CAMPUS COMPUTING, 2013
The 24th National Survey of Computing and Information Technology in US Higher Education

Kenneth C. Green
THE CAMPUS COMPUTING PROJECT
campuscomputing.net

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Methodology

- 451 institutional participants
- Web-based data collection
- Survey period: Sept 6 – Oct 9
- 80% of the 2013 participating campuses also participated in the 2012 survey
## 2013 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>68</td>
<td>40%</td>
</tr>
<tr>
<td>Private Research &amp; Doctoral Universities</td>
<td>92</td>
<td>39</td>
<td>42%</td>
</tr>
<tr>
<td>Public 4-Year Colleges</td>
<td>374</td>
<td>88</td>
<td>24%</td>
</tr>
<tr>
<td>(Baccalaureate &amp; Masters)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private 4-Year Colleges</td>
<td>824</td>
<td>162</td>
<td>20%</td>
</tr>
<tr>
<td>(Baccalaureate &amp; Masters)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Associate Degree/</td>
<td>1018</td>
<td>94</td>
<td>9%</td>
</tr>
<tr>
<td>Public Community Colleges</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2013 Highlights

- Top IT priorities focus on instruction, advancing the campus completion agenda & supporting mobile.
- Tablets and smart phones surpass laptops as important in IT planning.
- Big gains (again) in the deployment of mobile apps.
- Budget cuts continue to decline, but public campuses remain more at risk than private/non-profits.
- Mixed assessments from CIOs about the effectiveness of campus IT investments.
- Slow transition to the Clouds continues.
- Data document the rising role of video.
- Transitions continue in the LMS market.
Top Institutional IT Priorities Over the Next Two-Three Years, Fall 2013

- Assisting faculty integrate IT into instruction
- Hiring/retaining qualified IT staff
- Providing adequate user support
- Leveraging IT for student success
- Mobile computing
- Online education
- IT security
- Financing replacement of aging IT
- Professional development for IT staff
- Learning & managerial analytics
- Upgrading the campus network
- Supporting BYOD
- Migrating to the Cloud
- Shared services / IT collaboration
- ERP upgrade/preplacement
- Leveraging social media

Pct. reporting very effective (6/7)
scale: 1=not effective; 7=very effective

Top IT priorities focus on SERVICES:
Instructional integration, user support, mobile, online ed, student success
Top Institutional IT Priorities Over the Next Two-Three Years, Fall 2013

(scale score 1=not important; 7=very important; percentage for 6/7)

<table>
<thead>
<tr>
<th>Priority</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assisting faculty integrate technology into instruction</td>
<td>79</td>
<td>74</td>
</tr>
<tr>
<td>Hiring / retaining qualified IT staff</td>
<td>73</td>
<td>69</td>
</tr>
<tr>
<td>Providing adequate user support</td>
<td>72</td>
<td></td>
</tr>
<tr>
<td>Leveraging IT resources and services to advance the student success /</td>
<td></td>
<td></td>
</tr>
<tr>
<td>student completion priorities of my institution</td>
<td>72</td>
<td></td>
</tr>
<tr>
<td>Implementing / supporting mobile computing</td>
<td>67</td>
<td>61</td>
</tr>
<tr>
<td>Providing online / distance education</td>
<td>64</td>
<td>61</td>
</tr>
<tr>
<td>Upgrading / enhancing network and data security</td>
<td>63</td>
<td>54</td>
</tr>
<tr>
<td>Financing the replacement of aging hardware and software</td>
<td>52</td>
<td>50</td>
</tr>
<tr>
<td>Professional development for IT personnel</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Data analysis / learning and managerial analytics</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>Upgrading / replacing the campus network</td>
<td>48</td>
<td>42</td>
</tr>
<tr>
<td>Supporting / managing BYOD</td>
<td>47</td>
<td></td>
</tr>
<tr>
<td>Migrating to Cloud computing</td>
<td>39</td>
<td>33</td>
</tr>
<tr>
<td>Shared services / IT collaboration with other institutions</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>Upgrading / replacing administrative IT / ERP systems</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Using / leveraging social media as a resource for instruction</td>
<td>17</td>
<td></td>
</tr>
</tbody>
</table>

Top priorities focus on instructional integration, user support, and IT staffing.
# Top Institutional IT Priorities by Sector, Fall 2013

<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 (79%)</td>
<td>TIE: Instructional Integration &amp; Online Ed on the Web (79%)</td>
<td>Assisting Faculty Integrate IT into Instruction (84%)</td>
<td>Instructional Integration &amp; Leveraging IT for Student Success (82%)</td>
<td>Assisting Faculty Integrate IT into Instruction (78%)</td>
<td>Leveraging IT for Student Success (80%)</td>
</tr>
<tr>
<td>Hiring/ Retaining Qualified IT Staff (73%)</td>
<td>Hiring/ Retaining Qualified IT Staff (tie: 72%)</td>
<td>Hiring/ Retaining Qualified IT Staff (74%)</td>
<td>Hiring/ Retaining Qualified IT Staff (79%)</td>
<td>Hiring IT Staff &amp; Adequate User Support (69%)</td>
<td>Providing Online Ed on the Web (76%)</td>
</tr>
<tr>
<td>Providing Adequate User Support &amp; Mobile Computing (72%)</td>
<td>TIE: User Support &amp; Mobile Computing (72%)</td>
<td>TIE: User Support &amp; Mobile Computing (72%)</td>
<td>Providing Adequate User Support (76%)</td>
<td>Supporting Mobile Computing (67%)</td>
<td>Assisting Faculty Integrate IT into Instruction (75%)</td>
</tr>
</tbody>
</table>
## Top Institutional IT Priorities, 2013

<table>
<thead>
<tr>
<th>#</th>
<th>Campus Computing Survey (pct. reporting “very important”)</th>
<th>EDUCAUSE “Top 10 IT Issues” (panel assessment)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Assisting faculty integrate technology into instruction (74%)</td>
<td>Leveraging the wireless and device explosion on campus</td>
</tr>
<tr>
<td>2</td>
<td>Hiring / retaining qualified IT staff (73%)</td>
<td>Improving student outcomes by leveraging technology</td>
</tr>
<tr>
<td>3</td>
<td>Providing adequate user support (73%)</td>
<td>Developing a campus-wide cloud strategy</td>
</tr>
<tr>
<td>4</td>
<td>Leveraging IT resources to advance student success / student completion priorities (72%)</td>
<td>Developing an agile and open IT organizational model to accommodate a changing IT environment</td>
</tr>
<tr>
<td>5</td>
<td>Implementing/supporting mobile computing (67%)</td>
<td>IT security: the balance between infrastructure openness and security</td>
</tr>
<tr>
<td>6</td>
<td>Providing Online Education (64%)</td>
<td>Funding IT strategically</td>
</tr>
<tr>
<td>7</td>
<td>Network and Data Security (64%)</td>
<td>Developing a sustainable strategy for online ed</td>
</tr>
<tr>
<td>8</td>
<td>Financing the replacement of aging IT (52%)</td>
<td>Supporting the trend towards consumerization and BOYD</td>
</tr>
<tr>
<td>9</td>
<td>TIE: Professional development for IT personnel &amp; Learning/Managerial Analytics (50%)</td>
<td>Transforming the institution’s business with IT</td>
</tr>
<tr>
<td>10</td>
<td>Upgrading the campus network (48%)</td>
<td>Using analytics to support critical outcomes</td>
</tr>
</tbody>
</table>
### Rating the IT Infrastructure, Fall 2013

<table>
<thead>
<tr>
<th>Category</th>
<th>2012 Mean</th>
<th>2013 Mean</th>
<th>2012 Rank</th>
<th>2013 Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer networks and data communication</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online reference resources the library</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multimedia / AV enabled classrooms</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User support services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wireless networks</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency communications / notification</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enterprise systems</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telecommunications and phone system</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall assessment of IT security (network, “hardware,” and content)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructional computing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Web resources to support instruction</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cellular coverage across the campus</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Campus web site services / student portal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IT training for faculty</td>
<td>4.7</td>
<td>5.0</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Disaster planning</td>
<td>3.8</td>
<td>4.0</td>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>Data warehousing</td>
<td>4.0</td>
<td>4.0</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>IT training for students</td>
<td>3.7</td>
<td>3.9</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Research computing</td>
<td>4.2</td>
<td>4.3</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Mobile apps / services for students, faculty &amp;...</td>
<td>3.7</td>
<td>3.8</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Digital dashboards / ERP analytics</td>
<td>3.4</td>
<td>3.5</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>

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- **Highest rankings for the network, “hardware,” and content**
- **Lower rankings for services**
- **Would faculty and students agree with the ranking for user support services?**
IT Planning & Policy Issues
Tablets & Smartphones Over Laptops!

How important are these issues for campus IT planning and policy over the next 2-3 years
pct. reporting “very important” (6/7) scale: 1=not important; 7=very important

“Skating to where the digital puck” is going:

- A clear message that “new platforms” are more important in IT planning than old hardware.
IT Planning & Policy Issues

Other Top IT Planning Issues

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

- Planning priorities include a mix of security, technology, and service issues.
Rating the Effectiveness of Campus IT Investments, 2012

pct. reporting “very effective (6/7); scale: 1=not effective; 7=very effective

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

Sources: Green, Presidential Perspectives Survey, INSIDE HIGHER ED, March 2011
Green, CAO Survey, INSIDE HIGHER ED, Jan 2012
Green, Campus Computing 2012, Nov, 2012
CIOs Rate the Effectiveness of Campus Investments in Information Technology, 2012

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- Very mixed assessments about the effectiveness of campus IT investments

Bar chart showing the percentage of CIOs rating various campus investments as very effective (6/7) on a scale of 1 (not effective) to 7 (very effective):

- Admin info systems & operations: <50%
- Library resources and services: <50%
- On-campus teaching & instruction: 31-50%
- Student services: 31-50%
- Academic support services: 31-50%
- Online ed courses & programs: 31-50%
- Student recruitment: <30%
- Development efforts: <30%
- Alumni activities / engagement: <30%
- Research and scholarship: <30%
- Data analysis & managerial analytics: <30%

scale: 1=not effective; 7=very effective
CIOs Rate the Effectiveness of Campus Investments in Information Technology, 2012 vs. 2013

- Modest gains in 2013 survey
- Core message remains the same as last year: IT is doing ok, but not great.

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Budget Cuts, 2006-2013

percentage of institutions reporting budget reductions for central IT services over prior year funding, 2006-2013

- THE GOOD NEWS: declines in budget cuts continue
- Still experiencing the compounding consequences of continuing budget cuts
- Privates fare better than publics
- One-sixth (16%) experienced additional mid-year cuts, averaging 9%
Budget Cuts vs. Budget Gains, Fall 2013

- Investing in security, cloud, mobility & analytics
- Reduced spending in public labs and for replacement hardware
- Student lab replacement cycle now 3-4 years (77%) vs. 2-3 years (55%) in 2008
### ERP Expenditures

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

<table>
<thead>
<tr>
<th>means by sector, fall 2013</th>
<th>All</th>
<th>Universities</th>
<th>4-Yr. Colleges</th>
<th>Community</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Institutions</td>
<td>Public</td>
<td>Private</td>
<td>Public</td>
</tr>
<tr>
<td>Alumni / Advancement / Development</td>
<td>$46,298</td>
<td>$81,451</td>
<td>$140,328</td>
<td>$29,157</td>
</tr>
<tr>
<td>Business Intelligence / Data Analytics</td>
<td>53,128</td>
<td>121,986</td>
<td>71,404</td>
<td>49,969</td>
</tr>
<tr>
<td>CRM</td>
<td>53,645</td>
<td>117,082</td>
<td>106,702</td>
<td>39,846</td>
</tr>
<tr>
<td>Finance / Accounting</td>
<td>165,289</td>
<td>403,416</td>
<td>508,036</td>
<td>184,653</td>
</tr>
<tr>
<td>Student Information System</td>
<td>196,131</td>
<td>484,404</td>
<td>216,192</td>
<td>172,786</td>
</tr>
<tr>
<td>Human Resources: Recruitment</td>
<td>35,266</td>
<td>84,848</td>
<td>36,220</td>
<td>43,156</td>
</tr>
<tr>
<td>Human Resources: Records &amp; Payroll</td>
<td>90,787</td>
<td>273,702</td>
<td>211,140</td>
<td>49,487</td>
</tr>
<tr>
<td>Grants and Research Management</td>
<td>28,638</td>
<td>64,949</td>
<td>85,840</td>
<td>13,130</td>
</tr>
<tr>
<td>Learning Management Systems</td>
<td>131,000</td>
<td>270,866</td>
<td>239,935</td>
<td>111,882</td>
</tr>
<tr>
<td>Lecture Capture &amp; Video Management</td>
<td>35,047</td>
<td>74,270</td>
<td>47,749</td>
<td>29,115</td>
</tr>
<tr>
<td>Library System Management</td>
<td>60,086</td>
<td>128,432</td>
<td>95,674</td>
<td>59,663</td>
</tr>
<tr>
<td>ePortfolio Services</td>
<td>15,598</td>
<td>20,067</td>
<td>66,071</td>
<td>12,753</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%)
Organizational structures for many IT units are in transition.

- 36 percent 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 percent expect to restructure academic computing the next two years.

Little change in these numbers in recent years.

- Public 4-yr. colleges and universities were more likely to have an IT re-org than privates in the past 2 years.
- Universities are more likely to anticipate a re-org in the next 2 years.
IT Security

IT Security Incidents, A/Y 2006 – 2013

- Device theft rising (computer, phone, USB drive)
- Other issues "stable"
Student Security Incident Linked to a Social Networking Site

percentages by sector, 2006-2012

Social networks continue to present campus security challenges
IT Security

Intentional Employee Misconduct Affecting IT Security

percentages by sector, 2007-2013

- Employee misconduct reflects rising stress levels among IT staff
The IT Security Concerns of CIOs, Fall 2013

- The theft or loss of a device and network attack are the top security concerns.
- “Independent servers” are the “petulant adolescents” of campus IT security.

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Updating Campus IT Security & Disaster Plans, 2013

Last Update for IT Security

- 23 pct. DO NOT have a strategic plan for network and data security
- 33 pct. DO NOT have a strategic plan for IT disaster recovery (vs. 39% in 2012)

Last Update for IT Disaster Recovery

percentages, fall 2013

- past 13-24 months
- past 12 months
Much Ado About MOOCs?

percentages who agree/strongly agree, fall 2013

<table>
<thead>
<tr>
<th>Institution Type</th>
<th>Offer a viable model for the effective delivery of online instruction</th>
<th>Offer a viable business model for campuses to realize new revenues</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Institutions</td>
<td>55%</td>
<td>38%</td>
</tr>
<tr>
<td>Public Universities</td>
<td>55%</td>
<td>38%</td>
</tr>
<tr>
<td>Private Universities</td>
<td>55%</td>
<td>38%</td>
</tr>
<tr>
<td>Public 4-Yr. Colleges</td>
<td>55%</td>
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<td>55%</td>
<td>38%</td>
</tr>
<tr>
<td>Community Colleges</td>
<td>55%</td>
<td>38%</td>
</tr>
</tbody>
</table>

- A bare majority of CIOs see MOOCs as viable model for online instruction
- More than two-thirds of CIOs are uncertain about the revenue mode
- Incremental gains over 2012
Are perspectives on MOOCs informed by real experience with outsourcing?

- Outsourcing some online ed services is well underway
- Outsourcing viewed as more effective for instruction than for profits.
- CIOs in private universities more supportive of outsourcing instructional services than their peers.
To provide or not to provide

Campus IT Services

percentages, 2013

• Do we offer IT services that we could reduce or cut?
To provide or not to provide

Campus IT Services

percentages, 2013

Currently Provide  Should Provide

- Few CIOs are prepared to reduce IT services many say they would like to cut.
To provide or not to provide

Campus IT Services

percentages, 2013

- Few CIOs are prepared to reduce IT services many say they would like to cut.

Currently Provide

Should Provide

Do & Should Provide

- Faculty/staff email
- Printing for Students
- Student Email
- Public Computing Labs
- Evening/weekend help desk
- Video Lecture Capture
- Audio Lecture Capture
- Student ePortfolio
- Faculty ePortfolio
- Computer Resale

Currently Provide: 100%
Should Provide: 100%
Do & Should Provide: 100%

- Faculty/staff email
- Printing for Students
- Student Email
- Public Computing Labs
- Evening/weekend help desk
- Video Lecture Capture
- Audio Lecture Capture
- Student ePortfolio
- Faculty ePortfolio
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Currently Provide: 100%
Should Provide: 100%
Do & Should Provide: 100%

- Faculty/staff email
- Printing for Students
- Student Email
- Public Computing Labs
- Evening/weekend help desk
- Video Lecture Capture
- Audio Lecture Capture
- Student ePortfolio
- Faculty ePortfolio
- Computer Resale

Currently Provide: 100%
Should Provide: 100%
Do & Should Provide: 100%
Most CIOs believe that their campuses should offer ePortfolio services, even as many colleges do not.

Source: Kenneth C. Green, The 2013 Campus Computing Survey
Let’s Talk About Clouds
Where are the Clouds?

High Clouds
ERP & HPC

Middle Clouds
Calendar, CRM & LMS

Low Clouds
mail & calendar

Just over a fourth of campuses (27%) have a strategic plan for Cloud Computing, up from:

- 24% in 2012,
- 21% in 2011,
- 15% in 2010 and
- 9% in 2009.
Affirming the Strategic Importance of Cloud Computing

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

![Chart showing percentage who agree/strongly agree on strategic importance of cloud computing in different sectors.](chart.png)

Source: Kenneth C. Green, The 2012 Campus Computing Survey
Still little movement to the Cloud for the really big, high-value tasks:

- Risk
- Limited Options from Providers
- Trust
- Control

Source: Kenneth C. Green, *The 2012 Campus Computing Survey*
The Cloud

eMail and “Office” Applications

- Student email is now “deep” in the Cloud, courtesy of Google and Microsoft
- Less willing to move faculty & adm. email to Cloud services
- Slow campus movement to Cloud Apps – Google Docs and Microsoft 365
- Small but noticeable gains compared to fall 2012

Student Email
Faculty Email
Office Apps
2012

Percentage now using/converting to as of fall 2013

Bar chart showing usage of email and office applications across different categories of institutions.
LMS Moves to the Clouds

percentage reporting Cloud-based LMS, fall 2011 - 2013

2011 2012 2013

LMS as the “toe in the Cloud” experience for higher education?

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ERP Moves (Slowly) to the Cloud

Do gains in 2013 reflect the rising role of Cloud apps for HR services?

Do multi-campus system structures foster faster migration to the Cloud for ERP?

- Public 4-Yr Colleges
- Community Colleges

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Research and HPC Move (Slowly) to the Cloud

percentage reporting Cloud-based research & HPC, fall 2011 - 2013

Varying departmental vs. institutional strategies, initiatives, and deployment?
No Mass Movement to the Cloud by 2018

High likelihood of my campus moving to a Cloud/SaaS Solution in Five Years
(scale: 1=not likely; 7=very likely; pct.. for 6/7)

Some gains in 2013, but most CIOs don’t see “high cloud” applications coming soon to their campuses

Explanations?

- Absence of provider offerings
- Can’t visualize moving to Cloud
- Want to retain command, control & computing
- Let others make the journey first
“Lecture Capture is an Important Part of Our Campus Plan for Developing & Delivering Instructional Content”

- Slight gains in the importance of Lecture Capture.
- Growing role of video in lecture capture.
Percentages understate real numbers as much of the activity is in large, lower-division undergraduate classes.

Video increasingly important for hybrid, flipped, and online courses.
The Future (Still!) Bodes Well for eBooks!

eBook Content Will be an Important Source for Instructional Resources in Five Years (pct. who agree/strongly agree, 2009 - 2013)

- Students remain less enthusiastic than publishers.
- Still waiting for eTexts to deliver on added-value AND lower cost.

We’re still waiting for that future to arrive!
Encouraging the Use of the Creative Commons License for Digital Content

Producers vs. users

- Survey question focuses on the faculty as producers of digital content.
- Uncertain impact on the faculty prerogative to select course materials.

Bar chart showing percentages of producers and users across different types of institutions from fall 2011 to 2013.
Institutional Use of Social Media

**Campus Presence on Facebook**
(percentages, 2009 vs. 2013)

- Public Univ.
- Private Univ.
- Public 4-Yr.
- Private 4-Yr.
- Comm. Colleges

**Campus Presence on Twitter**
(Percentages, 2009 vs. 2013)

- Public Univ.
- Private Univ.
- Public 4-Yr.
- Private 4-Yr.
- Comm. Colleges

- Facebook: Incremental Gains
- Twitter: +10% for Pvt Univ and Pub 4-Yr.
Institutional Use of Other Media

Campus Presence on YouTube
(percentages, 2009 vs. 2013)

- Public Universities & Comm Colleges: +10%

Campus Presence on iTunesU
(percentages, 2009 vs. 2013)

- Public Universities & Comm Colleges: +10%
Managing and Monitoring Social Media

percentages, fall 2013

- Wide range of institutional policies on and practices on monitoring institutional social media activities.

Individual units operate with autonomy
Central monitoring but no campus policies
Campus policies and central monitoring

Public Universities
Private Universities
Public 4-Yr. Colleges
Private 4-Yr. Colleges
Community Colleges
A Profile of the LMS Market, Fall 2013

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

- **Blackboard (including Angel & WebCT)**: 41%
- **Moodle**: 23%
- **Desire2Learn**: 11%
- **Instructure**: 8%
- **Jenzabar**: 2%
- **eCollege**: 1%
- **Other**: 2%
- **No Std LMS**: 4%
- **Topping off on LMS use?** 62 pct. of classes using the LMS in 2013, compared to 58 pct. 2011 but way up from 17 pct. in 2000.
- **Blackboard share down from 57 pct. in 2010, 71 pct. in 2006.**
### Institutional Demography of LMS Providers, 2013

#### Percentage of Campuses Reporting a Campus-Standard LMS

<table>
<thead>
<tr>
<th>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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</thead>
<tbody>
<tr>
<td>Bb</td>
<td>41.6</td>
<td>51.5</td>
<td>56.4</td>
<td>39.8</td>
<td>35.4</td>
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<td>D2L</td>
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<td>13.2</td>
<td>2.6</td>
<td>21.6</td>
<td>1.9</td>
<td>22.8</td>
</tr>
<tr>
<td>eCollege</td>
<td>1.8</td>
<td>--</td>
<td>--</td>
<td>1.1</td>
<td>3.1</td>
<td>2.2</td>
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<tr>
<td>Instructure</td>
<td>8.0</td>
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<tr>
<td>Jenzabar</td>
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<td>--</td>
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<td>0.8</td>
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<tr>
<td>Moodle</td>
<td>23.3</td>
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<td>10.3</td>
<td>21.6</td>
<td>39.5</td>
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</tr>
<tr>
<td>Sakai</td>
<td>4.9</td>
<td>5.9</td>
<td>1.3</td>
<td>5.7</td>
<td>4.9</td>
<td>1.1</td>
</tr>
</tbody>
</table>

- **Market presence often varies by sector**
- **Two-thirds (64%) 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”

percentage who agree/strongly agree, fall 2010 - 2013

- Small but steady gains in percentage of campuses that view lecture capture as a key instructional resource.
Activating Mobile Apps, Fall 2010-2013

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

- 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 Issues
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?”

The Campus Computing Project
The Key Campus Technology Challenges are No Longer about IT

- **IT** is the “easy part” of technology on campus

- **THE CHALLENGES:** People, planning, policy, programs, priorities, silos, egos, and IT entitlements

- Provide much-needed support, recognition, and reward for faculty

- Address the rising level of digital demand in the midst of reduced financial resources for IT (and other key programs & services)

- Communicate about the effectiveness of and need for IT resources – to on- and off-campus audiences
The Context of the Campus IT Conversation

WHAT DO WE KNOW?

• The consumer experience now defines (rising) expectations about campus IT resources & services.
• There is rising pressure for higher education to provide the much promised productivity bang for all the IT bucks.

TWO KEY ISSUES

• Why don’t faculty do more with IT and eLearning?
• Why don’t colleges and universities make better use of IT for campus management?
plus ça change
How Do We Get Faculty to…

• 1986: Use computers
• 1996: Use the Internet
• 2012: Use Digital Resources

Changing (evolving!) questions but common underlying issues:
• Training
• User support
• Infrastructure
• Recognition & Reward
• Evidence of Benefit

Underlying Faculty Question
WHY SHOULD I DO THIS?
MOOC Madness?

THE GARTNER HYPE CYCLE FOR NEW TECHNOLOGIES

- Big numbers, big media coverage, big expectations
- Big dollars?
- Growing trustee and state interest in MOOCs as a way to grow revenue and/or reduce costs

The Gartner Group
What Do We Know About MOOCS?

Big numbers dominate much of the discussion, but:

- Open enrollment: no pre-reqs, no commitment & no “skin in the game”
- No course fees (no revenue!)
- Big enrollment drops in the first weeks: content, schedule, preparation, student support
- *Ad hoc* student support infrastructure
- Cost accounting for course development and instructional support?

Mean completion rate, as reported by 103 MOOC instructors

March 2013 Chronicle of Higher Education
Survey of 103 MOOC Instructors
Steve Jobs set his sights on textbooks as the next industry he wanted to transform, seeing it as “an $8 billion a year industry that was ripe for digital destruction. . . . His idea was to hire great textbook writers to create digital versions and make them a feature on the iPad.” Walter Issacson, *Steve Jobs*

**Underlying Premise**

**CONTENT IS KING**

**IN THE REAL WORLD**

Content becomes King only because of an effective (almost idiot-proof) *infrastructure* and *ecosystem.*
Textbooks Are an Ecosystem

And the ecosystem has also become a fortress.

- No (or low) cost to faculty and institutions
- Convenience
- Quality Control
- User Support

**Backend Infrastructure**
- Authors
- Editors
- Content Designers
- Instructional Specialists
- Author Contracts
- Supplemental Content

**Alliances that Add Value**
- Content
- Distribution
- Cross-Licensing
- Tech Firms

**Supplement / Supplant Requirements**
- Accreditation
- Standards/Regs
- Curricular Sequences

**User Support**
- Sales Reps
- Teacher’s Guides
- Student Handbooks
- Test Sets
- Web Sites
- Conferences
- Communities
- Call Centers
Academe Does NOT Make Effective Use of Data for Decisions

My campus does an effective job of “using data to aid and inform campus-decision-making.”

Scale score: 6/7; scale: 1=not effective; 7=very effective

*Although senior campus officials say they want and value data, the majority do not believe that their institutions do a very effective job of using data for decision-making.*

Sources: Green, Presidential Perspectives Survey, INSIDE HIGHER ED, March 2012
Green, CAO Survey, INSIDE HIGHER ED, Jan 2012
Green, CFO Survey, INSIDE HIGHER ED, July, 2011
Which Campus Units Make the Best Use of Data?

- Admissions
- Alumni / Development
- Athletics
- Physical Plant
- Food Service

**WHY?**
- Clear outcomes
- Semi-autonomous
- Independent resources
- Short decision cycles
- Dependent on data

**Change the Culture of Data**
- **OLD:** What YOU did wrong!
- **NEW:** How do WE do better!

*DATA AS A RESOURCE, NOT A WEAPON!*
The Technology Conundrum

We have lots of information technology. We just have too little information.
The (Digital) Potemkin Campus

• Rising expectations for the role and availability of IT resources to support instruction and operations/mgmt.

• Infrastructure is critical to the effective use of IT.

• **INSTRUCTION:** On-campus and online, the instructional infrastructure is not keeping pace with the demand for resources and services.

• **OPERATIONS:** Higher ed is years behind efforts in the consumer market to leverage the value of data.