THE CAMPUS COMPUTING PROJECT

The 2005 National Survey of Information Technology in U.S. Higher Education

Growing Concern About Campus IT Security; Slow Progress on IT Disaster Recovery Planning

College and university IT officials identify "nework and data security" as the "single most important IT issue" affecting their institutions over the next two-three years" according to new data from The Campus Computing Project. One-third (30.4 percent) of the campus IT officials participating in the 2005 Campus Computing Survey cite "network and data security" as the most important IT issue confronting their institutions, up from one-fifth (21.1 percent) in 2004. Across all sectors, IT security concerns are highest among campus officials in public four-year colleges, where more than two-fifths (44.1 percent) view network and data security as the most important IT issue for their institutions. In contrast about one-third of CIOs in public and private universities and one-fifth of senior campus IT officers in private four-year colleges and community colleges view security as their leading IT concern.

Additionally, a new item on the annual Campus Computing questionnaire reveals that fully half (50.7 percent) of the institutions participating in the 2005 survey experienced hacks or attacks on their campus networks in the past academic year; two-fifths (41.2 percent) report major spyware infestations, while a third (35.2 percent report major virus infestations affecting their institutions during the 2004/05 academic year. Additionally, a fifth (19.6 percent) of institutions experienced major security incidents involving identity management last year.

"The survey data go well beyond the sporadic public reports about data or IT security incidents at individual colleges or universities," says Kenenth C. Green, founding director of The Campus Computing Project. "The 2005 survey data mark a major shift in campus IT priorities from instructional integration to security and ERP/infrastructure issues. The data also confirm that network and data security are major concerns for campus IT officials across all sectors of American higher education."

Surprisingly, four years after the September 2001 attacks and the then very public discussions about IT disaster recovery, only three-fifths (57.4 percent) of campuses report a strategic plan for IT disaster recovery, little changed from 2004 (55.5 percent) or even 2002 (53.0 percent). "The Hurricane Katrina and Rita experiences earlier this year, plus the growing concerns about IT security, should be a reminder to all colleges and

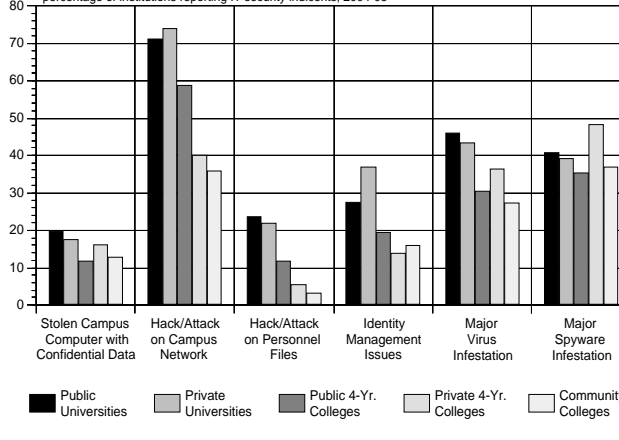## Rising Concern About IT Security

"Single Most Important IT Issue Affecting My Institution Over the Next 2-3 Years"

percentages: 2000-2005

2000	2001	2002	2003	2004	2005
Instructional Integration of IT (40.5%)	Instructional Integration of IT (31.5%)	Instructional Integration of IT (24.1%)	Instructional Integration of IT (21.1%)	Network & Data Security (21.1%)	Network & Data Security (30.4%)
IT User Support (22.3%)	IT User Support (15.4%)	Upgrade/ Replace ERP (18.9%)	Upgrade/ Replace ERP (17.6%)	Instructional Integration of IT (18.5%)	Instructional Integration of IT (18.1%)
Financing IT (14.6%)	Upgrade/ Replace ERP (12.6%)	Financing IT (15.1%)	Financing IT (16.1%)	Upgrade/ Replace ERP (17.2%)	Upgrade/ Replace ERP (15.9%)

IT Security Incidents, A/Y 2004-05

percentage of institutions reporting IT security indicents, 2004-05

Legend: Public Universities | Private Universities | Public 4-Yr. Colleges | Private 4-Yr. Colleges | Community Colleges

universities to lock down, or update, their IT disaster plans," says Green.

Data from the 2005 survey show continuing improvements in campus IT budgets. Just one-sixth (15.5 percent) of the surveyed institutions report budget cuts in academic computing for this year, compared to one-fourth (24.3 percent) in 2004, two-fifths (41.3 percent) in 2003, and 32.6 percent in 2002. In contrast, more than two-fifths (44.3 percent) of the campuses report increased funds for academic computing this year, up from 37.9 percent in 2004 and just 26.9 percent in 2003.

As in past years, private colleges and universities did better with budget gains than their public counterparts. Fully half (50.0 percent) of private universities report gains in their IT budgets this year, up from 41.2 percent in 2004. In contrast, only two-fifths (40.0 percent) of public universities experienced gains in their academic computing budets for 2005 (up from 31.9 percent last year). Among private four-year colleges, more than half (53.2 percent) report budget increases in academic computing (up from 47.4 percent in 2004), compared to two-fifths (38.2 percent) of public four-year colleges (up from 24.0 percent last year). Between 2004 and 2005 the proportion of community colleges reporting increased academic computing budgets was virtually unchanged at about 37 percent.

"Institutional technology budgets, and by extension, campus technology investments and initiatives, still feel the cumulative effects of major budget cuts in the early years of this decade. That said, the survey data provide important evidence of major improvements and much-needed stabilization in campus IT funding" says Green.

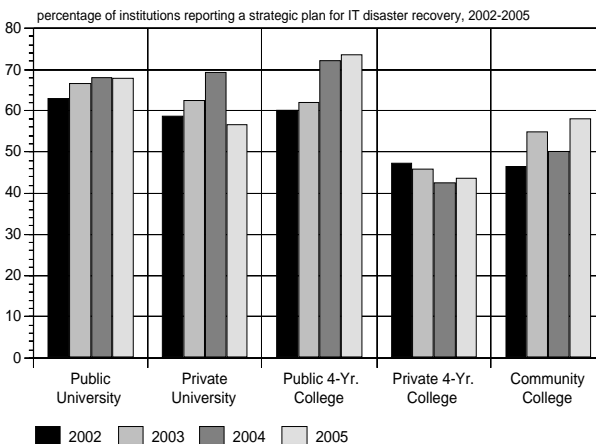Given CIO concerns about IT security, it is not surprising that secur-rity budgets were the category of IT spending most likely to experience improved funding for the 2005/06 academic year. Almost two-thirds (64.4 percent) of the surveyed institutions report gains in their IT security budgets, up from three-fifths (59.5 percent) in 2004. The 2005 survey

Little Progress on IT Disaster Recovery Planning?

percentage of institutions reporting a strategic plan for IT disaster recovery, 2002-2005

| | | | |
| 2002 | 2003 | 2004 | 2005 |

also documents gains in the proportion of campuses reporting increased funds for ERP upgrades/replacements (44.4 percent in 2005, compared to 38.4 percent in 2004), network server purchases (44.4 percent report gains, compared to 38.8 percent in 2004), and user training and support (26.1 percent in 2005 compared to 23.5 percent in 2004). "The data confirm that colleges and universities are investing in security, the administrative/ERP infrastructure, and user support," says Green.

The survey documents continuing gains for wireless networks across all sectors. Almost two-thirds (64.0 percent) of campuses now have a strategic plan for wireless networks as of fall 2005, compared to 55.5 percent in 2004, 45.5 percent in 2003, and 24.3 percent in 2001. More than a fourth (28.9 percent) of the institutions report "full-campus" wireless services this year, compared to a fifth (19.8 percent) in 2004, and just 3.8 percent in 2000.

Across all sectors, the 2005 data suggest that wireless services are available in more than two-fifths (42.2 percent) of college classrooms, up from a third (35.5 percent) in 2004. By sector, the proportion of wireless classrooms ranges from 26.8

percent in community colleges (compared to 20.9 percent in 2004) to 53.8 percent in private universities (up from 47.4 percent last year).

The 2005 survey data document the continuing campus efforts to stem the unauthoized distribution of digital content on campus networks. Four-fifths of the colleges and universities participating in the 2005 survey report "appropriate use" policies, up from three-fourths (76.3 percent) in 2004 and two-thirds (66.2 percent) in 2002. "The survey confirms the continuing efforts of campus officials to respond to the concerns of the media industry and members of Congress regarding P2P distribution on campus networks," says Green. However, he notes that the media industries continue to devote disproportionate attention to college students as the major cause of digital piracy when the primary terrain has shifted to the tens of millions of Amercan households that now purchase consumer broadband services from Adelphia, Comcast, SBC-Yahoo, TimeWarner and other Internet service providers. Green cites data from the Recording Industry of America as evidence that off-campus consumers, not college students, should be the real target of media publicity about digital piracy: less than ten percent of the individuals named as part of the RIAA's P2P litigation efforts are college students.

More institutions deployed campus portals this past year. Almost half (46.5 percent) of the institutions participating in the 2005 survey report a working (single sign on/initial sign on) campus portal, up from 37.1 percent last year and 21.2 percent in

2002. However, even as more institutions offer portal services, campus IT officials continue to rank the quality or effectiveness of their campus

Wireless Classrooms, 2004-2005

percentages, by campus type

2004 ☐ 2005 ■
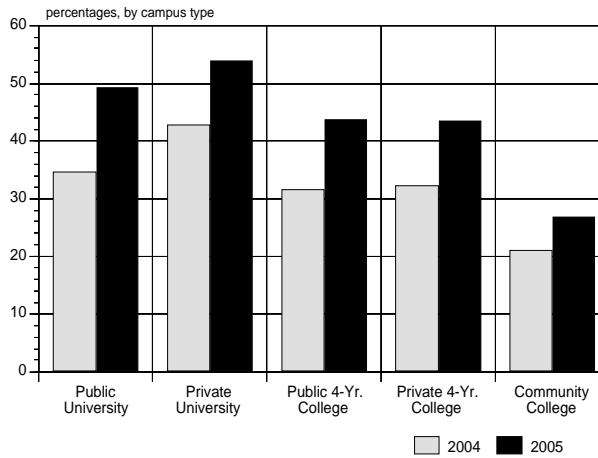
portal as very low compared to other IT services. Portals rank 13th on a list of 14 campus IT services (scale score 3.9, up from 3.7 in 2004 and 3.1 in 2003; scale:1=poor; 7=excellent). Portals rank just behind eCommerce

Campus Portals

institutions reporting a working campus portal, 2002-2005

■ 2002 ☐ 2003 ▨ 2004 ☐ 2005
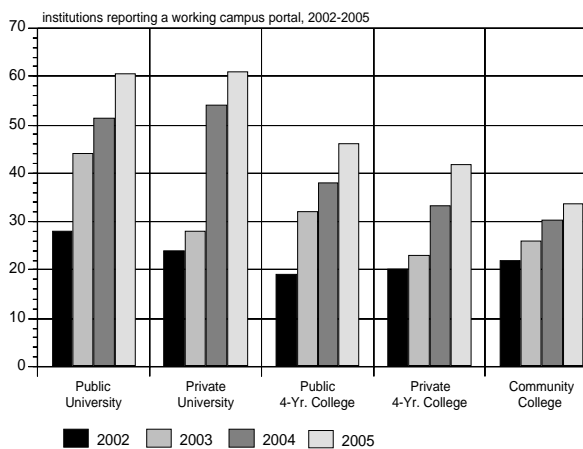
(scale score 4.1) and just ahead of Data Warehousing (scale score: 3.4). In contrast, the two highest ranked IT infrastructure components are computer networks (score 6.1, up from 6.0 in 2004) and online library reference resources (score 5.8, the same as in 2004).

The 2005 survey data suggest little change in the cautious support for Open Source administrative applications among senior campus IT officers first reported by The Campus Computing Project last year. Over half (55.1 percent, compared to 51.9 percent in 2004) agree that "Open Source will play an increasingly important role in our campus IT strategy." However, less than a third of the survey respondents (30.4 percent, compared to 28.9 percent in 2004) agree that "Open Source offers a viable alternative" for key campus administrative or ERP applications such as student information systems, campus finance systems, or personnel/HR sofware.

Begun in 1990, The Campus Computing Survey, is the largest continuing study of computing and information technology in American higher education. The 2005 survey is based on data provided by campus IT officials, typicaly the CIO, CTO, or other senior campus IT officer, representing 501 two-and four-year public and private colleges and universities across the United States. Survey respondents completed the questionnaire during September and October, 2005.

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