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

2013 Project Sponsors

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

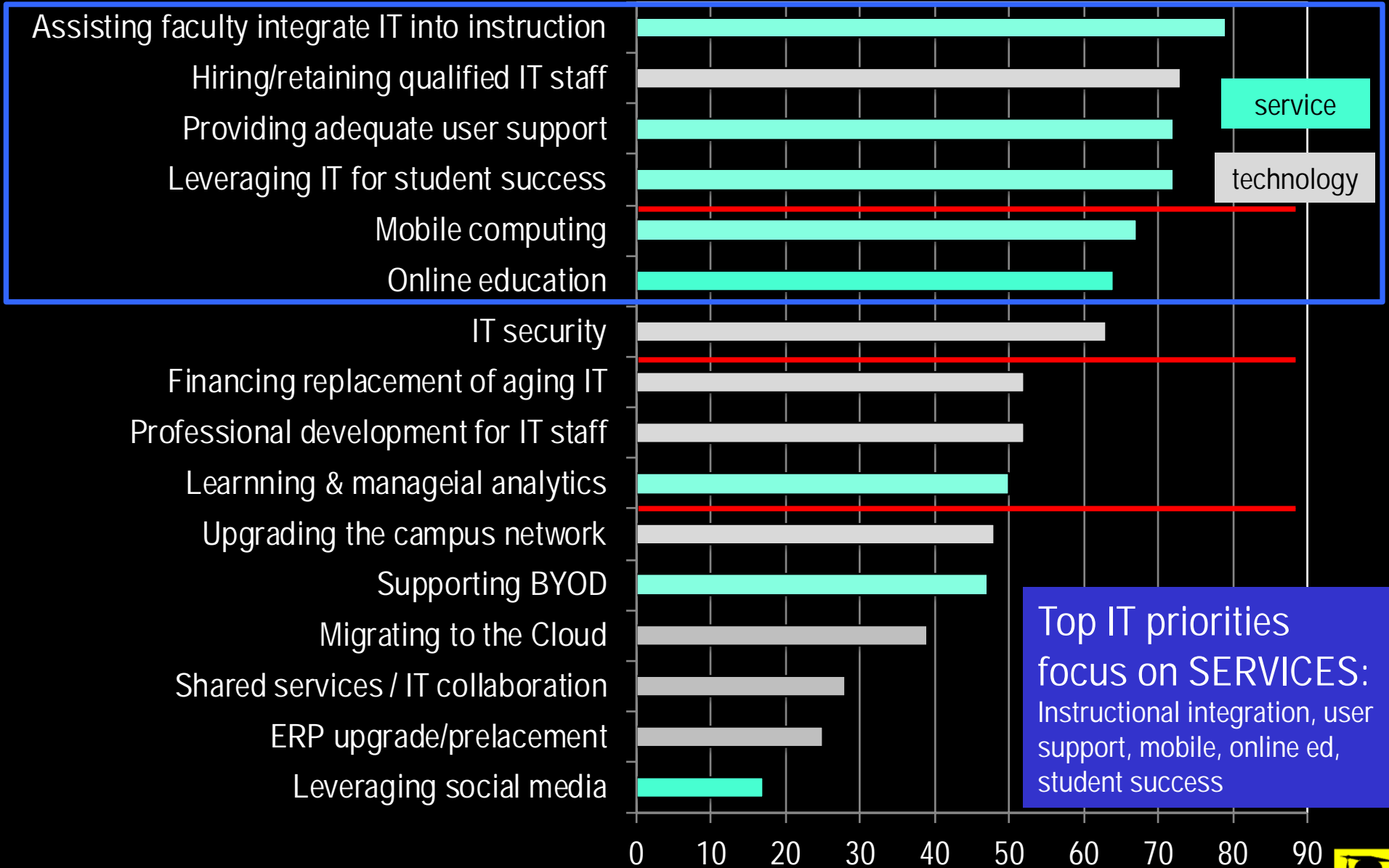| Category	Dept of Ed N (adjusted)	Survey N	Participation Rate (%.)
Public Research & Doctoral Universities	168	68	40%
Private Research & Doctoral Universities	92	39	42%
Public 4-Year Colleges (Baccalaureate & Masters)	374	88	24%
Private 4-Year Colleges (Baccalaureate & Masters)	824	162	20%
Associate Degree/ Public Community Colleges	1018	94	9%

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

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

service

technology

Priority	
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	
Learnning & mangeial analytics	
Upgrading the campus network	
Supporting BYOD	
Migrating to the Cloud	
Shared services / IT collaboration	
ERP upgrade/prelacement	
Leveraging social media	

0 10 20 30 40 50 60 70 80 90

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)

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

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

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Top Institutional IT Priorities by Sector, Fall 2013

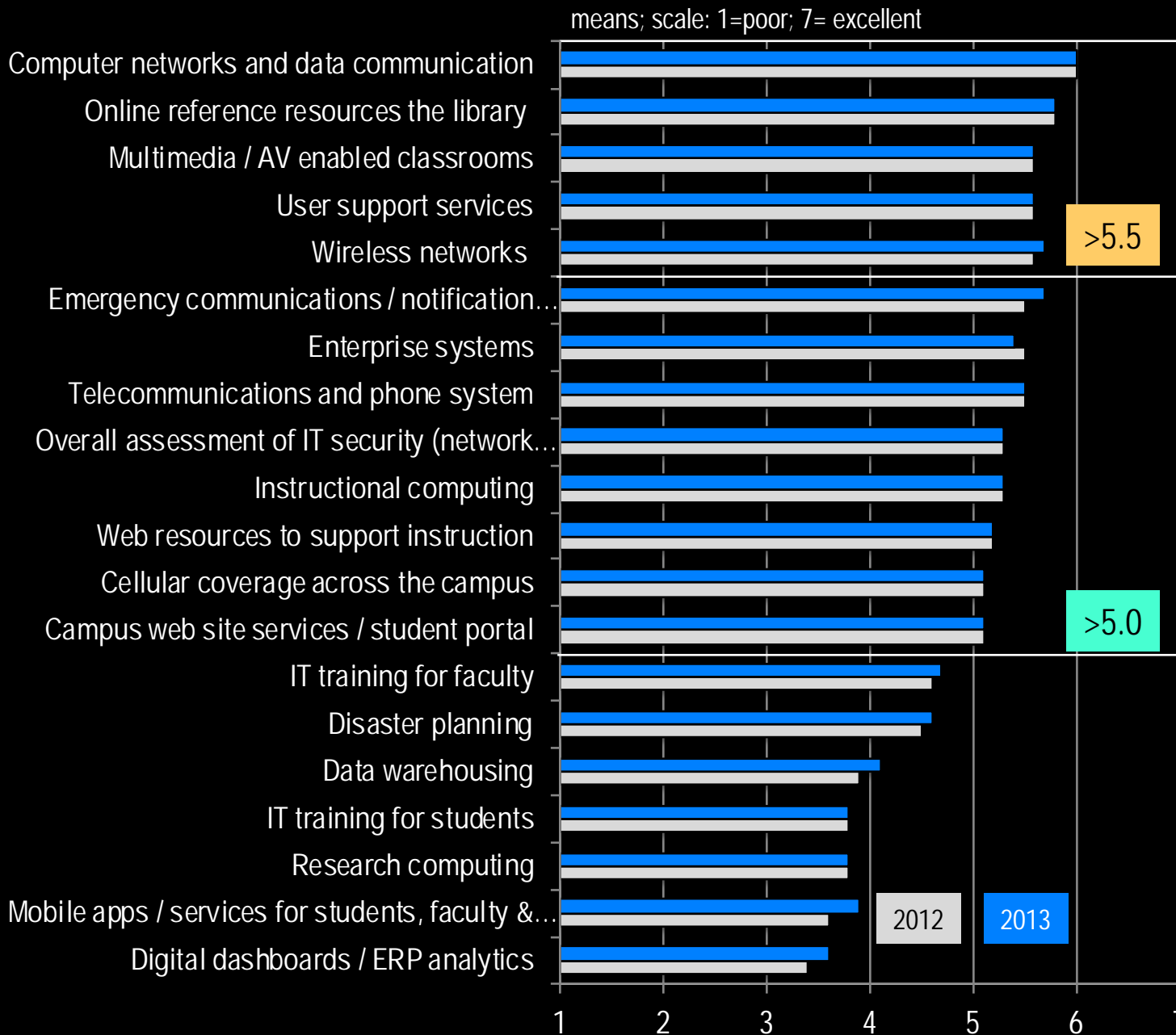| All Campuses	Public Universities	Private Universities	Public 4-Yr. Colleges	Private 4-Yr. Colleges	Community Colleges
Assisting Faculty Integrate IT into Instruction (79%)	TIE: Instructional Integration & Online Ed on the Web (79%)	Assisting Faculty Integrate IT into Instruction (84%)	Instructional Integration & Leveraging IT for Student Success (82%)	Assisting Faculty Integrate IT into Instruction (78%)	Leveraging IT for Student Success (80%)
Hiring/ Retaining Qualified IT Staff (73%)	Hiring/ Retaining Qualified IT Staff (tie: 72%)	Hiring/ Retaining Qualified IT Staff (74%)	Hiring/ Retaining Qualified IT Staff (79%)	Hiring IT Staff & Adequate User Support (69%)	Providing Online Ed on the Web (76%)
Providing Adequate User Support (72%)	TIE: User Support & Mobile Computing (72%)	TIE: User Support & Mobile Computing (72%)	Providing Adequate User Support (76%)	Supporting Mobile Computing (67%)	Assisting Faculty Integrate IT into Instruction (75%)

Top Institutional IT Priorities, 2013

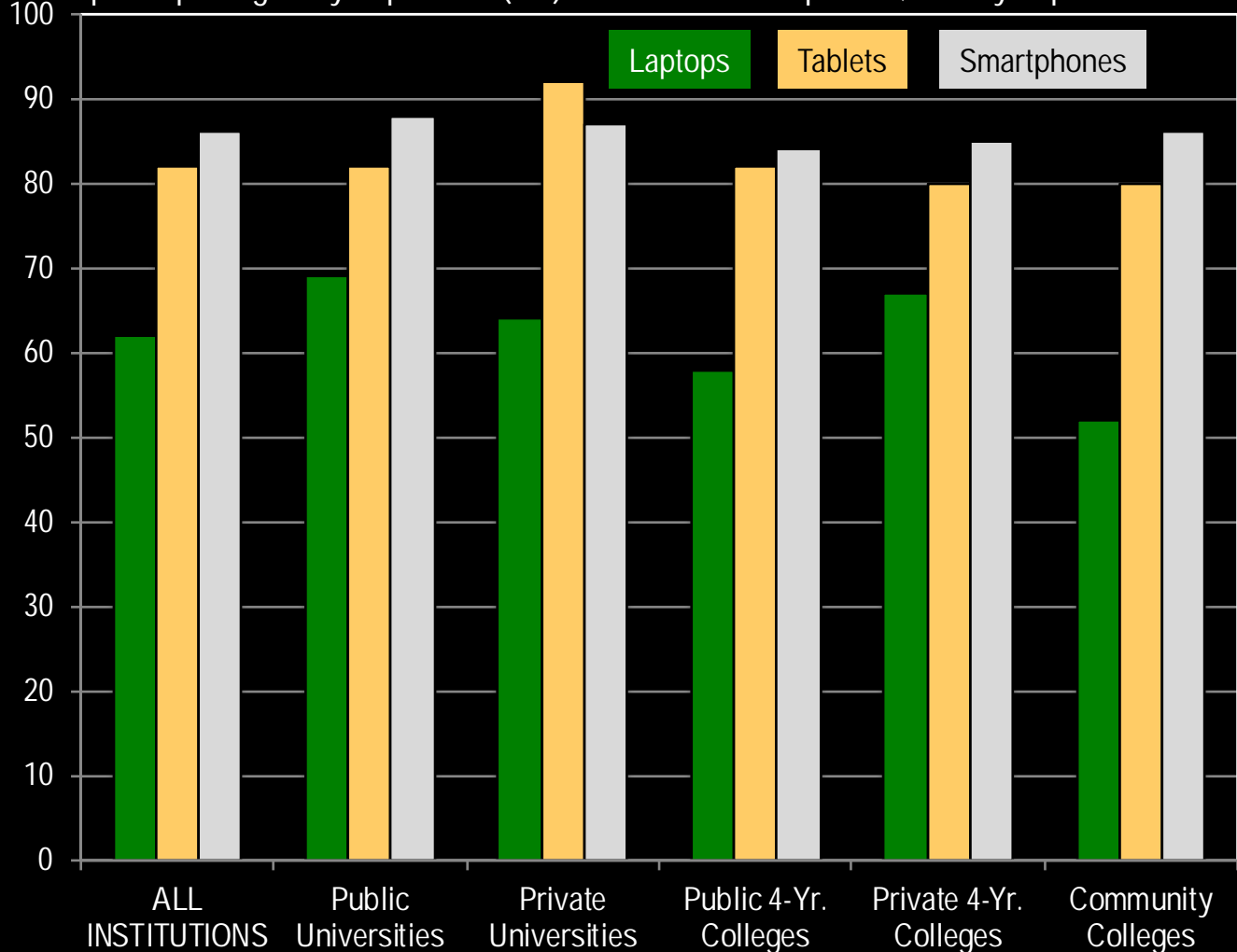|	Campus Computing Survey (pct.. reporting "very important")	EDUCAUSE "Top 10 IT Issues" (panel assessment)
1	Assisting faculty integrate technology into instruction (74%)	Leveraging the wireless and device explosion on campus
2	Hiring / retaining qualified IT staff (73%)	Improving student outcomes by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

Rating the IT Infrastructure, Fall 2013

means; scale: 1=poor; 7= excellent

Category	Rating
Computer networks and data communication	
Online reference resources the library	
Multimedia / AV enabled classrooms	
User support services	
Wireless networks	>5.5
Emergency communications / notification...	
Enterprise systems	
Telecommunications and phone system	
Overall assessment of IT security (network...	
Instructional computing	
Web resources to support instruction	
Cellular coverage across the campus	
Campus web site services / student portal	>5.0
IT training for faculty	
Disaster planning	
Data warehousing	
IT training for students	
Research computing	
Mobile apps / services for students, faculty &...	2012 2013
Digital dashboards / ERP analytics	

Scale: 1 2 3 4 5 6 7

- **Highest rankings for the network, "hardware," and content**

- **Lower rankings for services**

- **Would faculty and students agree with the ranking for user support services?**

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Rating the Effectiveness of Campus IT Investments, 2012

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

Legend: Presidents (cyan) | Provosts (white) | CIOs (orange)

Y-axis: 0, 10, 20, 30, 40, 50, 60, 70
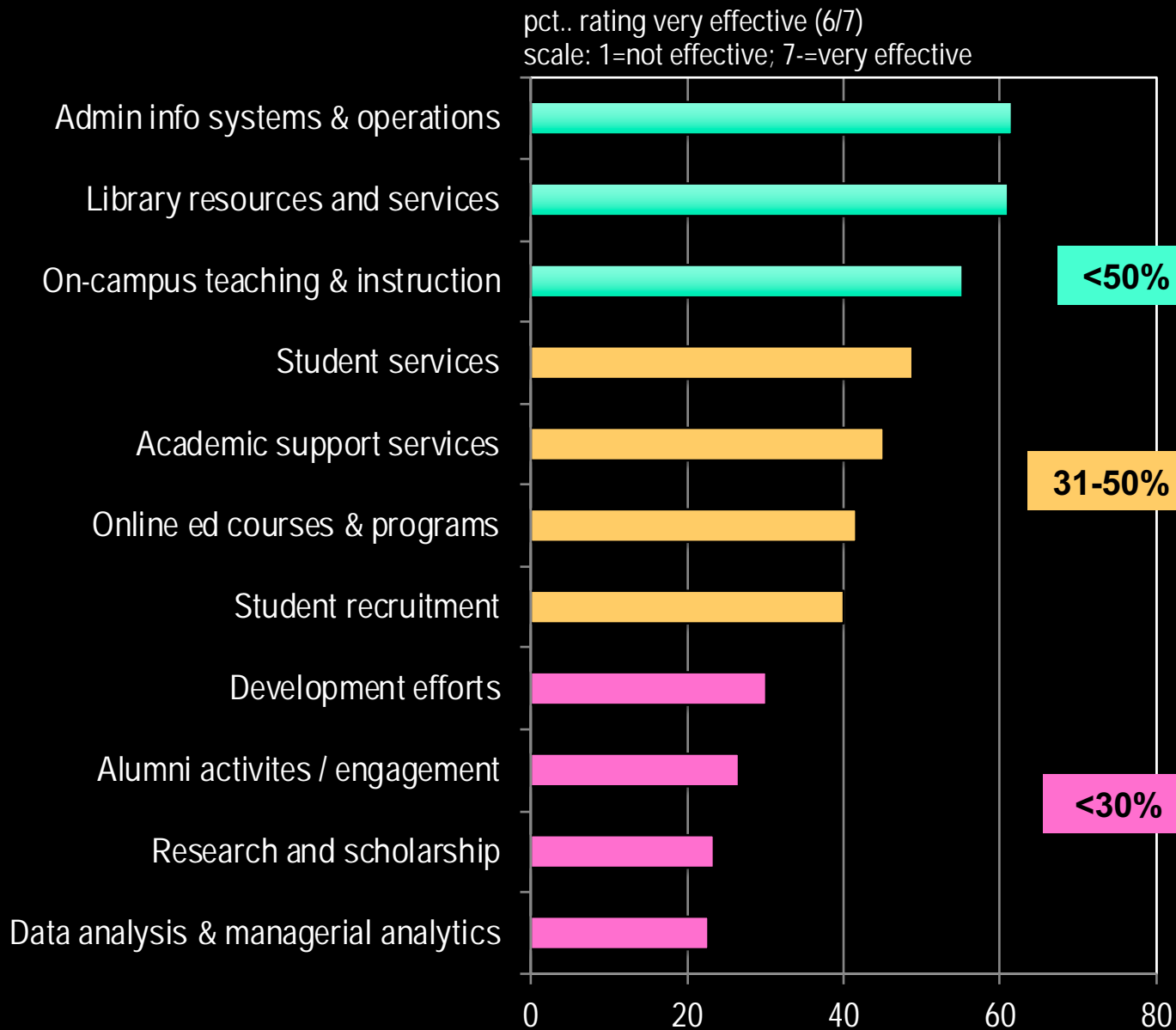
Categories (X-axis): On-Campus Instruction | ERP / Admin Info Systems | Analytics

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

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CIOs Rate the Effectiveness of Campus Investments in Information Technology, 2012

pct.. rating very effective (6/7)
scale: 1=not effective; 7-=very effective

Category	Value (approx)
Admin info systems & operations	61
Library resources and services	61
On-campus teaching & instruction	55
Student services	48
Academic support services	45
Online ed courses & programs	42
Student recruitment	40
Development efforts	30
Alumni activites / engagement	26
Research and scholarship	23
Data analysis & managerial analytics	22

<50%

31-50%

<30%

- Very mixed assessments about the effectiveness of campus IT investments

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CIOs Rate the Effectiveness of Campus Investments in Information Technology, 2012 vs. 2013

pct.. rating very effective

Admin info systems & operations

Library resources and services

On-campus teaching & instruction

Student services

Academic support services

Online ed courses & programs

Student recruitment

Development efforts

Alumni activites / engagement

Research and scholarship

Data analysis & managerial analytics

2013

<50%

31-50%

<30%

0   20   40   60   80

- Modest gains in 2013 survey

- *Core message remains the same as last year:* IT is doing ok, but not great.

Budget Cuts, 2006-2013

percentage of institutions reporting budget reductions for central IT services over prior year funding, 2006-2013
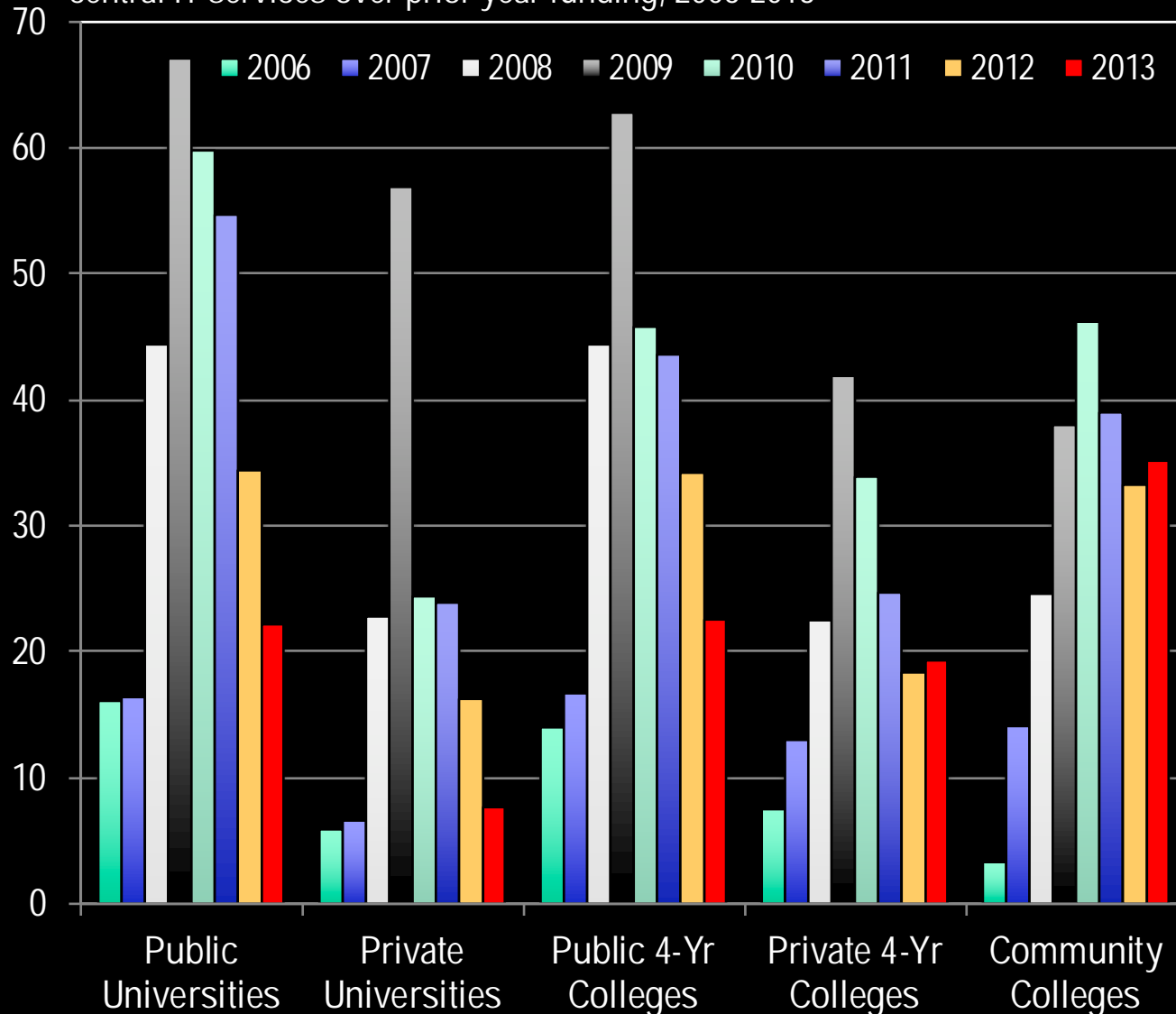
- *THE GOOD NEWS:* declines in budget cuts continue

- Still experiencing the compounding consequences of continuing budget cuts

- Privates fare better than publics

- One-sixth (16%) experienced additional mid-year cuts, averaging 9%

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Budget Cuts vs. Budget Gains, Fall 2013

percentage of institutions reporting budget increases or cuts, by budget line fall, 2013

Legend: Budget Increase | Budget Cut

Categories (x-axis): Central IT Budget, Wireless Services, ERP Software & Services, Cloud Computing, IT Security, Mobile Services, Business Analytics

Y-axis: -30 to 60
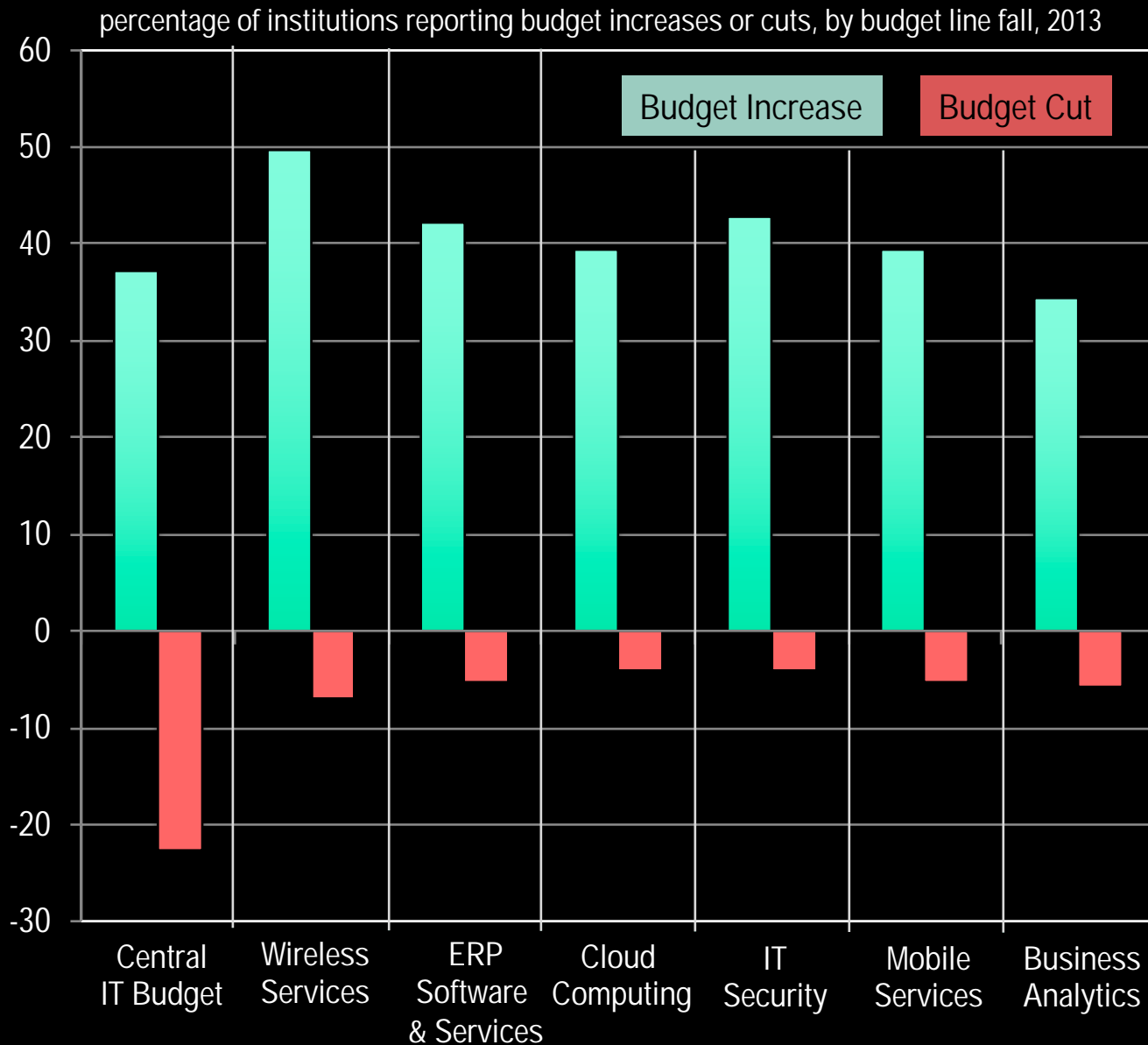
- Investing in security, cloud, mobility & analytics

- 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)

means by sector, fall 2013	All Institutions	Universities		4-Yr. Colleges		Community Colleges
		Public	Private	Public	Private	
Alumni / Advancement / Development	$ 46,298	$ 81,451	$140,328	$ 29,157	$ 34,277	$ 21,436
Business Intelligence / Data Analytics	53,128	121,986	71,404	49,969	22,466	39,932
CRM	53,645	117,082	106,702	39,846	46,534	21,429
Finance / Accounting	165,289	403,416	508,036	184,853	42,853	63,524
Student Information System	196,131	484,404	216,192	172,786	102,942	163,845
Human Resources: Recruitment	35,266	84,848	36,220	43,156	18,738	25,847
Human Resources: Records & Payroll	90,787	273,702	211,140	49,487	33,782	51,582
Grants and Research Management	28,638	64,949	85,840	13,130	5,809	10,182
Learning Management Systems	131,000	270,866	239,935	111,882	68,136	106,373
Lecture Capture & Video Management	35,047	74,270	47,749	29,115	16,428	28,829
Library System Management	60,086	128,432	95,674	59,663	39,137	42,865
ePortfolio Services	15,598	20,067	66,071	12,753	8,011	5,476

- 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%)

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Reorganizing IT Units, Fall 2013

Organizational structures for many IT units are in transition.

36 pct. have reorganized academic computing units in the past two years

15 percent who have reorganized academic computing expect to do it again in the next two years!.

29 pct. expect to restructure academic computing the next two years.

Little change in these numbers in recent years
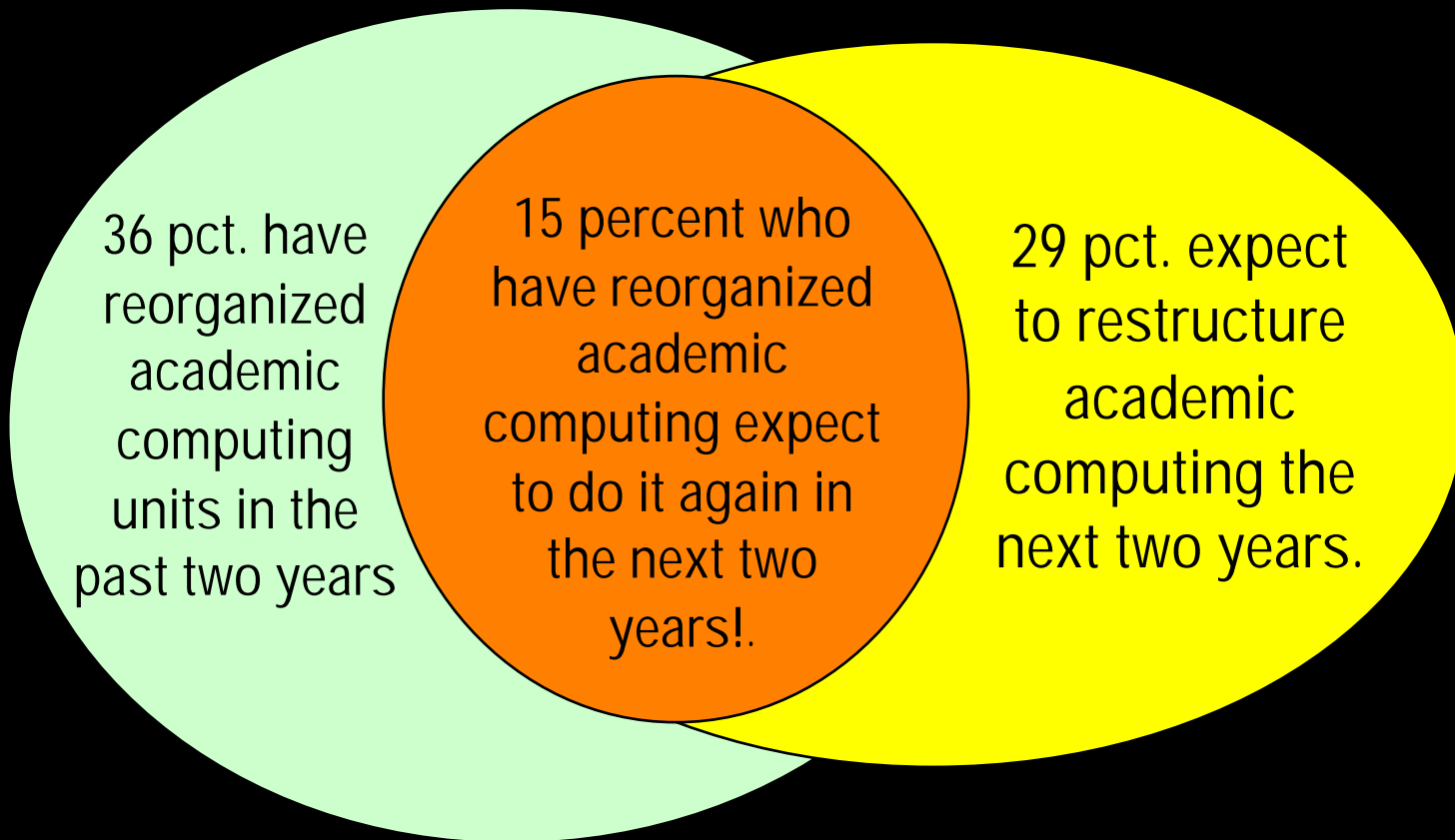
- Public 4-yr. colleges and universities were more likely to have an IT re-org than privates in the past 2 years

- Universities are more likely to anticipate a re-org in the next 2 years

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IT Security

IT Security Incidents, A/Y 2006 – 2013

percentages ■ 2006 ■ 2007 ■ 2008 ■ 2009 ■ 2010 ■ 2011 ■ 2012 ■ 2013
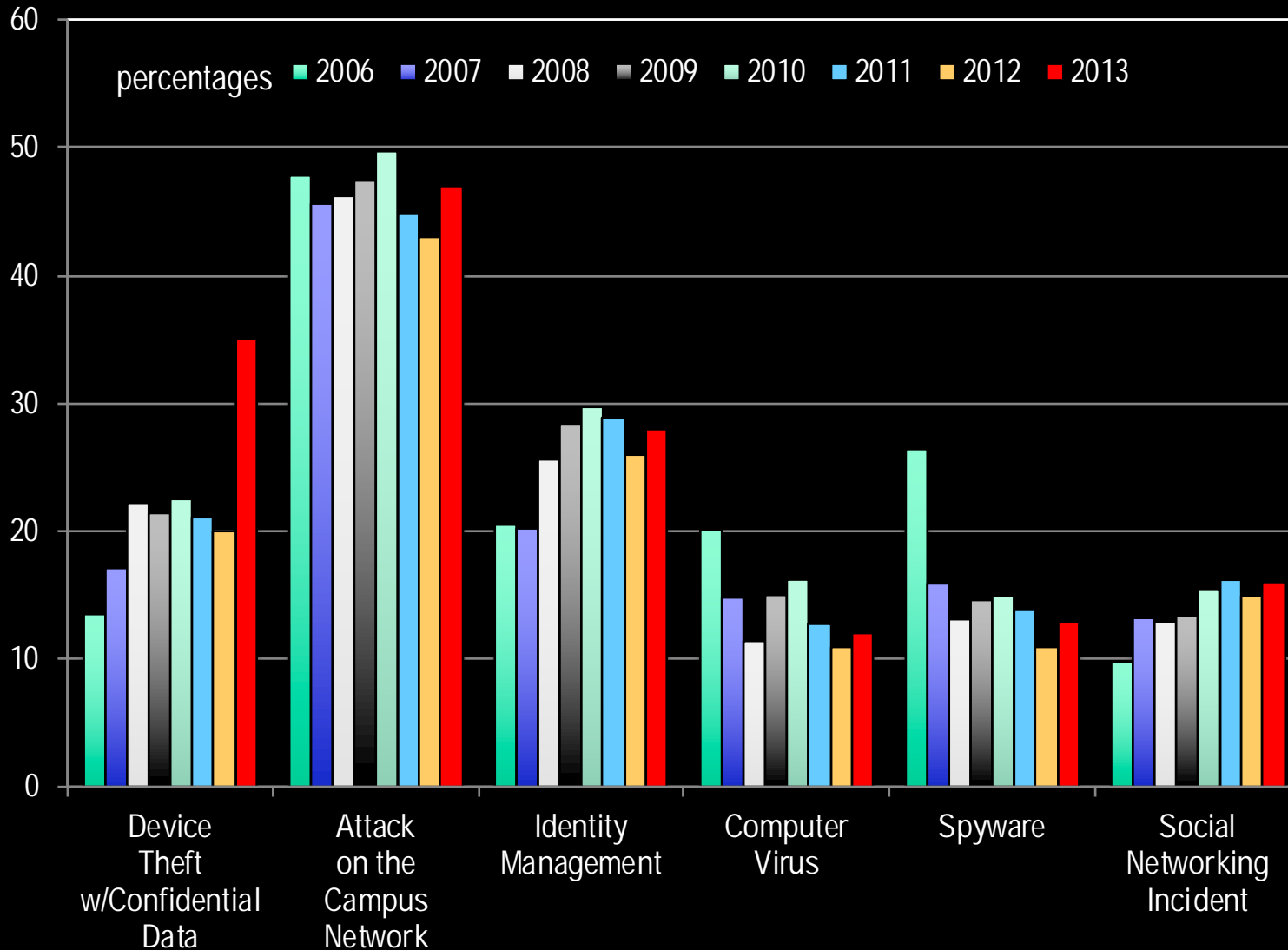
- Device theft rising (computer, phone, USB drive)

- Other issues "stable"
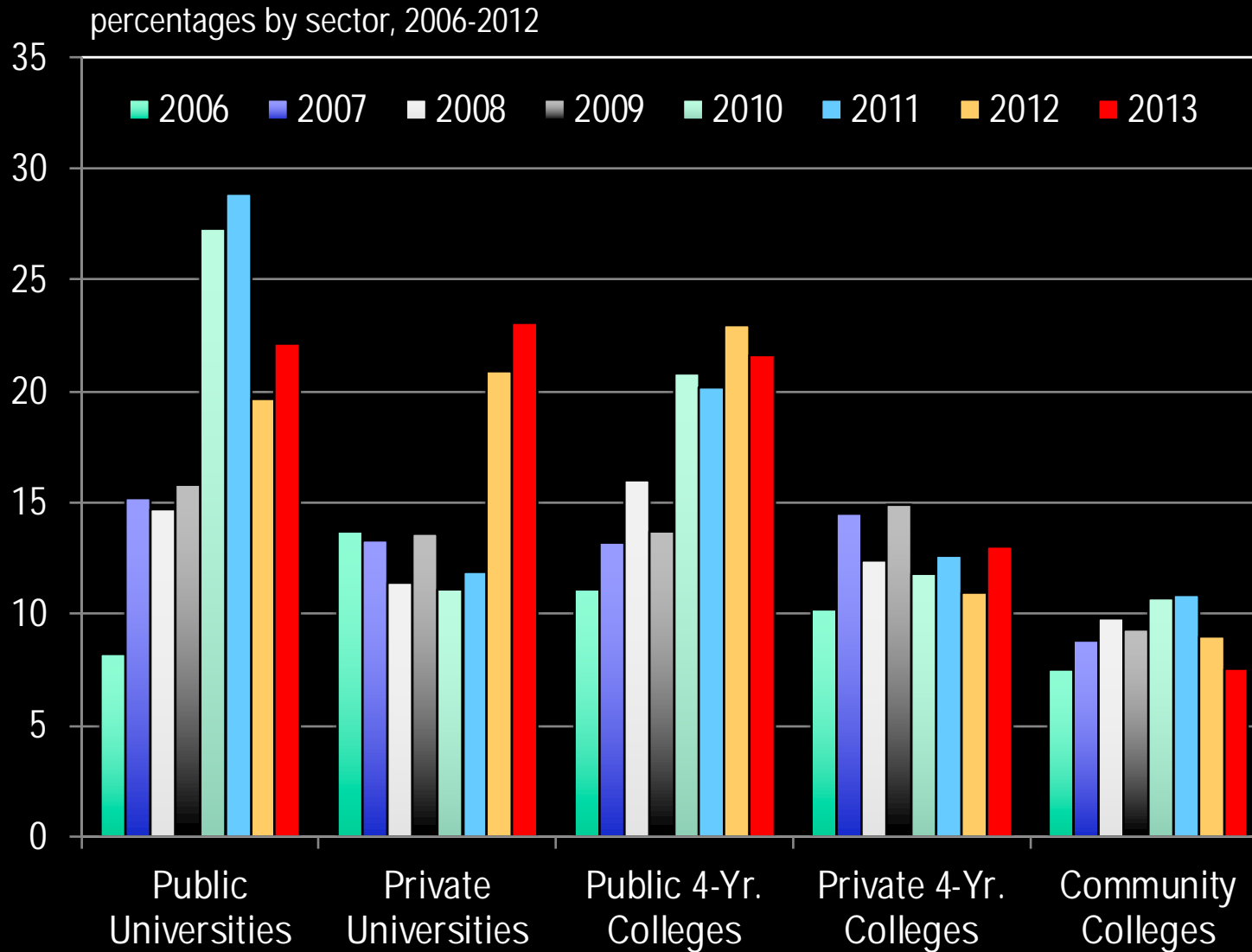
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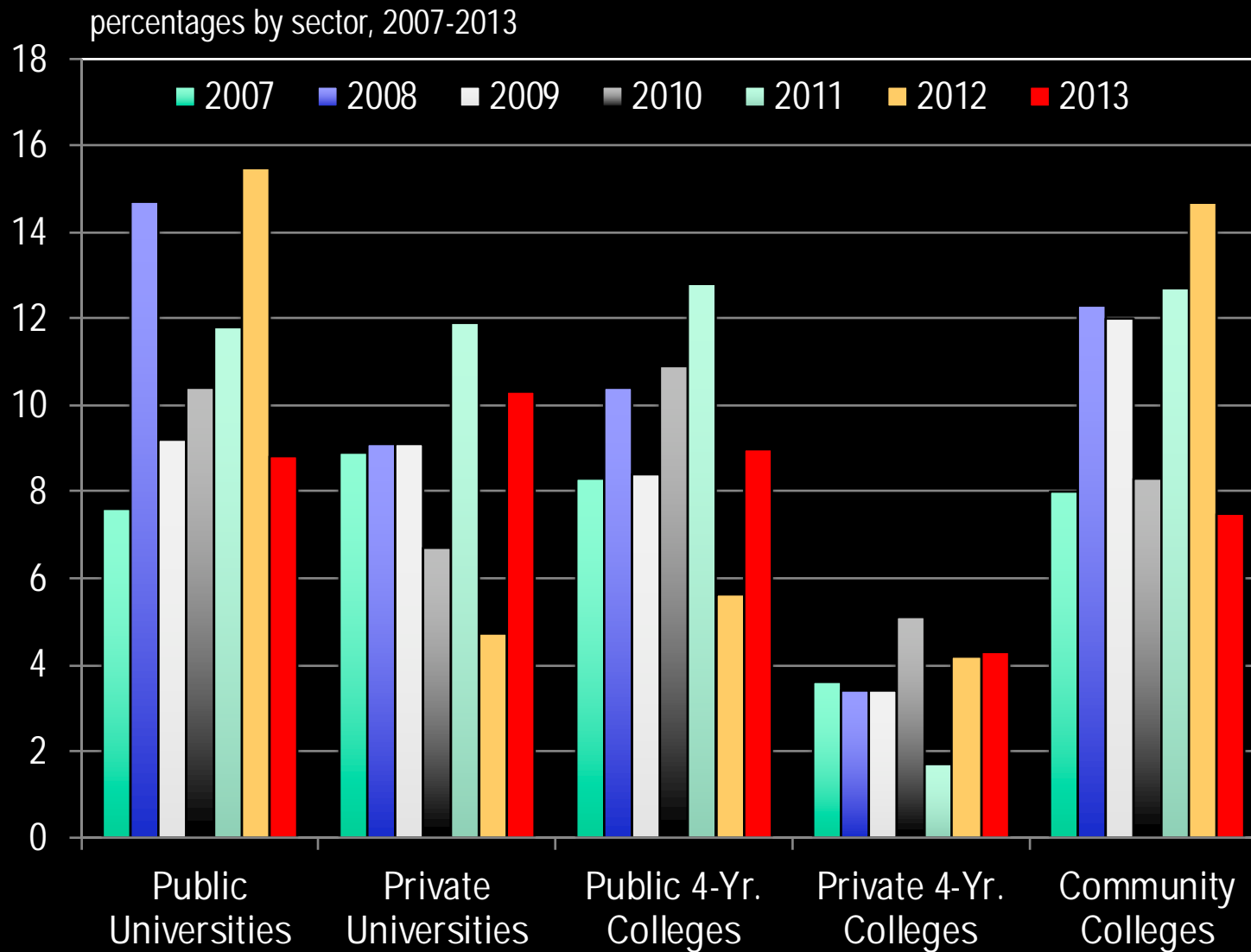
The IT Security Concerns of CIOs, Fall 2013

pct. reporting high (4/5); scale: 1=low; 5=high

Concern	Value
Stolen computer, phone, tablet, USB drive	~75
Hack / attack on the campus network	~69
Identity management issues	~67
Hack on server not managed…	~65
Hack / attack on student data files	~64
Hack / attack on adm /fin files	~64
Other attack on institutional data files	~55
Major spyware infestation	~49
Major computer virus infestation	~46
Employee malfeascence	~42
Incident linked to social networks	~40
Hack / attack on research files	~39

(x-axis: - 10 20 30 40 50 60 70 80)

- 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.
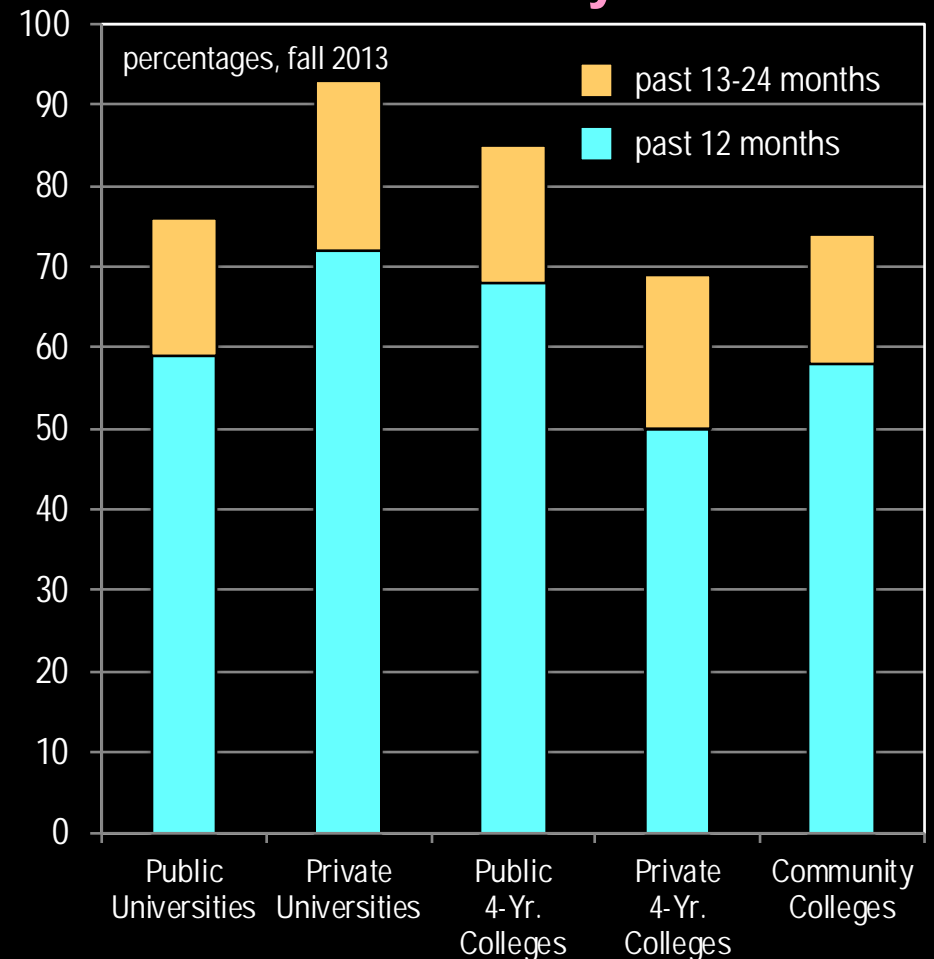
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Updating Campus IT Security & Disaster Plans, 2013

- 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)
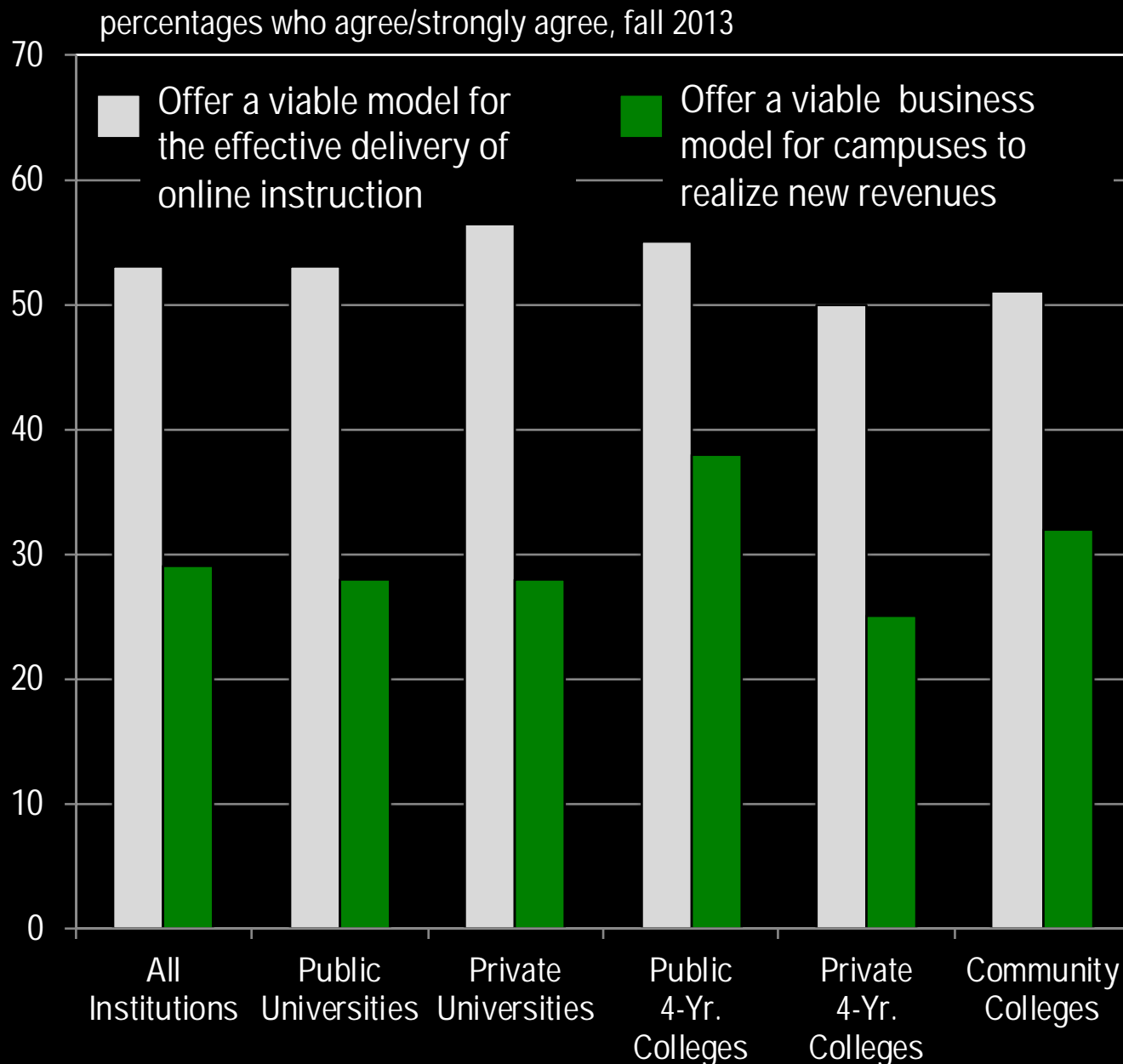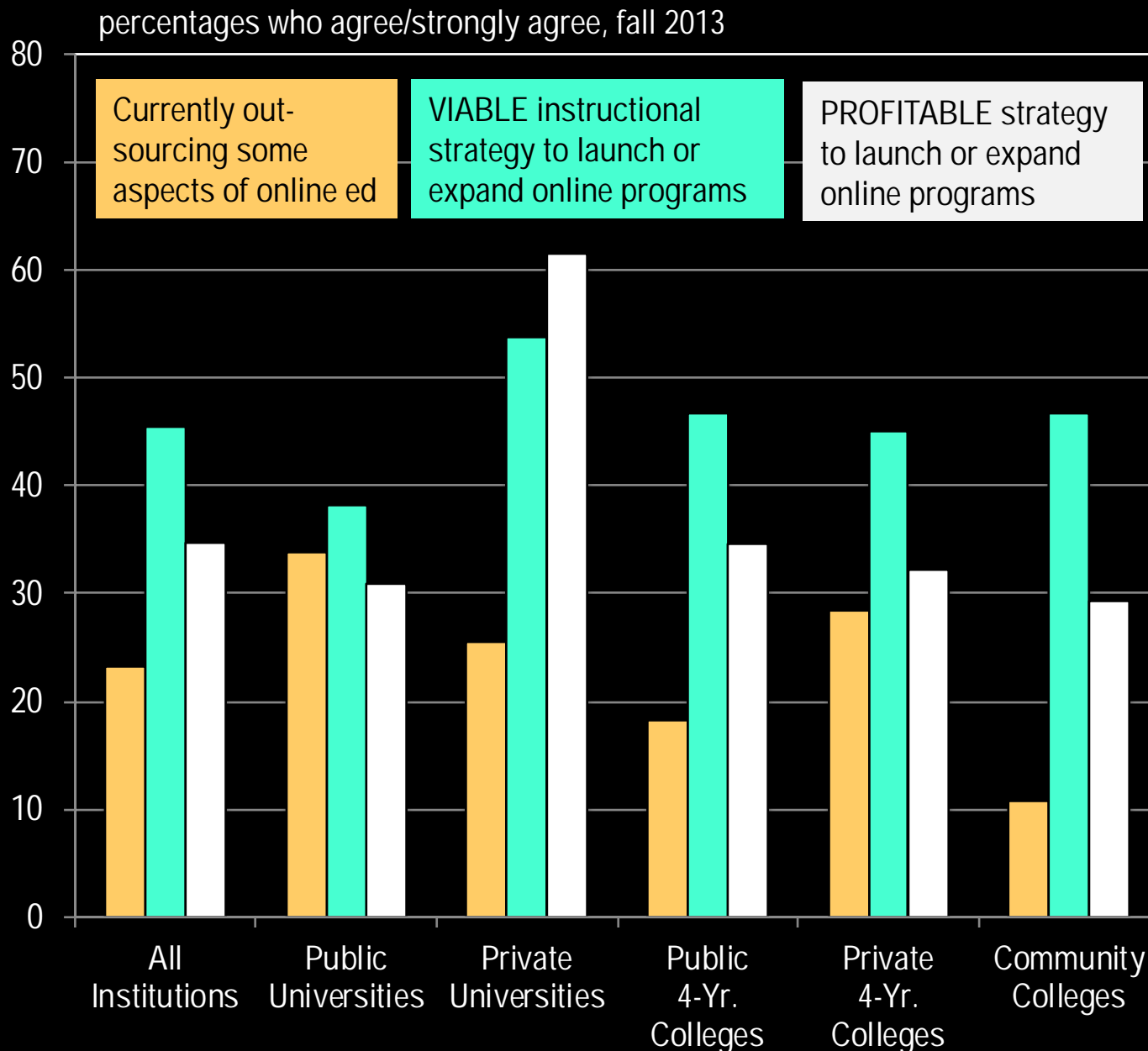
Last Update for IT Security

percentages, fall 2013

Legend:
- past 13-24 months
- past 12 months

Categories (x-axis): Public Universities, Private Universities, Public 4-Yr. Colleges, Private 4-Yr. Colleges, Community Colleges
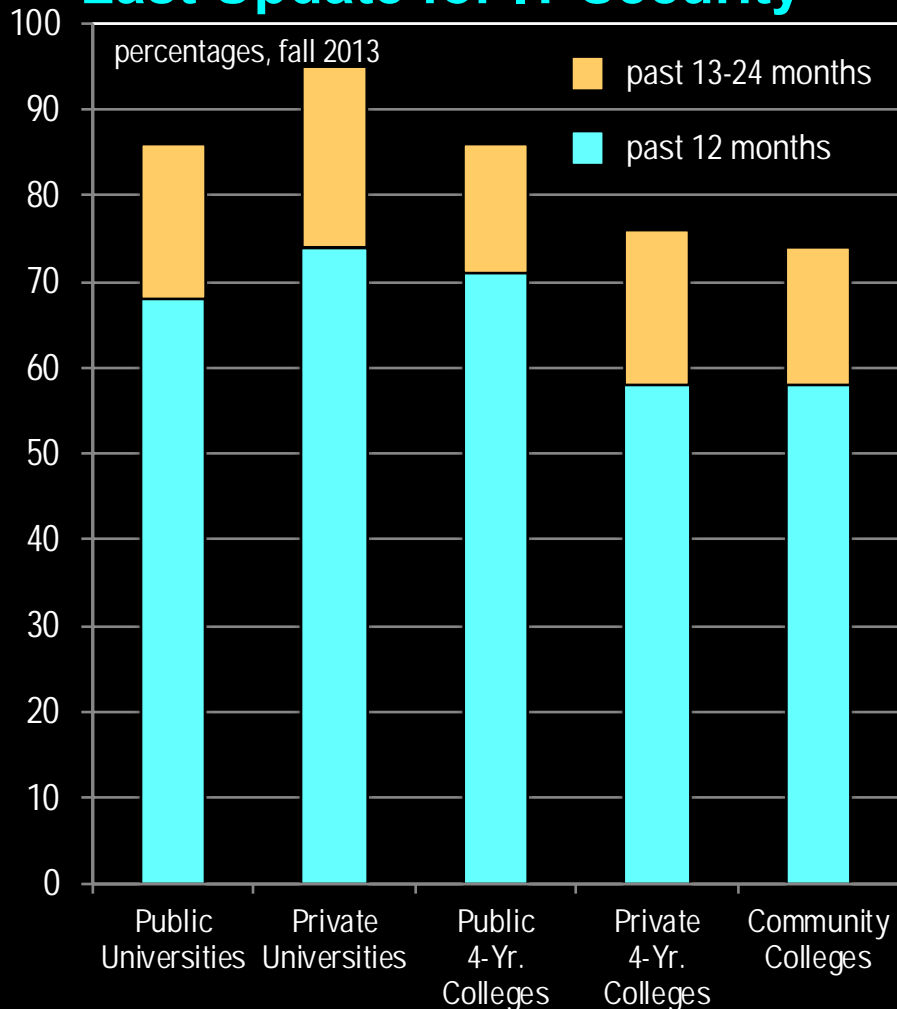
Last Update for IT Disaster Recovery

percentages, fall 2013

Legend:
- past 13-24 months
- past 12 months

Categories (x-axis): Public Universities, Private Universities, Public 4-Yr. Colleges, Private 4-Yr. Colleges, Community Colleges

Much Ado About MOOCs?

percentages who agree/strongly agree, fall 2013

Legend:
- ▢ Offer a viable model for the effective delivery of online instruction
- ▮ Offer a viable business model for campuses to realize new revenues

Categories (x-axis): All Institutions, Public Universities, Private Universities, Public 4-Yr. Colleges, Private 4-Yr. Colleges, Community Colleges

- 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

Outsourcing Instructional Services for Online Programs?

percentages who agree/strongly agree, fall 2013

Legend:
- Currently out-sourcing some aspects of online ed
- VIABLE instructional strategy to launch or expand online programs
- PROFITABLE strategy to launch or expand online programs

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

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
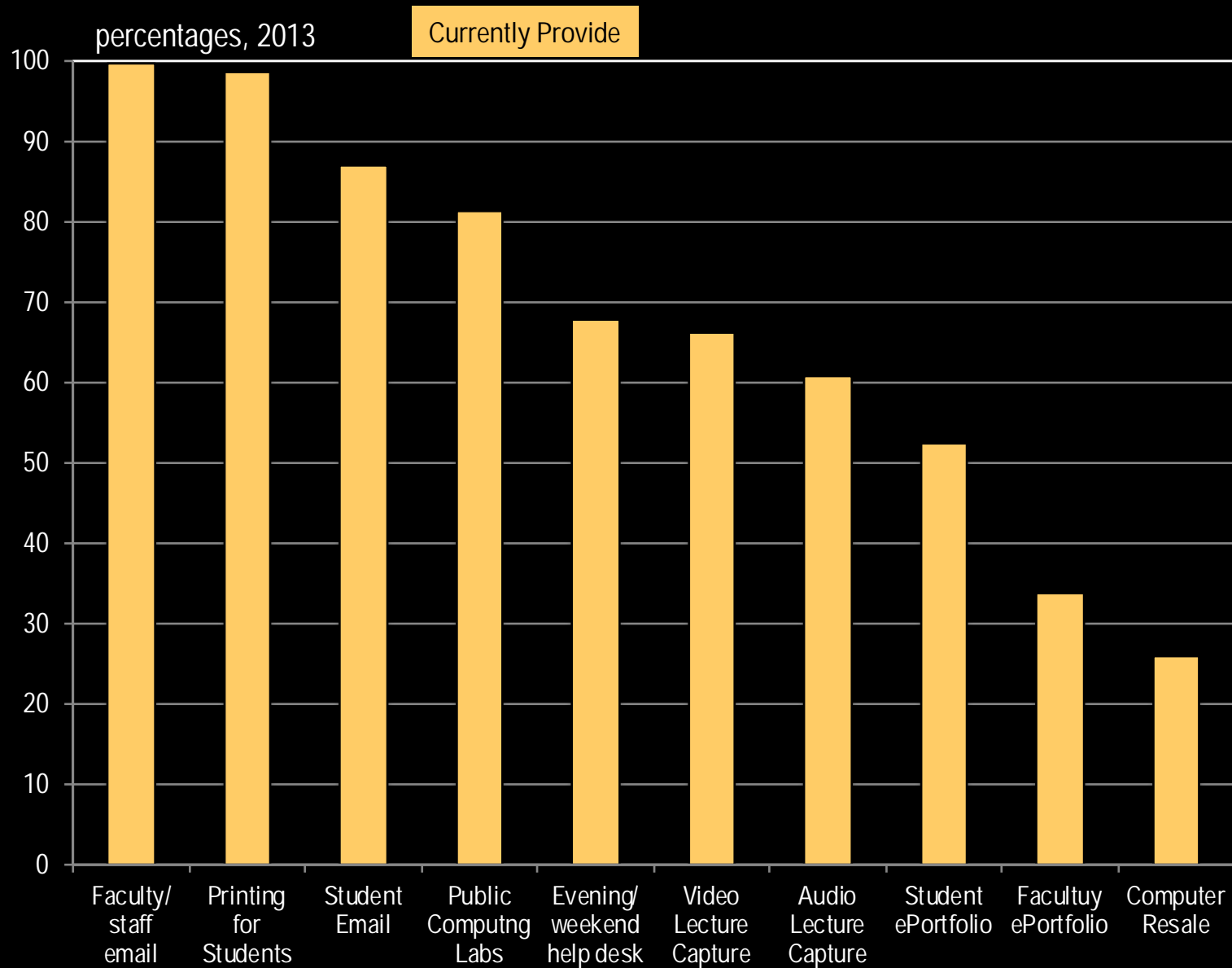
Campus IT Services

percentages, 2013 — Currently Provide — Should Provide
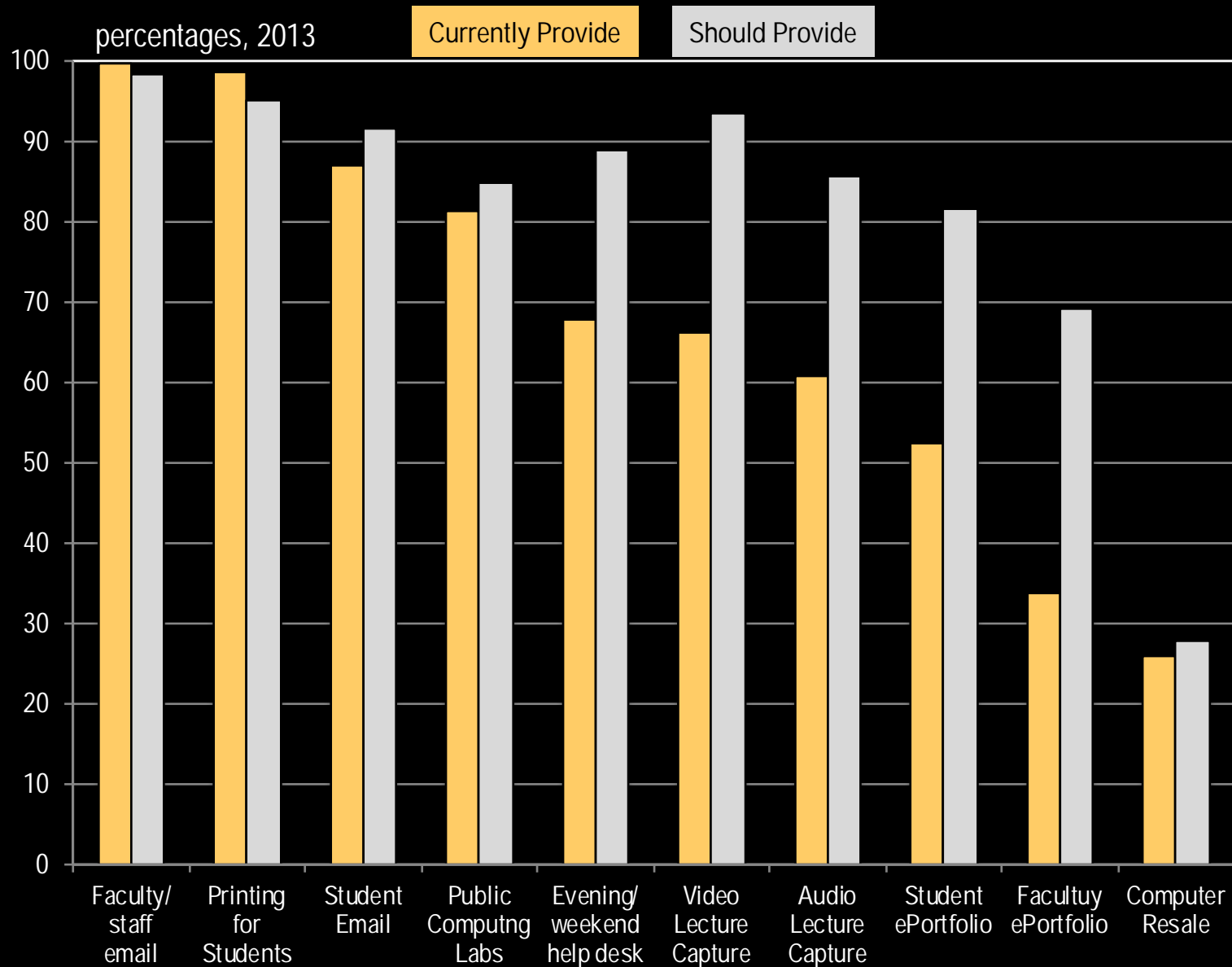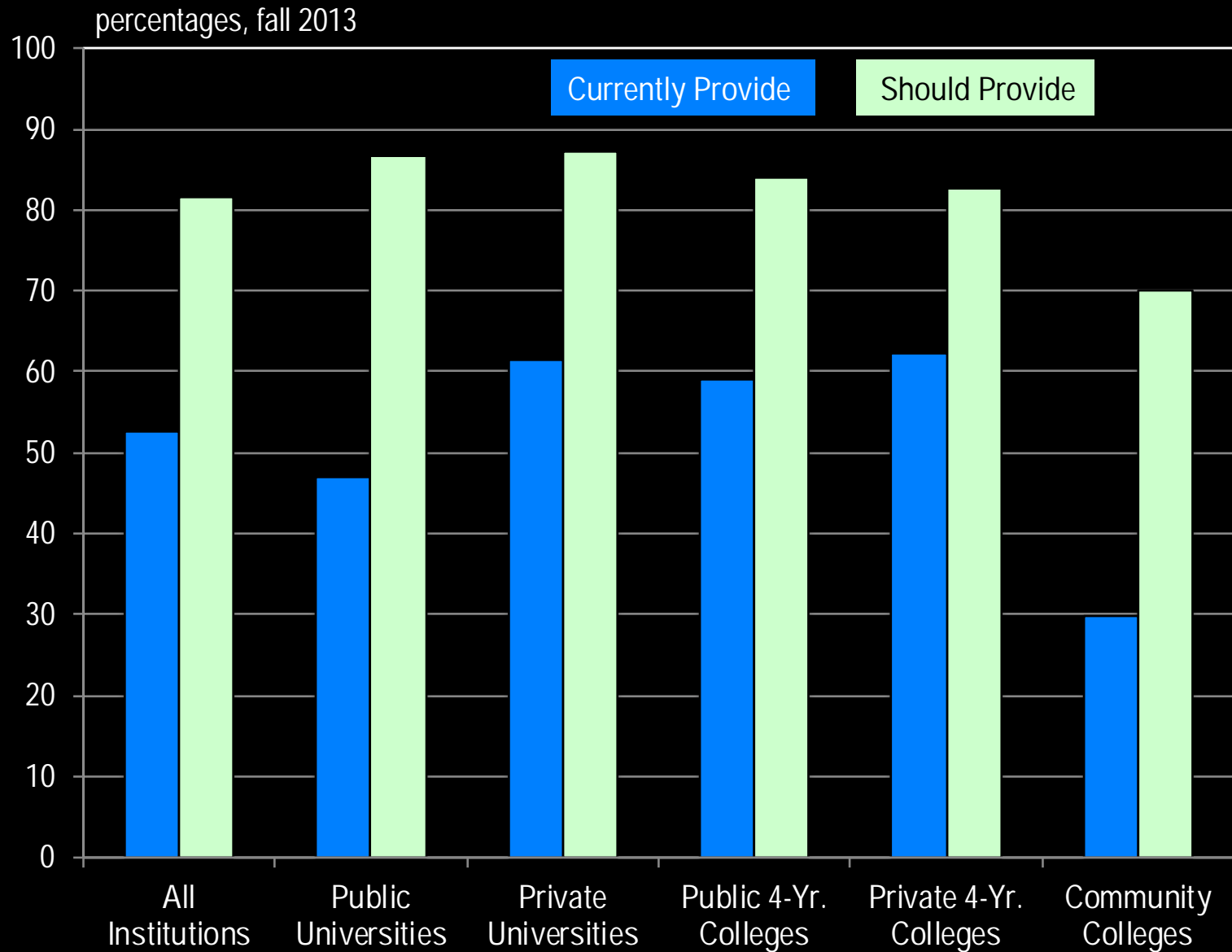
- Few CIOs are prepared to reduce IT services many say they would like to cut.

To provide or not to provide
Campus IT Services

percentages, 2013 | Currently Provide | Should Provide | Do & Should Provide
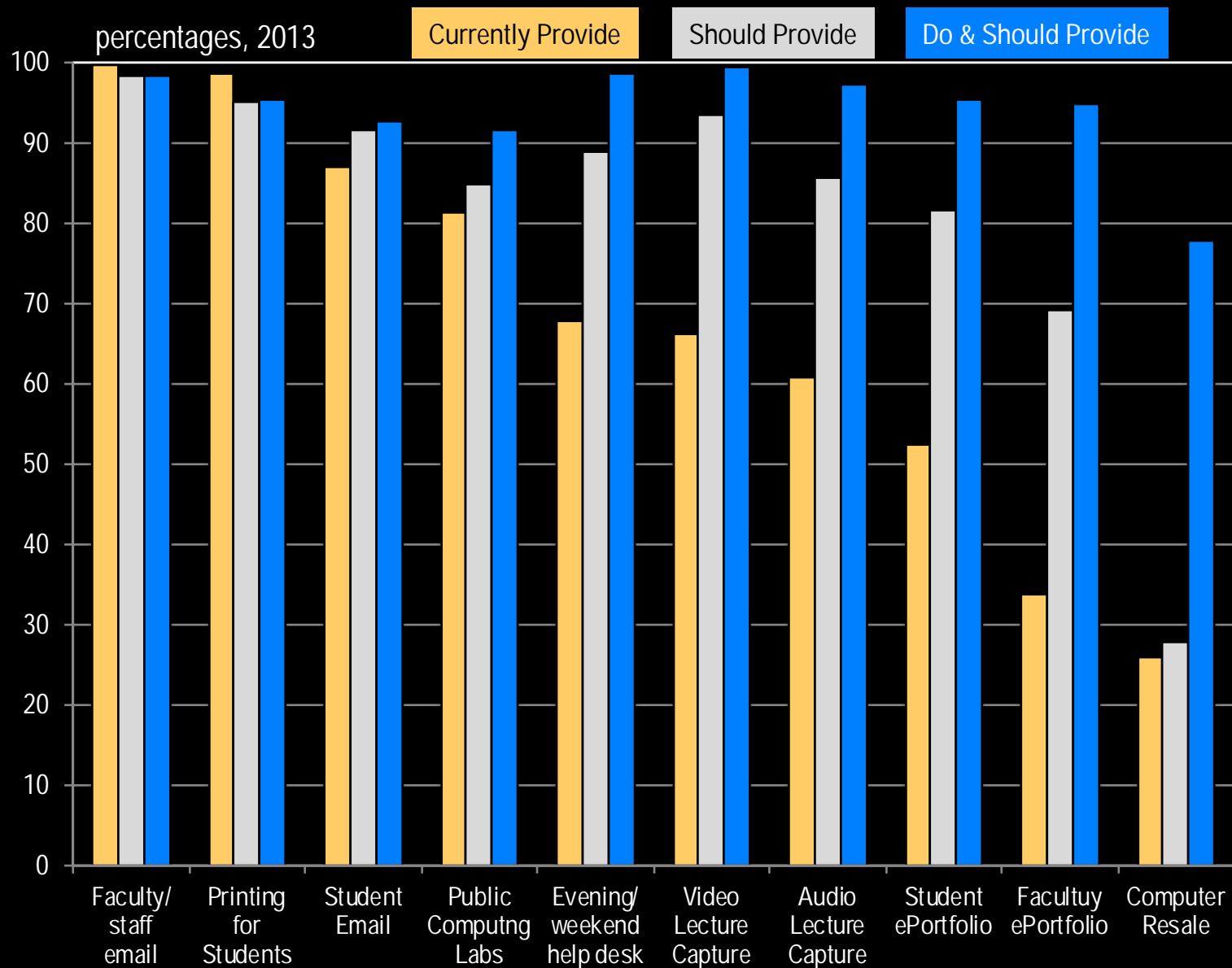
- Few CIOs are prepared to reduce IT services many say they would like to cut.

ePortfolio Services for Students

percentages, fall 2013

Legend: Currently Provide, Should Provide

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

- 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*

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Let's Talk About Clouds

Where are the Clouds?

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.

High Clouds
ERP & HPC

Middle Clouds
Calendar, CRM & LMS

Low Clouds
mail & calendar

Affirming the Strategic Importance of Cloud Computing

percentage who agree/strongly agree, fall 2013

Legend:
- Viable strategy for key ERP applications
- Increasingly important role in ERP strategy
- Important part of campus plan to reduce IT costs
- 2012

Categories (x-axis): Public Universities, Private Universities, Public 4-Yr. Colleges, Private 4-Yr. Colleges, Community Colleges
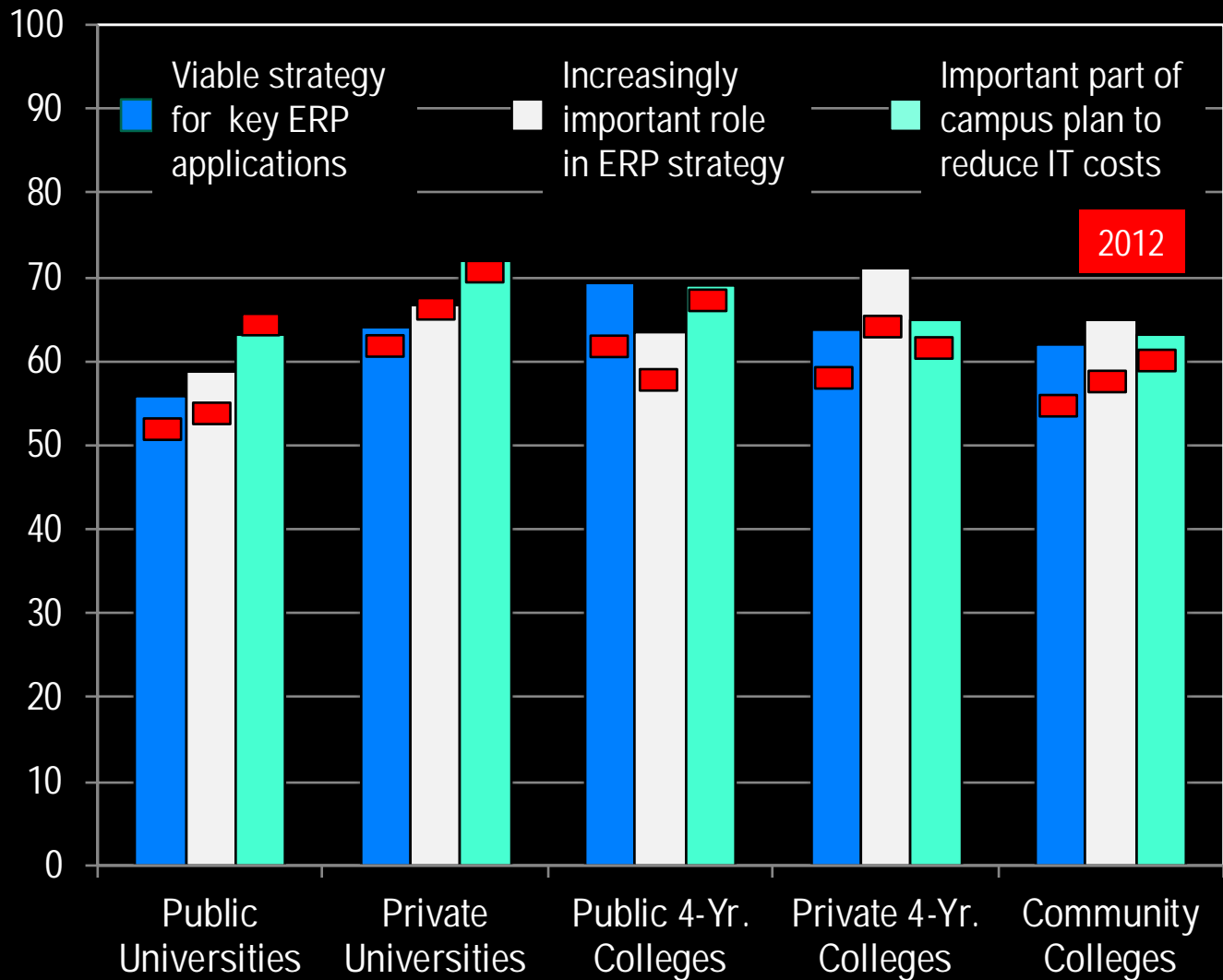
- Across all sectors, a clear message that CIOs view moving ERP to the Cloud as strategic for their institution.
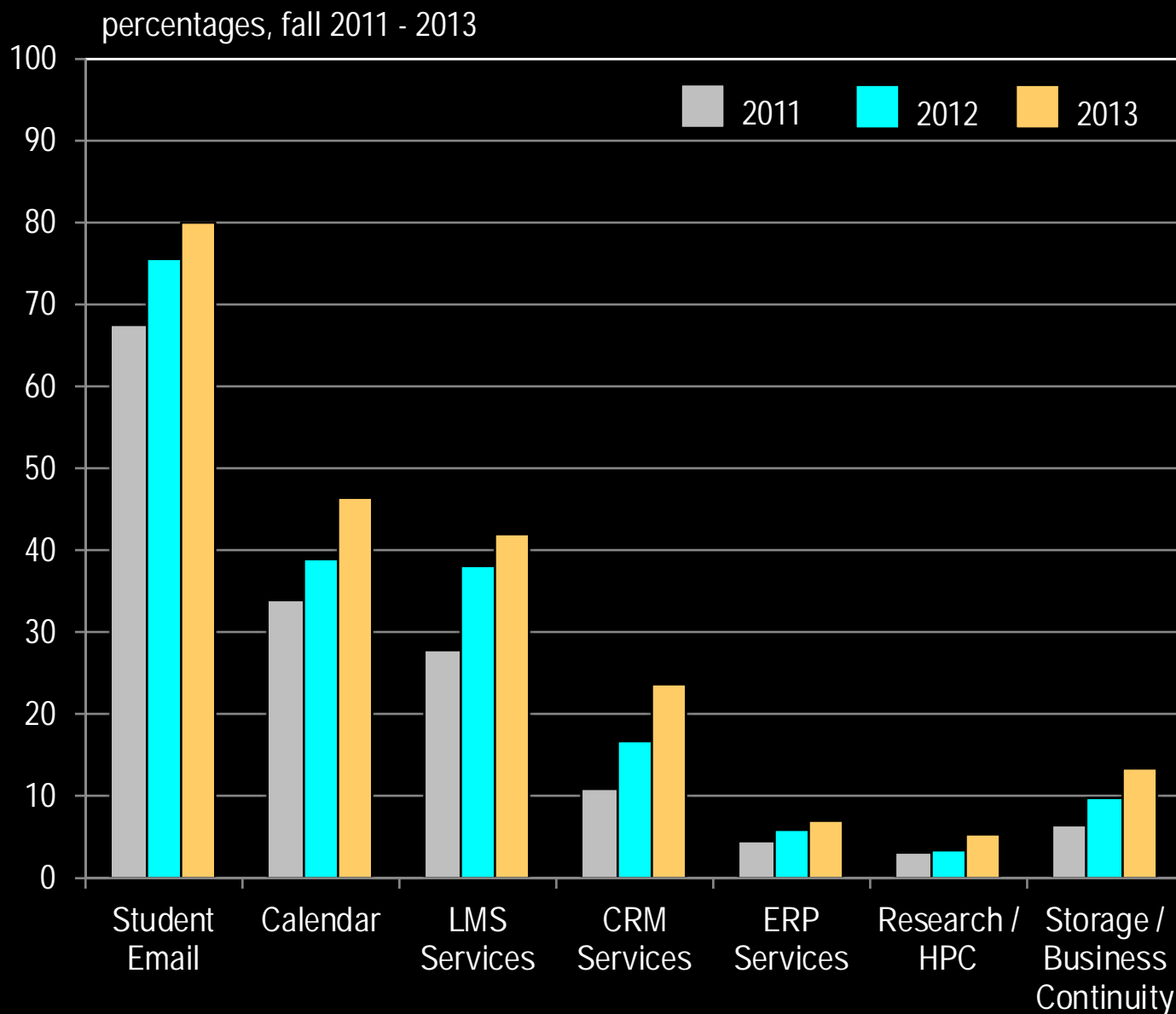
The Cloud
eMail and "Office" Applications

percentage now using/converting to as of fall 2013

Legend: Student Email | Faculty Email | Office Apps | 2012

Categories: All Institutions | Public Universities | Private Universities | Public 4-Yr. Colleges | Private 4-Yr. Colleges | Community Colleges
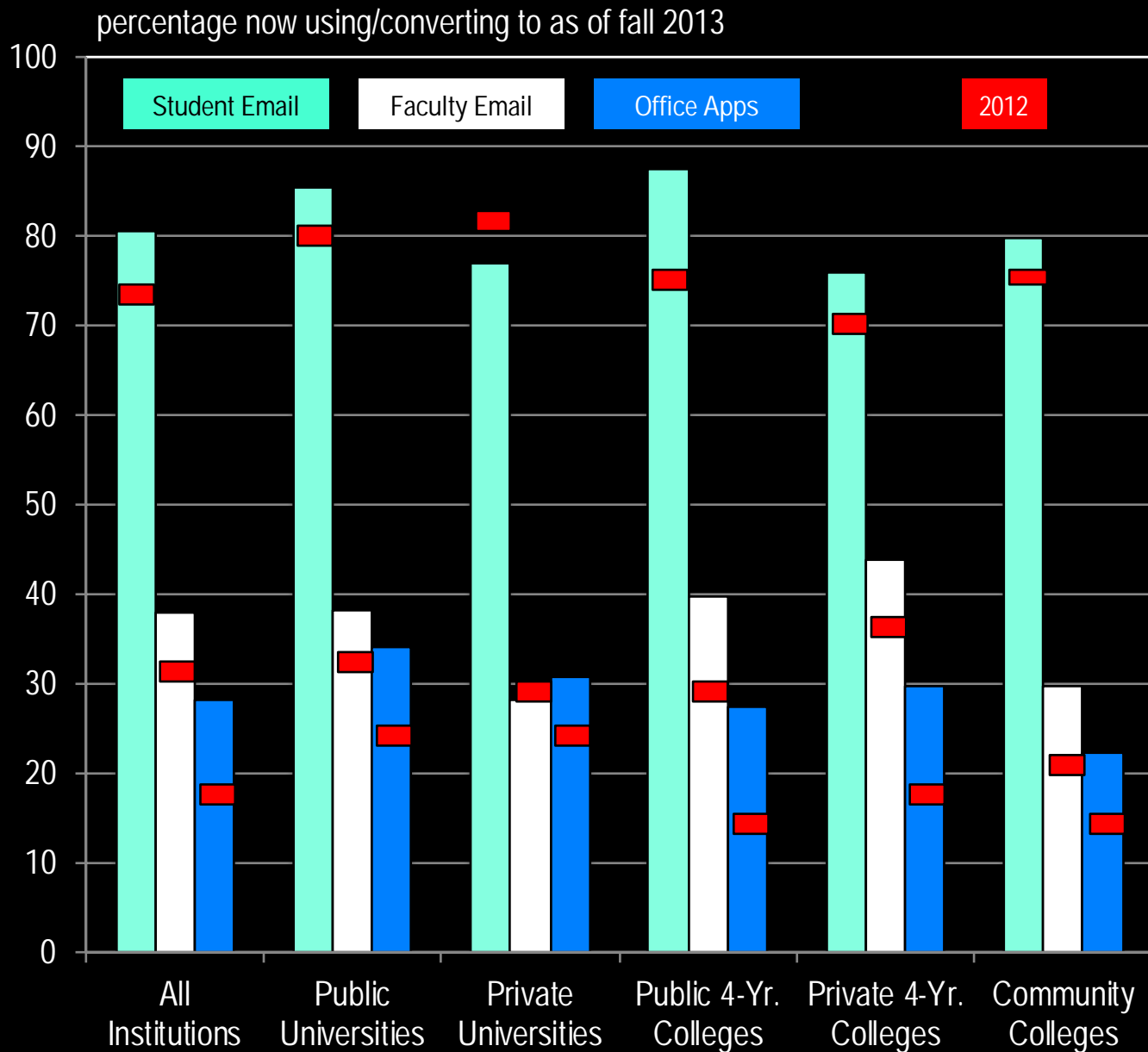
- Student email is now "deep" in the Cloud, courtesy of Google and Microsoft

- Less willing to move faculty & adm. email to Cloud services

- Slow campus movement to Cloud Apps – Google Docs and Microsoft 365

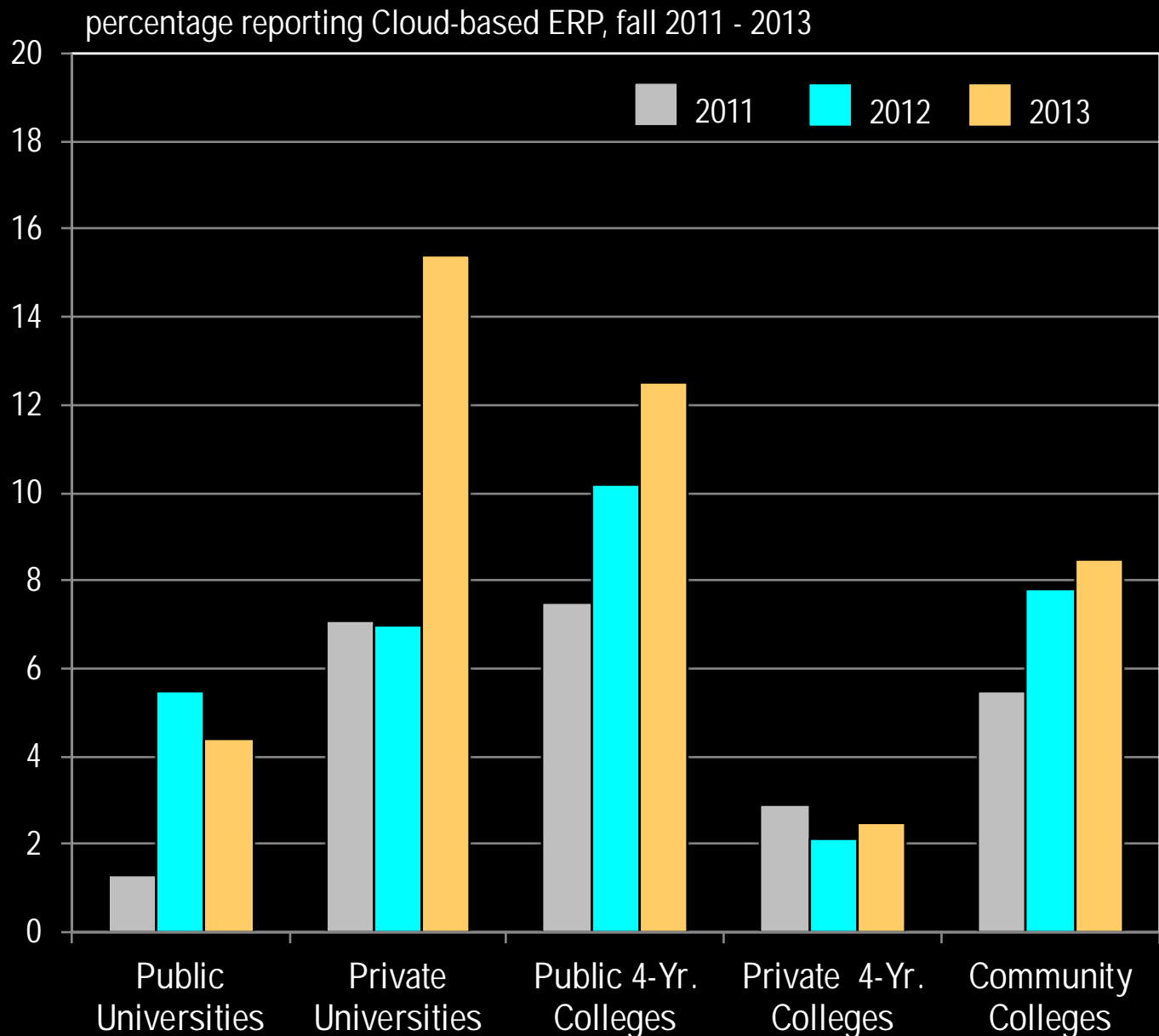- Small but noticeable gains compared to fall 2012

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LMS Moves to the Clouds

percentage reporting Cloud-based LMS, fall 2011 - 2013
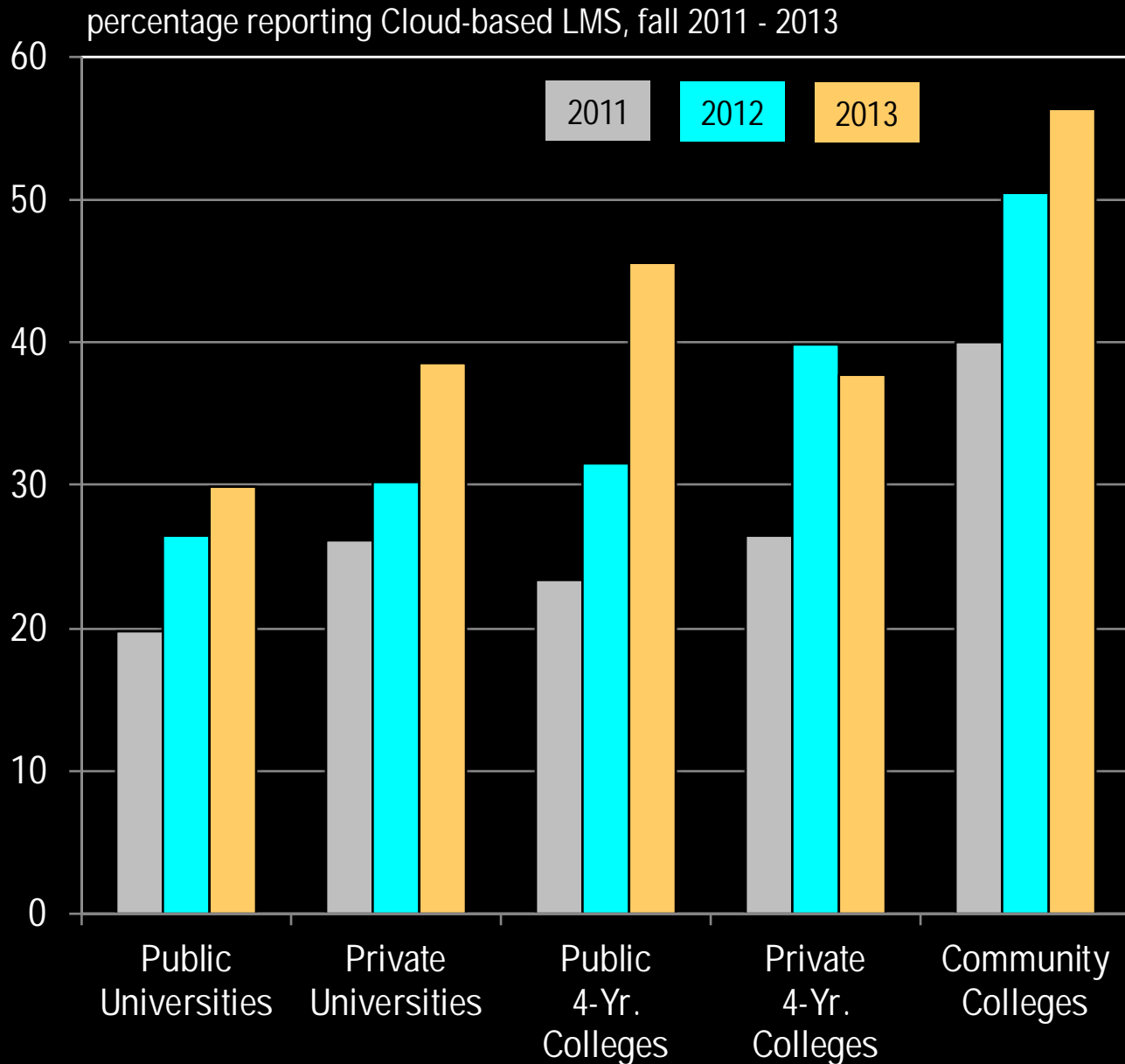
LMS as the "toe in the Cloud" experience for higher education?

ERP Moves (Slowly) to the Cloud

percentage reporting Cloud-based ERP, fall 2011 - 2013

- 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
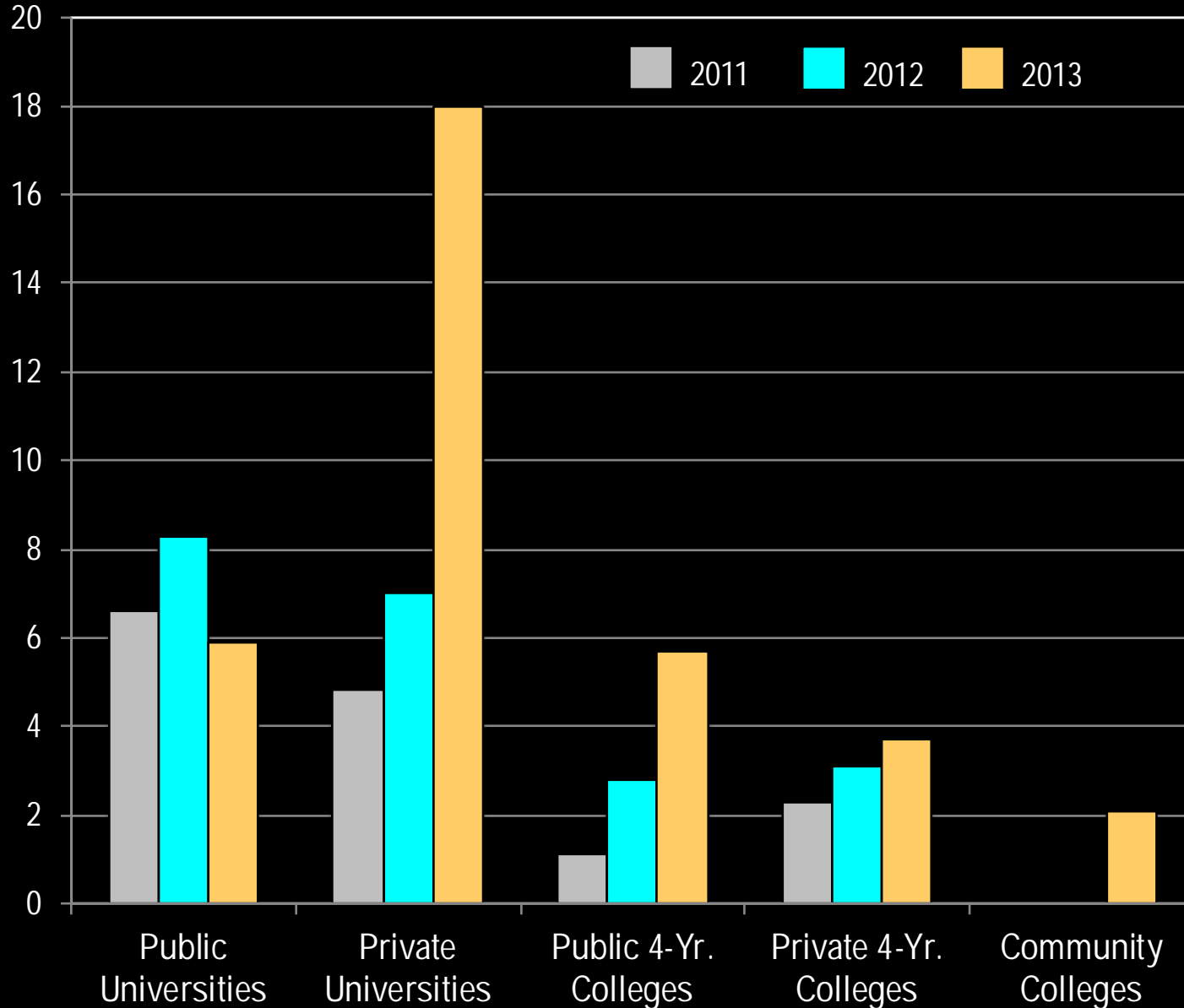
Varying departmental vs. institutional strategies, initiatives, and deployment?

# 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

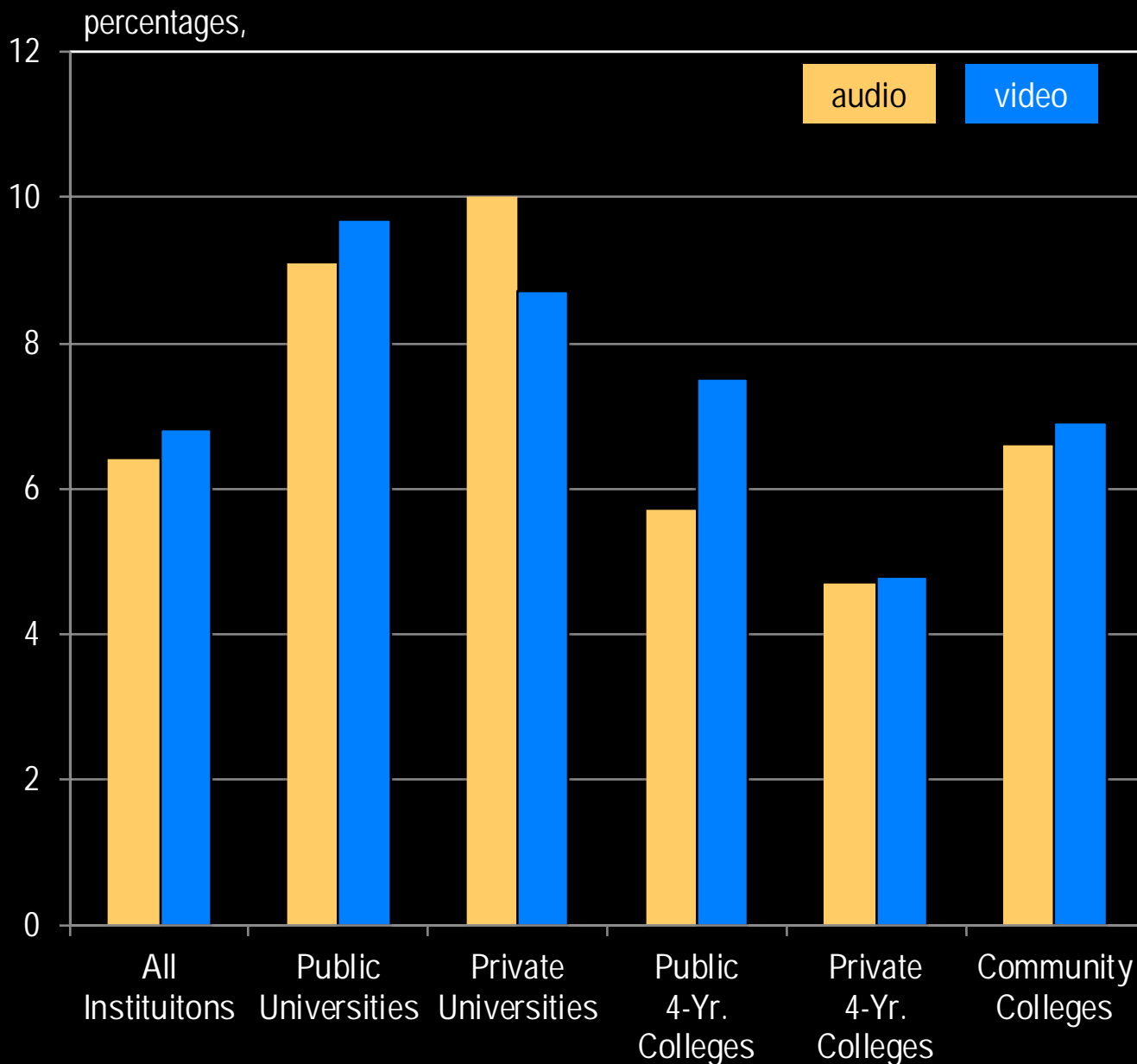- Want to retain command, control & computing

- Let others make the journey first

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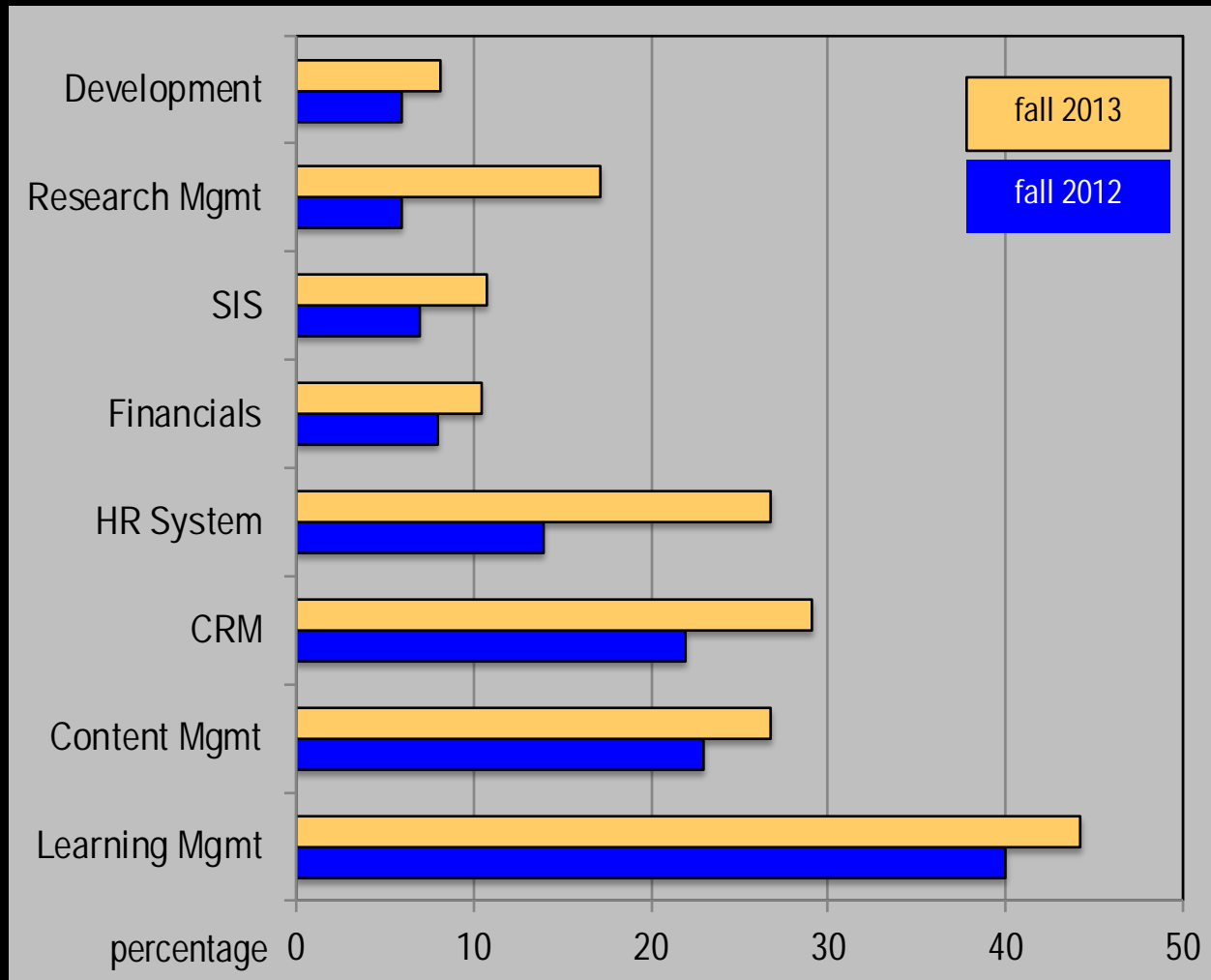
"Lecture Capture is an Important Part of Our Campus Plan for Developing & Delivering Instructional Content"

percentage who agree/strongly agree, fall 2010-2013
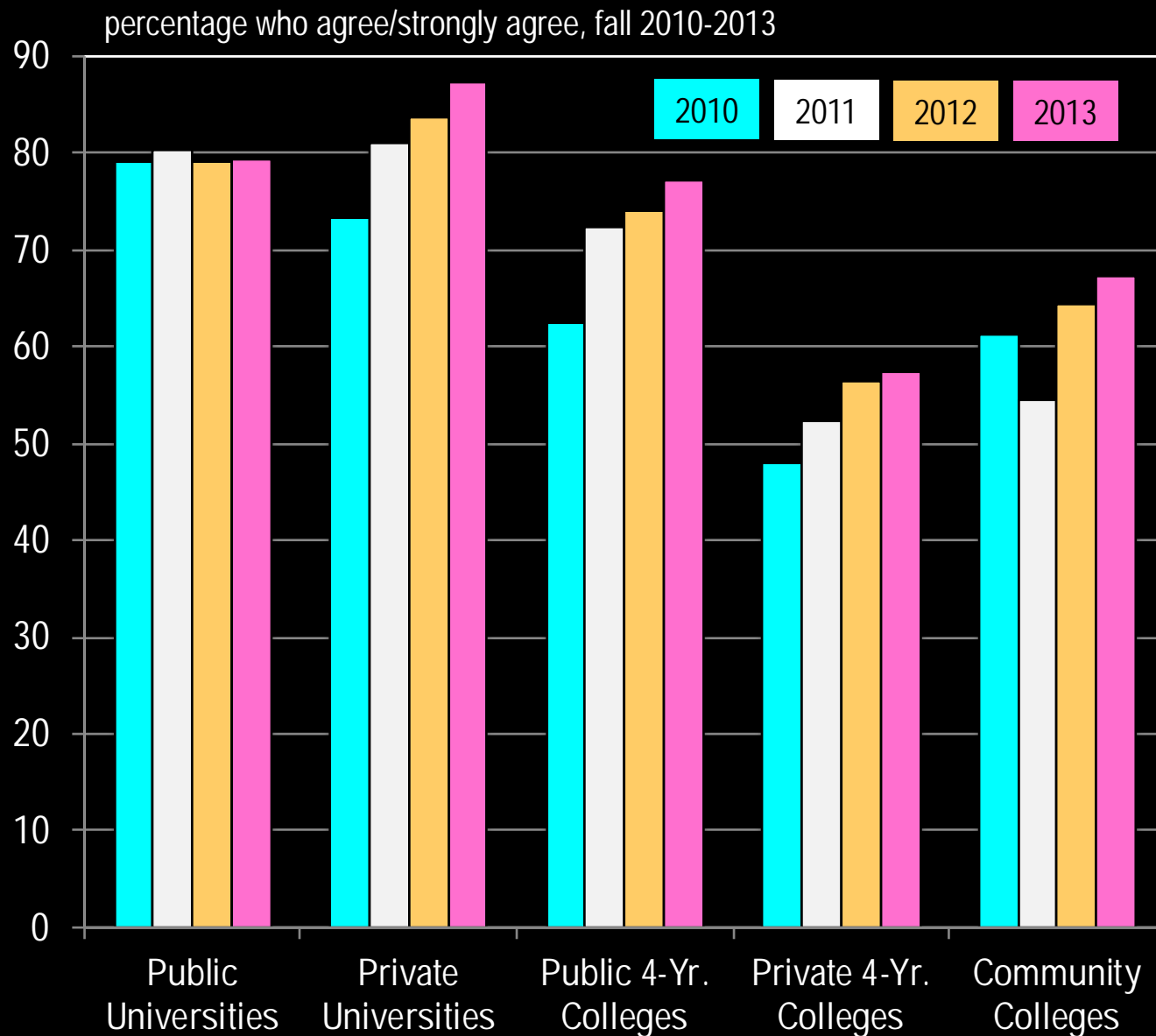
- Slight gains in the importance of Lecture Capture.

- Growing role of video in lecture capture

Lecture Capture, Fall 2013

percentages,

|	All Instituitons	Public Universities	Private Universities	Public 4-Yr. Colleges	Private 4-Yr. Colleges	Community Colleges
audio	6.4	9.1	10.0	5.7	4.7	6.6
video	6.8	9.6	8.7	7.5	4.8	6.9

Legend: audio, video

- 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

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The Future (Still!) Bodes Well for eBooks!

eBook Content Will be an Important Source for
Instructional Resources in Five Years
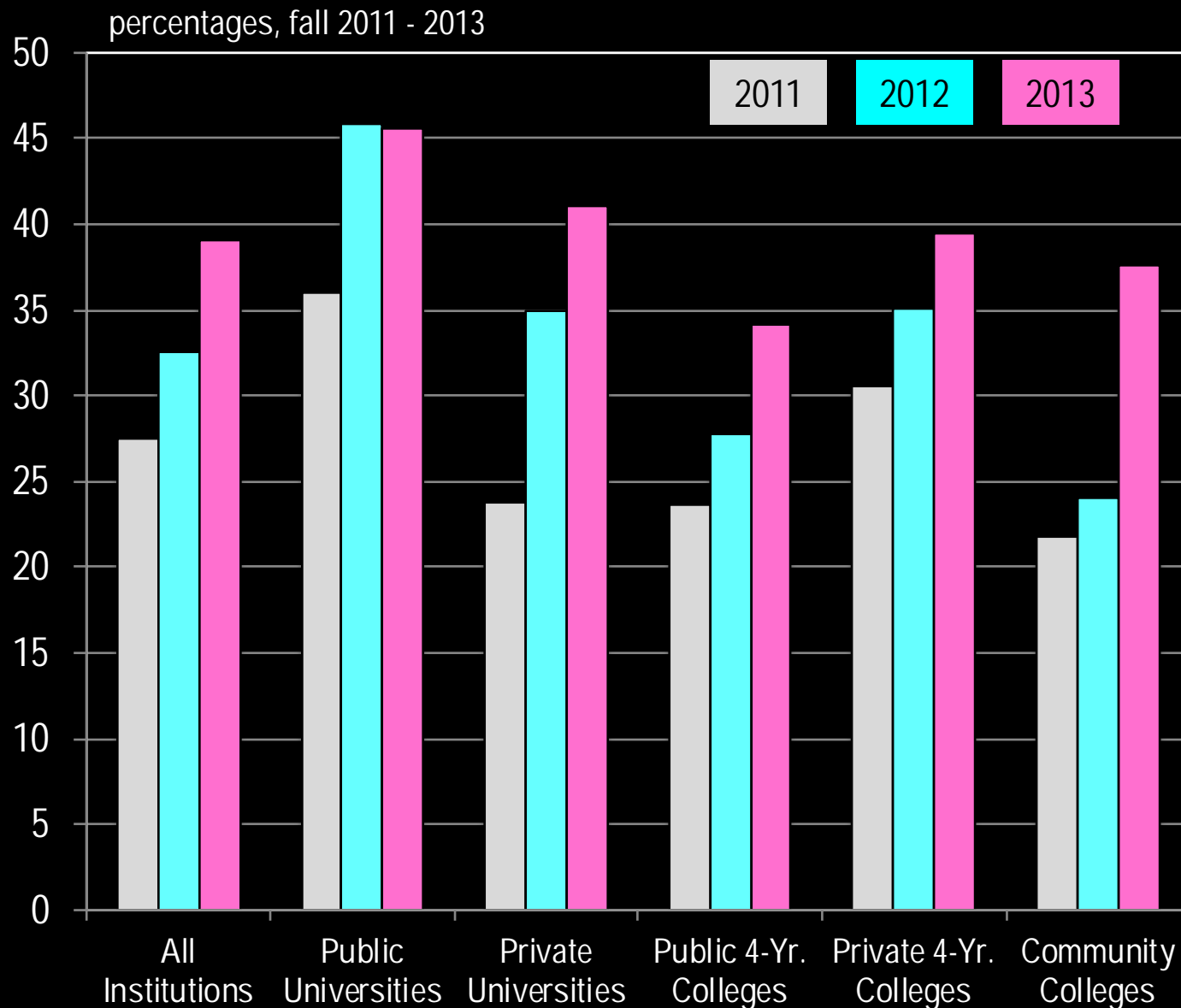(pct. who agree/strongly agree, 2009 - 2013)
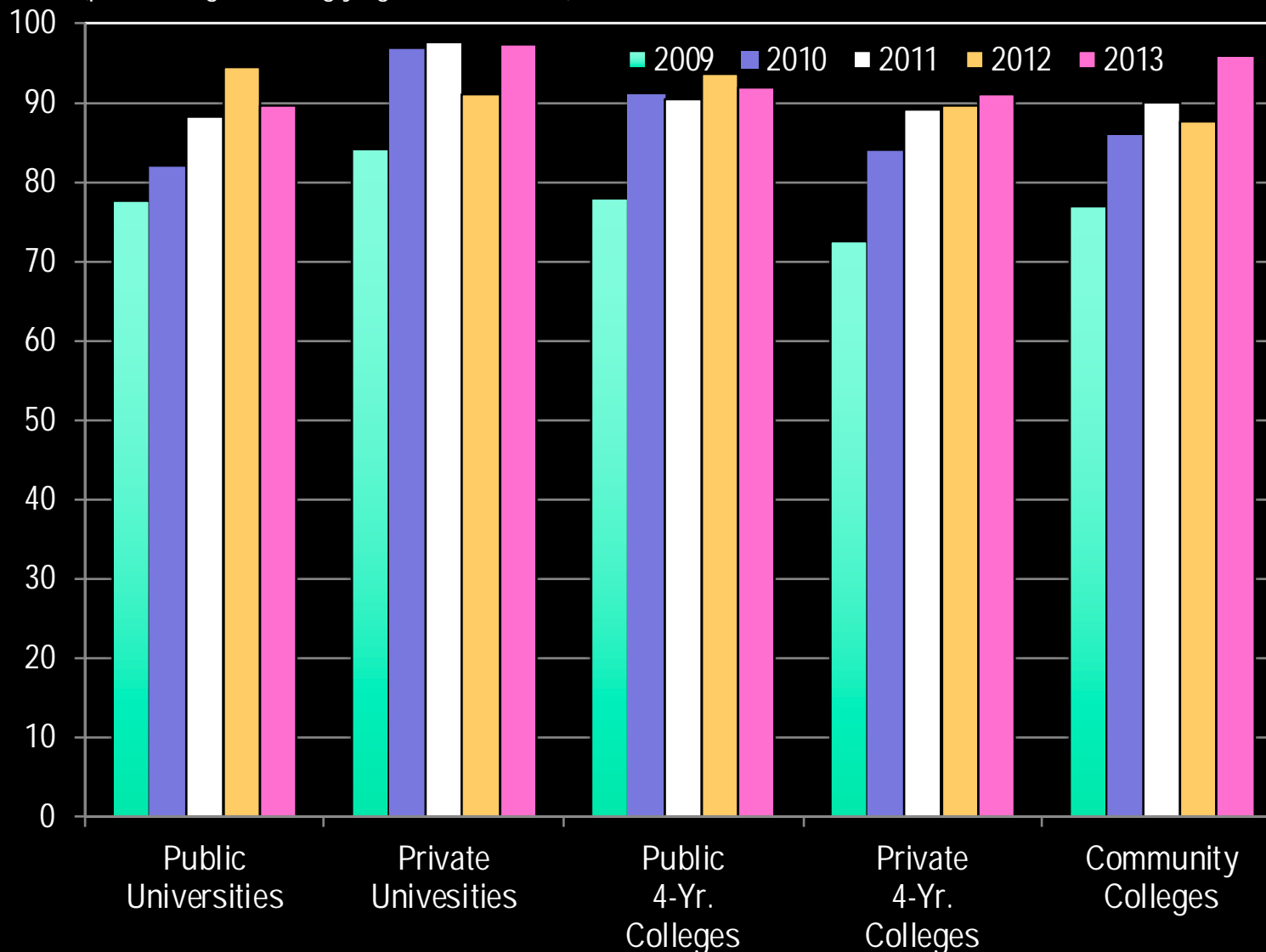
*We're still
waiting for that
future to arrive!*

- Students
  remain less
  enthusiastic
  than
  publishers.

- Still waiting
  for eTexts to
  deliver on
  added-value
  AND lower
  cost.

Legend: ■ 2009 ■ 2010 ■ 2011 ■ 2012 ■ 2013

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

Encouraging the Use of the Creative Commons License for Digital Content

percentages, fall 2011 - 2013

Legend: 2011 | 2012 | 2013

Categories: All Institutions, Public Universities, Private Universities, Public 4-Yr. Colleges, Private 4-Yr. Colleges, Community Colleges
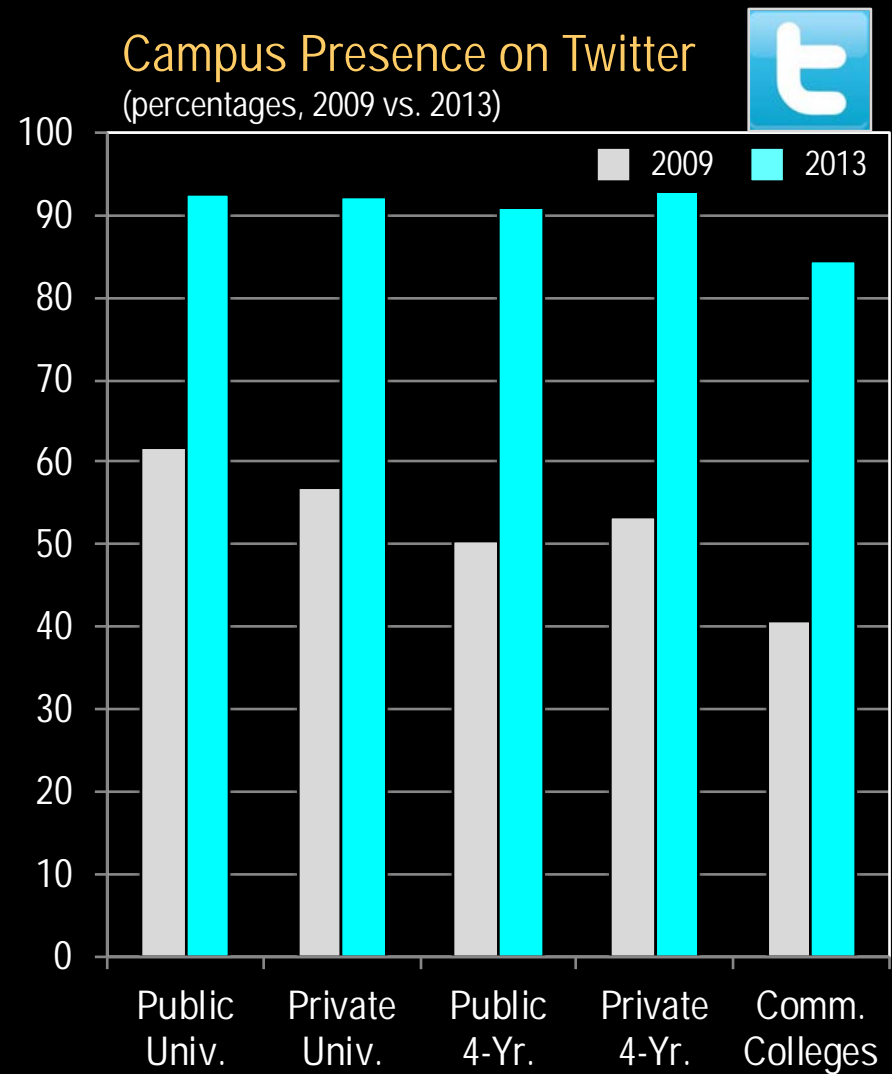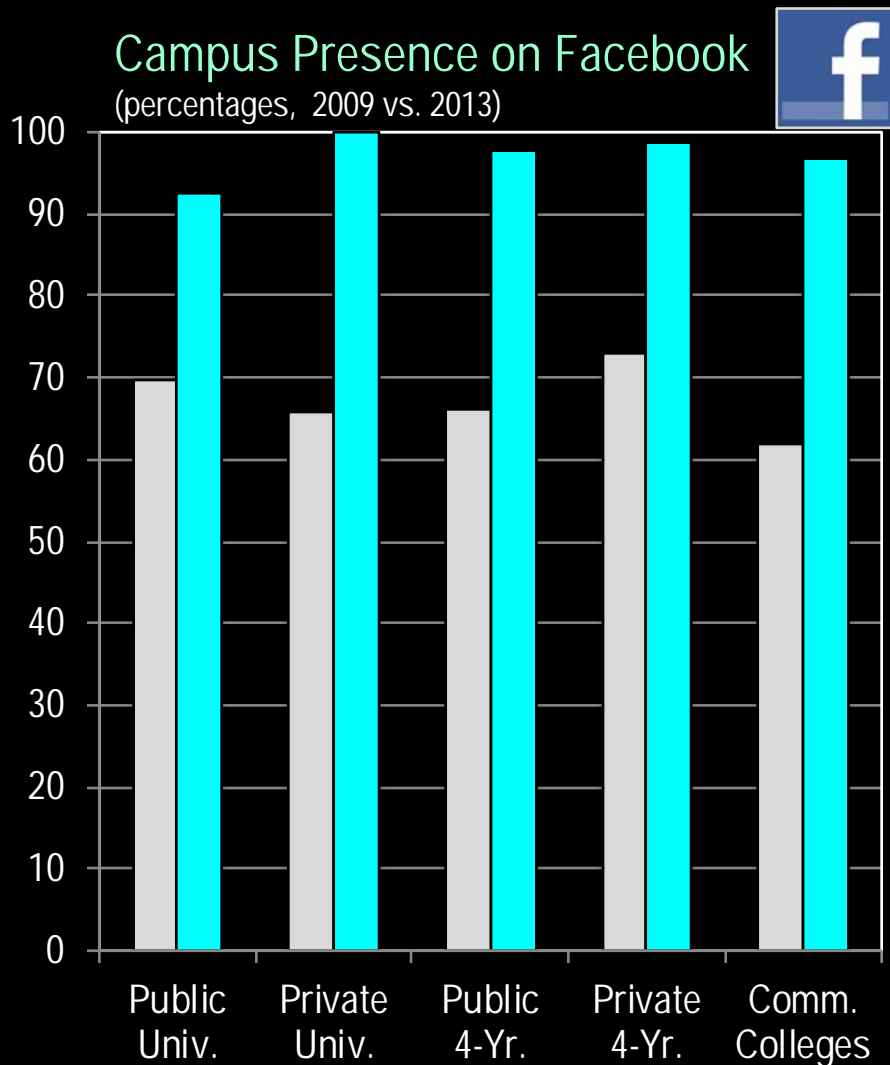
Producers vs. users

- Survey question focuses on the faculty as producers of digital content

- Uncertain impact on the faculty prerogative to select course materials
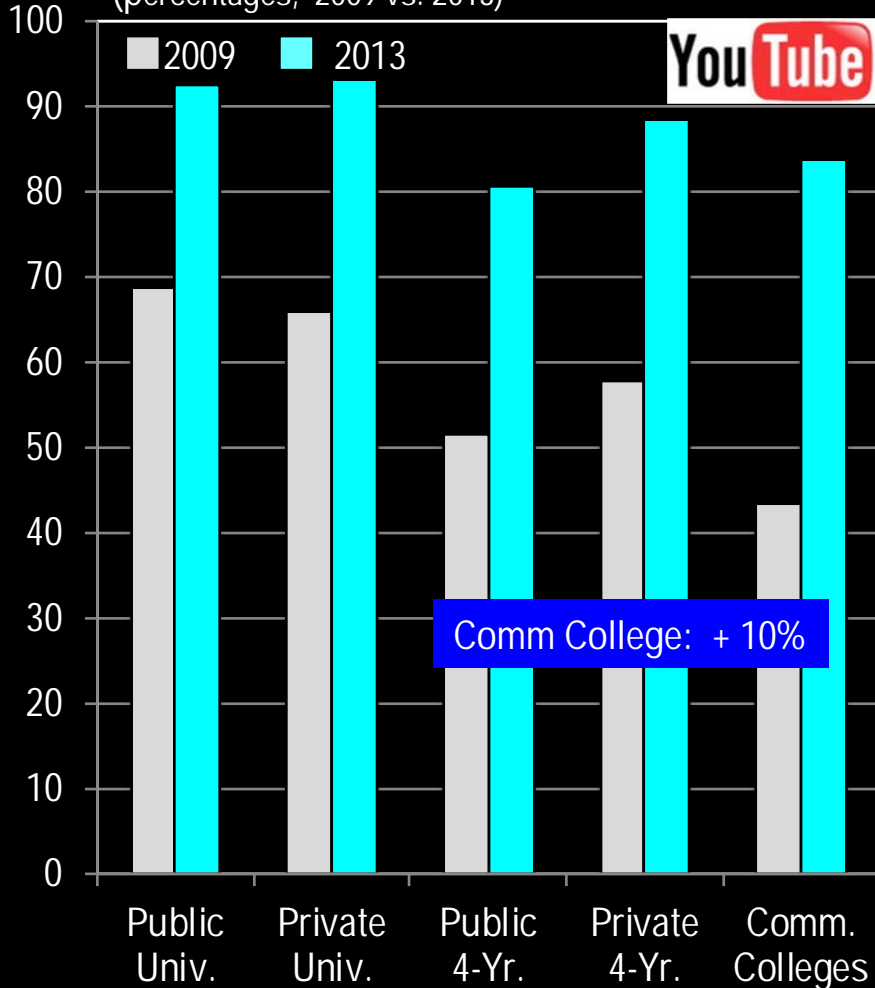
Institutional Use of Social Media

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

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

- 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)

Legend: ■ 2009 ■ 2013

YouTube

Comm College: + 10%

Categories: Public Univ., Private Univ., Public 4-Yr., Private 4-Yr., Comm. Colleges

Campus Presence on iTunesU
(percentages, 2009 vs. 2013

Legend: ■ 2009 ■ 2013

iTunes U

Public Universities &
Comm Colleges: + 10%

Categories: Public Univ., Private Univ., Public 4-Yr., Private 4-Yr., Comm. Colleges

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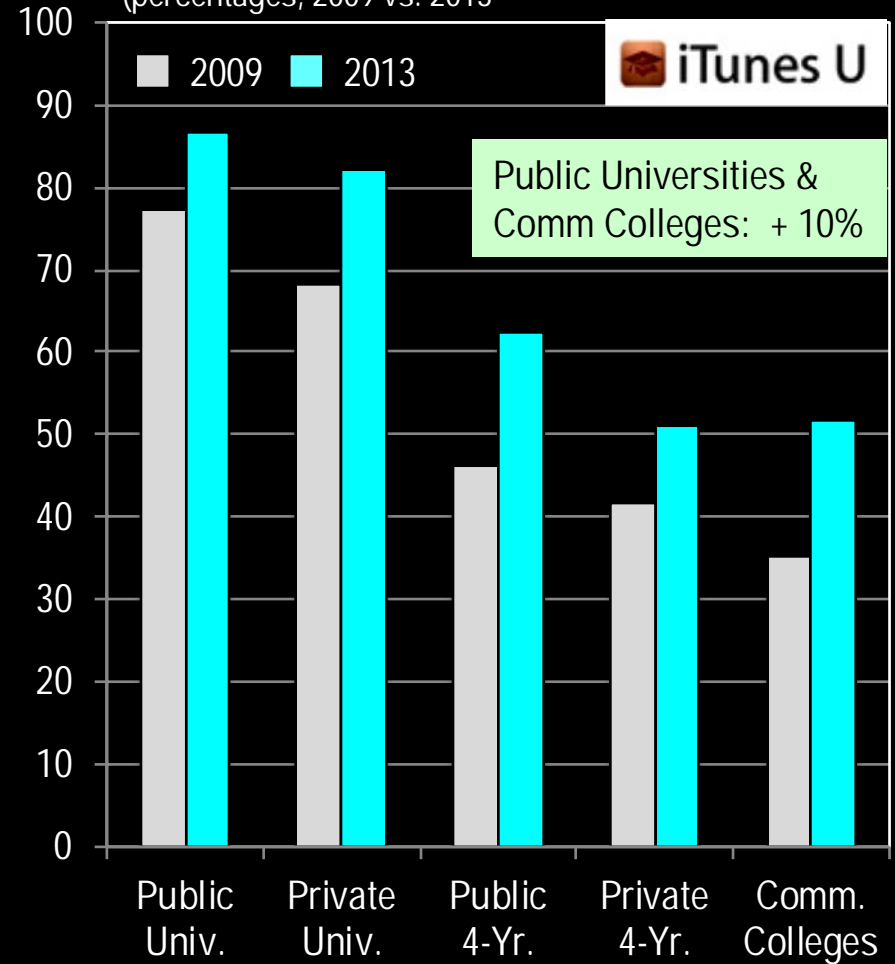
Managing and Monitoring Social Media

percentages, fall 2013
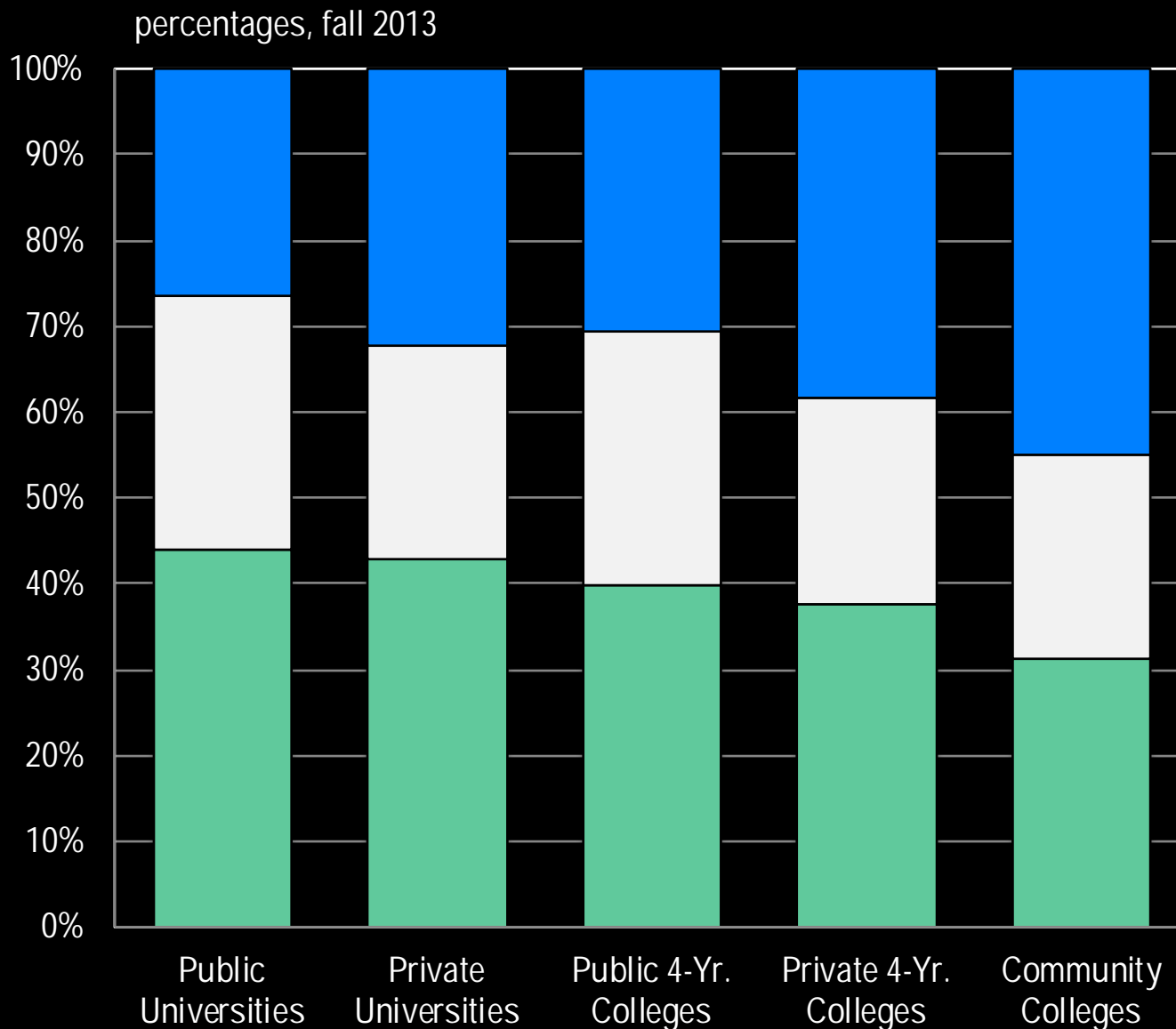
- Wide range of institutional policies on and practices on monitoring institutional social media activities.

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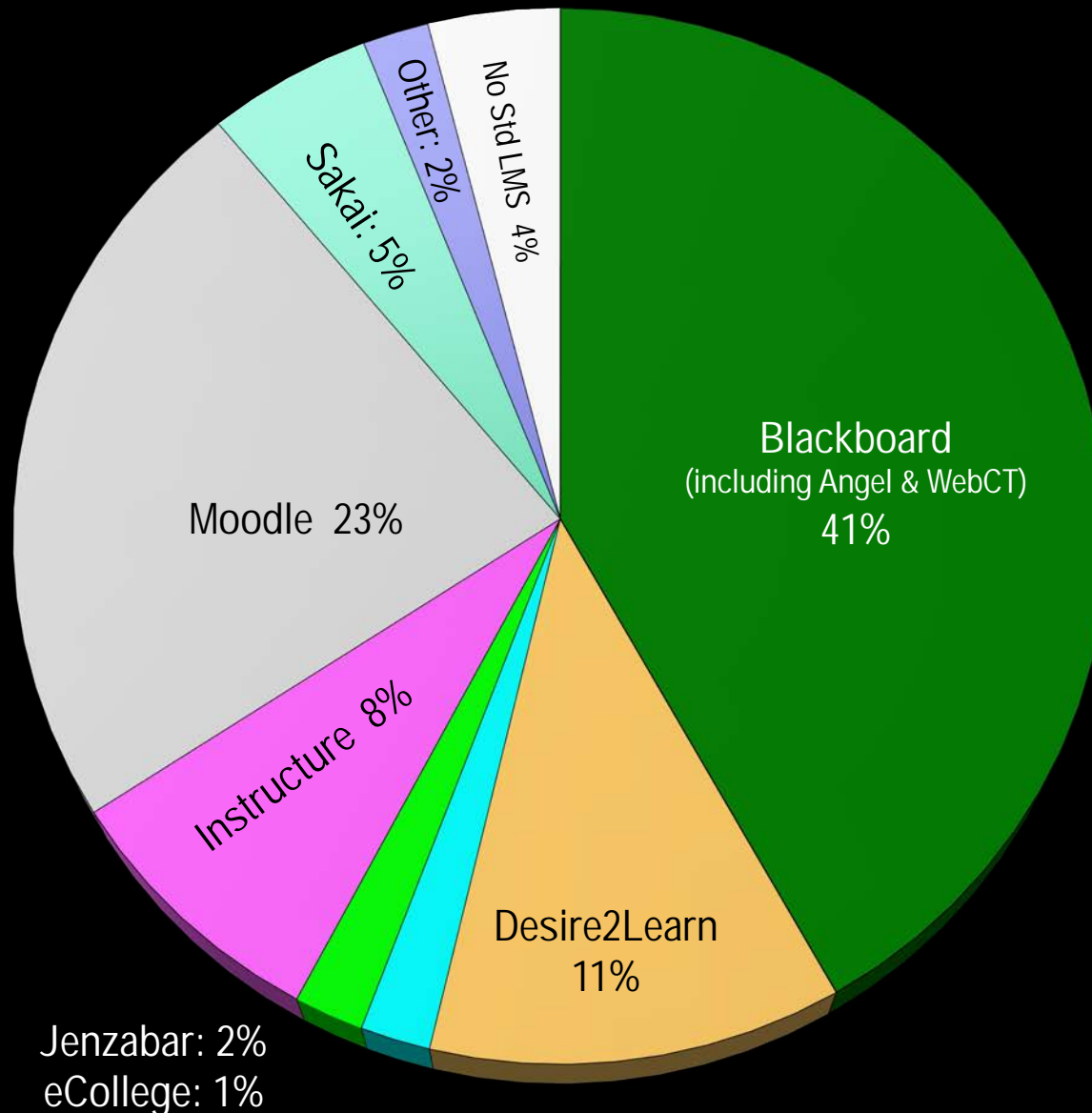- Individual units operate with autonomy
- Central monitoring but no campus policies
- Campus policies and central monitoring

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A Profile of the LMS Market, Fall 2013

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

- **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.

Pie chart segments:
- Blackboard (including Angel & WebCT) 41%
- Desire2Learn 11%
- Jenzabar: 2%
- eCollege: 1%
- Instructure 8%
- Moodle 23%
- Sakai: 5%
- Other: 2%
- No Std LMS 4%

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Institutional Demography of LMS Providers, 2013

percentage of campuses reporting a campus-standard LMS

	All	Pub Univ	Pvt Univ	Pub 4-Yr	Pvt 4-Yr	Comm Coll
Bb	41.6	51.5	56.4	39.8	35.4	40.9
D2L	11.8	13.2	2.6	21.6	1.9	22.8
eCollege	1.8	--	--	1.1	3.1	2.2
Instructure	8.0	11.8	7.7	5.7	5.6	11.8
Jenzabar	2.0	--	--	--	5.2	0.8
Moodle	23.3	5.9	10.3	21.6	39.5	15.1
Sakai	4.9	5.9	1.3	5.7	4.9	1.1

- Market presence often varies by sector

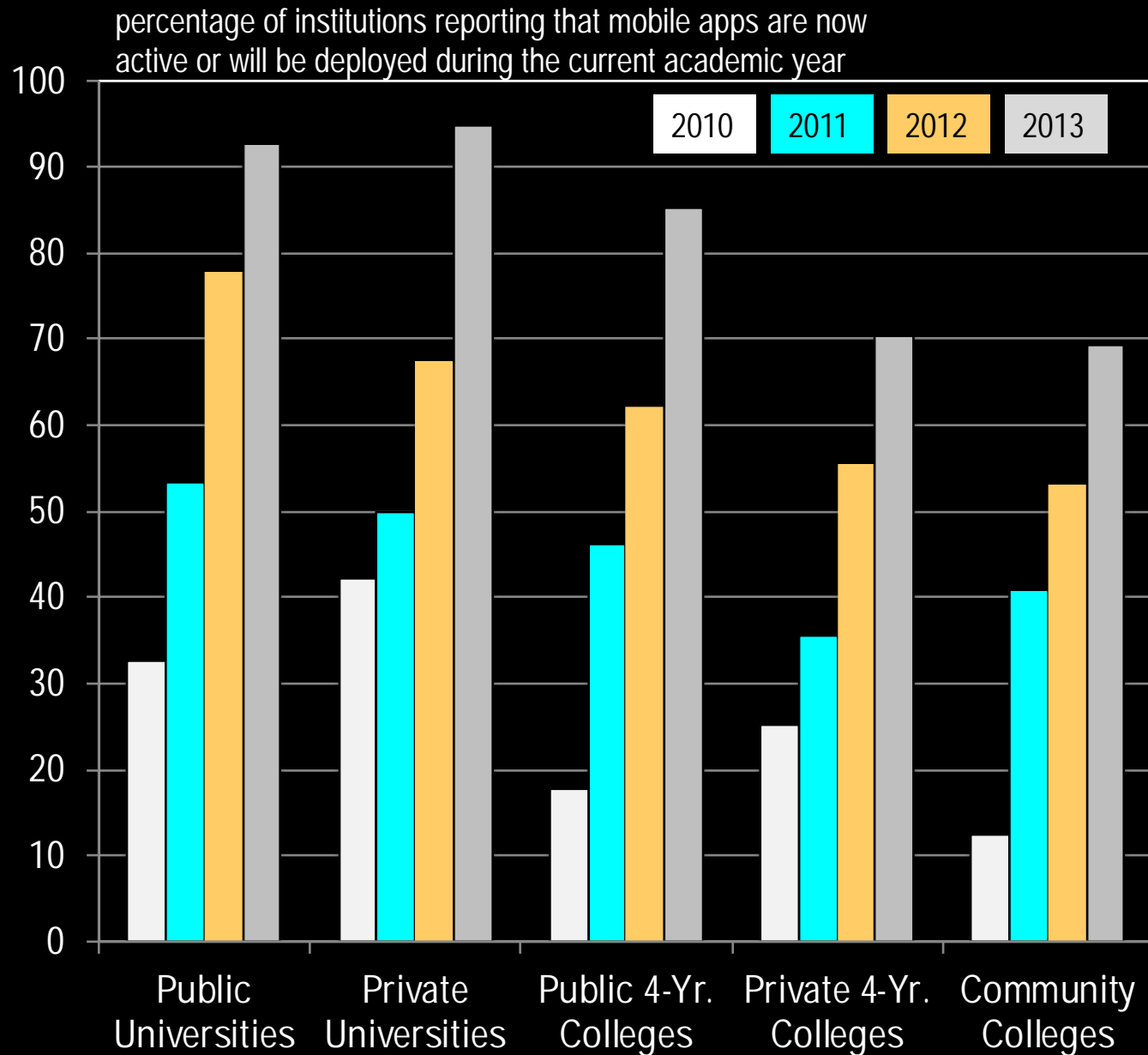- Two –thirds (64%) of campuses report plans to review the current LMS strategy for budget or other reasons

"Mobile Apps are an Important Part of Our Campus Plan to Enhance Instr. Resources & Campus Services"

percentage who agree/strongly agree, fall 2010 - 2013

Legend: 2010 | 2011 | 2012 | 2013

X-axis: Public Universities | Private Universities | Public 4-Yr. Colleges | Private 4-Yr. Colleges | Community Colleges
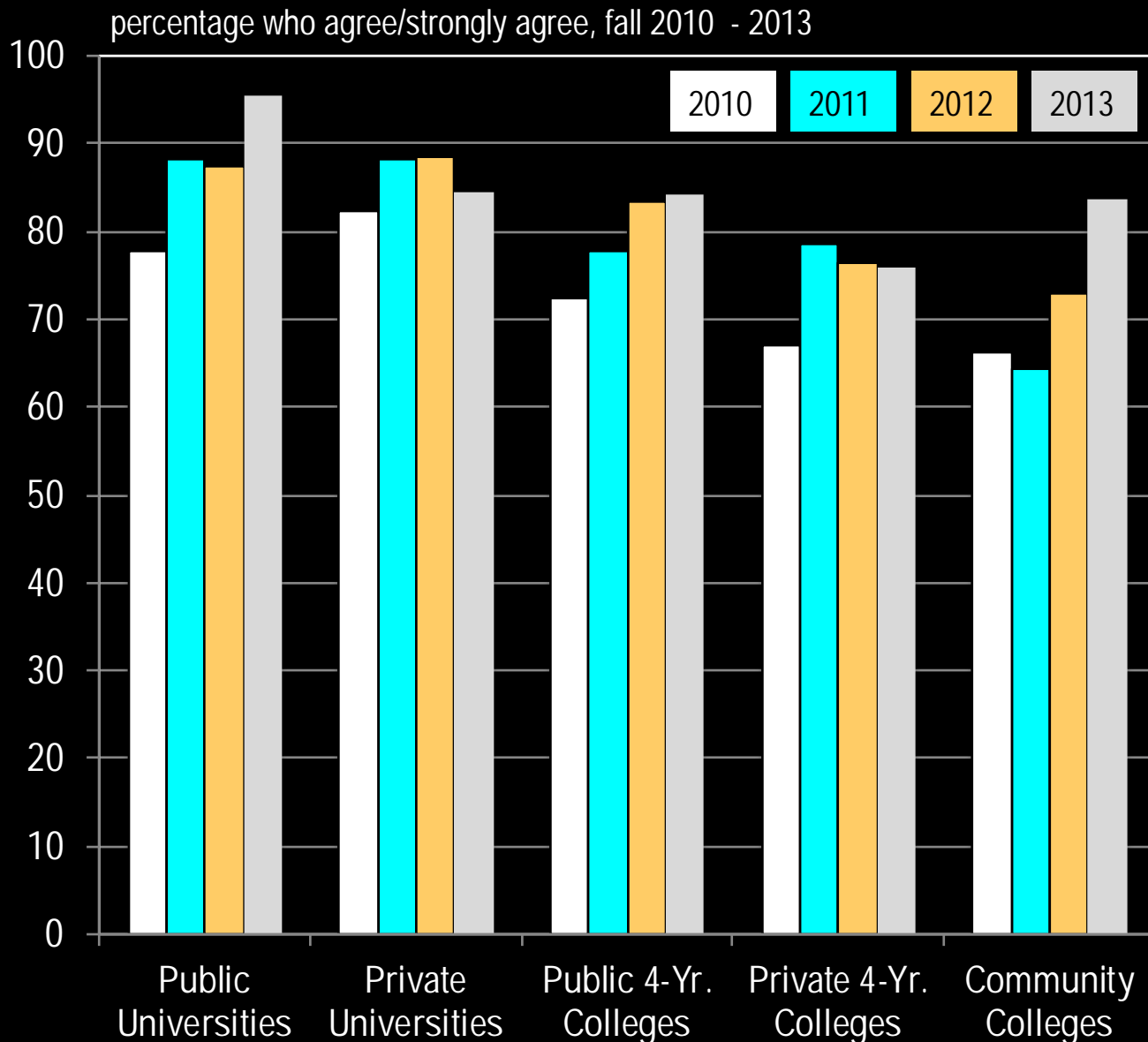
- Small but steady gains in percentage of campuses that view lecture capture as a key instructional resource.

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

Legend: 2010 | 2011 | 2012 | 2013

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

- Big gains (again) over the past 12 months

- Impact of student expectations and consumer market experience

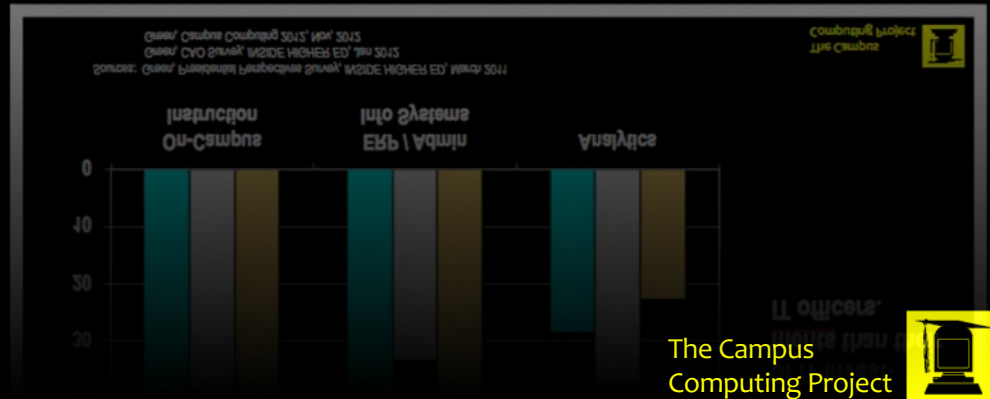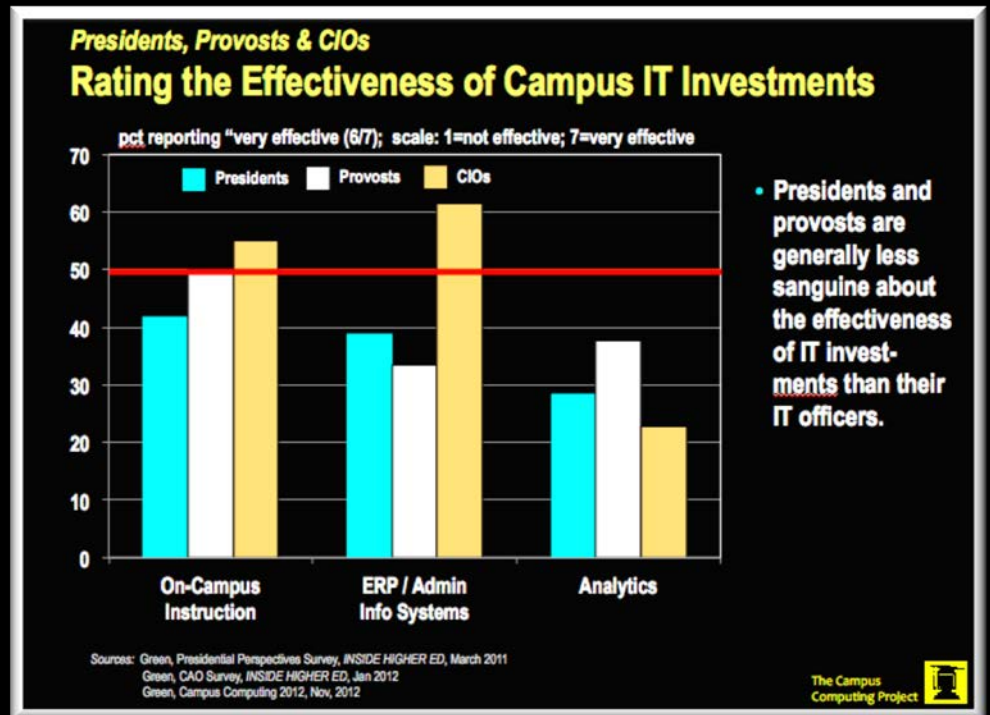- More (LMS & ERP) mobile app & service providers means a wide range of costs for deployment

Some Key Issues

Mixed Rating on the Effectiveness of Campus IT Investments

- Very mixed assessments from presidents, provosts, and IT officers about the effective-ness of IT investments

- Unrealistic expectations about the impact on instruction and operations?

- Over-promised and under-delivered?

- *"A failure to communicate?"*

Presidents, Provosts & CIOs
Rating the Effectiveness of Campus IT Investments

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

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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?

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plus ça change

How Do We Get Faculty to…

- 1986: Use computers

- 1996: Use the Internet

- 2012: Use Digital Resources

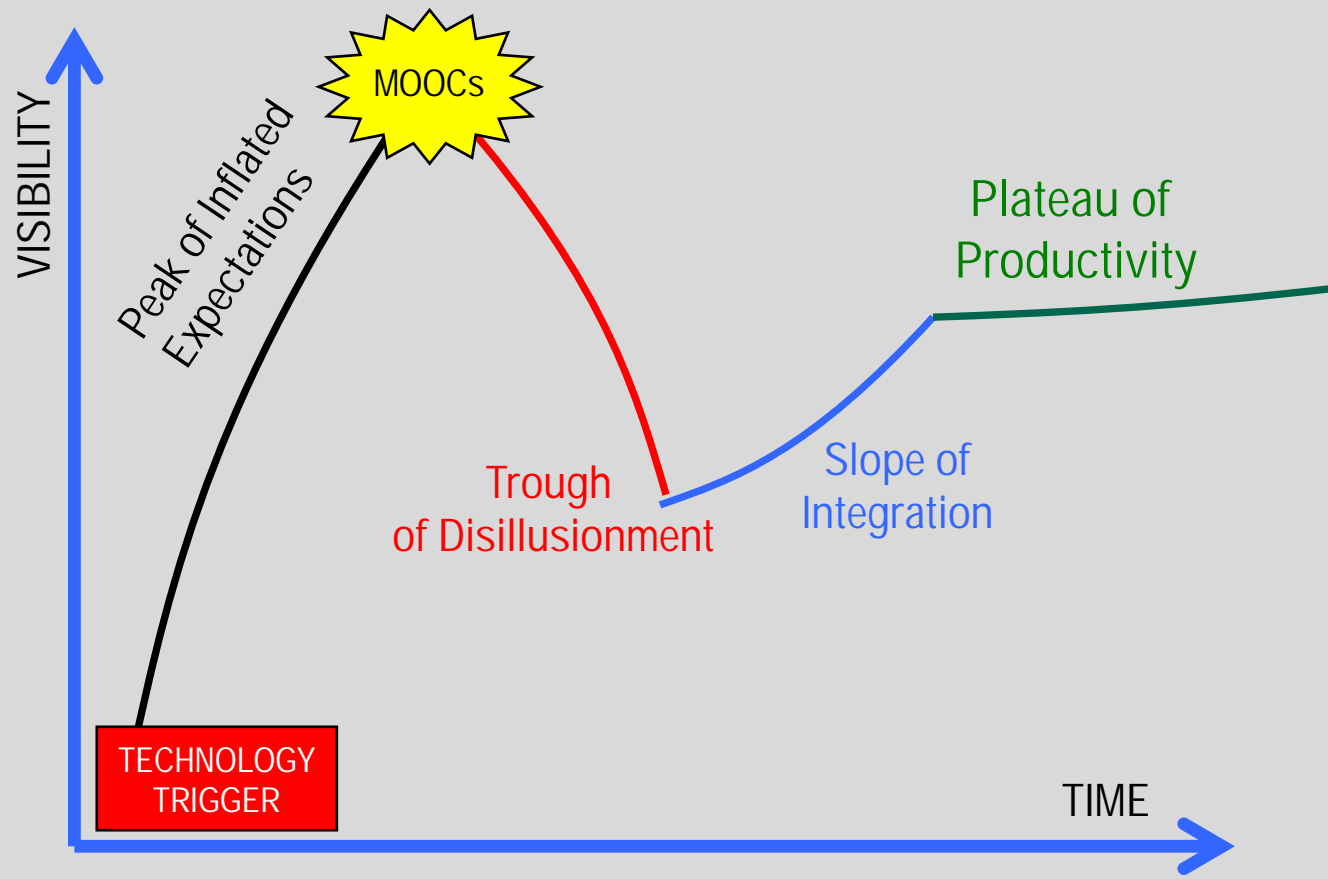*Underlying Faculty Question*

WHY SHOULD I DO THIS?

Changing (evolving!) questions but common underlying issues:

- Training

- User support

- Infrastructure

- Recognition & Reward

- Evidence of Benefit

MOOC Madness?

THE GARTNER HYPE CYCLE FOR NEW TECHNOLOGIES

VISIBILITY

Peak of Inflated Expectations

MOOCs

Plateau of Productivity

Trough of Disillusionment

Slope of Integration

TECHNOLOGY TRIGGER
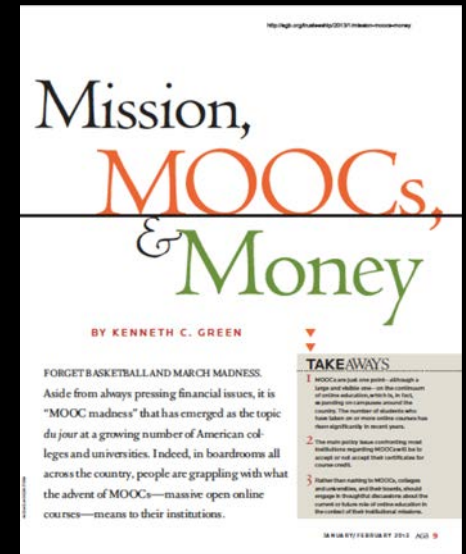
TIME

The Gartner Group

- *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

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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?

Mission, MOOCs, & Money

BY KENNETH C. GREEN

FORGET BASKETBALL AND MARCH MADNESS.
Aside from always pressing financial issues, it is
"MOOC madness" that has emerged as the topic
du jour at a growing number of American colleges and universities. Indeed, in boardrooms all
across the country, people are grappling with what
the advent of MOOCs—massive open online
courses—means to their institutions.

TAKEAWAYS

7.5 pct.

Mean completion rate, as reported by 103 MOOC instructors

March 2013 *Chronicle of Higher Education*
Survey of 103 MOOC Instructors

TARGET: Textbooks
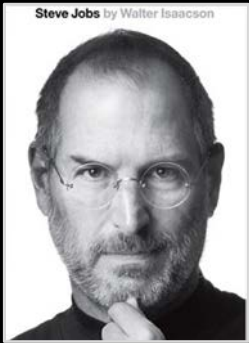
Steve Jobs set his sights on textbooks as the next industry he wanted to transform, seeing it as "an $8 billion a year industry that was ripe for digital destruction. . . . His idea was to hire great textbook writers to create digital versions and make them a feature on the iPad." Walter Issacson, *Steve Jobs*

Underlying Premise

CONTENT IS KING

IN THE REAL WORLD

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

iTunes

amazon kindle

You Tube

NETFLIX

f t

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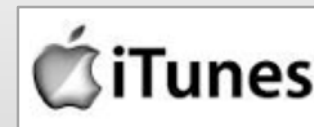
Textbooks Are an Ecosystem

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
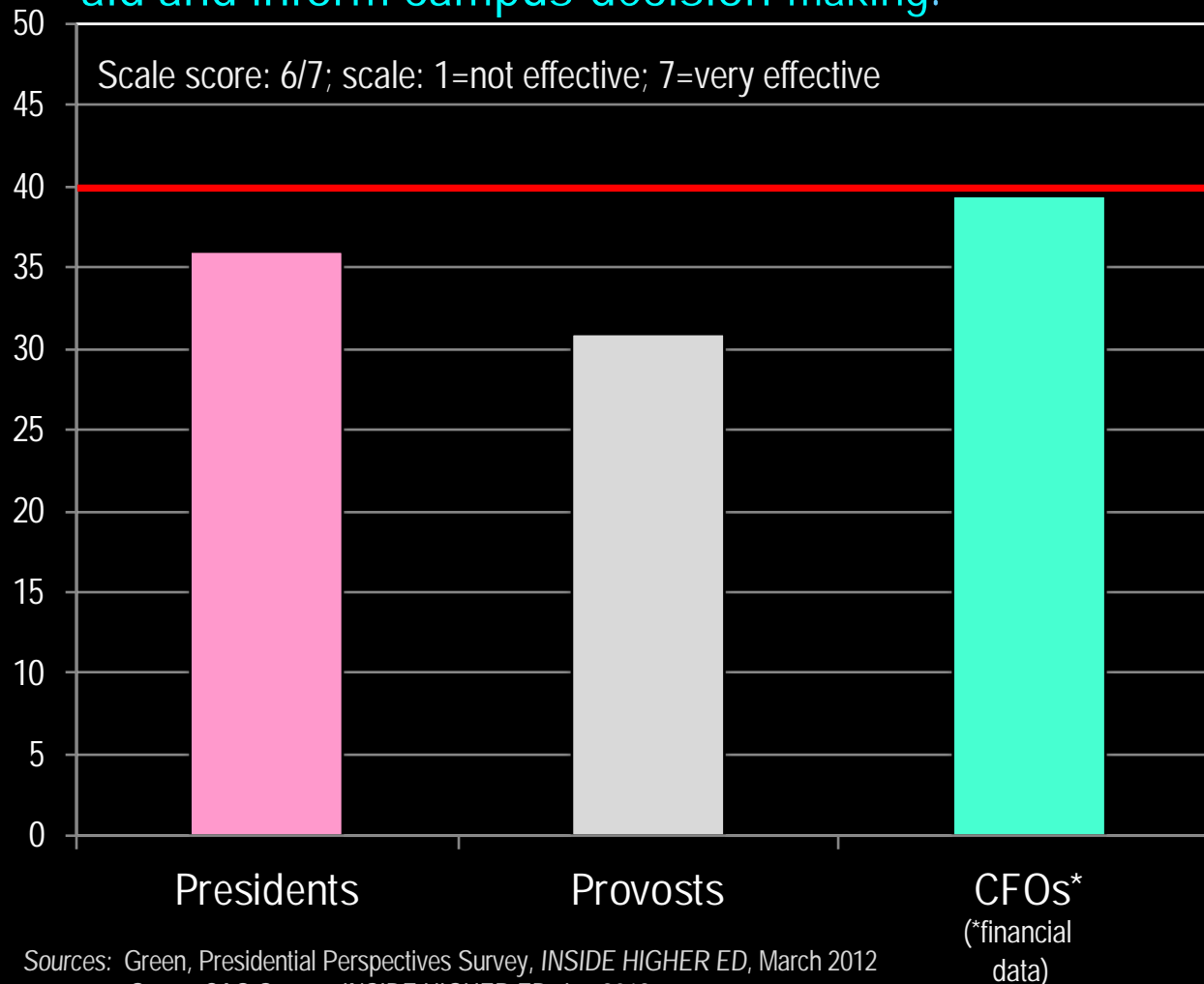- Conferences
- Communities
- Call Centers

And the ecosystem has also become a fortress.

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

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

| | Presidents | Provosts | CFOs* (*financial data) |

- 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

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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!

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The Technology Conundrum

We have lots of information technology.
We just have too little information.

© CartoonBank, 2002

The (Digital) Potemkin Campus

Grigory Potemkin   Catherine The Great

- 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.

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