A Mixed Assessment About the Effectiveness of Campus IT Investments; More Campuses Go Mobile and Slowly to the Cloud, While Fewer Experience IT Budget Cuts

New data from fall 2012 Campus Computing Survey offer a mixed assessment about the effectiveness of institutional investments in information technology. The new survey also confirms big gains in the proportion of institutions that are activating mobile apps and services for their students. Additionally, the 2012 data document the continuing decline in the number of campuses that have experienced IT budget cuts as a consequence of the economic downturn that began in 2008.

Assessing the Effectiveness of Campus IT Investments

A new question on the 2012 Campus Computing Survey reveals that senior campus IT officials offer a very mixed assessment about the effectiveness of various institutional investments in information technology. For example, three-fifths view the institutional investment in IT for library resources and for administrative information systems to be “very effective,” while just over half (55.2 percent) cite the investment in IT for on-campus instruction as “very effective.” In contrast, less than a fourth (22.7 percent) view the IT investment in “data analysis and managerial analytics” as very effective. Among CIOs at research institutions, only a two-fifths (41.7 percent) at public universities and a third (32.6 percent) in private universities assess current IT investments to support research and scholarship as “very effective.”

“These new data suggest that CIOs recognize the need for their institutions to extract more value from the continuing and significant dollars their campuses invest in information technology,” says Kenneth C. Green, founding director of The Campus Computing Survey. “Although colleges and universities are doing many things well with IT, for many campus officials the return on the institutional investment in information technology often falls short of both expectations and need.”

More Colleges Go Mobile

Across all sectors of higher education, the 2012 survey documents another year of big gains in the proportion of colleges and universities that have activated mobile apps. Three-fifths (60.2 percent) of the campuses participating in this year’s survey have activated mobile apps as of fall 2012 or will do so in the coming academic year, compared to two-fifths (41.5 percent) in fall 2011 and 23.1 percent in fall 2010. Across sectors, public universities lead the move to mobile: more than three-fourths (77.8 percent) report active or impending mobile apps for fall 2012, compared to 67.5 percent for private universities, and a range of 50-60 percent for public and private four-year colleges and also for community colleges.

The numbers on the effectiveness of campus IT investments become even more striking when compared to the data from two national surveys of college and university presidents and provosts that Green conducted for Inside Higher Ed in 2011. Taken together, the three surveys reveal that many presidents and provosts are less sanguine about campus IT investments than their IT officers: just 42.1 percent of presidents and 50.0 percent of chief academic officers view the IT investment to support on-campus instruction as “very effective,” compared to 55.2 percent of CIOs. Although 61.5 percent of CIOs report the institutional investment in administrative information systems to be “very effective,” only 39.0 percent of presidents and 33.4 percent of provosts offer a similar assessment. Interestingly, CIOs offer a lower assessment about effectiveness of IT investments to support campus analytical efforts: just 22.7 percent of CIOs view the investment in IT to support data analytics as very effective, compared to 28.6 percent of provosts and 37.7 percent of presidents.

Green says that this gap in the assessments of IT effectiveness among of presidents, provosts, and CIOs could be explained in several ways: “For some campus officials these numbers reflect unfulfilled expectations, while for others it could be that both technology advocates and technology providers have frequently over-promised and under-delivered. And in other instances it may well be that institutional IT officers have failed to communicate the effectiveness of IT investments at their campuses.”

“Several factors explain these continuing gains,” says Green. “Colleges and universities are clearly playing catch-up with the
consumer experience. Students come to campus with their smartphones and tablets expecting to use mobile apps to navigate campus resources and use campus services. Also important is that compared to two years ago, more firms – both LMS and ERP providers – now offer mobile options for their campus clients.”

Green adds that some technology providers now offer free mobile apps, which also means that the costs of going mobile have changed significantly in recent years.

Fewer Campuses Experience Budget Cuts

The 2012 data indicate that just over a fourth (27.0 percent) of the surveyed institutions experienced cuts affecting the current (A/Y 2012-13) budget for central IT resources and services, down from more than a third (35.8 percent) in fall 2011, 41.6 percent in 2010, and fully half (50.0 percent) in fall 2009.

Among public institutions, about a third of universities, four-year campuses, and community colleges reported reductions in the central budget for IT fall 2012, down dramatically from 2011, when more than 54.7 percent of public universities, 43.6 percent of public four-year colleges, and 39.0 percent of community colleges experienced central IT budget cuts.

Private/non-profit institutions continue to fare better than their public counterparts: 16.3 percent of private universities experienced central IT budget cuts this year, compared to one-fourth (24.9 percent) in fall 2011 and 56.9 percent in 2009. Among private four-year colleges, the percentage reporting budget cuts fell to 18.3 percent, down from 24.7 percent in fall 2011 and 41.9 percent in 2009.

“The new data offer some generally good news, as fewer institutions experienced IT budget reductions this year than last,” says Green. “But the IT budget cuts continue for many and the proportion of public campuses experiencing IT budget reductions remains high, about a third across all sectors.” Green cites the rising demand for an array of campus IT resources and services – mobile apps, high speed wireless, IT user support services, instructional design assistance for faculty teaching online, and IT security, plus the need to refresh an aging campus IT infrastructure – as major sources of pressure on campus IT budgets, and by extension, major challenges for campus IT leaders.

Small Gains in Cloud Computing

Despite the continuing discussion in both the campus and the corporate sectors about the operational and financial benefits of Cloud Computing, the 2012 survey data show only small gains in the movement of mission-critical campus operations to the Cloud. Just 5.9 percent of the survey participants report that their campus has moved or is converting to Cloud Computing for ERP (administrative system) services, up from 4.4 percent in 2011 (range: from 10.2 percent for private universities to 2.1 percent for private four-year colleges). Similarly, just 9.8 percent have moved to Cloud Computing for storage, archiving, or business continuity services as of fall 2012, compared to 6.5 percent last year. And

of public universities have migrated these activities to the Cloud as of this fall, compared to 6.6 percent in 2011; among private universities, 7.0 percent report cloud-based HPC activities, compared to 1.1 percent last year.

Other Cloud services post higher numbers. This fall almost two-fifths of the survey participants (38.1 percent, up from 27.8 percent in 2011) report that they have moved or are migrating LMS applications to Cloud services, while a sixth (16.6 percent, up from 10.9 percent last year) indicate that their institution is using a Cloud-based CRM (Customer Relationship Management) application.

“The gains for Cloud Computing posted this year should be encouraging to both campus IT leaders and to technology providers,” says Green, although he notes that the major campus ERP providers only recently began to offer Cloud-based services to their campus clients. Even as the performance benefits and cost savings of migrating to the Cloud appear compelling, “trust really is the coin of the realm: many campus IT officers are not ready to migrate mission-critical data, resources, and services to the Cloud services offered by their IT providers.”

Continuing Shifts in the LMS Market

The 2012 data also document an increasing competitive market for Learning Management Systems (LMS). The proportion of survey participants reporting that their institution uses various versions of Blackboard (including Angel and WebCT) as the campus-standard LMS fell to 44.8 percent in fall 2012, down from 50.6 percent in 2011, 57.1 percent in 2010, and 71.0 percent in fall 2006. Concurrently, Blackboard’s major LMS competitors – Desire2Learn (11.1 percent in fall 2012), Moodle (20.1 percent), and Sakai (6.1 percent) - have all gained share during this period. Additionally, Canvas by Instructure has emerged as an aggressive new competitor: 4.6 percent of the 2012 survey participants report that their institution has selected Canvas as the campus-standard LMS application, up from zero percent just three years ago.

“The campus LMS market remains a textbook example of a mature market with immature, or evolving, technologies, and that’s a prescription for both volatility and competition,” says Green. “Two-thirds of this year’s survey participants report that their campus is or will soon begin a review of the institutional LMS strategy, affirming the assessment that higher education can be a very volatile market for LMS providers.”

The 2012 Campus Computing Survey is based on survey data provided by senior campus IT officials, typically, the CIO, CTO, or other senior campus IT officer, representing 542 two- and four-year public and private/non-profit colleges and universities across the United States. Survey respondents completed the online questionnaire from September 20 through October 26*. Copies of the 2012 Campus Computing Survey will be available on December 15th from The Campus Computing Project in Encino, CA (campuscomputing.net). Price: $45, which includes shipping to US addresses.
CAMPUS COMPUTING, 2012
The 23rd National Survey of Computing and Information Technology in US Higher Education

Kenneth C. Green
THE CAMPUS COMPUTING PROJECT
campuscomputing.net

7 November 2012
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Project Sponsors

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Methodology

- 543 institutional participants
- Web-based data collection
- Survey period: Sept 20 – Oct 26
- 70 pct. of the 2012 participating campuses also participated in the 2011 survey

### 2012 Survey Participants

<table>
<thead>
<tr>
<th>Category</th>
<th>Dept of Ed N (adjusted)</th>
<th>Survey N</th>
<th>Participation Rate (pct)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Research &amp; Doctoral Universities</td>
<td>168</td>
<td>72</td>
<td>43%</td>
</tr>
<tr>
<td>Private Research &amp; Doctoral Universities</td>
<td>92</td>
<td>43</td>
<td>47%</td>
</tr>
<tr>
<td>Public 4-Year Colleges (Baccalaureate &amp; Masters)</td>
<td>374</td>
<td>108</td>
<td>29%</td>
</tr>
<tr>
<td>Private 4-Year Colleges (Baccalaureate &amp; Masters)</td>
<td>824</td>
<td>191</td>
<td>23%</td>
</tr>
<tr>
<td>Associate Degree/ Public Community Colleges</td>
<td>1018</td>
<td>129</td>
<td>13%</td>
</tr>
</tbody>
</table>
Why Survey Researchers Send (lots of) Annoying eMail Reminders

552 Participating Institutions

- 51 pct. of the surveys were submitted in the final week
- 19 pct. of the surveys arrived after the Oct 24 deadline

2012 Highlights

- Assisting faculty with the instructional integration of IT returns as a top CIO priority
- Big gains (again) in the deployment of mobile apps
- Budget cuts continue to decline, but public campuses more at risk than privates.
- Mixed assessments from presidents, provosts, and CIOs about the effectiveness of IT investments
- Still searching for the Clouds!
- Transitions continue in the LMS market
Single Most Important IT Issue, 2000-2008

Trends, 2000-2008

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td></td>
<td>Assisting Faculty Integrate IT into Instruction (40.3%)</td>
<td>Assisting Faculty Integrate IT into Instruction (31.5%)</td>
<td>Assisting Faculty Integrate IT into Instruction (26.3%)</td>
<td>Assisting Faculty Integrate IT into Instruction (21.4%)</td>
<td>Network &amp; Data Security (21.1%)</td>
<td>Network &amp; Data Security (30.5%)</td>
<td>Network &amp; Data Security (29.5%)</td>
<td>Network &amp; Data Security (25.5%)</td>
<td>Network &amp; Data Security (20.7%)</td>
</tr>
<tr>
<td>2001</td>
<td></td>
<td>User Support (22.3%)</td>
<td>Upgrade/ Replace ERP (12.6%)</td>
<td>Upgrade/ Replace ERP (16.6%)</td>
<td>Upgrade/ Replace ERP (17.6%)</td>
<td>Assisting Faculty Integrate IT into Instruction (18.5%)</td>
<td>Assisting Faculty Integrate IT into Instruction (17.3%)</td>
<td>Assisting Faculty Integrate IT into Instruction (17.8%)</td>
<td>Upgrade/ Replace ERP (16.3%)</td>
<td>Hiring/ Retaining IT Staff (16.7%)</td>
</tr>
<tr>
<td>2002</td>
<td></td>
<td>Finishing It (14.6%)</td>
<td>Finishing It (15.1%)</td>
<td>Finishing It (16.1%)</td>
<td>Upgrade/ Replace ERP (17.2%)</td>
<td>Upgrade/ Replace ERP (16.1%)</td>
<td>Upgrade/ Replace ERP (16.1%)</td>
<td>Upgrade/ Replace ERP (16.3%)</td>
<td>Hiring/ Retaining IT Staff (12.3%)</td>
<td>Assisting Faculty Integrate IT into Instruction (11.9%)</td>
</tr>
<tr>
<td>2003</td>
<td></td>
<td>Assisting Faculty Integrate IT into Instruction (26.3%)</td>
<td>Assisting Faculty Integrate IT into Instruction (21.4%)</td>
<td>Assisting Faculty Integrate IT into Instruction (24.3%)</td>
<td>Assisting Faculty Integrate IT into Instruction (21.4%)</td>
<td>Network &amp; Data Security (21.1%)</td>
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<td>Network &amp; Data Security (25.5%)</td>
<td>Network &amp; Data Security (20.7%)</td>
</tr>
<tr>
<td>2004</td>
<td></td>
<td>Upgrade/ Replace ERP (16.1%)</td>
<td>Upgrade/ Replace ERP (17.2%)</td>
<td>Upgrade/ Replace ERP (17.6%)</td>
<td>Assisting Faculty Integrate IT into Instruction (18.5%)</td>
<td>Assisting Faculty Integrate IT into Instruction (17.3%)</td>
<td>Assisting Faculty Integrate IT into Instruction (17.8%)</td>
<td>Upgrade/ Replace ERP (16.3%)</td>
<td>Hiring/ Retaining IT Staff (16.7%)</td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td></td>
<td>Upgrading campus network</td>
<td>Providing online/distance ed</td>
<td>Mobile computing</td>
<td>Providing adequate user support</td>
<td>Network &amp; data security</td>
<td>Network &amp; data security</td>
<td>Financing/replacing aging hardware/software</td>
<td>Instructional integration of IT</td>
<td>Hiring/ retaining qualified staff</td>
</tr>
<tr>
<td>2006</td>
<td></td>
<td>Upgrading/replacing ERP systems</td>
<td>Providing online/distance ed</td>
<td>Mobile computing</td>
<td>Providing adequate user support</td>
<td>Network &amp; data security</td>
<td>Network &amp; data security</td>
<td>Financing/replacing aging hardware/software</td>
<td>Instructional integration of IT</td>
<td>Hiring/ retaining qualified staff</td>
</tr>
<tr>
<td>2007</td>
<td></td>
<td>Providing online/distance ed</td>
<td>Mobile computing</td>
<td>Providing adequate user support</td>
<td>Network &amp; data security</td>
<td>Network &amp; data security</td>
<td>Financing/replacing aging hardware/software</td>
<td>Instructional integration of IT</td>
<td>Hiring/ retaining qualified staff</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td></td>
<td>Mobile computing</td>
<td>Providing adequate user support</td>
<td>Network &amp; data security</td>
<td>Network &amp; data security</td>
<td>Financing/replacing aging hardware/software</td>
<td>Instructional integration of IT</td>
<td>Hiring/ retaining qualified staff</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Single Most Important IT Issue, 2010 and 2011

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

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### Top Institutional IT Priorities Over the Next Two-Three Years, Fall 2012

<table>
<thead>
<tr>
<th>Objective</th>
<th>Percentage Reporting “Very Important” (6/7)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assisting faculty integrate IT into instruction</td>
<td>74%</td>
</tr>
<tr>
<td>Providing adequate user support</td>
<td>70%</td>
</tr>
<tr>
<td>Hiring/retaining qualified IT staff</td>
<td>69%</td>
</tr>
<tr>
<td>Providing online education</td>
<td>61%</td>
</tr>
<tr>
<td>Implementing / supporting mobile computing</td>
<td>61%</td>
</tr>
<tr>
<td>Upgrading / enhancing network &amp; data security</td>
<td>54%</td>
</tr>
<tr>
<td>Financing the replacement of aging IT</td>
<td>50%</td>
</tr>
<tr>
<td>Upgrading / replacing the campus network</td>
<td>42%</td>
</tr>
<tr>
<td>Migrating to Cloud computing</td>
<td>33%</td>
</tr>
<tr>
<td>Upgrading / replacing Admin IT / ERP systems</td>
<td>25%</td>
</tr>
<tr>
<td>Upgrading / replacing emergency comm.</td>
<td>16%</td>
</tr>
</tbody>
</table>

Top priorities focus on instructional integration, user support, and IT staffing.

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

- Assisting faculty integrate IT into instruction: 74%
- Providing adequate user support: 70%
- Hiring / retaining qualified IT staff: 69%
- Providing online education: 61%
- Implementing / supporting mobile computing: 61%
- Upgrading / enhancing network & data security: 54%
- Financing the replacement of aging IT: 50%
- Upgrading / replacing the campus network: 42%
- Migrating to Cloud computing: 33%
- Upgrading / replacing Admin IT / ERP systems: 25%
- Upgrading / replacing emergency comm.: 16%

Top priorities focus on instructional integration, user support, and IT staffing.
Top Institutional IT Priorities by Sector, Fall 2012

<table>
<thead>
<tr>
<th>All Campuses</th>
<th>Public Universities</th>
<th>Private Universities</th>
<th>Public 4-Yr. Colleges</th>
<th>Private 4-Yr. Colleges</th>
<th>Community Colleges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assisting Faculty Integrate IT into Instruction (74%)</td>
<td>Providing Online Ed on the Web (73%)</td>
<td>Assisting Faculty Integrate IT into Instruction (81%)</td>
<td>Hiring Retaining Qualified IT Staff (82%)</td>
<td>Assisting Faculty Integrate IT into Instruction (74%)</td>
<td>Assisting Faculty Integrate IT into Instruction (71%)</td>
</tr>
<tr>
<td>Providing Adequate User Support (70%)</td>
<td>Assisting Faculty with IT in Instruction &amp; Hiring Retaining Qualified Staff (66: 72%)</td>
<td>Upgrading Enhancing network &amp; data security (83%)</td>
<td>Providing Adequate User Support (76%)</td>
<td>Providing Adequate User Support (69%)</td>
<td>Providing Online Ed on the Web (73%)</td>
</tr>
<tr>
<td>Hiring Retaining Qualified IT Staff (69%)</td>
<td>Providing Adequate User Support (67%)</td>
<td>Hiring Retaining Qualified IT Staff (68%)</td>
<td>Assisting Faculty Integrate IT into Instruction (74%)</td>
<td>Hiring Retaining Qualified IT Staff (69%)</td>
<td>Hiring Retaining Qualified IT Staff (64%)</td>
</tr>
</tbody>
</table>

Top Institutional IT Priorities, 2012

<table>
<thead>
<tr>
<th>Campus Computing Survey (pct. reporting “very important”)</th>
<th>EDUCAUSE “Top 10 IT Issues” (panel assessment)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Assisting faculty integrate technology into instruction (74%)</td>
<td>Updating IT professional skills and roles</td>
</tr>
<tr>
<td>2 Providing adequate user support (70%)</td>
<td>Supporting trends towards consumerization and BYOD</td>
</tr>
<tr>
<td>3 Hiring retaining qualified IT staff (69%)</td>
<td>Developing a campus-wide cloud strategy</td>
</tr>
<tr>
<td>4 Tie: Providing online ed via the web and implementing/supporting mobile computing (61%)</td>
<td>Improving operational efficiency through the use of IT resources</td>
</tr>
<tr>
<td>5 Upgrading enhancing network &amp; data security (54%)</td>
<td>Integrating IT into institutional decision-making</td>
</tr>
<tr>
<td>6 Financing the replacement of aging IT (50%)</td>
<td>Using analytics to support institutional outcomes</td>
</tr>
<tr>
<td>7 Upgrading enhancing the campus network (42%)</td>
<td>Funding IT strategically</td>
</tr>
<tr>
<td>8 Migrating to Cloud computing (33%)</td>
<td>Transforming the institution’s business with IT</td>
</tr>
<tr>
<td>9 Upgrading enhancing administrative IT / ERP systems (24%)</td>
<td>Supporting the research mission through HPC, large data, and analytics</td>
</tr>
<tr>
<td>10 Upgrading enhancing emergency comm. (16%)</td>
<td>Establishing and implementing IT governance</td>
</tr>
</tbody>
</table>
Rating the IT Infrastructure

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

CIOs Rate the Effectiveness of Campus Investments in Information Technology

- Very mixed assessments about the effectiveness of campus IT investments
Presidents, Provosts & CIOs
Rating the Effectiveness of Campus IT Investments

- Presidents and provosts are generally less sanguine about the effectiveness of IT investments than their IT officers.

The Effectiveness of IT Investments to Support Instruction

- CIOs: 94% agree that “technology has done much to improve instruction on my campus.”
- Effectiveness of IT Investment to Support Instruction: Less than half of presidents and provosts report investments in technology to support on-campus instruction have been “very effective.”
The Effectiveness of IT Investments in Admin Info Systems

- Less than half of presidents and provosts report investments in technology to support administrative systems have been “very effective.”

The Effectiveness of IT Investments in Analytics

- Less than a fourth of CIOs report investments in technology to support analytics have been “very effective,” compared to a third of provosts and two-fifths of presidents.
Budget Cuts, 2006-2012

- **THE GOOD NEWS:**
  - Big declines in budget cuts
  - Still experiencing the compounding consequences of continuing budget cuts
  - Privates fare better than publics
  - One-sixth (16 pct.) experienced additional mid-year cuts, averaging 1.5-2.0 pct.

ERP Expenditures

*(estimated annual expenditures for licensing and maintenance fees)*

Means by sector, thousands of dollars

<table>
<thead>
<tr>
<th></th>
<th>ALL</th>
<th>Pub Univ.</th>
<th>Pvt Univ.</th>
<th>Pub 4-Yr.</th>
<th>Pvt 4-Yr.</th>
<th>Comm. College</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance &amp; Accounting</td>
<td>$ 143</td>
<td>490</td>
<td>265</td>
<td>104</td>
<td>47</td>
<td>77</td>
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<tr>
<td>Student Info. System</td>
<td>189</td>
<td>525</td>
<td>240</td>
<td>179</td>
<td>77</td>
<td>149</td>
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<tr>
<td>HR - Recruitment</td>
<td>47</td>
<td>128</td>
<td>35</td>
<td>47</td>
<td>20</td>
<td>42</td>
</tr>
<tr>
<td>HR – Records &amp; Payroll</td>
<td>120</td>
<td>382</td>
<td>219</td>
<td>69</td>
<td>36</td>
<td>87</td>
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<tr>
<td>LMS</td>
<td>123</td>
<td>275</td>
<td>133</td>
<td>113</td>
<td>69</td>
<td>114</td>
</tr>
<tr>
<td>Alumni/ Development</td>
<td>46</td>
<td>115</td>
<td>110</td>
<td>28</td>
<td>34</td>
<td>22</td>
</tr>
<tr>
<td>Est. TOTAL</td>
<td>$ 669</td>
<td>1,915</td>
<td>1,003</td>
<td>540</td>
<td>283</td>
<td>493</td>
</tr>
<tr>
<td>% of Central IT $</td>
<td>8.6%</td>
<td>8.0%</td>
<td>6.7%</td>
<td>8.9%</td>
<td>8.0%</td>
<td>12.8%</td>
</tr>
</tbody>
</table>
Reorganizing IT Units, Fall 2012

Organizational structures for many IT units are in transition.

- 36% have reorganized academic computing units in the past two years.
- 16% who have reorganized academic computing expect to do it again in the next two years.
- 28% expect to restructure academic computing in the next two years.

Little change in these numbers in recent years.

IT Security Incidents, A/Y 2006 - 2012

- IT Security Incidents by Sector:
  - Computer Theft w/ Confidential Data
  - Hack/Attack on the Campus Network
  - Identity Management
  - Computer Virus
  - Spyware
  - Social Networking Issues

Percentages by Sector:
- 2006
- 2007
- 2008
- 2009
- 2010
- 2011
- 2012

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Social networks continue to present campus security challenges.

Employee misconduct reflects rising stress levels among IT staff.
Updating Campus IT Security & Disaster Plans

- 25% do not have a strategic plan for network security
- 39% do not have a strategic plan for IT disaster recovery

Emergency Notification Participation Strategy: “Opt-In” (User Must Register)

- Notification systems are of limited value if large numbers of campus users have no access
- Lower numbers are better; more users pre-registered
Emergency Notification

Deploying the Notification System

- Seeking new opportunities to extract value from the notification system
- More use increases the risk of text spam

Let’s Talk About Clouds

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Where are the Clouds?

A fourth of campuses (24 pct.) have a strategic plan for Cloud Computing, up from 21 pct. in 2011, 15 pct in 2010 and 9 pct. in 2009.

High Clouds  
ERP & HPC

Middle Clouds  
CRM & LMS

Low Clouds  
mail & calendar

Affirming the Strategic Importance of the Cloud

percentage who agree/strongly agree, fall 2012

- Across all sectors, a clear message that CIOs view moving ERP to the Cloud as strategic for their institution.
The Cloud
Slow Migration to Cloud Computing
percentages, fall 2011 vs. 2012

Still little movement to the Cloud for the really “Big” Tasks
• Risk
• Limited Options from Providers
• Trust
• Control

LMS Moves to the Clouds
percentage reporting Cloud-based LMS, fall 2011 vs. 2012

LMS as the “toe in the Cloud” experience for higher education?
ERP Moves (Slowly) to the Cloud

Do Multi-Campus System Structures Foster Migration to the Cloud for ERP?
- Public 4-Yr Colleges
- Community Colleges

Research and HPC Move (Slowly) to the Cloud

Departmental vs. institutional strategies, initiatives, and deployment?
“Lecture Capture is an Important Part of Our Campus Plan for Developing & Delivering Instructional Content”

- Slight gains in the importance of Lecture Capture?
- Deployment remains low – about 6 pct., vds. 5 pct. in fall 2011
  - Range from 8.3 pct. in Pvt Univ to 4.5 pct. in Pvt Colleges

Lecture Capture and Podcasting

Rising Use of Lecture Capture
(percentage of classes by sector, 2008-2012)

Steady Gains in Podcasting
(percentage of classes by sector, 2007-2012)
The Future (Still!) Bodes Well for eBooks!

**eBook Content Will be an Important Source for Instructional Resources in Five Years**

<table>
<thead>
<tr>
<th>Public Universities</th>
<th>Private Universities</th>
<th>Public 4-Yr. Colleges</th>
<th>Private 4-Yr. Colleges</th>
<th>Community Colleges</th>
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**eBook Readers Will be an Important Platform for Instructional Content in Five Years**

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<tr>
<th>Public Universities</th>
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Encouraging the Use of the Creative Commons License for Digital Content

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<tr>
<th>All Institutions</th>
<th>Public Universities</th>
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<th>Public 4-Yr. Colleges</th>
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</tbody>
</table>

- **Survey question focuses on the faculty as producers of digital content**
- **Uncertain impact on the faculty prerogative to select course materials**
Much Ado About MOOCs?

- A bare majority of CIOs see MOOCs as a viable model for online instruction.
- More than two-thirds of CIOs are uncertain about the revenue model.

Institutional Use of Social Media

- Campus Presence on Facebook (percentages, 2009 vs. 2012)
- Campus Presence on Twitter (percentages, 2009 vs. 2012)
Institutional Use of Other Media

Managing and Monitoring Social Media

- Wide range of institutional policies on and monitoring activities across sectors.
A Profile of the LMS Market, Fall 2012

Does your campus have a single [campus-wide] LMS?
(percentages, all institutions)

- **Blackboard** (including Angel & WebCT) 45%
- **Desire2Learn** 11%
- **Moodle** 20%
- **Sakai** 7%
- **Other** 6%
- **No LMS** 7%

- Topping off on LMS use? 58 pct. of classes using the LMS in 2012, little changed from 2011 but up from 17 pct. in 2000.
- Blackboard share down from 57 pct. in 2010, 71 pct. in 2006.

Institutional Demography of LMS Providers, 2012

<table>
<thead>
<tr>
<th>LMS Provider</th>
<th>All</th>
<th>Pub Univ</th>
<th>Pvt Univ</th>
<th>Pub 4-Yr</th>
<th>Pvt 4-Yr</th>
<th>Comm Coll</th>
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<td>62.8</td>
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<td>6.9</td>
<td>2.3</td>
<td>19.4</td>
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<td>eCollege</td>
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<td>1.4</td>
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<td>0.9</td>
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<tr>
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<td>Jenzabar</td>
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<tr>
<td>Sakai</td>
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<td>9.7</td>
<td>11.6</td>
<td>6.5</td>
<td>6.8</td>
<td>0.8</td>
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</table>

- Market presence often varies by sector
- Two-thirds of campuses report plans to review the current LMS strategy for budget or other reasons
“Mobile Apps are an Important Part of Our Campus Plan to Enhance Instr. Resources & Campus Services”

- Small but steady gains in percentage of campuses that view lecture capture as a key instructional resource.

Activating Mobile Apps, Fall 2010-2012

- Big gains (again) over the past 12 months
- Impact of student expectations and consumer market experience
- More (LMS & ERP) mobile app & service providers means a wide range of costs for deployment
Some Key IT Issues

- CIOs estimate that about one-fifth of courses use anti-plagiarism software to check student papers.
Mixed Rating on the Effectiveness of Campus IT Investments

- Very mixed assessments from presidents, provosts, and IT officers about the effectiveness of IT investments
- Unrealistic expectations about the impact on instruction and operations?
- Over-promised and under-delivered?
- “A failure to communicate?”

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
Where Are The Clouds?

- Why the delay?
- Low, but slowly rising levels of deployment for core ERP and research services.
- Trust is the “coin of the realm”
- LMS: “a toe in the clouds”
# The 2012 Campus Computing Report

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<th>5-user PDF Copy @ $75.00</th>
<th>PDF Site License @ $150.00</th>
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