THE CAMPUS COMPUTING PROJECT

The 2001 National Survey of Information Technology in US Higher Education

eCommerce Comes Slowly to the Campus

Colleges and universities are making slow yet steady progress on eCommerce and eService initiatives, according to new data from the 2001 Campus Computing Survey More than a fourth (27.6 percent) of the nation's colleges and universities can process credit card payments from their campus Web sites, a gain of 50 percent in the past year (up from 18.6 percent in 2000 and 5.1 percent in 1998). About one-eighth (11.8 percent) of 2001 survey respondents report that their campus has a strategic plan for eCommerce, compared to 6.8 percent in the 2000 survey. And over half (55.4 percent) of the institutions participating in the 2001 survey report that their campus Web site offers on-line course registration, up from 43.1 percent in 2000 and 20.9 percent in 1998.

"The good news is that the past year saw some significant gains on a number of eCommerce and eService measures across all sectors of higher education," says Kenneth C. Green founder/ director of The Campus Computing Project and a visiting scholar at The Claremont Graduate University in Claremont, CA. Yet Green reports that the campus community is still playing catch-up on

eCommerce and eService issues: "Considering the wide array of electronic commerce and electronic service options routinely available to students and faculty in the consumer and corporate sectors, it's clear that campus community is perhaps two years behind in its eCommerce/ eService offerings."

Green cites as one example the experience of tens of thousands of fall 2001 freshmen: "Across the country over the past two months, newly arriving college students have been offered a wide array of eCommerce and eService options from the commercial enterprises – banks, credit card firms, and long distance providers, among others – that want their business and their loyalty. Students can easily and securely access their bank and credit card accounts on the Web, or check on their long distance bills. Yet many do not have access to parallel services – online transcripts, registration, financial account or financial aid information." Green notes that the issue ahead for campuses is not just eCommerce – credit card transactions on the Web for tuition, textbooks and campus t-shirts – but a broader set of eServices issues which support the instructional mission and enhance a wide array of campus services.

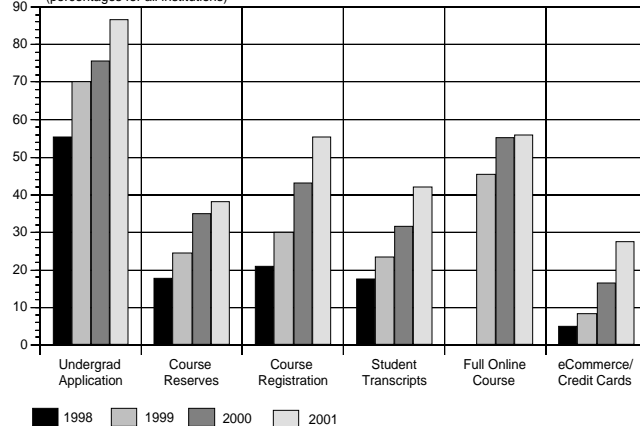Indeed, other data from the 2001 survey support Green's comments about a

Campus Web Site Services

(percentages by campus type, 2001)

	Public University	Private University	Public 4-Yr. College	Private 4-Yr. College	Community College
undergraduate application	98.8	100.0	91.7	90.2	70.5
financial aid application	85.7	73.1	62.5	46.9	51.4
course catalog	100.0	96.2	94.2	84.4	84.9
course registration	79.4	88.5	72.5	37.9	55.5
online courses	84.1	53.8	83.3	35.5	74.0
library/card catalog	98.8	100.0	93.3	85.3	78.1
course reserves	79.4	69.2	44.2	40.2	8.9
student transcripts	69.8	69.2	50.8	33.5	34.2
IT support resources	90.5	88.5	83.3	69.6	37.7
instructional software	81.0	69.2	64.2	32.6	18.5
college book store serices	87.3	73.1	67.5	57.1	43.2
eCommerce (fee payment)	49.2	42.3	41.7	17.9	20.5

Web Site Services, 1998-2001

(percentages for all institutions)

Categories: Undergrad Application, Course Reserves, Course Registration, Student Transcripts, Full Online Course, eCommerce/ Credit Cards

Legend: ■ 1998   ▥ 1999   ▨ 2000   □ 2001

lagging eCommerce/eService infrastructure. This year's survey respondents rated the campus capacity for eCommerce last on a list 11 different technology infrastructure metrics that include network and telecommunications services, user support services, online instructional resources, network security, and IT training for students and faculty.

Adding to the eService/eCommerce challenges ahead for college and universities are the budget cuts underway across all sectors of American higher education. The 2001 survey data provide clear indicators of declining technology spending during the current academic year.

About one-fifth (18.0 pct) of the institutions participating in the 2001 Campus Computing Survey report a decline in the academic computing budget at their campus for the current academic year, compared to about one-eighth (11.4 percent) in the 2000 survey report. In contrast, half (51.6 percent) of the survey respondents report increases in their institution's academic computing budget for 2001/2002, compared to 58.0 percent reporting gains in 2000/2001. The number of campuses reporting reduced funds for academic computing appears largest among public universities, community colleges, and private four-year colleges.

Similarly, the 2001 survey data signal a downturn in spending on administrative computing. As above, almost one-fifth (18.3 percent) of the survey respondents report a decline in the campus budget for administrative computing, compared to one-eighth (11.7 percent) in 2000.

A final indicator of declining technology budgets for the current academic year (2001/2002) is reflected in purchasing plans. Across all sectors, four key purchasing indicators (purchasing by academic units, purchasing by administrative units, all institutional purchases of desktop/notebook computers, and purchases of network servers) show declines in the percentage of campuses reporting "increased purchases" and greater numbers institutions reporting "reduced purchasing," compared to the 2000 data.

Downturn in Academic Computing Budgets

(percentage reporting budget downturn, 2000 vs 2001, by sector)
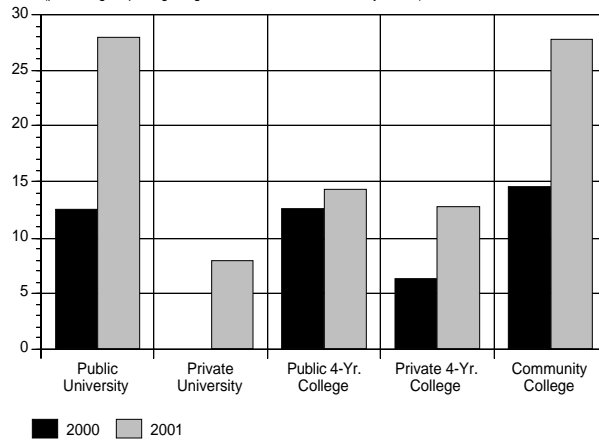
"Even before September 11th, campus officials could see the consequences of the downturn in the economy over the past 12 months their for the current year," says Green.

He adds that the downturn in technology funding in higher education comes at the end of a seven year cycle in which campus technology budgets increased dramatically: "Coming out of the recession of the early 1990s, funding for campus IT resources was spurred on first by the emergence of the Web in the mid-1990s, and later by Y2K issues at the close of the decade. Even absent the current econonic slowdown, it seems likely that we would have had a natural downturn in technology funding after seven years of steady gains across all sectors."

As in the past five years, survey respondents across all sectors of higher education identify "assisting faculty integrate technology into instruction" as the single most important IT issue confronting their campuses "over the next two or three years." Roughly a third (31.5 percent) of the 2001 survey respondents tag instructional integration as the key IT issue for their institutions in the coming years (com-

pared to 40.5 percent in 2000 and 29.6 percent in 1997).

"Providing adequate user support" again ranks second in the 2001 survey (15.4 percent in 2001, compared to 22.3 percent in 2000 and 25.0 percent in 1997). However, a new item on the 2001 survey, "upgrading/replacing administrative/ERP systems," ranks third. Roughly one-sixth (12.6 percent) of the initial survey respondents identify ERP issues as "the single most important IT issue" for their institution over the next 2-3 years. And roughly equal proportions (about 11 percent) of the 2001 survey respondents report that "hiring retaining qualified IT staff" and "financing the replacement of aging computers/technology" are their top institutional technology challenges in the coming years.

The survey data reveal that wireless networks are an increasingly important issue for all sectors of higher education. One-fourth (24.3 percent) of the campuses report that they have a strategic plan for wireless networks; another third (32.1 percent) report the strategic plan for going wireless is currently in development.

Roughly half (50.6 percent) of the institutions in the 2001 survey report that they have functioning wireless LANs, compared to 29.6 percent in 2000. Another tenth (10.8 percent) report that wireless LANS will become functional this year. Just 6.2 percent of the survey respondents indicate that full-campus wireless networks are up and running at their institutions as of fall 2001, compared to 3.8 percent in 2000; an equal number (6.6 percent) report that their campuses will be fully wireless during the coming academic year (vs. 3.8 percent in 2000).

Across all sectors, the 2001 data suggest that wireless services cover about a tenth (10.9 percent) of the physical campus at those institutions reporting wireless networks.

Going Wireless

(percentages by sector, 2001

- ■ Strategic plan for wireless
- ▨ Wireless LAN now functional
- ▨ Pct. of campus covered by wirless
- ▨ Full-campus wireless networkl

A growing number of campus respondents identify course management systems (CMS) as "very important" in their institutional IT planning (scale score 5.8, compared to 5.5 in

Policy vs. Practice
Course Management Tools

(percentages by sector, 2001)

- ■ Campus has selected a standard CMS Product
- ▨ Pct of classes using CMS

2000; scale: 1=not important/7-very important). The survey data indicate that roughly three-fourths (73.2 percent) of the institutions participating in the 2001 survey have already established a "single product" standard for course management software, up from 57.8 percent in 2000.

The 2001 data also reveal that the approximately one-fifth (20.6 percent) of all college courses now use course management tools, up from 14.7 percent in 2000.

Across all sectors, respondents identify network security as a critical issue for their campuses (scale score 6.4; scale: 1=not important; 7=very important). However, respondents rate their "network security against hackers and virus attacks" as fair (scale score 4.9; scale: 1-=poor; 7=excellent).

The 2001 survey data indicate that proportion of students who own computers is rising, up to almost of three-fourths (71.5 percent) of all students in 2001, compared to 58.6 percent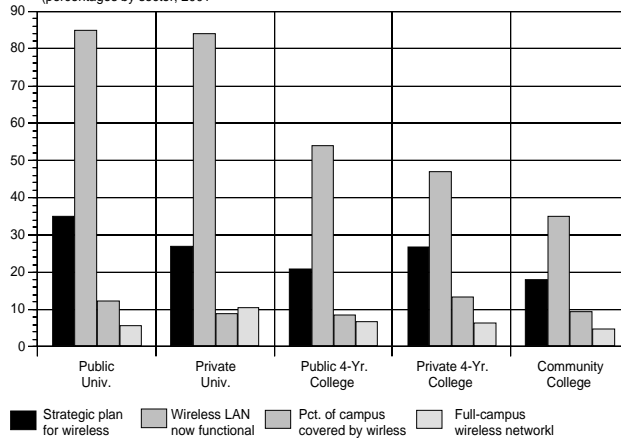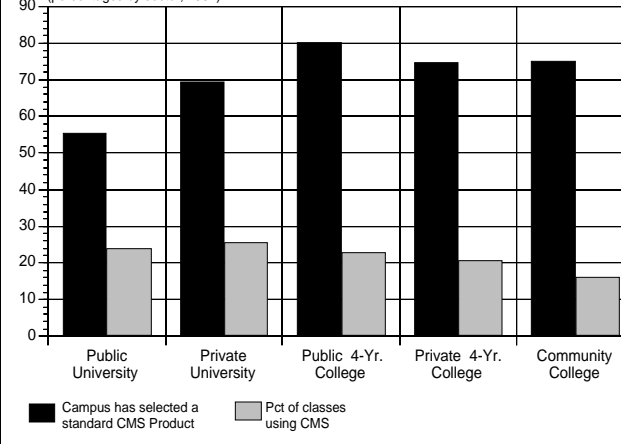 in 2000. The survey respondents estimate that over just half (55.7 percent) of students own desktop computers, while about one-sixth (15.8 percent) own notebook systems. Notebook computer ownership is highest in private universities (22.2 percent of the students), and in public universities and private four-year colleges (about one-fifth of the students in each sector).

The annual Campus Computing Survey, now in its 12th year, is based on data provided by campus officials, typically the senior technology officer (CIO/CTO, vice president for information technology, etc.) at 590 two- and four-year public and private colleges and universities across the United States. Participating institutions completed the survey during the summer and fall of 2001.

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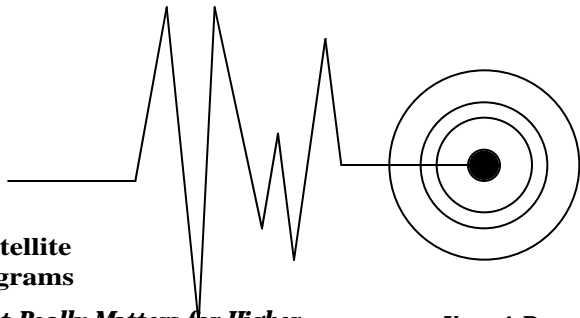
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