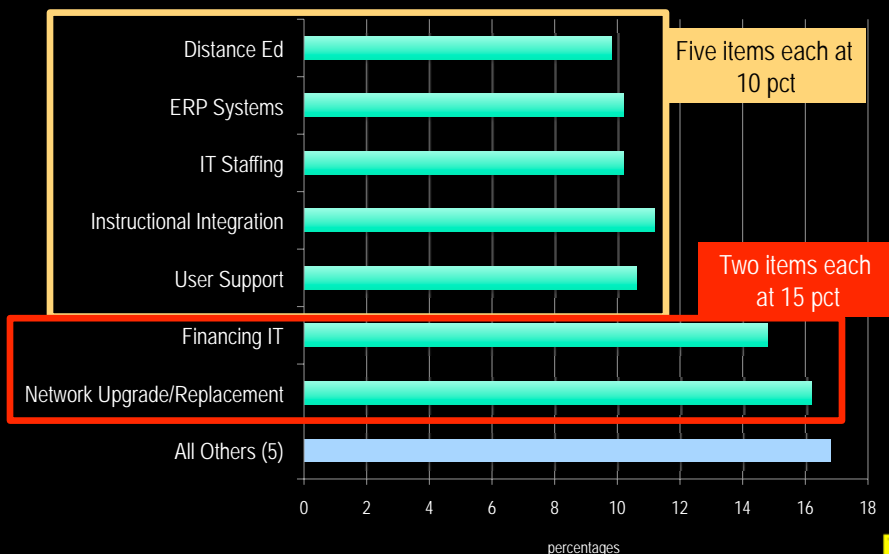
Trends, 2000-2008

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!



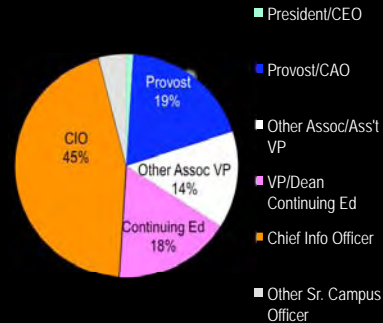
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Why Is Distance Ed Now a Top CIO Priority?

- 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.

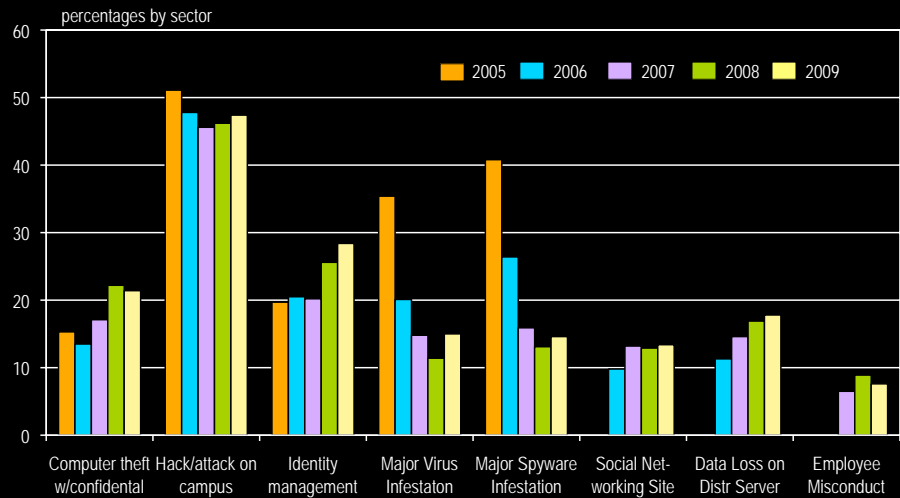


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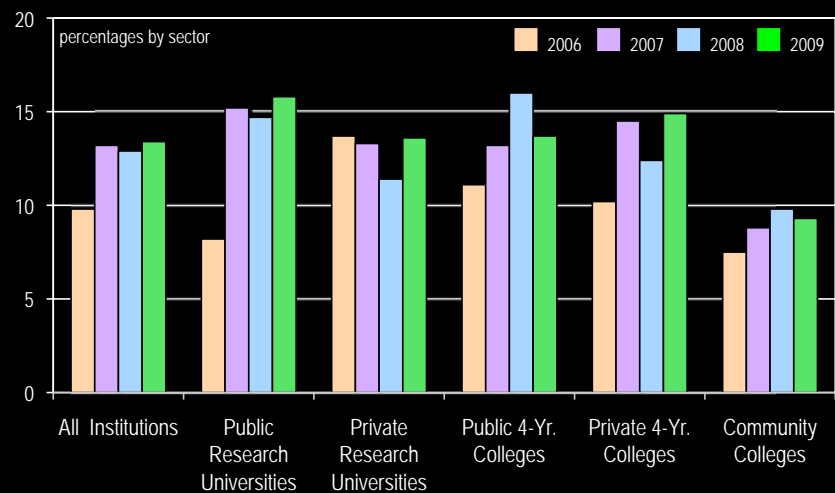
IT Security

IT Security Incidents, AY 2005 - 2009



IT Security

Student Security Incident Linked to Social Networking Site Incidents



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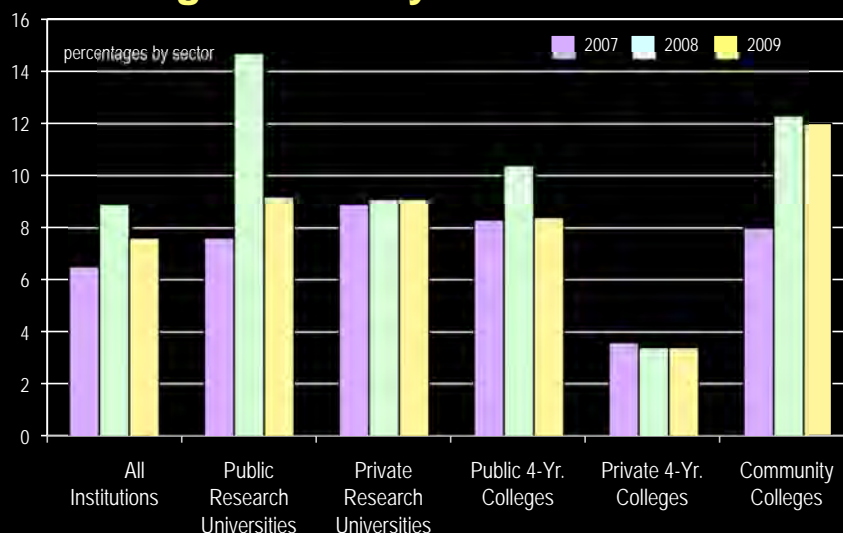


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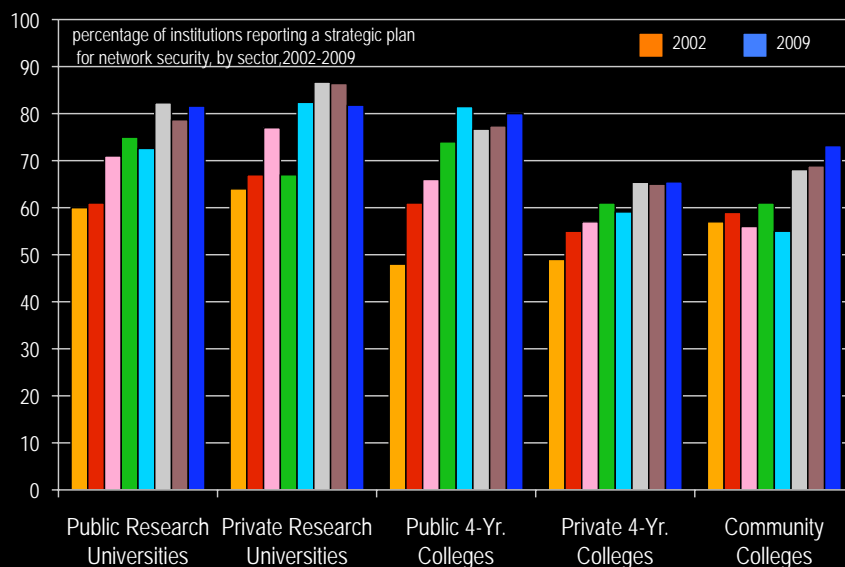
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Intentional Employee Misconduct Affecting IT Security



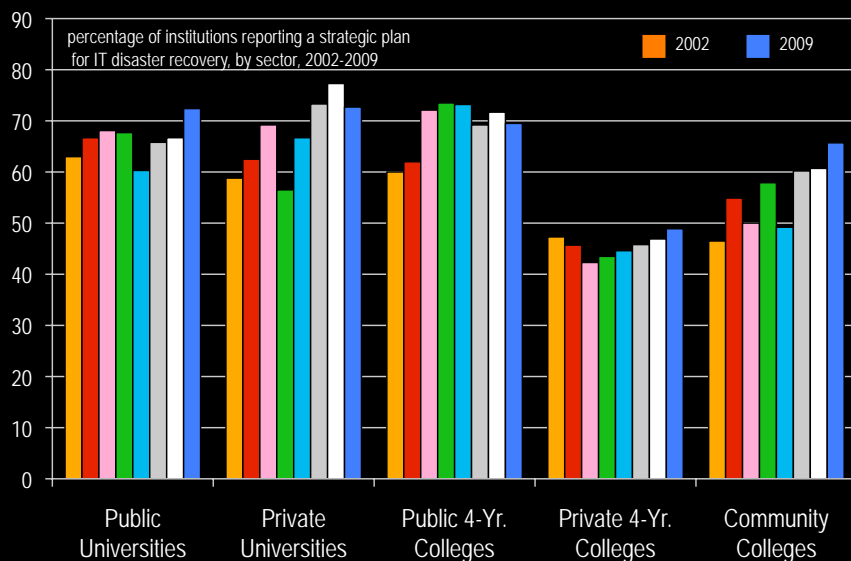
Strategic Plan for Network Security



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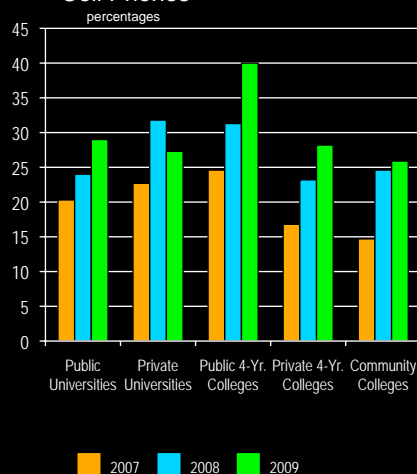
Slow Progress on IT Disaster Recovery



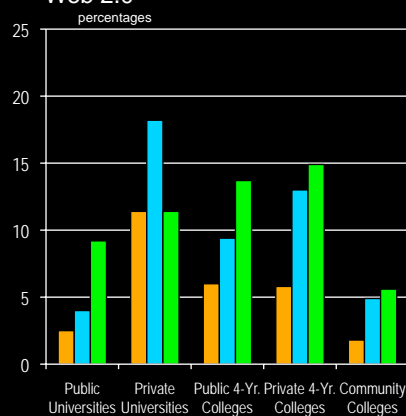
Strategic Plans

Cell Phones and Web 2.0

Cell Phones



Web 2.0



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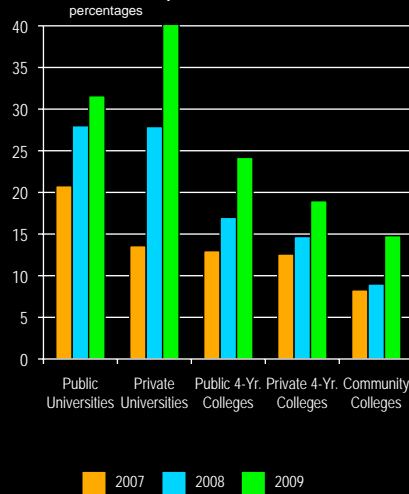
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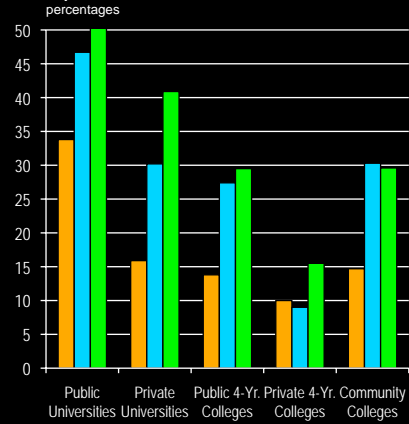
Web 2.0 Comes to Campus

Campus Wikis and Second Life

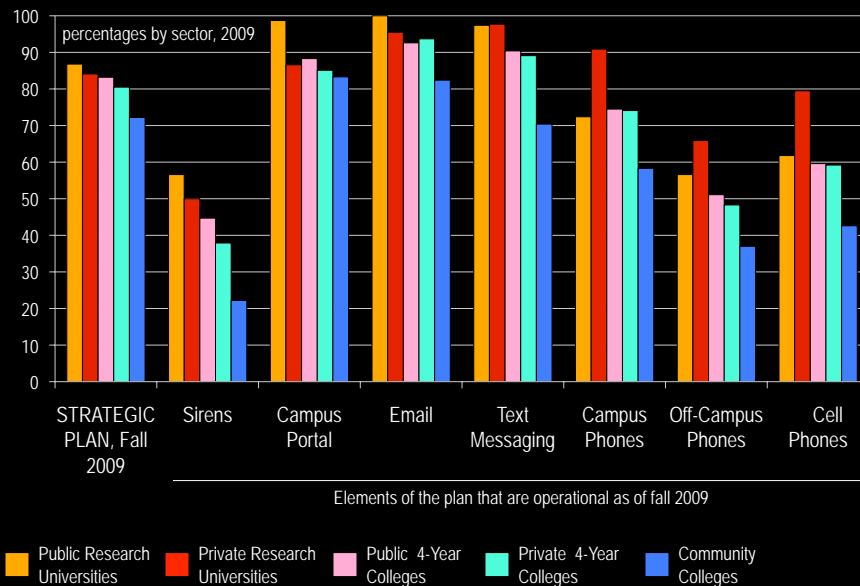
Public Campus Wiki



Campus Presence on Second Life



Emergency Notification Services, 2009



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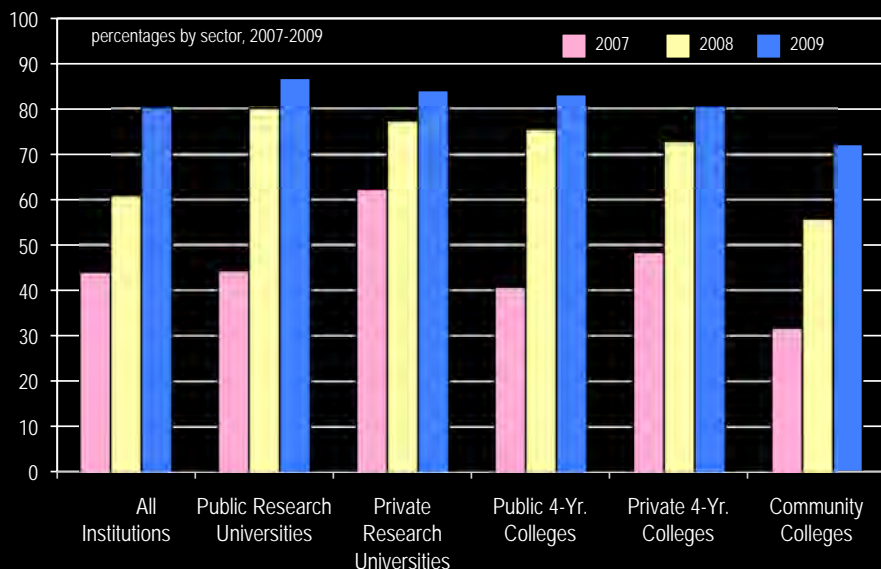
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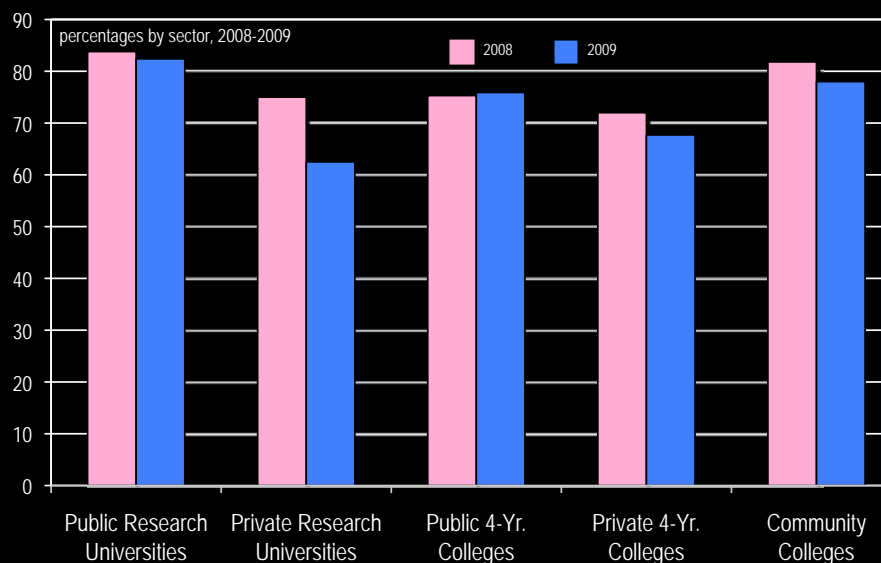
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Strategic Plans For Emergency Notification



Emergency Notification

Participation Strategy: "Opt-In" (Must Register)



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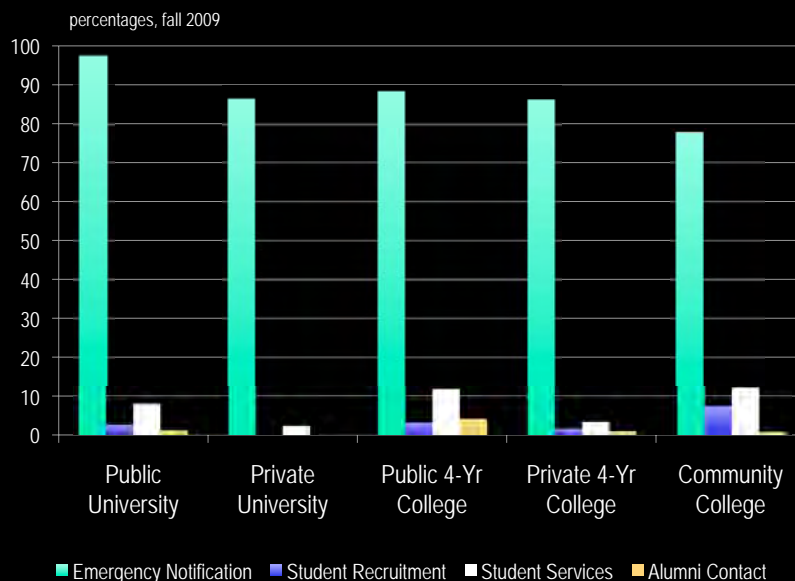
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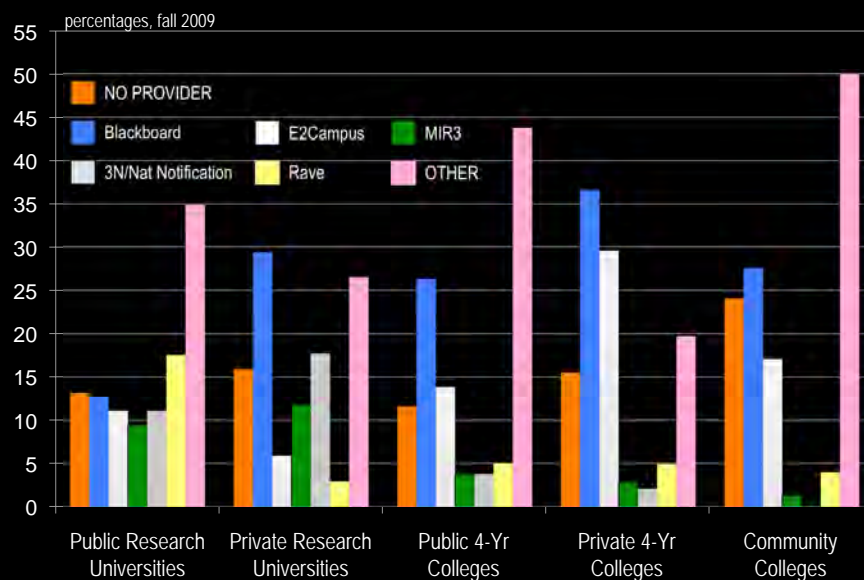
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Deploying the Notification System



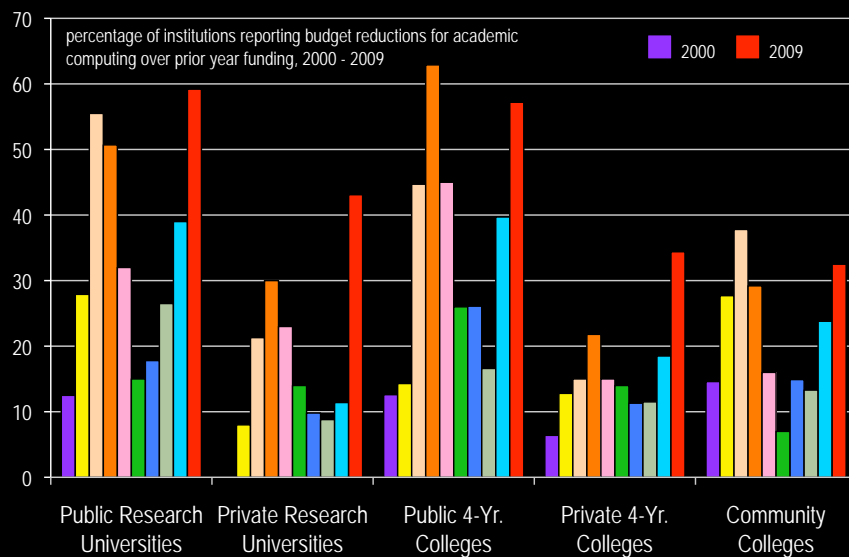
Third Party Notification Providers



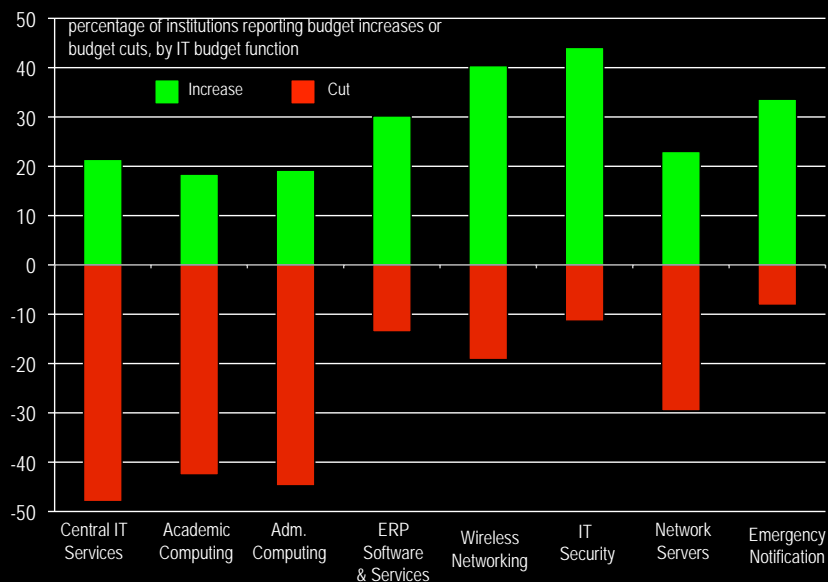
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Budget Cuts, 2000-2009



Budgets Trends by IT Function, 2009



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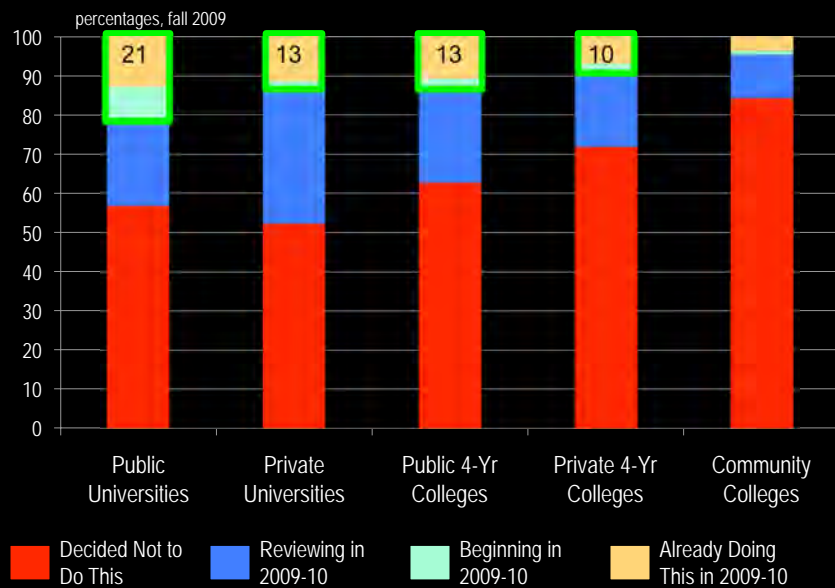
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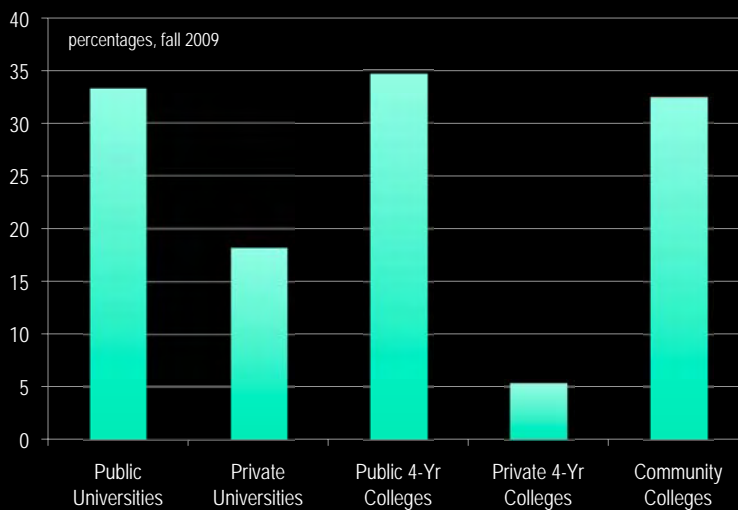
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Phasing Out Public Computing Labs



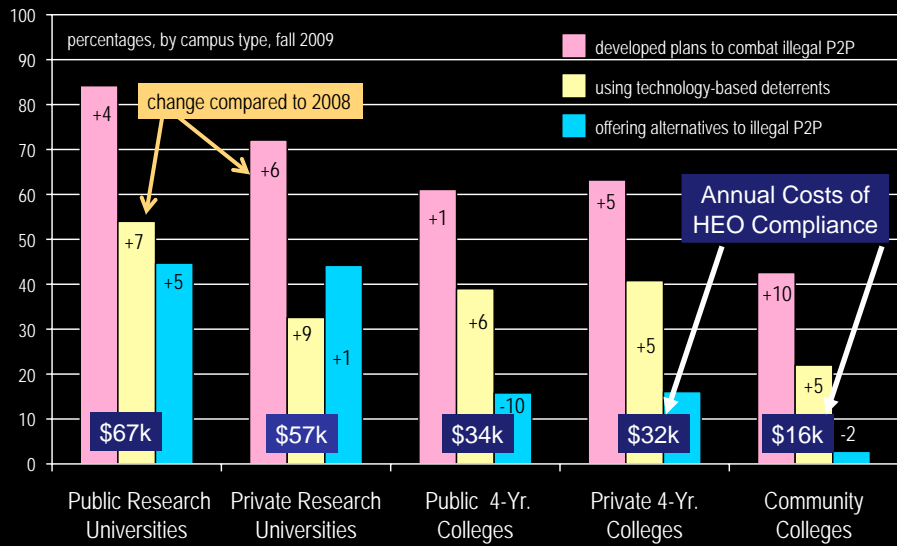
Federal Stimulus Funds Will Help Sustain IT Resources at My Campus



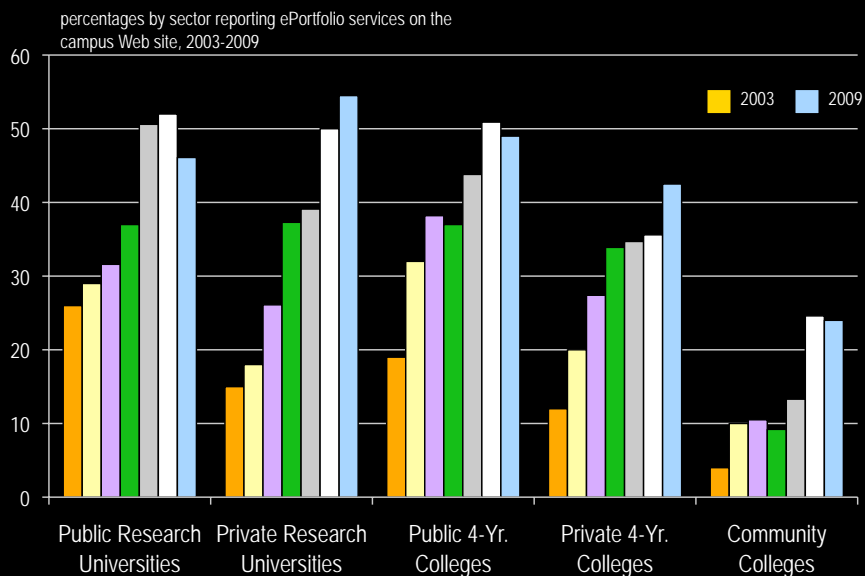
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Current Compliance with P2P Provisions of HEOA



ePortfolios



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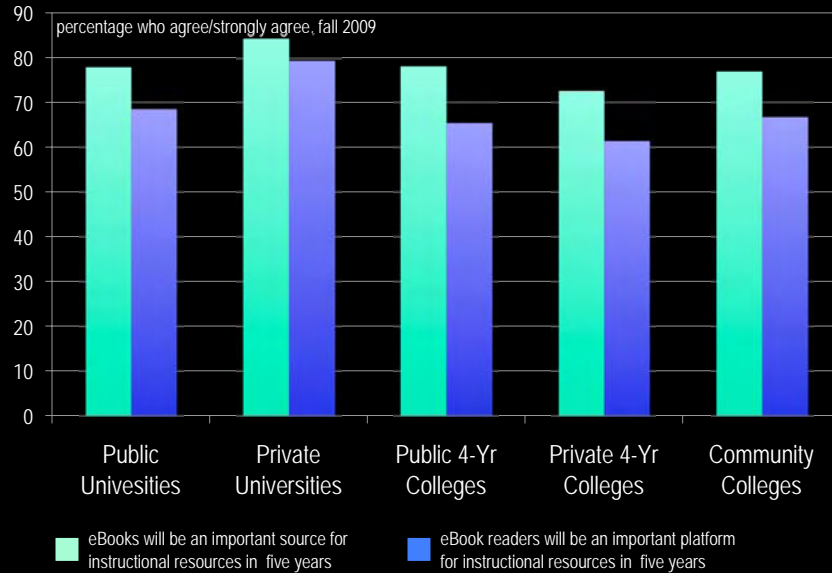
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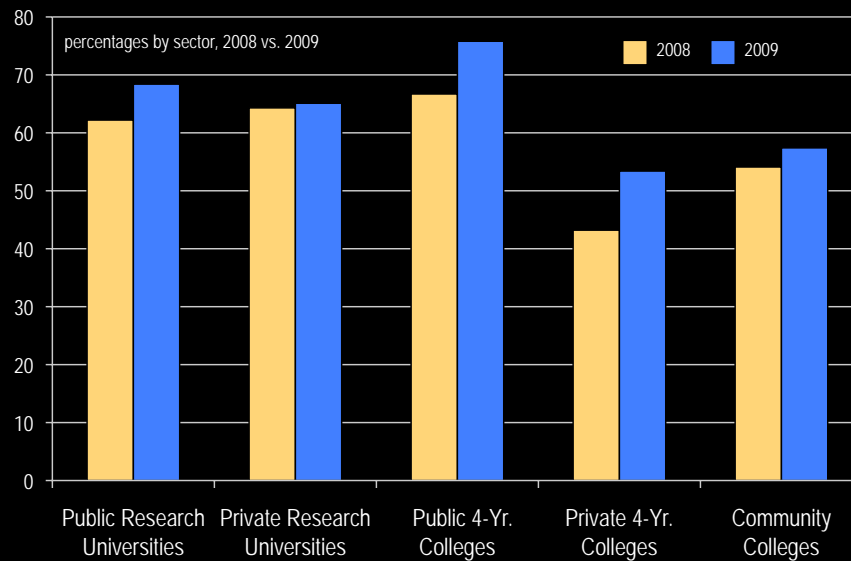
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eBooks



Campus License for Antiplagarism Software

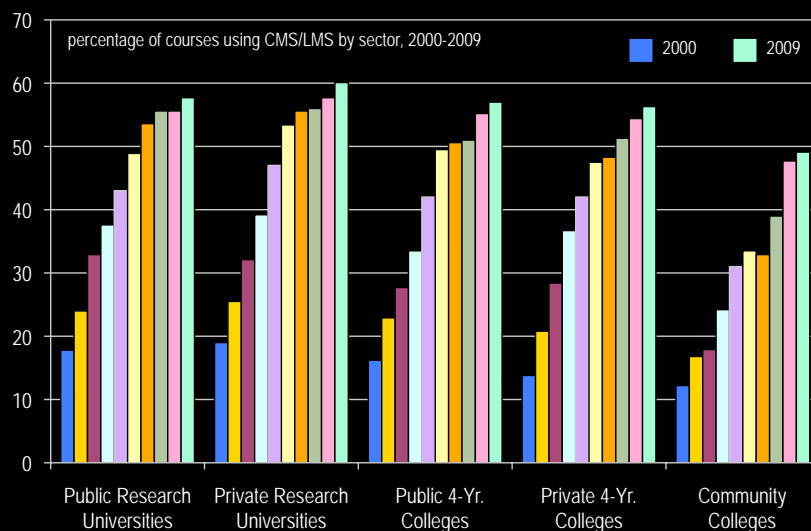


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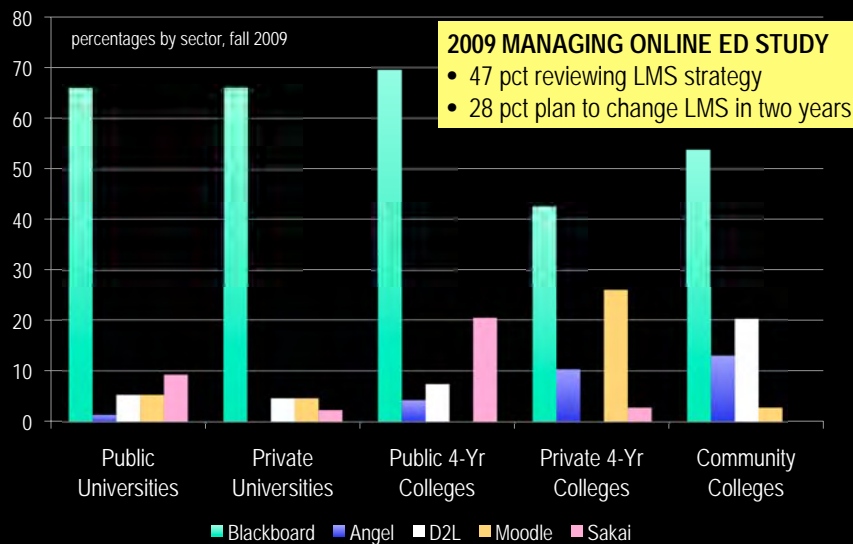
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Rising Use of IT in Instruction

Learning Management Tools (CMS/LMS)



LMS Deployment by Sector, 2009



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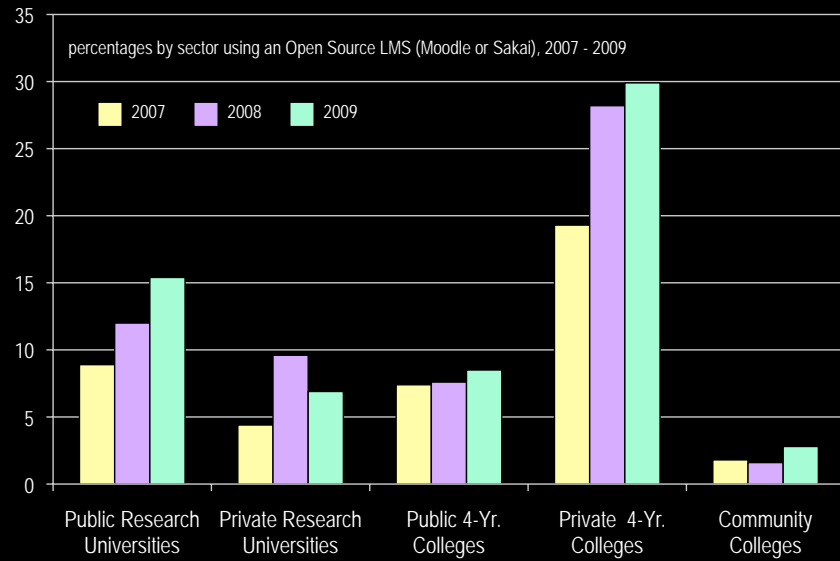
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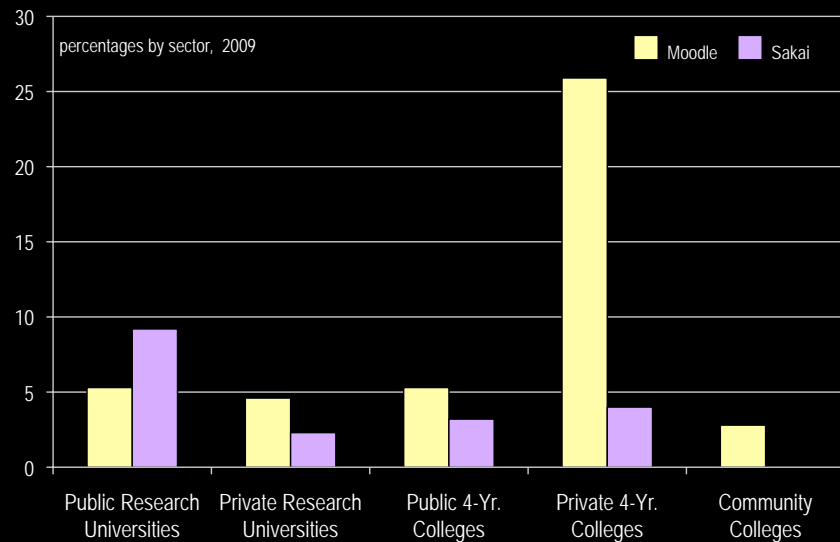
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Open Source LMS Deployment, 2007-2009



Moodle vs. Sakai Deployment, 2009

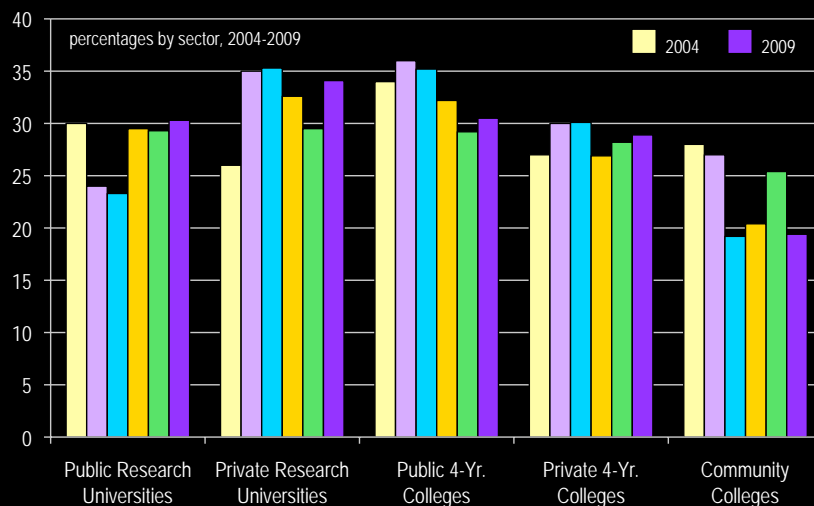


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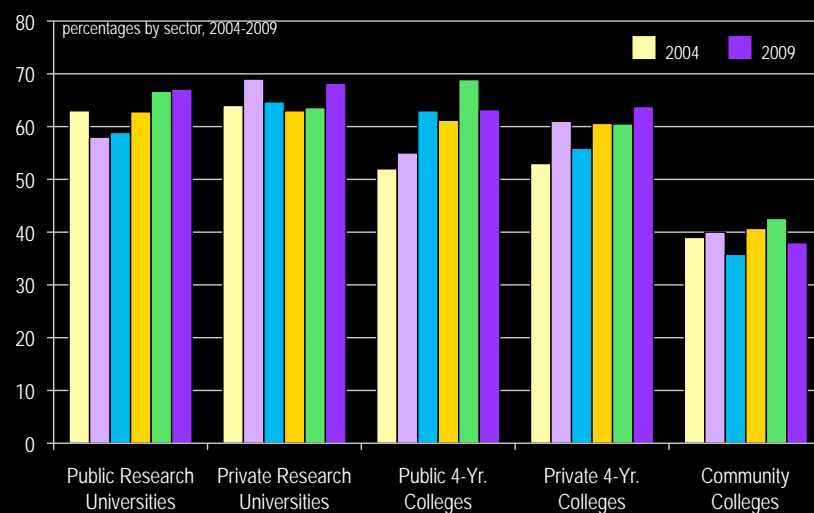
Perspectives on Open Source

Open Source Offers a Viable Alternative for Key Campus ERP Applications



Perspectives on Open Source

Open Source Will Play an Increasingly Important Role in Our Campus IT Strategy



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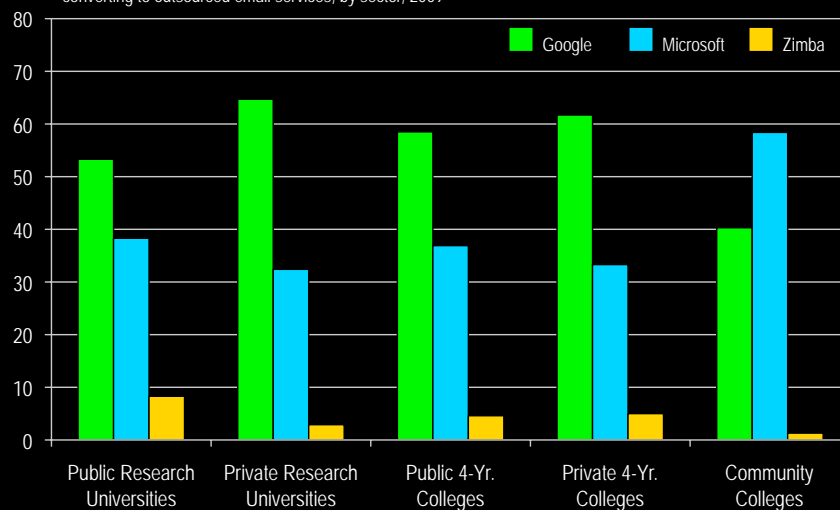


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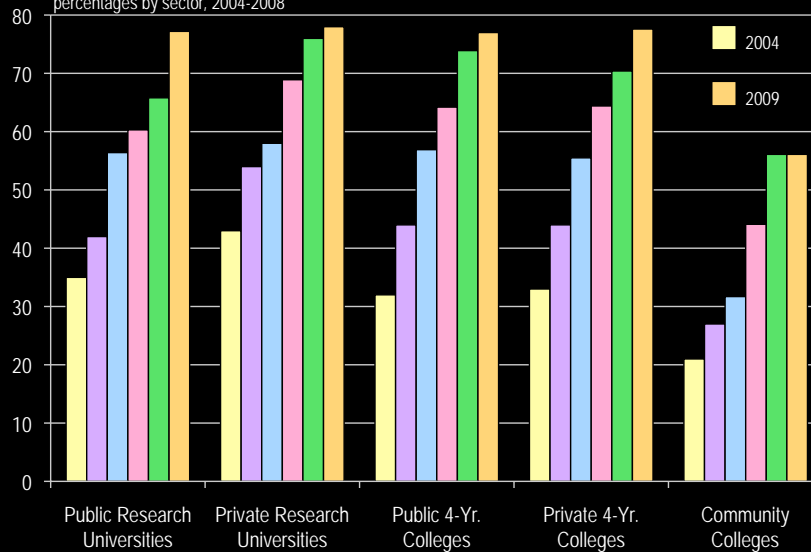
Outsourcing eMail Service Provider

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



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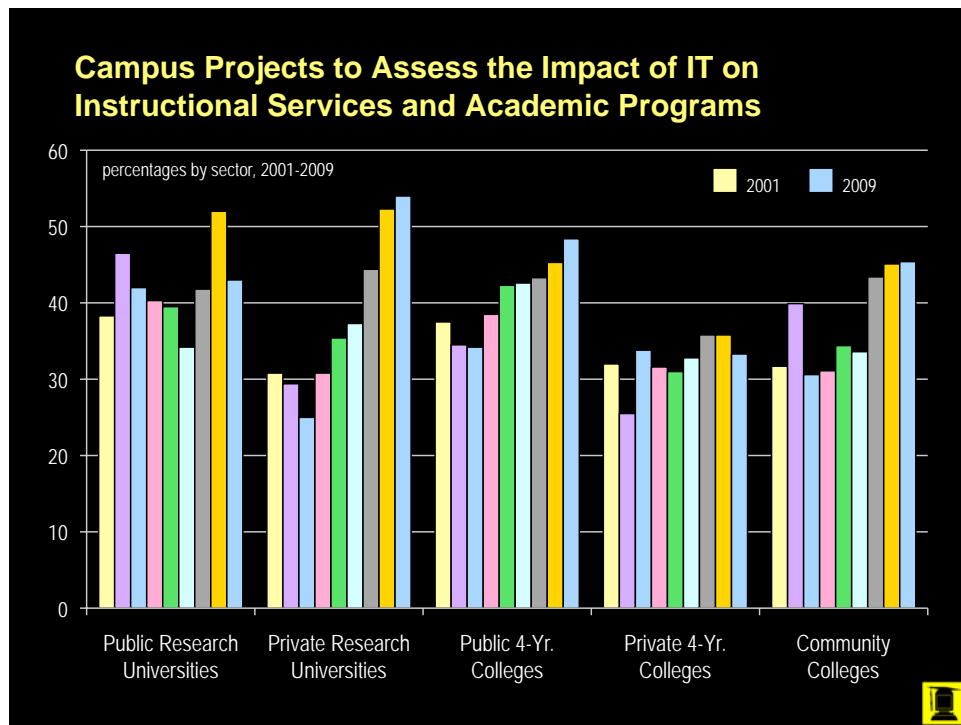
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Some Key IT Issues



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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



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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



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