THE CAMPUS COMPUTING PROJECT

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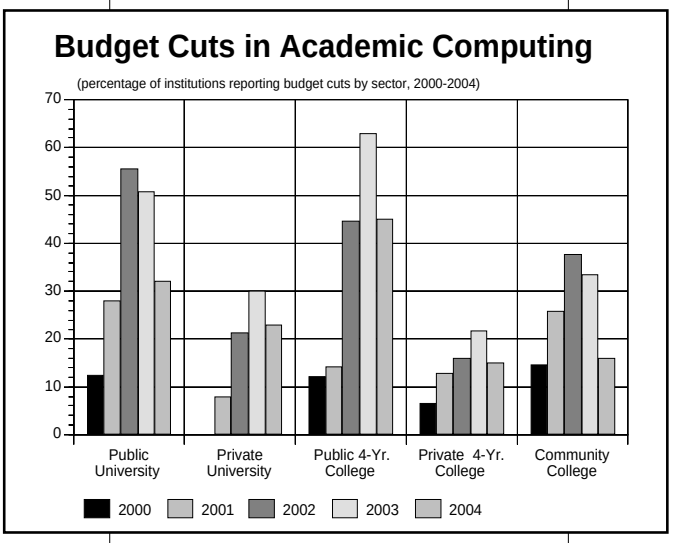
The 2004 National Survey of Information Technology in U.S. Higher Education

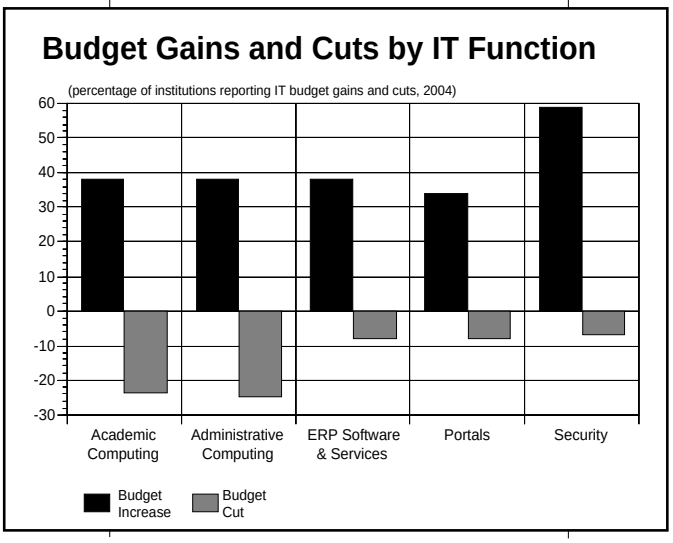
Tech Budgets Get Some Relief
Cautious Support for Open Source Applications

Colleges and universities are beginning to experience some relief from the budget cuts that have cast a shadow over campus IT efforts and investments for the past few years, according to new data from the 2004 Campus Computing Survey. Just one-fourth (24.3 percent) of the campuses participating in this year's survey report budget cuts in academic computing, compared to two-fifths (41.3 percent) in 2003, and 32.6 percent in 2002. Similarly, just a fourth (25.3 percent) of the institutions in the 2004 survey report reduced funding for administrative computing, compared to 42.3 percent in 2003, 31.0 percent in 2002, and 18.3 percent in 2001.

Private colleges and universities seem to have fared a bit better with IT budgets than their public counterparts: 41.2 percent of private universities reported increased funds for academic computing, compared to 31.9 percent of public universities. Almost half the private four-year colleges (47.4 percent) report increased support for academic computing this year, compared to just a fifth (24.0 percent) of public four-year colleges. Among community colleges, almost two-fifths (37.3 percent) report increased money for academic computing for the current budget cycle.

"While tech budgets, and by extension, campus technology investments and initiatives, still suffer the cumulative impact of the campus budget cuts of recent years, the 2004 survey data provide evidence of some improvement for the current academic year," says Kenneth C. Green, founding director of The Campus Computing Project. "The IT budget index – a comparison of campuses reporting budget gains versus budget cuts – was decidedly positive this year, compared to negative or marginal for the past few years."





Another indicator of stabilizing technology funding is the decline this year in the percentage of institutions reporting mid-year budget cuts. Just a fifth (19.2 percent) of the institutions participating in the 2004 survey report mid-year budget cuts, down from a third (32.4 percent) in the 2003 survey and 24.9 percent in 2002. Moreover, the mid-year budget cuts were significantly smaller this past year, averaging 1.5 percent, compared to 9.5 percent in 2003 and 7.2 percent in 2002.

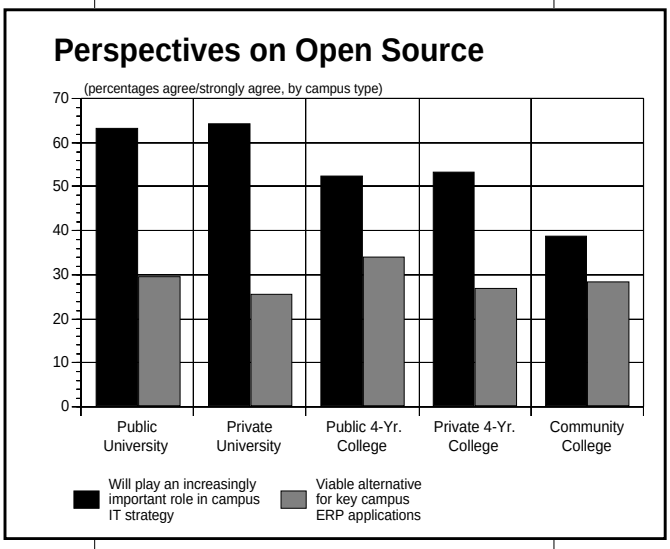
Not surprisingly, network security and administrative (or ERP) budgets were most likely to experienced increased funding for 2004. Three-fifths (59.5 percent) of the surveyed col-

leges and universities report gains in the network security budget, and almost two-fifths (38.4 percent) report more funds for ERP software and services. "The survey data indicate that institutions feel compelled to invest in improved IT security and enhanced information systems," says Green.

Other data from the 2004 survey confirm the priority of IT security and ERP issues. For example, in past years the survey respondents, typically chief information officers (CIOs), identified the "instructional integration of information technology" as the "single most important IT issue confronting their institutions over the next two-three years." However, instructional integration ranks second in 2004, well behind network security and barely ahead of "upgrading/replacing administrative/ERP systems" as the top campus IT priority. The data also reveal differences by sectors: security and ERP issues are the top priorities for research universities and public four-year colleges; instructional integration and security are the top priorities for private four-year colleges and community colleges.

New items on the 2004 survey suggest cautious support for Open Source applications among senior campus IT officers. Over half (51.9 percent) agree that "Open Source will play an increasingly important role in our campus IT strategy." Not surprisingly, support for Open Source is highest in universities: roughly two-thirds of the respondents in public and private research universities affirm the "increasingly important" role of Open Source. However, less than a third of the survey respondents (28.9 percent) agree that Open Source "offers a viable alternative" for key campus administrative or ERP applications such as student information or campus financal systems.

"The data suggest an 'affirmative ambivalence' about Open Source administrative applications among campus technology officials," says Green. He notes that Open Source applications are already a common part of the "back room" IT operations on campuses and in corporations. The long-term questions about Open Source, says Green, "involve the costs and benefits of developing and supporting complex administrative applications intended for the desktops and laptops of non-technical users."



The 2004 survey documents the continuing efforts of colleges and universities to stem the unauthorized, peer-to-peer (P2P) distribution of digital content on campus networks. Three-fourths (76.3 percent) of the institutions participating in the 2004 survey report "appropriate use" policies for digital content, up from two-thirds (66.2 percent) in 2003. The data show increases in appropriate use policies across all sectors. For example, 86.1 percent of public universities report appropriate use policies in 2004, compared to 80.9 percent in 2003; among private universities, the number rose from 77.5 percent in 2003 to 87.2 percent in 2004. Similarly, in public four-year colleges, appropriate use policies increased from 74.0 percent in 2003 to 87.2 percent in 2004, while 81.1 percent of private four-year colleges report appropriate use policies this year, up from 67.7 pecent in 2003.

"The 2004 data confirm that colleges and universities are making sig-

THE CAMPUS COMPUTING PROJECT

Begun in 1990, The Campus Computing Project is the largest continuing study ofthe role of information technology in American higher education. The project's national studies draw on qualitative and quantitative data to help inform faculty, campus officials, policy-makers and others others interested in a wide array of information technology issues that affect U. S. colleges and universities.

The 2004 Campus Computing Survey was supported, in part, by the following sponsors: Adobe Systems, Apple Computer, BearingPoint, Blackboard, CDW-G, Cisco Systems, Datatel, Dell Computer, eCollege, EDUCAUSE, Follett Higher Education Group, Gateway Computer, Hewlett Packard, Houghton Mifflin Company, IBM Higher Education, Intel, Jenzabar, LearningTimes, Macromedia, Mellon Foundation, Microsoft, Pearson Education, PeopleSoft, rSmart Group, SAS Institute, SunGard Collegis, SunGard SCT, Sun Microsystems, Thomson Learning, and TouchNet.

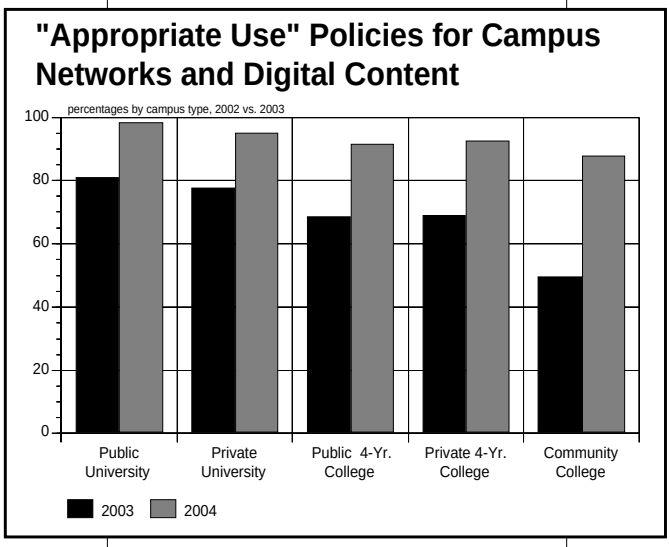
For additional information, please contact:

THE CAMPUS COMPUTING PROJECT
KENNETH C. GREEN
VISITING SCHOLAR, SCHOOL OF EDUCATIONAL STUDIES
THE CLAREMONT GRADUATE UNIVERSITY • CLAREMONT, CA 91711 • USA

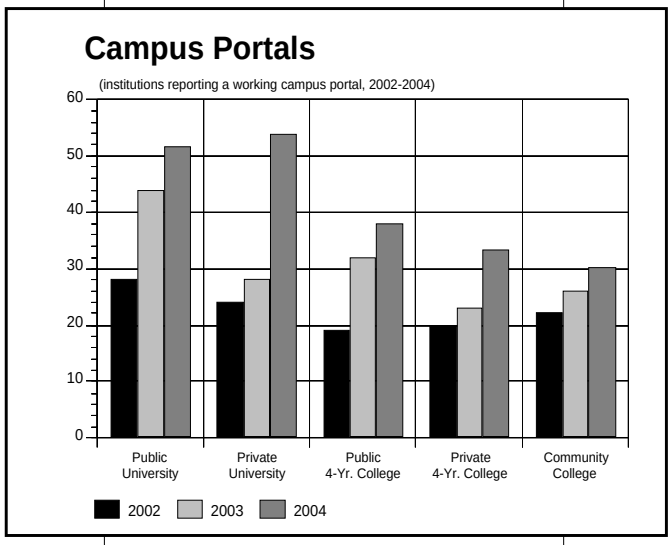
MAILING ADDRESS
P.O. BOX 261242 • ENCINO, CA 91426-1242 • USA
TEL: 818.990.2212 • FAX: 818.784.8008 • www.campuscomputing.net

ificant efforts to repond to the concerns of media industry officials and members of Congress regarding the unauthorized distribution and downloading of music, video, and other commercial content on campus networks," says Green. However, he comments that "the media industry and the media continue to devote disproportionate attention to college students as the primary source of digital piracy," when, in fact, the terrain has shifted from college campuses to some 23 million American households that now have consumer broadband services. Green cites data from the Recording Industry of America (www.riaa.org) as evidence that off-campus consumers, not college students, should be the real target of media publicity about digital piracy: just 191 (3.5 percent) of the RIAA's 5,441 lawsuits targeting P2P distribution of digital content involve college students.

The 2004 data point to continuing gains regarding campus planning for and the deployment of wireless networks (WiFi). More than half (55.5 percent) of the campuses report strategic plans for wireless networks, as of fall 2004, up from 45.5 percent in 2003 and 24.3 percent in 2001. Fully four-fifths (81.1 percent) of the campuses participating in the 2004 survey report wireless LANs, up from 77.2 percent last year, 67.9 percent in 2002 and 29.6 percent in 2000. A fourth (19.8 percent) indicate that full-campus wireless networks are up and running at their institutions as of fall 2004, compared to 14.2 percent last year and just 3.8 percent in 2000. Across all sectors, the 2004 data reveal that wireless networks are available in more than a third (35.5 percent) of college classrooms, ranging from 47.4 percent in private universities to 24.8 percent in community colleges.



More institutions deployed campus portals this past year. Almost two-fifths (37.1 pecent) of colleges and universities report a working (single sign on/initial sign on) campus portal as of fall 2004, up from 28.4 percent in 2003 and 21.2 percent in 2002. However, when asked to assess the campus IT infrastructure, survey respondents rank campus portals lowest among 13 different infrastructure services (2004 portal score of 3.7, up from 3.1 in 2002; scale:1=poor; 7=excellent), just behind eCommerce capacity (score 3.8). In contrast, the two highest ranked IT infrastructure components are computer networks (score 6.0, compared to 5.9 in 2003) and online library reference resources (score 5.8, compared to 5.6 in 2003).



Although survey respondents acknowledge the need to assess and evaluate campus IT initiatives and services, comparatively few institutions have developed IT assessment programs. For example, survey respondents strongly agree that institutions should "assess the benefits of IT invesments" (scale score 5.8; scale: 1=not important; 7=very important) and "clarify goals and plans" for campus techology resources (score 6.3). However, just a third (34.0 percent) report that their institutions routinely "assess the benefits of IT on instructional services and academic programs."

Begun in 1990, The Campus Computing Survey, is the largest continuing study of computing and information technology in American higher education. The 2004 survey is based on data provided by campus officials, typicaly the CIO, CTO, or most senior campus IT officer, representing 516 two-and four-year public and private colleges and universities across the United States. Survey respondents completed the questionnaire during summer and fall, 2004.

Copies of the 2004 Campus Computing Report will be available on December 10th. Price: $37 (plus $2.00 shipping). Order from Kenneth Green, c/o Campus Computing, PO Box 261242; Encino, CA 91426-1242. Please use the order form on page 4.

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