THE CAMPUS COMPUTING PROJECT

The 2010 National Survey of Information Technology in U.S. Higher Education

IT Budget Cuts Are Down; LMS Strategies Are in Transition

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 (59.8 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).
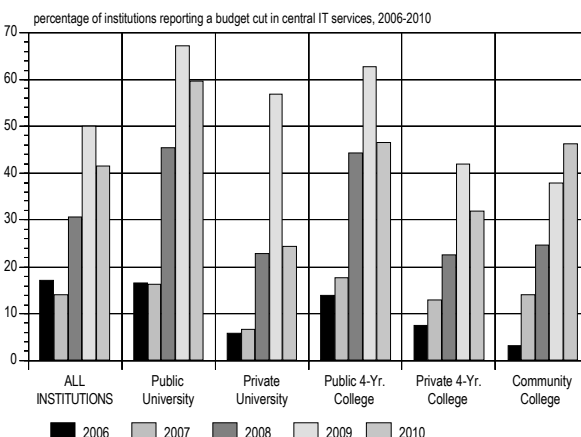
"The new survey data provide a modicum of good news about money: fewer institutions experienced budget cuts this year than last," says Kenneth C. Green, founding director of The Campus Computing Project, the largest continuing study of eLearning and information technology in American higher education. "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.
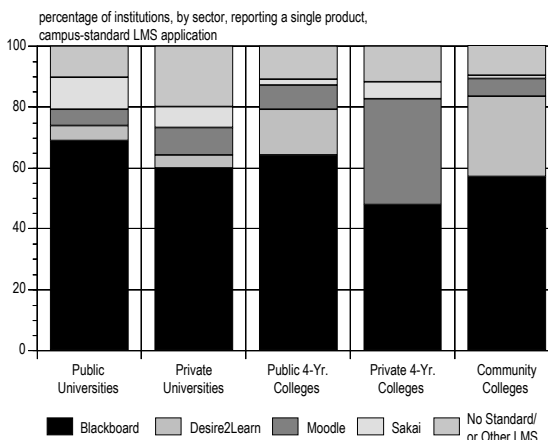
The 2010 survey highlights the continuing transition in the higher education market for Learning Management Systems (LMS). The proportion of campus CIOs and senior IT officials reporting that their institution uses Blackboard as the campus-standard LMS has dropped from 71.0 percent in 2006 to 57.1 percent 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."

IT Budget Cuts, 2006-2010

percentage of institutions reporting a budget cut in central IT services, 2006-2010

Legend: ■ 2006   2007   2008   2009   2010

Categories: ALL INSTITUTIONS, Public University, Private University, Public 4-Yr. College, Private 4-Yr. College, Community College

The LMS Market in Higher Education, Fall 2010

percentage of institutions, by sector, reporting a single product, campus-standard LMS application

Legend: ■ Blackboard   Desire2Learn   Moodle   Sakai   No Standard/ or Other LMS

Categories: Public Universities, Private Universities, Public 4-Yr. Colleges, Private 4-Yr. Colleges, Community Colleges

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; cyberbulling, 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 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 academe. Well over four-fifths (86.5 percent) of the survey participants agree/strongly agree that "eBook content will be an important source for instructional

Prospects Look Promising for Mobile Apps, eBooks, and Lecture Capture

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 pri-
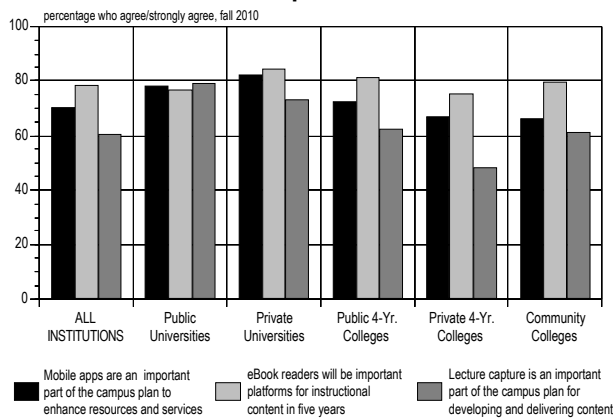
arily for print and then port print content into electronic formats. Consequently, eBooks and eTextbooks do not - yet - offer a compelling value proposition for most students."

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 Septermber and early October, 2010.

THE CAMPUS COMPUTING PROJECT

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

© Kenneth C. Green, 1990-2010

Project Sponsors

Adobe • Apple • Blackboard • Blackboard connect • CAMPUS MANAGEMENT • CENGAGE Learning

CENTER FOR DIGITAL EDUCATION • CISCO • DATATEL • DELL • Desire2Learn

follett HIGHER EDUCATION GROUP • Google • hobsons • IBM

JENZABAR • KAPLAN • LONGSIGHT building open source solutions together • McGraw Hill Higher Education

Microsoft • moodlerooms • NEC

PEARSON • ORACLE • Perceptis • presidium

rSmart • SAS • SONY • sonicfoundry

SUNGARD HIGHER EDUCATION • turnitin • TouchNet SET THE CURVE • wcet

Methodology

- ◆ **523 survey respondents**

- ◆ **Web-based data collection**

- ◆ **Survey period: early Sept – 6 Oct , 2010**

- ◆ **76 pct of 2010 campuses participated in the 2009 survey**

2010 Survey Participants

Category	Dept of Ed N (adjusted)	Survey N	Participation Rate (pct)
Public Research & Doctoral Universities	168	77	46%
Private Research & Doctoral Universities	92	45	49%
Public 4-Year Colleges (Baccalaureate & Masters)	374	101	27%
Private 4-Year Colleges (Baccalaureate & Masters)	824	179	21%
Associate Degree/ Public Community Colleges	1018	121	12%

CAMPUS COMPUTING, 2010
Kenneth C. Green • The Campus Computing Project

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

Trends, 2000-2008

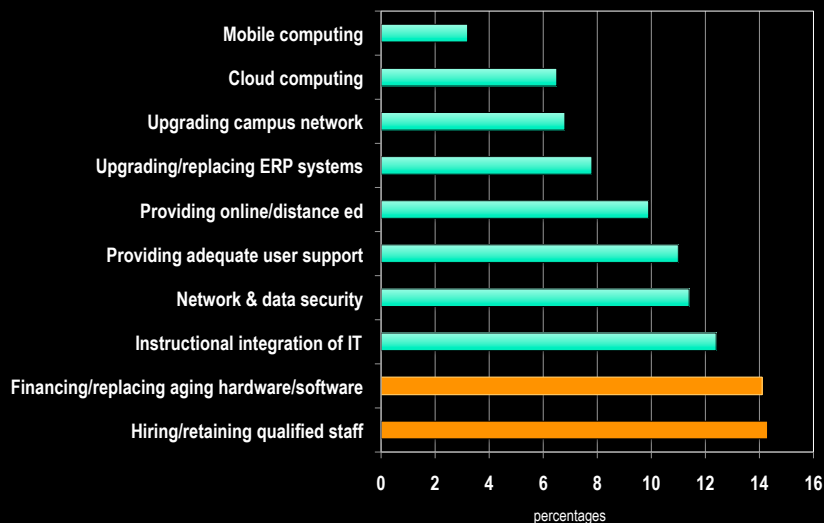| 2000	2001	2002	2003	2004	2005	2006	2007	2008
Instructional Integration (40.5%)	Instructional Integration (31.5%)	Instructional Integration (24.3%)	Instructional Integration (21.4%)	Network & Data Security (21.1%)	Network & Data Security (30.0%)	Network & Data Security (29.5%)	Network & Data Security (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, 2010

There is no "Single Most Important" IT Issue!

Bar chart titled "percentages" with x-axis from 0 to 16:

- 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	Public Universities	Private Universities	Public 4-Yr. Colleges	Private 4-Yr. Colleges	Community Colleges
Hiring/ Retaining IT Staff (14.3%)	Financing Replacing of Aging IT (19.5%)	Data & Network Security (17.8%)	Hiring/ Retaining Staff (14.9%)	Instructional Integration of Info. Tech. (17.3%)	Providing Adequate User Support (18.2%)
Financing Replacing of Aging IT (14.1%)	Hiring/ Retaining Staff (18.2%)	Online/ Distance Ed (15.6%)	Upgrading the Campus Network & Instructional Integration (tie - 13.9%)	Hiring/ Retaining Staff (15.1%)	Financing Replacing of Aging IT (16.5%)
Instructional Integration of Info. Tech. (12.4%)	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 (tie -11.2%)	Hiring/ Retaining IT Staff (11.6%)

Why Is Distance Ed Now a CIO Priority?

- Rapidly rising enrollments

- Key role of IT in operational infra-structure of online programs

- *CIOs are the line managers for online ed at many campuses!*

Title of the Sr. Campus Officer for Online Ed	pct
CIO	44.5
Provost	19.2
VP/Dean Continuing Ed	17.6
Assoc/Ass't VP	13.7
Other Campus Officer	4.4

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

Budget Cuts, 2006-2010

percentage of institutions reporting budget reductions for central IT services over prior year funding, 2006-2010
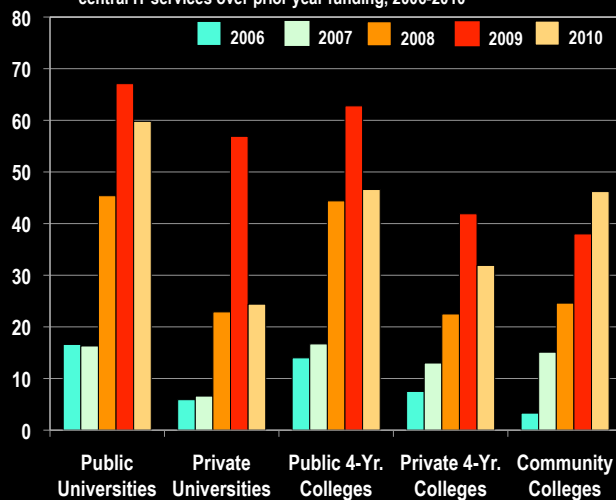
- Budget cuts abating

- Privates fare better than publics
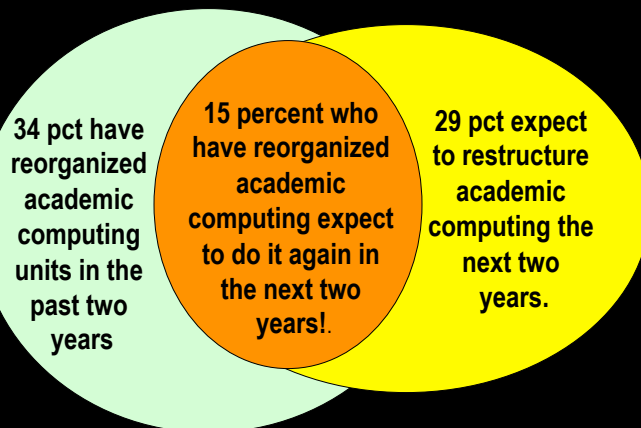
- Community colleges suffer still more cuts

Budgets Trends by IT Function, 2010

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

Legend: Increase (green), Cut (red)

Categories: Central IT Services, Academic Computing, Adm. Computing, ERP Software & Services, Wireless Networking, IT Security, Network Servers, Mobile Computing

2009 markers shown on various bars.
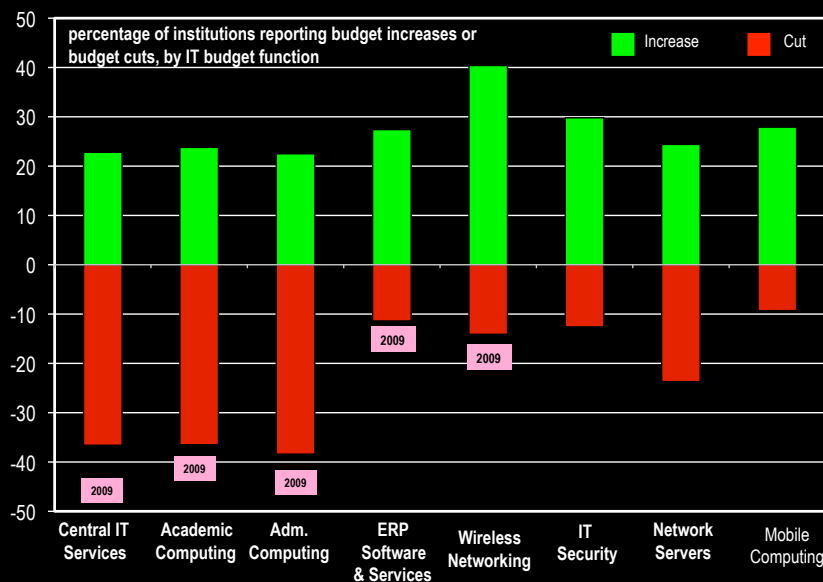
Reorganizing IT Units, Fall 2010

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
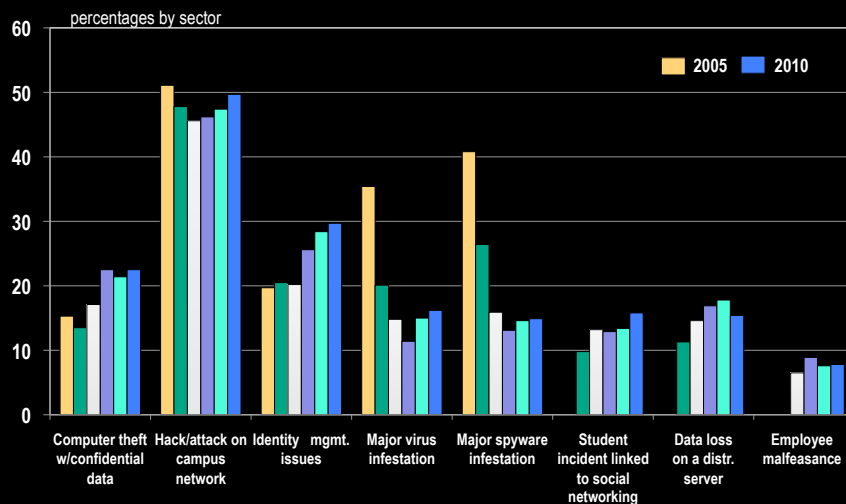
IT Security

Student Security Incident Linked to a Social Networking Site

percentages by sector
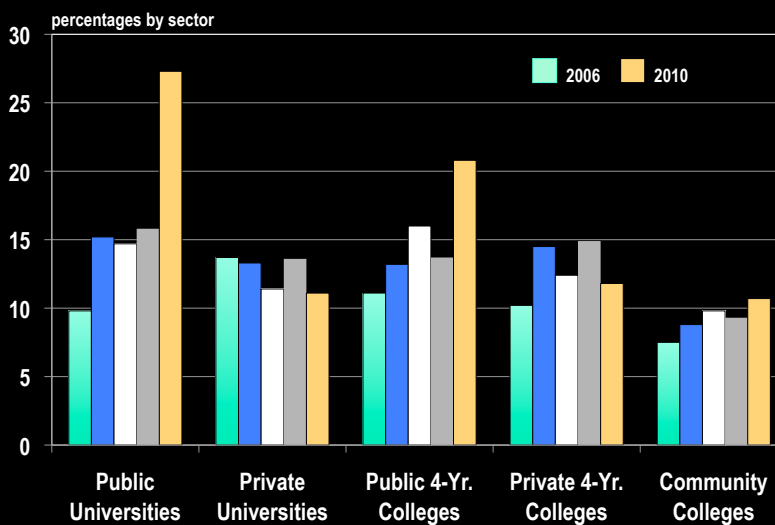
IT Security

Intentional Employee Misconduct Affecting IT Security

percentages by sector
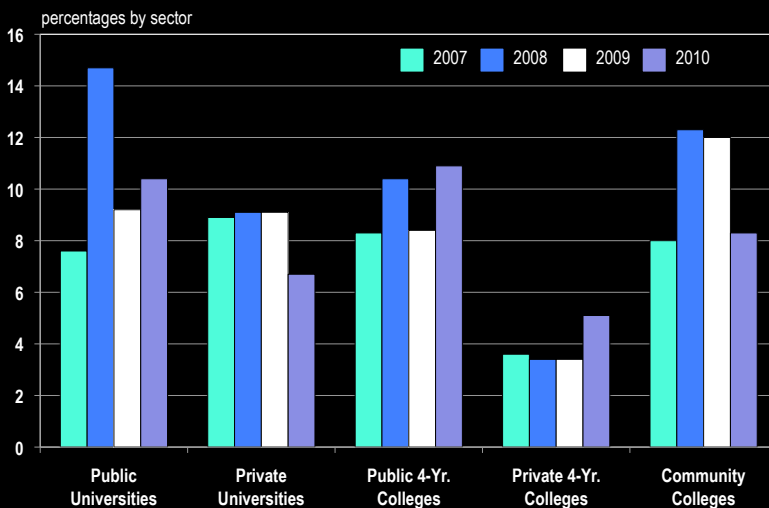
Slow Progress on IT Disaster Recovery

percentage of institutions reporting a strategic plan for IT disaster recovery, by sector, 2002-2010
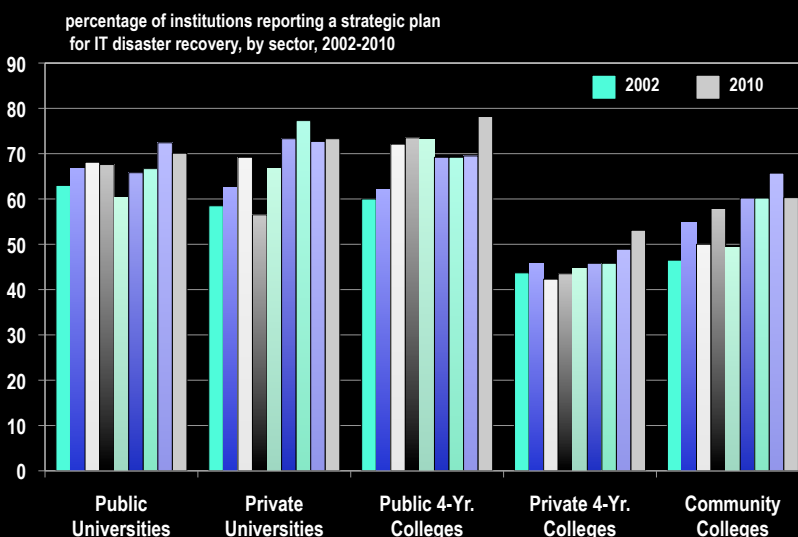
Web 2.0 Comes to Campus
Campus Wikis and Second Life

Public Campus Wiki
percentages
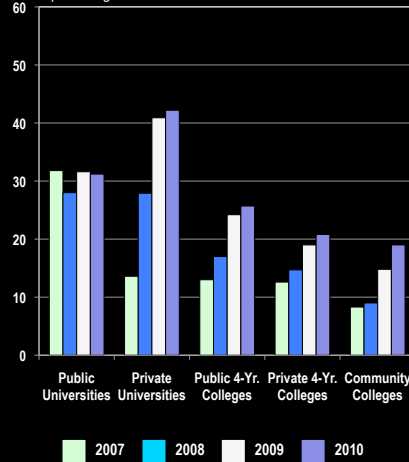
Campus Presence on Second Life
percentages

Legend: 2007 | 2008 | 2009 | 2010

Categories (both charts): Public Universities, Private Universities, Public 4-Yr. Colleges, Private 4-Yr. Colleges, Community Colleges
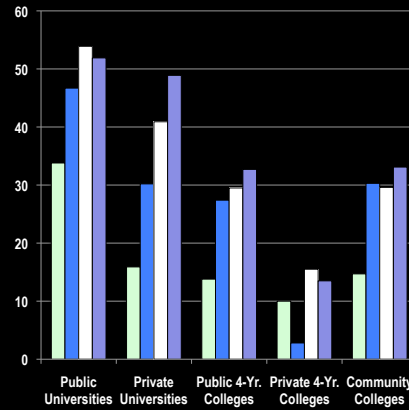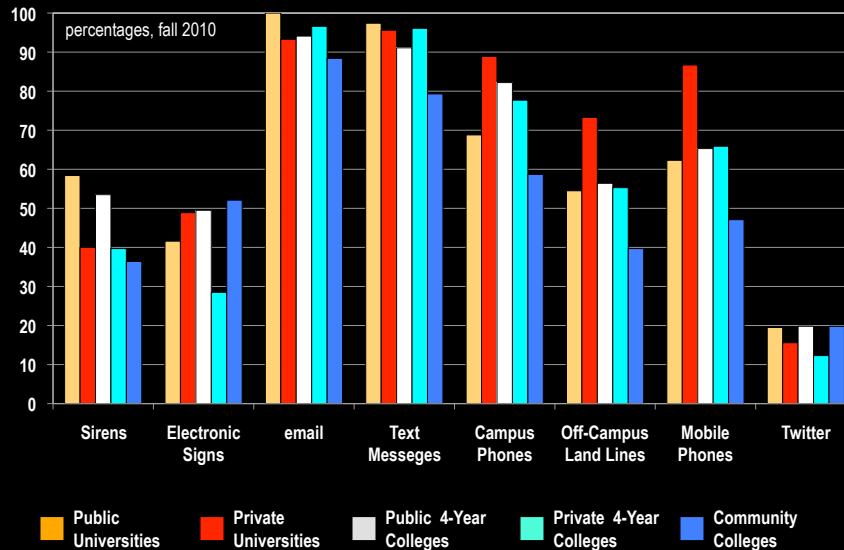
Emergency Notification Services, 2010

Elements of the Notification Plan that are Operational as of fall 2010

percentages, fall 2010

Categories: Sirens, Electronic Signs, email, Text Messeges, Campus Phones, Off-Campus Land Lines, Mobile Phones, Twitter

Legend: Public Universities | Private Universities | Public 4-Year Colleges | Private 4-Year Colleges | Community Colleges
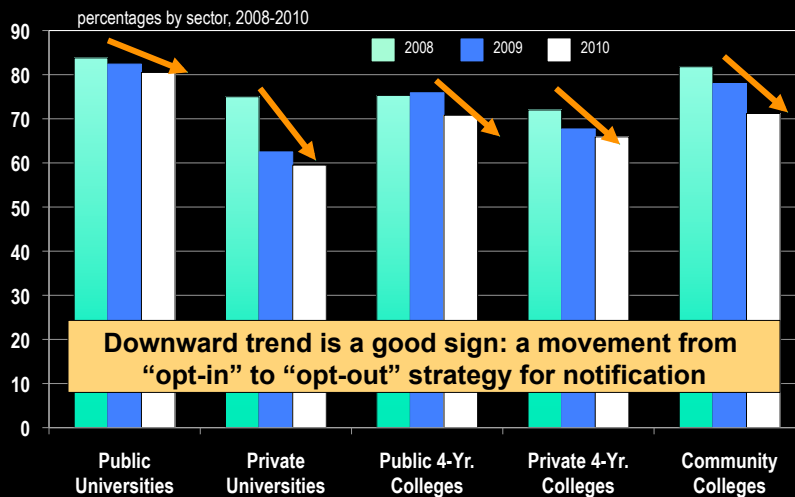
CAMPUS COMPUTING, 2010
Kenneth C. Green • The Campus Computing Project

Emergency Notification

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

percentages by sector, 2008-2010

Legend: 2008 | 2009 | 2010

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

Categories: Public Universities | Private Universities | Public 4-Yr. Colleges | Private 4-Yr. Colleges | Community Colleges

---

Addressing Budget Issues by:

Phasing Out Public Computer Labs?
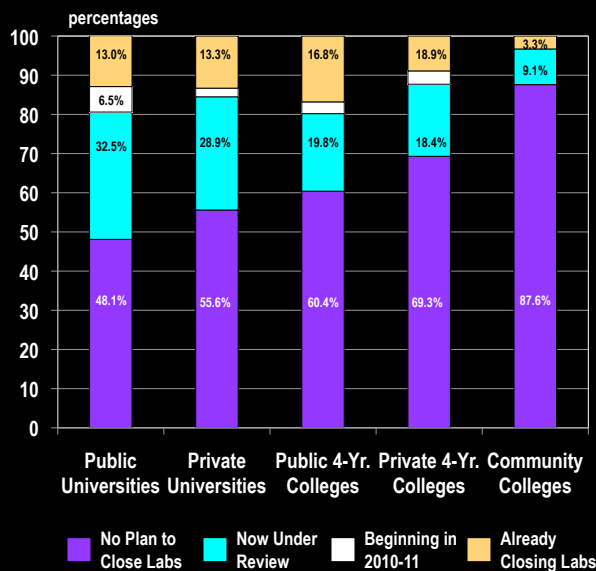
percentages

Sector	Already Closing Labs	Beginning in 2010-11	Now Under Review	No Plan to Close Labs
Public Universities	13.0%	6.5%	32.5%	48.1%
Private Universities	13.3%		28.9%	55.6%
Public 4-Yr. Colleges	16.8%		19.8%	60.4%
Private 4-Yr. Colleges	18.9%		18.4%	69.3%
Community Colleges	3.3%		9.1%	87.6%

More Campuses Closing Labs in 2010?

- Private Univ.: +1.8%
- Public 4-Yr.: +6.2%
- Pvt. 4-Yr: +2.0%

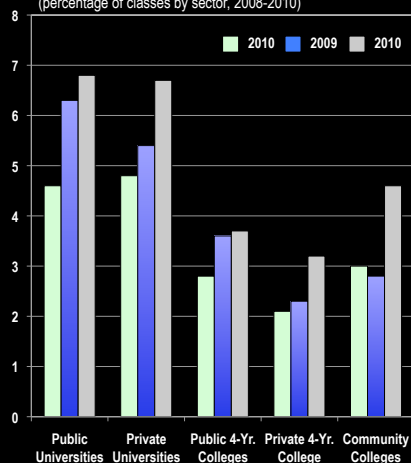Legend: No Plan to Close Labs | Now Under Review | Beginning in 2010-11 | Already Closing Labs

---

"Lecture Capture is an Important Part of Our Campus Plan for Developing & Delivering Instructional Content"

percentage who agree/strongly agree, fall 2010
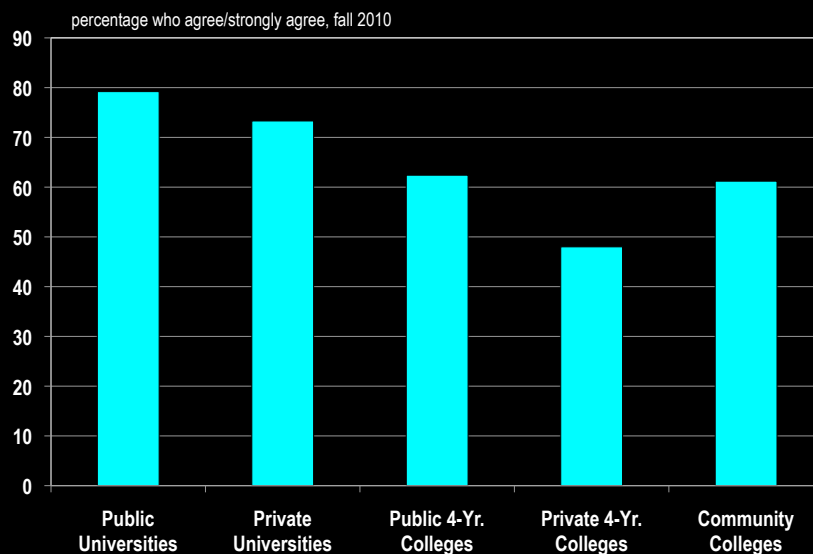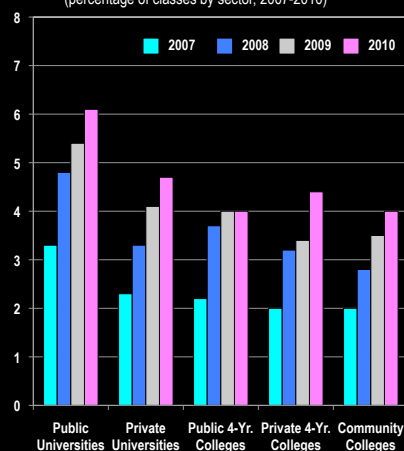

Lecture Capture and Podcasting

Rising Use of Lecture Capture
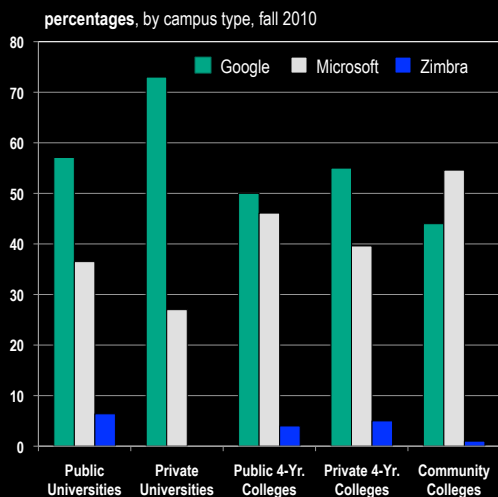(percentage of classes by sector, 2008-2010)

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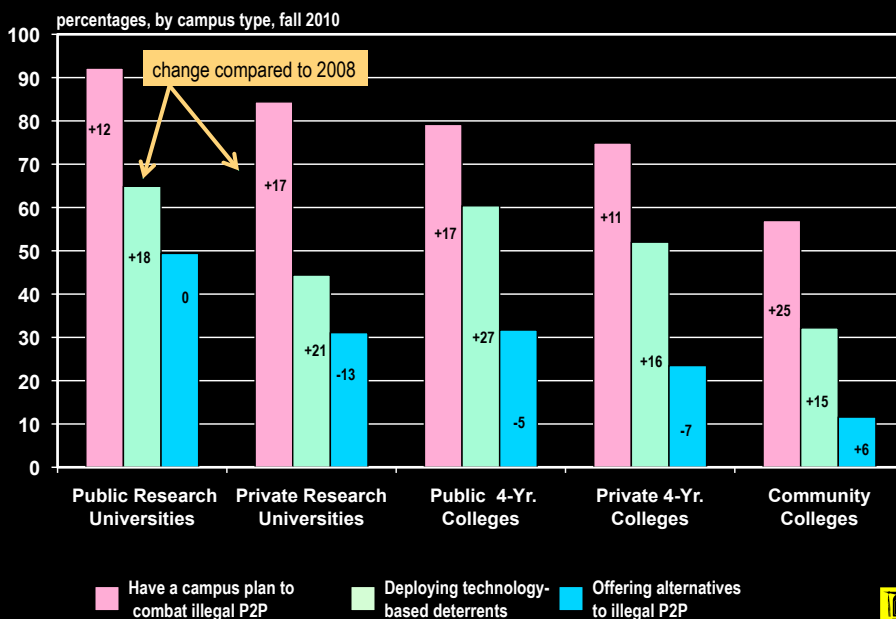(percentage of classes by sector, 2007-2010)

Outsourced eMail Services

percentages, by campus type, fall 2010

Legend: Google | Microsoft | Zimbra

(Bar chart with categories: Public Universities, Private Universities, Public 4-Yr. Colleges, Private 4-Yr. Colleges, Community Colleges; y-axis 0 to 80)

• **About 60 pct. of campuses now outsource student email vs. 15 pct. for faculty email**
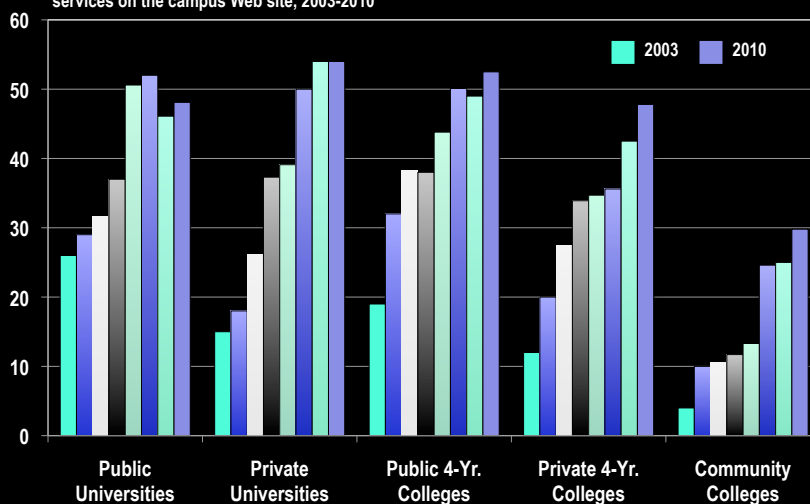
Campus Compliance with the P2P Provisions of HEOA

percentages, by campus type, fall 2010

change compared to 2008

Public Research Universities
- +12
- +18
- 0

Private Research Universities
- +17
- +21
- -13

Public 4-Yr. Colleges
- +17
- +27
- -5

Private 4-Yr. Colleges
- +11
- +16
- -7

Community Colleges
- +25
- +15
- +6

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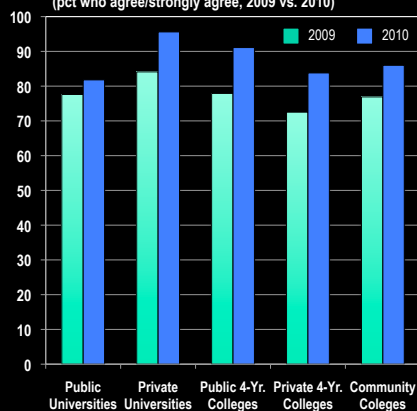- Deploying technology-based deterrents
- Offering alternatives to illegal P2P

ePortfolios

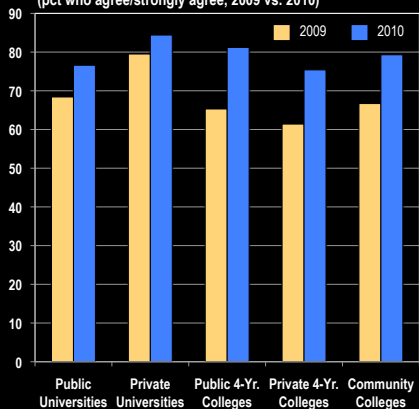percentages by sector reporting ePortfolio services on the campus Web site, 2003-2010

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
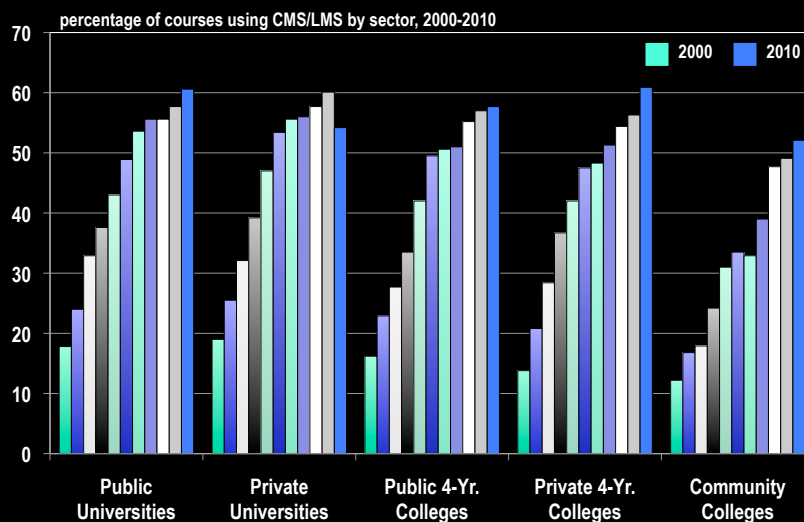(pct who agree/strongly agree, 2009 vs. 2010)

Rising Use of IT in Instruction
Learning Management Tools (CMS/LMS)

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

Legend: 2000, 2010

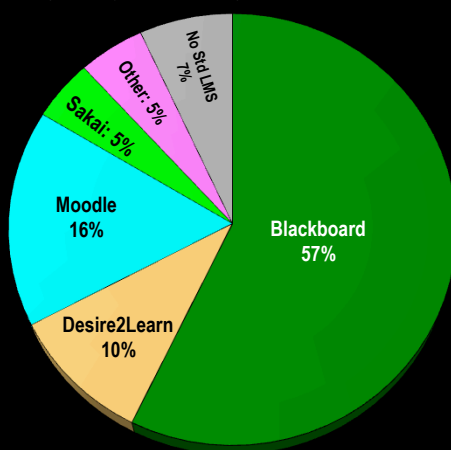Sectors: Public Universities, Private Universities, Public 4-Yr. Colleges, Private 4-Yr. Colleges, Community Colleges

A Profile of the LMS Market, Fall 2010

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

(percentages, all institutions)

Pie chart:
- Blackboard 57%
- Moodle 16%
- Desire2Learn 10%
- Sakai 5%
- Other: 5%
- No Std LMS 7%

% by sector	Bb	D2L	Moodle	Sakai
Public Univ.	68.8	5.2	5.2	10.4
Pvt. Univ.	60.0	4.4	8.9	6.7
Public 4-Yr.	64.4	14.9	7.9	2.0
Private 4-Yr.	47.8	---	34.8	5.6
Comm. Colleges	57.0	26.5	5.8	0.8

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

Legend: 2006, 2010

Categories: Blackboard, Angel, Desire2Learn, Moodle, Sakai
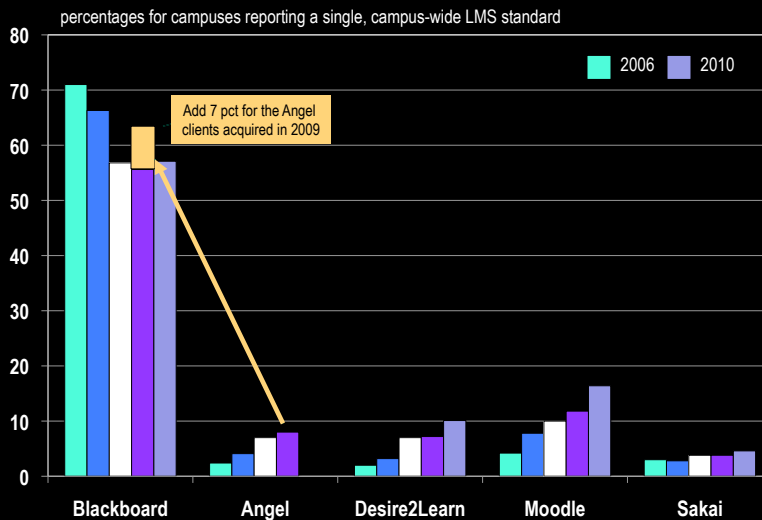
"Mobile Apps are an Important Part of Our Campus Plan to Enhance Instr. Resources & Campus Services"
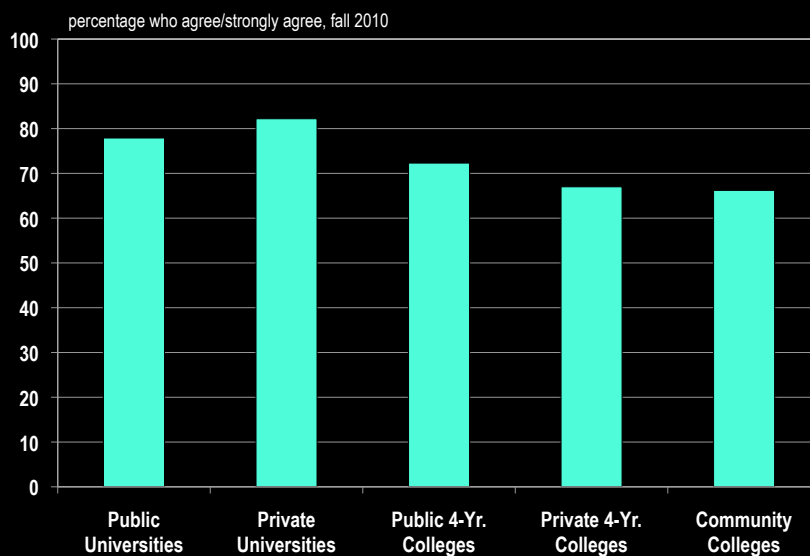
percentage who agree/strongly agree, fall 2010

Categories: Public Universities, Private Universities, Public 4-Yr. Colleges, Private 4-Yr. Colleges, Community Colleges
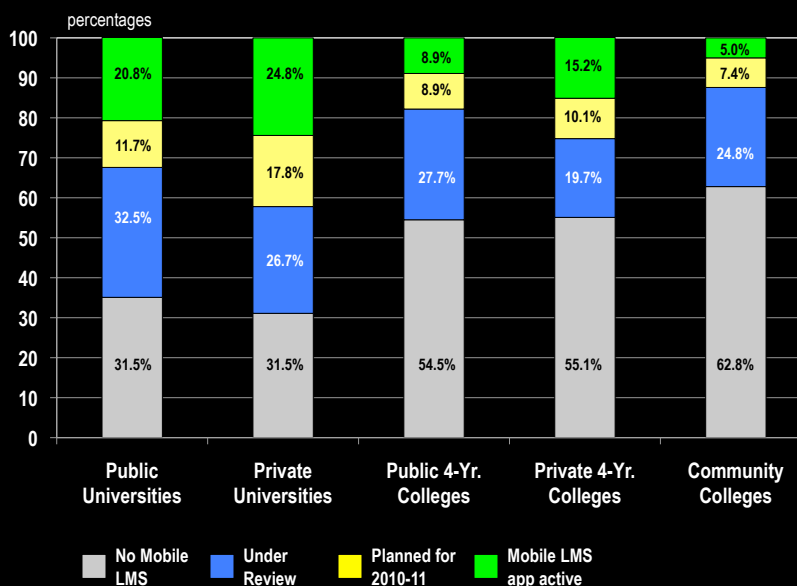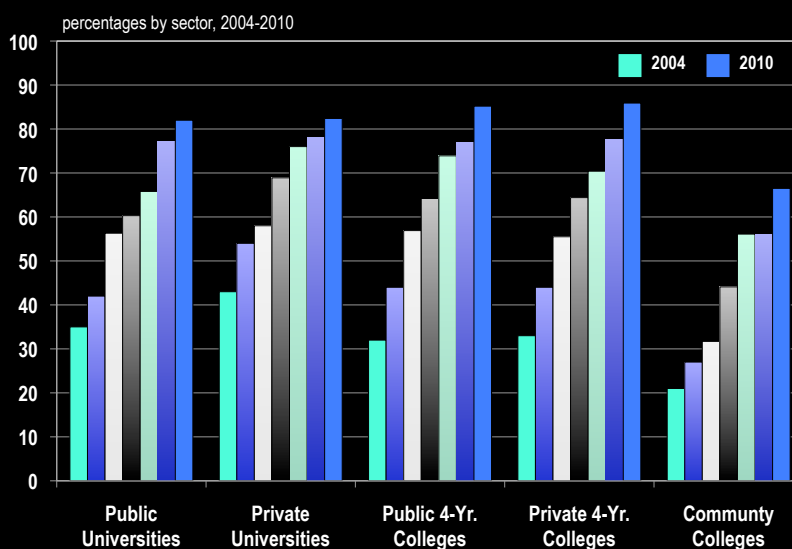
www.campuscomputing.net

Campus License for Antiplagarism Software

percentages by sector, 2008-2010

Legend: 2008, 2009, 2010

Categories: Public Universities, Private Universities, Public 4-Yr. Colleges, Private 4-yr. Colleges, Community Colleges
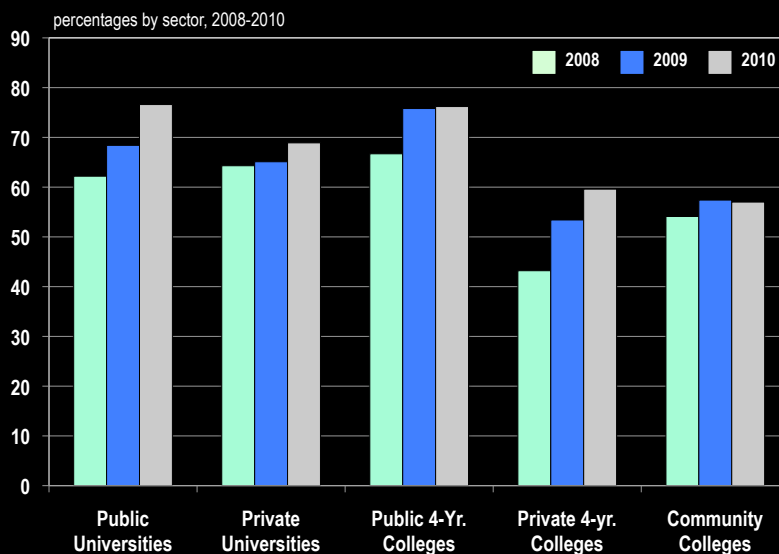
Campus Projects to Assess the Impact of IT on Instructional Services and Academic Programs

percentages by sector, 2001-2010

Years: 2001, 2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010

Legend: Public Universities, Private Universities, Public 4-Year Colleges, Private 4-Year Colleges, Community Colleges
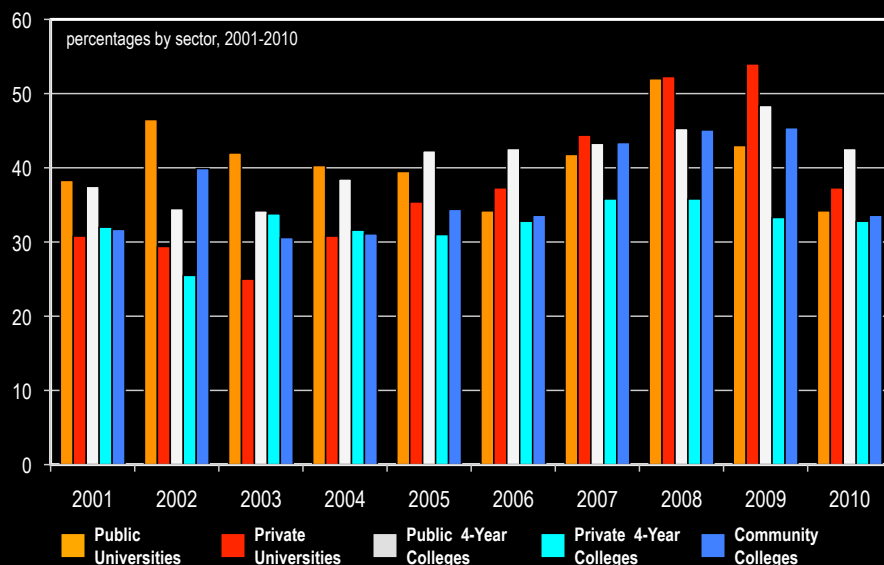
Some Key IT Issues

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

Wayne Gretsky

"skate to where the puck is going, not to where is it…"

◆ **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?

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…

eBooks – Year Two

It not clear that eBooks – from any provider, on any platform, or accessed via any eBook reader – provide, at present, a compelling value proposition for most college students. Indeed, for eReaders and digital texts to advance in the campus market publishers and eReader providers will have to address three key challenges: price, features, and format.
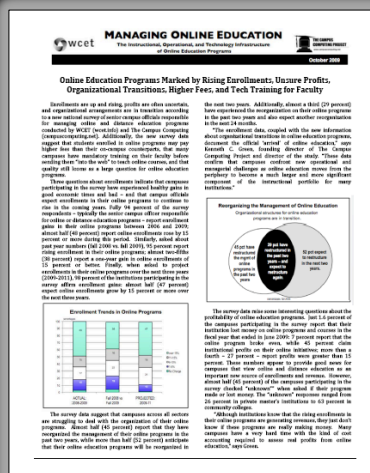
INSIDE HIGHER ED   digitaltweed

15 Aug 2010

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**

CAMPUS COMPUTING, 2010

Kenneth C. Green   •   The Campus Computing Project

campuscomputing.net
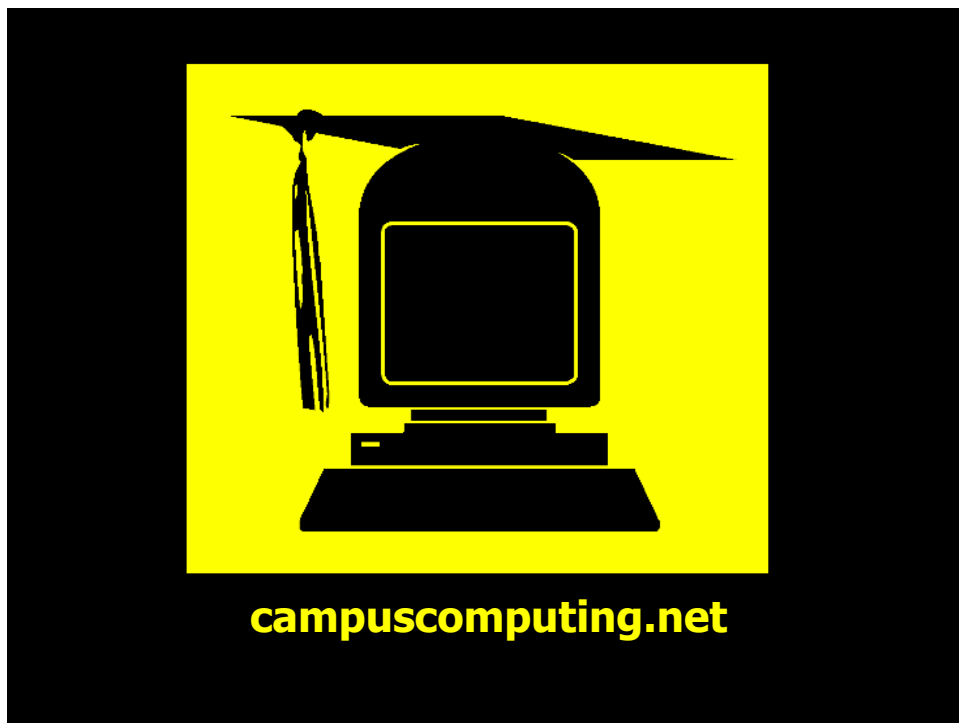
THE CAMPUS COMPUTING PROJECT®

www.campuscomputing.net

PO Box 261242 ◆ Encino, CA ◆ 91426-1242 ◆ USA
Tel: 818.990.2212 ◆ Fax: 818.784.8008
cgreen@campuscomputing.net

AVAILABLE FOR DELIVERY ON 10 DEC 2010   *FAX TO:* 818.784.8008

THE 2010 CAMPUS COMPUTING REPORT

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

The 2010 Campus Computing Report

___ *Print Copy:* 2010 Campus Computing Report ($39.00 each copy) $ _____

___ *PDF File:* Campus Computing 2010 ($75.00 for one PDF file; max. 5 users)   _____

___ *Site License,* Campus Computing 2010 ($150.00 for one PDF file to be
 posted on a campus server and restricted to authorized campus users)   _____

Campus Computing Reports 2004-2009

___ *PDF File:* Campus Computing 2009 ($75.00 for one PDF file; max. 5 users)   _____

___ *PDF File:* Campus Computing 2008 ($75.00 for one PDF file; max. 5 users)   _____

___ print copy, Campus Computing 2009 ($35.00 each print copy)   _____

___ print copy, Campus Computing 2008 ($35.00 each print copy)   _____

___ print copy, Campus Computing 2007 ($35.00 each print copy)   _____

___ print copy, Campus Computing 2006 ($30.00 each print copy)   _____

___ print copy, Campus Computing 2005 ($30.00 each print copy)   _____

___ print copy, Campus Computing 2004 ($30.00 each print copy)   _____

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: |__|__|__|__| *Security Code:* |__|__|__|__|

Name on Card: _____

Please ship to:

Name*:* _____

Title*:* _____

Institution/Org*:* _____

Address*:* _____

City: _____   STATE: _____   ZIP:_____

Phone*:* _____   Fax: _____

e-mail*:* _____

FM10