New data from the 2015 Campus Computing Survey reveal that college and university CIOs and senior IT officers believe that digital technologies do (or will) have a significant impact on student learning and outcomes. Almost all (94 percent) of the fall 2015 survey participants, who represent 417 two- and four-year public and private colleges and universities, agree or strongly agree that “digital curricular resources make learning more efficient and effective for students.” Similarly, most (87 percent) report that “digital curricular resources provide a richer and more personalized learning experience than traditional print materials.” Finally, the survey participants also overwhelmingly agree (96 percent) that “adaptive learning technology has great potential to improve learning outcomes for students.”

Yet even as CIOs express great confidence about the impact and benefit of digital curricular resources, the current deployment numbers are low: survey participants estimate that just a tenth (10 percent) of general education courses make use of educational courseware, and just 4 percent of developmental and general education classes utilize adaptive learning technologies.

“This strong statement of support for digital instructional resources is not surprising,” says Kenneth C. Green, founding director of the Campus Computing Survey, which marks its 25 anniversary this fall. “CIOs and senior campus IT officers are, understandably, advocates for the instructional use of technology at their institutions. Although faculty make decisions about curricular resources for their courses, CIOs are responsible for the enabling infrastructure, including training and user support.”

Yet Green notes that clear and compelling evidence about the benefit of technology in instruction and the impact of IT on learning outcomes can be problematic. For example, the survey data reveal that just a fifth of the institutions that participated in the 2015 survey “have a formal program to assess the impact of IT on instruction and learning outcomes.” Consequently, says Green, “decisions about IT in instruction are often fueled by good intentions, anecdotal data, opinion, and epiphany as opposed to research and hard evidence.” Green cites the continuing discussion about Learning Management Systems as an example: “Is the LMS just a platform that supports instruction or does the LMS – or a specific LMS platform – actually have a clear and discrete benefit on learning outcomes? Fully 15 years after many campuses first deployed a LMS, we really don’t have good data to provide a clear answer to this question.”

**The Coming of OER**

Related to the enthusiasm for digital instructional resources, four-fifths (81 percent) of the survey participants agree that “Open Source textbooks/Open Education Resource (OER) content will be an important source for instructional resources in five years.” Advocates believe that OER titles, which are typically distributed to students in a digital format, offer a viable, very low cost alternative to expensive textbooks.

While the 2015 survey data indicate that OER utilization levels are currently low (just 6 percent of courses), fully two-fifths (38 percent) of the survey participants report that their institution encourages faculty to use OER content, up from a third (33 percent) in fall 2014.

“The emerging OER movement may offer a viable alternative to commercial textbooks and course content,” says Green. Yet he expresses some concern about the absence of infrastructure to support OER – the editors, fact-checkers, instructional designers and others who add value, as well as costs, to the development of commercial textbooks and course materials. Too, Green notes that many faculty depend on book updates as well as the ancillaries such as class presentation materials, test sets, and supporting web sites routinely provided by commercial publishers. While the immediate “text to text” comparisons may be favorable for OER, Green notes that “looming issues for the OER movement are the review process, ancillaries, and updates that many faculty have come to expect, even if the cost of these resources and services are paid by students when they purchase commercial titles.”
The 2015 Campus Computing Survey

Campus IT Priorities

Again this fall, CIOs and senior campus IT officers identified “assisting faculty with the instructional integration of information technology” (80 percent) as the their top institutional IT priority over the next two-three years, followed by hiring and retaining qualified IT staff and providing adequate user support (both at 78 percent). Network and data security was fourth in the fall 2015 survey (76 percent), followed by “leveraging IT for student success, which dropped to fifth in 2015 from fourth in 2014 (74 percent).

“Viewed in aggregate, these data document the continuing challenges that CIOs and senior IT officers confront, and that faculty and students experience,” says Green. Moreover these priorities stand in stark contrast to some of the related survey data on these issues. For example, even as instructional integration is the top institutional IT priority again this fall, less than a fifth of campuses (17 percent) recognize instructional IT efforts as part of the faculty review and promotion process.

Similarly, although IT officers express concern about hiring and retaining qualified technology staff, three-fourths report that that salaries and benefits for tech staff at their institutions are not competitive with off-campus job opportunities. Moreover, a fifth of campuses cut funding for professional development for IT staff this past year, and a fourth reduced central IT staffing. And although IT user support is a perennial concern, only a fourth (27 percent) of CIOs and senior IT officers rate IT training for faculty and staff as excellent at their institution, while just a tenth (10 percent) believe that their campus offers excellent IT training for students.

Outsourcing Online Programs

In aggregate three-in-ten (29 percent) of the institutions participating in the 2015 survey report outsourcing their online programs, about the same as in 2014 and up from 23 percent in fall 2013. The outsourcing numbers range from 41 percent in private universities to 16 percent in community colleges. However, CIOs and senior campus IT officers are not upbeat about outsourcing: just 45 percent view outsourcing as a viable instructional strategy for their institution’s online efforts and only a third (34 percent) believe that outsourcing provides a profitable revenue strategy for online programs. The clear exception to these low numbers is in private universities, where two-thirds (65 percent) of CIOs and senior IT officers agree that outsourcing online programs is a viable academic strategy and more than two-fifths (45 percent) believe outsourcing also provides a viable revenue strategy.

Going Mobile

The 2015 survey documents the continuing campus movement to mobile. More than four-fifths (84 percent) of the institutions participating in this year’s survey have activated mobile apps or will do so in the coming academic year, compared to 78 percent in 2013, 60 percent in fall 2012, 42 percent in fall 2011, and 23 percent in fall 2010. Across sectors, private universities lead the mobile movement: 99 percent will be up on mobile apps by the end of the current academic year, followed by 92 percent of public universities and public BA/MA colleges, 79 percent of community colleges, and 73 percent of private BA/MA institutions.

What explains these gains in going mobile? “Colleges and universities continue to play catch-up with the consumer experience. Students of all ages come to campus with their smartphones and tablets expecting to use mobile apps to navigate campus resources and use campus services,” says Green.

Interestingly, although CIOs and senior IT officers representing 70 percent of the institutions that participated fall 2015 survey identify “implementing/supporting mobile computing” as a top institutional IT priority over the next two-three years, less than a fifth (17 percent) rate mobile services at their institution as “excellent,” about the same as in 2014.

Small Gains in Cloud Computing

The proportion of campuses reporting a strategic plan for Cloud computing rose to 33 percent in fall 2015, up from 29 percent last year, 21 percent in 2011, and 9 percent in 2009. Just 12 percent of the survey participants report that their campus has moved or is converting to Cloud Computing for ERP (administrative) services, compared to 9 percent last year, 6 percent in 2012, and up from 4 percent in 2011 (range: from 22 percent for private universities to 4 percent for public universities.) Almost a third (30 percent) appear convinced that Cloud computing is no more secure than their own, on-campus management of technology and data. And less than a fifth of institutions expect to be running mission-critical finance and student information systems on the Cloud by fall 2020.

No Mass Movement to the Cloud in Five Years

“It is very likely that my campus will move to a Cloud/SaaS Solution in five years (fall 2020).”

The 2015 Campus Computing Survey is based on data provided by senior campus IT officials, typically, the CIO, CTO, or other senior campus IT officer, representing 417 two- and four-year public and private/non-profit colleges and universities across the United States. Survey respondents completed the online questionnaire from September 17 through October 22. PDF copies of the 2015 Campus Computing Survey will be available on December 10th from The Campus Computing Project in Encino, CA (campuscomputing.net). Price: $45, which includes shipping to US addresses.

The Campus Computing Project

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, 2015
Casey Green • The Campus Computing Project

CAMPUS COMPUTING, 2015
The 26th National Survey of Computing, eLearning, and Information Technology in US Higher Education

Casey Green
THE CAMPUS COMPUTING PROJECT
campuscomputing.net  @digitaltweed

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sonicfoundry  UNICON
TouchNet  UNICON

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Methodology

- 417 institutional participants
- Web-based data collection
- Survey period: Sept. 17 – Oct. 21
- 75 pct. of the 2015 participating colleges and universities also completed the 2014 survey

2015 Survey Participants

<table>
<thead>
<tr>
<th>Category</th>
<th>Dept of Ed N (adjusted)</th>
<th>Survey N</th>
<th>Participation Rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Research &amp; Doctoral Universities</td>
<td>168</td>
<td>57</td>
<td>34%</td>
</tr>
<tr>
<td>Private Research &amp; Doctoral Universities</td>
<td>92</td>
<td>32</td>
<td>35%</td>
</tr>
<tr>
<td>Public 4-Year Colleges (Baccalaureate &amp; Masters)</td>
<td>374</td>
<td>72</td>
<td>19%</td>
</tr>
<tr>
<td>Private 4-Year Colleges (Baccalaureate &amp; Masters)</td>
<td>824</td>
<td>168</td>
<td>20%</td>
</tr>
<tr>
<td>Associate Degree/ Public Community Colleges</td>
<td>1018</td>
<td>88</td>
<td>9%</td>
</tr>
</tbody>
</table>
2015 Highlights

- Top IT priorities focus on instruction, staffing, user support, advancing the campus completion agenda, and IT security.
- Big differences in the CIO assessments of the things we do/provide vs. the things we buy.
- Great faith in the benefits of adaptive learning and digital curricular resources.
- Slow transition to the Cloud continues; Cloud security is a big concern for a significant minority.
- Rising institutional support for Open Educational Resources.

New Survey Items for 2015

<table>
<thead>
<tr>
<th>Statement</th>
<th>Pct. Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>We have a difficult time retaining IT talent because our salaries and</td>
<td>74</td>
</tr>
<tr>
<td>benefits are not competitive with off-campus job opportunities.</td>
<td></td>
</tr>
<tr>
<td>Digital curricular resources make learning more efficient and effective</td>
<td>94</td>
</tr>
<tr>
<td>for students.</td>
<td></td>
</tr>
<tr>
<td>Adaptive learning technology has great potential to improve</td>
<td>96</td>
</tr>
<tr>
<td>learning outcomes for students.</td>
<td></td>
</tr>
<tr>
<td>Third party Cloud Services (Amazon, Google, IBM, Microsoft) services</td>
<td>69</td>
</tr>
<tr>
<td>(Amazon, Google, IBM, Microsoft) are an important part of our campus</td>
<td></td>
</tr>
<tr>
<td>plan to offer high performance computing services.</td>
<td></td>
</tr>
</tbody>
</table>
### Top Five Campus IT Priorities Over the Next Two-Three Years, Fall 2015

<table>
<thead>
<tr>
<th>Priority</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assisting faculty integrate technology into instruction (80%)</td>
<td>Only 17% recognize instructional IT activities as part of the faculty review/promotion process</td>
</tr>
<tr>
<td>Hiring/retaining qualified IT staff (78%)</td>
<td>74% report IT salaries are not competitive</td>
</tr>
<tr>
<td>Providing adequate user support (78%)</td>
<td>26% reduced IT staffing</td>
</tr>
<tr>
<td>Upgrading/enhancing network and data security (76%)</td>
<td>18% cut funds for professional development</td>
</tr>
<tr>
<td>Leveraging IT resources to support student success (74%)</td>
<td>User support overrated: 56% excellent?</td>
</tr>
<tr>
<td></td>
<td>IT training for faculty: just 27% excellent?</td>
</tr>
<tr>
<td></td>
<td>IT training for students: just 10% excellent?</td>
</tr>
<tr>
<td></td>
<td>46% experienced an attack on the campus network in the past year (over 60% in univ.)</td>
</tr>
<tr>
<td></td>
<td>50% increased spending on IT security</td>
</tr>
<tr>
<td></td>
<td>Only 21% assess impact of IT on instruction</td>
</tr>
<tr>
<td></td>
<td>Just 27% report IT investments in analytics are “very effective”</td>
</tr>
</tbody>
</table>

### Top Institutional IT Priorities Over the Next Two-Three Years, Fall 2015

<table>
<thead>
<tr>
<th>Priority</th>
<th>Scale: 1=not important; 7=very important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assisting faculty integrate IT into instruction</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Hiring/retaining qualified IT staff</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Providing adequate user support</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Network and data security</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Leveraging IT for student success</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Mobile computing</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Supporting online education</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Professional development for IT staff</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>IT business continuity/disaster planning</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Data analysis/analytics</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Upgrading the campus network</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Financing replacement of aging IT</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Supporting BYOD</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Migrating to the Cloud</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Upgrading/replacing ERP</td>
<td>7 (very important)</td>
</tr>
<tr>
<td>Upgrade/replace the LMS</td>
<td>6 (very important)</td>
</tr>
</tbody>
</table>

*9 of 10 top priorities focus on SERVICES*
Top Three Institutional IT Priorities by Sector, Fall 2015

<table>
<thead>
<tr>
<th>All Campuses</th>
<th>Public Universities</th>
<th>Private Universities</th>
<th>Public BA/MA Colleges</th>
<th>Private BA/MA Colleges</th>
<th>Community Colleges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assisting Faculty Integrate IT into Instruction (81%)</td>
<td>Hiring/Retaining Qualified IT Staff (80%)</td>
<td>Hiring/Retaining Qualified IT Staff (87%)</td>
<td>Leveraging IT Resources for Student Success (90%)</td>
<td>Assisting Faculty Integrate IT into Instruction (81%)</td>
<td>Providing Adequate User Support (83%)</td>
</tr>
<tr>
<td>Hiring/Retaining Qualified IT Staff and IT User Support (78%)</td>
<td>Leverage IT Resources for Student Success (79%)</td>
<td>Assisting Faculty Integrate IT into Instruction and IT Security (81%)</td>
<td>Assisting Faculty Integrate IT into Instruction (88%)</td>
<td>Network and Data Security (77%)</td>
<td>Mobile Computing and Online Courses (78%)</td>
</tr>
<tr>
<td>Network and Data Security (76%)</td>
<td>Providing Adequate User Support (77%)</td>
<td>Providing Adequate User Support (78%)</td>
<td>IT Staffing and User Support (86%)</td>
<td>IT Staffing and User Support (74%)</td>
<td>Hiring/Retaining Qualified IT Staff (77%)</td>
</tr>
</tbody>
</table>

CIOs Have Great Faith in The Benefits of Digital Technologies for Instruction

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Agree/St. Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital curricular resources make learning more efficient and effective for students.</td>
<td>94%</td>
</tr>
<tr>
<td>Digital curricular resources provide a richer and more personalized learning experience than print materials.</td>
<td>87%</td>
</tr>
<tr>
<td>Adaptive learning technology has great potential to improve learning outcomes for students.</td>
<td>96%</td>
</tr>
</tbody>
</table>

But deployment numbers are currently low:
- Only 10% of general education classes use courseware
- Just 4% of developmental and general ed. courses use adaptive learning technologies
Rating the IT Infrastructure, Fall 2015

- Highest rankings for the network, “hardware,” and content
- Lower rankings for services
- Would faculty and students agree with the ranking for user support services?

CIO Assessments of Digital Resources and Services for Disabled Users

- Campuses struggle to provide legally-mandated digital access and resources to disabled students
- Only half (50%) have a strategic plan for ADA/Sec. 503 compliance

Litigation Waiting to Happen
IT Planning & Policy Issues, Fall 2015

Smartphones and Tablets Over Laptops!

How important are these hardware issues for campus IT planning and policy over the next 2-3 years?

Mean scores, fall 2015  Scale: 1=not important; 7=very important

“Skating to where the digital puck” is going:

• A consistent and clear message that new platforms are more important in IT planning than old hardware.

CIOs Rate the Effectiveness of Campus Investments in Information Technology, Fall 2015

• Continue to see very mixed assessments about the effectiveness of campus IT investments
The Challenge of Effective IT User Support

IT user support is a top IT priority (#3 / 78%)

- Just 58% report IT user support services are “excellent”
- Less than a third provide “excellent” IT training for faculty
- Just a tenth provide “excellent” training for students

Budget Cuts, 2008-2015

- Still experiencing the compounding consequences of continuing budget cuts
- Community Colleges still suffering
- Almost a fourth of institutions (24%) experienced mid-year IT budget cuts, averaging 2.6%
Big gain in 2015           Big decline in 2015

Budget Cuts vs. Budget Gains, Fall 2015

<table>
<thead>
<tr>
<th>Category</th>
<th>Increase</th>
<th>Decrease</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Budget, Central IT</td>
<td>36.2</td>
<td>29.3</td>
</tr>
<tr>
<td>Wireless Networks</td>
<td>50.6</td>
<td>5.5 ▼</td>
</tr>
<tr>
<td>User Training and Support</td>
<td>18.4</td>
<td>12.0 ▼</td>
</tr>
<tr>
<td>ERP Software and Services</td>
<td>41.3</td>
<td>4.8</td>
</tr>
<tr>
<td>Mobile Computing Resources</td>
<td>34.3</td>
<td>4.6</td>
</tr>
<tr>
<td>IT Security Issues and Resources</td>
<td>50.1</td>
<td>3.8</td>
</tr>
<tr>
<td>Cloud Computing</td>
<td>38.4</td>
<td>4.3</td>
</tr>
<tr>
<td>Professional Development</td>
<td>22.3</td>
<td>19.5</td>
</tr>
<tr>
<td>Business Analytics</td>
<td>35.3</td>
<td>6.1</td>
</tr>
</tbody>
</table>

- Investing in wireless, security, cloud, mobility & analytics
- Reduced spending in public labs and for replacement hardware
- Student lab computer replacement cycle now 4-5 years (69%) vs. 2-3 years (55%) in 2008

ERP Expenditures, Fall 2015
(estimated annual expenditures for licensing and maintenance fees)

<table>
<thead>
<tr>
<th>Category</th>
<th>All Institutions</th>
<th>Universities</th>
<th>MA &amp; BA Colleges</th>
<th>Community</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Public</td>
<td>Private</td>
<td>Public</td>
<td>Private</td>
</tr>
<tr>
<td>Alumni / Advancement / Development</td>
<td>$49,609</td>
<td>$140,686</td>
<td>$100,991</td>
<td>$31,452</td>
</tr>
<tr>
<td>Business Intelligence / Big Data Analytics</td>
<td>$75,130</td>
<td>$208,039</td>
<td>$69,589</td>
<td>$88,865</td>
</tr>
<tr>
<td>CRM</td>
<td>$62,873</td>
<td>$106,026</td>
<td>$117,841</td>
<td>$42,729</td>
</tr>
<tr>
<td>Finance / Accounting</td>
<td>$158,775</td>
<td>$393,032</td>
<td>$518,419</td>
<td>$99,457</td>
</tr>
<tr>
<td>ePortfolio services</td>
<td>$14,703</td>
<td>$23,606</td>
<td>$14,134</td>
<td>$8,191</td>
</tr>
<tr>
<td>Grants and Research Management</td>
<td>$53,020</td>
<td>$178,188</td>
<td>$84,183</td>
<td>$23,456</td>
</tr>
<tr>
<td>Learning Management Systems / LMS</td>
<td>$128,411</td>
<td>$278,769</td>
<td>$174,137</td>
<td>$125,692</td>
</tr>
<tr>
<td>Lecture Capture and Campus Video Mgmt.</td>
<td>$45,418</td>
<td>$150,060</td>
<td>$47,262</td>
<td>$31,515</td>
</tr>
<tr>
<td>Library System Management</td>
<td>$77,703</td>
<td>$245,813</td>
<td>$80,196</td>
<td>$60,999</td>
</tr>
<tr>
<td>Human Resources (recruitment)</td>
<td>$33,224</td>
<td>$84,239</td>
<td>$38,326</td>
<td>$35,957</td>
</tr>
<tr>
<td>Human Resources (HR records and payroll)</td>
<td>$130,101</td>
<td>$332,910</td>
<td>$227,233</td>
<td>$41,067</td>
</tr>
<tr>
<td>Student Information System</td>
<td>$219,449</td>
<td>$919,727</td>
<td>$339,038</td>
<td>$190,384</td>
</tr>
</tbody>
</table>

- Core ERP spending accounts for about 9-10% of total central IT expenditures.
- Less dollars for ERP in community colleges but a larger proportion of the IT budget (11-12%)
Updating Campus IT Security & Disaster Plans, 2015

Last Update for Network & Data Security

- 22% DO NOT have a strategic plan for network and data security
- 32% DO NOT have a strategic plan for IT disaster recovery

Last Update for IT Disaster Recovery

Declining Confidence in MOOCs

MOOCs offer a viable model for the effective delivery of online instruction
MOOCs offer a viable business model for campuses to realize new revenues

BIG DECLINES IN THE 2015 DATA (10-15 points compared to 2013!)

- Four-fifths of CIOs are uncertain about the MOOC revenue model.
- Private Univ. CIOs support the academic model but doubt the financial model.
Outsourcing Instructional Services for Online Programs?

Are perspectives on MOOCs informed by real experience with outsourcing?

- Little change in the 2015 data vs. 2014.
- Outsourcing viewed as more effective for instruction than for profits.
- CIOs in private universities more supportive of outsourcing instructional services than their peers.

“We are experiencing major cost over-runs / unexpected costs in our ERP deployment activities.”

- Cost problems seem to be structural in some ERP deployments.
Two Views of the Cloud

The Tower and the Cloud addresses as it illustrates the promise, pitfalls and potential evolution of the academic work in a network-based world . . . in a future that may arrive faster than we expect.

Diana Oblinger
President
EDUCAUSE, 2008

Data from the 2015 Campus Computing Survey suggest that less than a fifth of CIOs and senior campus IT officers expect their institution to be deploying high-value, mission-critical Cloud-based ERP applications in five years – by fall 2020.

What Kind of Clouds?

High Clouds
ERP, HPC & Storage

Middle Clouds
Calendar, CRM & LMS

Low Clouds
mail & calendar

A third of campuses (33%) now have a strategic plan for Cloud Computing, up from:

- 29% in 2014
- 27% in 2013,
- 24% in 2012,
- 21% in 2011,
- 15% in 2010 and
- 9% in 2009.

Highest in 4 Universities (38%)
Lowest in Comm. Colleges (22%)
Affirming the Strategic Importance of Cloud Computing

- Across all sectors, a clear message that CIOs view moving ERP applications to the Cloud as strategic for their institution.

Is the Cloud Secure?

“Cloud computing services offer a level of security and reliability that equals or exceeds on-campus hosting”

- Rising confidence in IT security from Cloud providers.

- A small number (6%) had a cloud security problem this past year (14% in public universities)

- A fifth (21%) report "high concern" for a cloud security incident in the coming year
The Cloud
Slow Migration to Cloud Computing
percentages, fall 2011 - 2015

Still little movement to the Cloud for the really big, high-value tasks:
• Risk
• Limited options from providers
• Trust
• Control

LMS Moves to the Clouds
percentage reporting Cloud-based LMS, fall 2011 - 2015

• LMS providers seem to lead on Cloud services
• LMS as the “toe in the Cloud” experience for higher ed?
No Mass Movement to the Cloud in Five Years

It is very likely that my campus will move to a Cloud/SaaS Solution in five years
(scale: 1=not likely; 7=very likely; percentage for very likely: 6/7)

Some gains in 2015, but most CIOs still don’t see “high cloud” applications coming soon to their campuses

WHY?
- Absence of clear path from ERP providers
- Can’t visualize moving to Cloud
- Want to retain command and control
- Let others make the journey first

No Mass Movement to Open Source ERP Applications by Fall 2019

High likelihood of my campus moving to an Open Source ERP Application in Five Years
(scale: 1=not likely; 7=very likely; pct. for 6/7)

WHY?
- Many Kuali apps are still in development or early release phase
- Risk-averse campus culture
- Let others make the journey first
- Awaiting evidence regarding costs and effectiveness
- Impact of the Sakai - Unizin experience?
Growing Use of Video Lecture

- Percentages understate real student numbers as much of the activity is in large, lower-division undergraduate classes.
- Video increasingly important for hybrid, flipped, and online courses.

Encouraging Faculty to Use Open Source / OER Content for Courses

- 6% of courses now using OER materials
- Small gains in formal institutional support for the use of OER course materials
- BIG ISSUE: Faculty concern about quality, ancillaries, and updates
- LOOMING LARGE: Faculty choice of instructional content
Institutional Demography of LMS Providers, 2015

<table>
<thead>
<tr>
<th></th>
<th>All</th>
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<th>Private Univ</th>
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<tr>
<td>Bb</td>
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<td>50.9</td>
<td>50</td>
<td>40.7</td>
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<td>35.2</td>
</tr>
<tr>
<td>D2L</td>
<td>11.8</td>
<td>8.8</td>
<td>6.3</td>
<td>20.8</td>
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<td>25.0</td>
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<td>Instructure (Canvas)</td>
<td>14.2</td>
<td>15.8</td>
<td>18.8</td>
<td>13.9</td>
<td>8.9</td>
<td>21.6</td>
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<td>Moodle</td>
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<td>7.0</td>
<td>9.4</td>
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<td>37.5</td>
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<tr>
<td>Sakai</td>
<td>3.1</td>
<td>1.8</td>
<td>9.4</td>
<td>&gt; 1.0</td>
<td>4.8</td>
<td>1.1</td>
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Three-fifths (61.6%) of campuses report plans to review the current LMS strategy for budget or other reasons

Market presence varies by sector

3 Big LMS Stories
- Decline of Bb
- Rise of Canvas
- Sakai after Unizin

Activating Mobile Apps, Fall 2010-2015

Percentage of institutions reporting that mobile apps are now active or will be deployed during the current academic year

- Impact of student expectations and consumer market experience
- Almost half (48%) of campuses appear to be building their own mobile apps!

Although mobile is a top IT priority (#6 / 70%), only 18% of CIOs and sr. IT officers rate mobile services as "excellent"
Campus Computing Celebrates 25 Years of “Data, Information and Insight” on IT Planning and Policy Issues

In God we trust; all others bring data!

Campus Computing “Brings Data:

- PRIORITIES: identifying what really matters
- TRENDS: reporting how things change – and why
- SECTORS: higher ed is not one market, but many
- NARRATIVE: watching the digital puck and connecting the digital dots

W. Edwards Deming
“Over the past decade most institutions have not invested in formal efforts to assess the impact of technology on instruction and learning…”

“If campus officials are truly committed to advancing the role of technology in instruction, then it is time for these leaders to stand up for and stand with the faculty who are doing this work…”

“In the effort to make better use of data for decision-making, we have to address the data culture in higher education. We have stop using data as a weapon and commit to using data as a resource…”

“Much as we struggle with the meaning and attributes of quality in higher education, so too do we struggle with the meaning and attributes of productivity, particularly in the context of campus investments in and expenses for technology in research, instruction, operations and management, and support services…”

Partner is not a verb. (and Other Key Issues for Doing Business with Higher Ed)

What You Need to Know

1. Partner is not a verb.
2. Trust is the coin of the realm.
3. No “logo buddies.”
4. You are not your client.
5. Your price is not your client’s cost.
6. It’s a neural network.
Casey Green is the founding director of The Campus Computing Project, the largest continuing study of the role of eLearning and information technology in American colleges and universities. The project is widely cited by campus officials and corporate executives as a definitive source for data, information, and insight about IT planning and policy issues affecting higher education.

An invited speaker at some two dozen academic and professional conferences each year, Green is the author or editor of some 20 books and published research reports and more than 100 articles and commentaries that have appeared in academic journals and professional publications. His DigitalTweed blog, recently cited by EdTech Magazine as one of the “50 must read higher ed IT blogs,” is published by Inside Higher Ed.

In 2002 Green received the first EDUCAUSE Award for Leadership in Public Policy and Practice. The EDUCAUSE award cites his work in creating The Campus Computing Project and recognizes his “prominence in the arena of national and international technology agendas, and the linking of higher education to those agendas.”

A graduate of New College (FL), Green earned his Ph.D. in higher education and public policy at the University of California, Los Angeles.