

EDUCAUSE

2008 Program Plan Highlights

*prepared for the EDUCAUSE Board of Directors
December 2007*

The mission of EDUCAUSE is broad in scope, as are the programs that have been undertaken in support of the membership:

EDUCAUSE advances higher education by promoting the intelligent use of information technology.

This Program Plan is intended to serve a variety of purposes important to EDUCAUSE:

- to communicate to the membership the scope and range of activities being undertaken by the association;
- to create a composite set of objectives that will be used to evaluate segments of the program, as well as to provide a basis for performance appraisal for the staff;
- to provide an integrated view of the budget and the programmatic initiatives of EDUCAUSE.

Each year, EDUCAUSE prepares such a plan and posts it on the web so that the entire membership can see the scope of activities and priorities of this association. A more in-depth internal version of this plan for management purposes includes more detailed budgets and performance measures.

Proposals for major initiatives for 2008 were presented in draft form to the Board of Directors of EDUCAUSE in August 2007, when they, along with a preliminary budget, were reviewed by the Board. Based upon that feedback, amendments and modifications were made, and a summary of significant priorities for 2008, with budget detail, was presented and approved at the Board meeting held in association with the annual conference. The full plan, outlining all association efforts for fiscal year (calendar year) 2008, is posted on the web in December after approval by the EDUCAUSE Board of Directors.

Functional Areas

In this program plan, the operational philosophy and the financial structure of the association are defined in the context of six distinct functions, into which all activities of EDUCAUSE have been aggregated:

LEADING EDGE INITIATIVES

Leading Edge Initiatives include the EDUCAUSE Learning Initiative (ELI); the Net@EDU program; the EDUCAUSE Center for Applied Research (ECAR); and the efforts that EDUCAUSE undertakes in support of policy, particularly its relationship

with the Coalition for Networked Information (CNI) and coordination and cooperation with other professional societies.

MEMBER PROGRAMS AND SERVICES

This section covers a number of specialized services and programs to help members of EDUCAUSE derive the best benefit from their relationship with the association and better accomplish their jobs within their home institutions. This area includes a broad-based technology transfer effort to take the lessons drawn from the EDUCAUSE leading-edge initiatives and share them with the entire membership. It includes a variety of information resources as well as programs to encourage communication with and among members, such as Member Committees and Constituent Groups, and programs to enable effective, productive relationships with corporations.

ANNUAL CONFERENCE

The annual conference is the signature event of the association, attracting around 7,000 attendees annually. This event is critical to the diffusion of new developments, professional development efforts, and exchange of information on best practices. It provides an opportunity to recognize outstanding accomplishments in the field and is a forum for debating and developing new ideas.

PROFESSIONAL DEVELOPMENT

EDUCAUSE maintains a strong professional development program. Opportunities are offered by EDUCAUSE through face-to-face events such as the annual, regional, and special-topic conferences, seminars, workshops, summits, and institutes, as well as via online activities, web-based seminars, and online discussion groups. The content of these events is driven by the members, and opportunities for members to participate have grown significantly in recent years. The EDUCAUSE e-book series, EDUCAUSE Connect, the magazines, and other publications also offer our members opportunities for professional development experiences through contributing to and making use of the content.

MARKETING COMMUNICATIONS SERVICES AND PUBLISHING SERVICES

The EDUCAUSE publishing program is an award-winning service to the membership, and includes the periodicals *EDUCAUSE Review* and *EDUCAUSE Quarterly*, the *Washington Update*, and books, monographs, and other print publications that support the mission of the association.

The Marketing Communications program provides access to information about key issues in higher education IT, and about the activities of the association to the broader community. Using the web, blogs, e-mail, print, audio, and video, the marketing and communications program works to reach many communities (institutional, corporate, political, association, and the press) with timely and relevant information in an accessible and useful way.

ADMINISTRATION AND FINANCE

Administration, a necessary function in any organization, involves the management of human resources and the physical office environment to support association activities, and prudent stewardship of association financial resources. Also included are the technology and records-management infrastructures that enable the association to conduct its business and maintain financial records of its relations with members and potential members, which can be used in a variety of programmatic ways.

Program Highlights from 2007

Leading Edge Initiatives

- Established a new membership model for ELI for 2007-08. The previous two membership levels (\$5,000 and \$3,500) were consolidated into a single fee of \$2,500. Rather than members pre-paying for conference seats, a member-only registration fee was instituted. For most existing members, the new structure results in lower costs than under the previous model.
- Increased membership in the first two months of the new structure by an additional 18 percent beyond the membership growth earlier in the year. As a result, ELI membership grew to over 200 paying members in 2007. In addition, ELI has successfully broadened its base to include more comprehensive, baccalaureate, and community colleges.
- Increased the registration ceiling for the 2007 ELI Annual Meeting by 40 percent to 450—and sold out. The 2007 meeting exceeded the previous year’s satisfaction rating by 11 percent (92 percent of respondents indicated they were satisfied or very satisfied). Four new activities were added to the 2007 ELI Annual Meeting: the use of informal spaces for gatherings and to showcase learning space design, the addition of “Learning Circles” as an interactive learning experience for participants, corporate sponsorship of specific conference elements, and a review by a research team to ensure that the event fosters participant learning.
- Received the highest participant satisfaction rating to date for the 2007 ELI Spring Focus Session on immersive learning environments: 95 percent of respondents indicated they were satisfied or very satisfied; two-thirds of respondents were very satisfied. The spring focus session also marked ELI’s first “video newsreel,” a video that summarized the 1.5 day event in 30 minutes.
- Used interactive theater for the first time at the 2007 ELI Fall Focus Session on being net savvy as a learning environment; hosted video cameos of students discussing net savvy issues; used Twitter, a social networking tool, to gather audience reflections; and used the “carousel” strategy to organize an interactive brainstorming session. Participant satisfaction with this event was also high, with 88 percent of respondents indicating they were satisfied or very satisfied with the experience and 85 percent indicating that what they learned was useful or very useful in helping them deal with campus issues.
- Developed a second “video newsreel” for the 2007 Fall Focus Session capturing event highlights and interviews with speakers and program advisory group members.

EDUCAUSE 2008 PROGRAM PLAN: OVERVIEW

- Continued the very popular ELI “7 Things You Should Know About...” technology briefs. “7 Things” pieces comprise seven of the top 10 most popular EDUCAUSE resource library items for the year ending September 11, 2007.
- Released four ELI white papers in an “authentic learning” series in 2007, along with one white paper in the “assessment” series.
- Created a “student voices” series for ELI in 2007 to ensure that the student perspective is consistently represented. Three papers were released: *Confessions of a Podcast Junkie: A Student Perspective*; *Reflecting, Writing, and Responding: Reasons Students Blog*; and *The Campus Press Blogs*.
- Highlighted the promise of cyberinfrastructure to improve teaching and learning, with ELI creating a series of case studies. To date, three have been released.
- Released the 2007 Horizon Report—a joint project between ELI and the New Media Consortium—at the 2007 ELI Annual Meeting.
- Continued the excitement surrounding *Educating the Net Generation*, which continues to be a best seller—it still ranks among the top 25 most popular EDUCAUSE resource library items more than three years after its release. In addition, the topic is now being used as the basis for conferences in the U.S., Australia, and Europe.
- Maintained the momentum for *Learning Spaces*. The site for this e-book averaged over 4,600 sessions per month from September 1, 2006–August 31, 2007. During that same period, the full e-book or individual chapters from it have been downloaded nearly 30,000 times.
- Continued to produce ELI podcasts as part of regular resource offerings. Podcast interviews and selected audio sessions were released for all face-to-face ELI events. For the year ending September 11, 2007, ELI podcasts comprised 11 of the top 50 most popular EDUCAUSE podcasts.
- Expanded and updated the ELI web site, including the use of a new tabbed structure to make resources easier to find. Added a “student voices” tab to the ELI Resources page to highlight ELI materials that focus on student perspectives.
- Began producing screencasts as a way of introducing new tools to members. Screencasts have been used to provide an overview of the ELI web site as well as to enhance the multimedia experiences it offers.
- Continued ELI’s web Seminar series in 2007, which averaged 188 participants per seminar.
- Presented an ELI preconference workshop at each EDUCAUSE regional conference and facilitated discussion sessions as a mechanism to ensure that ELI material is made available to the broader EDUCAUSE audience.
- Created a new type of Discovery Tool for ELI in 2007, designed to help institutions get started with new technologies such as podcasting and blogging. For example, the Guide to Podcasting recaps what podcasting is, gives first-hand accounts of how students use—and don’t use—podcasting, shows how podcasting supports learning, explains the benefits and limitations of podcasting in comparison with other tools, highlights implementation and assessment considerations, and identifies valuable podcasting resources.
- Created three categories of ELI Discovery Tools—tools that are designed to save members time in creating professional development events, applying technology, or

gathering student input. The categories are: workshop guides (collections of readings, discussion questions, and customizable worksheets), technology guides (compilation of essential information and practical guidelines for integrating technology into teaching and learning), and student input tools (designed to gather student feedback about needs, wants, and issues with teaching, learning, and technology).

- Released the following Discovery Tools in 2007: Net Generation Workshop Guide, Learning Space Workshop Guide, Net Savvy Workshop Guide, Guide to Podcasting, and Guide to Blogging.
- Increased ECAR subscriptions from around 400 colleges and universities at the end of 2006 to over 460 in calendar 2007. Three corporations sponsored ECAR in 2007, and six subscribed to ECAR research.
- Published four major ECAR studies in 2007, on (1) undergraduate students and IT, (2) IT and business continuity, (3) IT collaboration, and (4) the IT help desk.
- Produced a significant ECAR study of e-research in U.S. medical schools and colleges in cooperation with the American Association of Medical Colleges (AAMC).
- Deployed ECAR surveys on IT governance and IT leadership and workforce that will result in studies to be published in 2008.
- Initiated ECAR research on funding for research cyberinfrastructure, to be published in 2008, as a result of the Cyberinfrastructure Summit.
- Published 24 ECAR research bulletins.
- Published four ECAR Roadmaps and 14 case studies. In addition to the case studies associated with the major studies mentioned above, ECAR published case studies of the European Bologna Declarations and Process; institutional transformation at the University of Porto, Portugal; IT security governance at Trinity University Dublin, Republic of Ireland; and IT Services Management and ITIL at the University of Cardiff, Wales.
- Released three major research reports from the Burton Group, provided under license to ECAR subscribing institutions.
- Launched a significant research effort in Europe and Australasia. Seventy-five percent of all Australian universities are participating in ECAR's studies of IT security and identity management. More than 50 European universities are also participating. Results will be published in 2008 and will feature comparisons with U.S. college and university responses where possible.
- Delivered two ECAR symposia that were fully subscribed and attended by more than 250 participants in 2007.
- Continued to lead higher education community effort—including six presidential associations—to provide input to federal policymakers as they move forward on updating America's telecommunication laws.
- Continued to host a Federal Relations working group on telecommunications reform with federal-relations representatives from 13 participating institutions and associations.
- Completed over 50 individual Congressional meetings and a Congressional staff briefing.
- Completed seven meetings with FTC Commissioners and their Internet Task Force regarding their work on the "Broadband Connectivity: Competition Policy" report.

EDUCAUSE 2008 PROGRAM PLAN: OVERVIEW

- Worked with FCC staff to establish rules for the 700 MHz spectrum auction and to release more spectrum for unlicensed use in the White Spaces debate.
- Met with FCC Commissioner Michael Copps to discuss R&D issues for networking.
- Led the successful effort to persuade hundreds of member institutions to send letters and place phone calls to their senators opposing the “Reid amendment” on campus file sharing.
- Continued to coordinate with pro-net neutrality groups outside of higher education such as Amazon, Google, Free Press, and Public Knowledge for both Congressional and grassroots activity.
- Coordinated and supported the operations of the CALEA technology committee.
- Facilitated and provided presentations at CALEA briefings for higher education in multiple venues, and created and maintained web pages with CALEA background information and legal analysis.
- Continued liaison work with other national and international identity management activities, including the E-Authentication Partnership, the Federal PKI Policy Authority, the Federal Certificate Policy Working Group, the Pharmaceutical Industry Bridge, the Aerospace Industry Bridge, and the International Committee on ID Management.
- Served on the USHER and InCommon oversight bodies and worked to coordinate HEBCA and USHER infrastructures.
- Served on the Steering Committee of the Common Solutions Group.
- Served on the Network Policy and Planning Advisory Committee and now the External Relations Advisory Committee of Internet2.
- Served on the NSF Business and Operations Advisory Board.
- Hosted the 15th and 16th “Fed/Ed” PKI Coordination meetings in Washington.
- Continued coordinating outreach for the NSF Middleware Initiative collaboration with Internet2 on identity and access management, including an ongoing series of CAMP workshops; an updated identity management CD; a wide variety of articles, presentations, and case studies; collaborative work with the registrar community; and continued work with the Net@EDU StateNets working group. Coordinated with Internet2 on a proposal to NSF for the next phase of these initiatives.
- Continued operating the EDUCAUSE Identity Management Services Program, offering customized and reduced-cost products and services to EDUCAUSE members.
- Continued dealing with a wide variety of policy and eligibility issues related to old and new .edu names.
- Continued to staff the Joint Committee of the Higher Education and Entertainment Communities in the area of peer-to-peer file sharing.
- Hosted two national workshops on technological measures for the control of copyright infringement on campus networks and published a report on requirements for such technologies for the use of vendors, higher education, the entertainment industry, and Congress. Organized additional studies as next steps.
- Expanded the new Network Policy Council, supporting its visits to Congress, the FCC, and its presentations to EDUCAUSE members. Developed and distributed an updated brochure on *Broadband America—Realizing the Vision*.
- Expanded the activities of the new Net@EDU Working Group on Campus

Cyberinfrastructure.

- Organized and hosted an EDUCAUSE Summit on Cyberinfrastructure that garnered a series of community recommendations on how EDUCAUSE can best help our members address the important new challenges of cyberinfrastructure (CI). Initiated an ECAR study and a project to distill the relevant documents into a “what to do” guide in response.
- Organized and hosted a corresponding EDUCAUSE Summit on IT Governance, including the inter-institutional issues raised by cyberinfrastructure and national coalitions, and developed an action plan for next steps.
- Led the higher education community efforts to promote National Cyber Security Awareness Month in October along with partner organization, the National Cyber Security Alliance, including the release of videos from the student video contest and other awareness resources.

Member Programs and Services

- Updated and enhanced the EDUCAUSE Core Data Service. The survey was completed and submitted by more than 959 institutions and was released using improved service tools on the interactive database service.
- Completed the merger of connect.educause.edu and the EDUCAUSE Resource Center, bringing together traditional content with social software services. The site offers increased ability to interact and comment on content, faceted search filtering, graphics support, detailed author information, and limited content management capabilities.
- Analyzed and monitored the use of our existing web site and new content channels to inform communications and content strategy.
- Redesigned several web sites, including the Internet Forum, connect.educause.edu, and several pages supporting new ELI initiatives.
- Continued to maintain syndicated information feeds (RSS) for all EDUCAUSE Resource Center topics, new job listings, *EQ*, *EDUCAUSE Review*, EDUCAUSE news, and connect.educause.edu content.
- Produced and delivered more than 350 podcasts of EDUCAUSE-related content, interviews, and conference sessions.
- Deployed a mechanism to give members the opportunity to provide more detailed information about their areas of professional responsibility to improve member information and services.
- Completed revision of the awards program, including presenting the second annual Catalyst Award to uPortal, which involved research into the project and contact with nearly two dozen individuals who were part of its evolution and development of ways to acknowledge individual participation as part of the award process.
- Maintained the volunteer applicant pool for 2007–2008 advisory and program committees (358 unique applicants for openings on advisory and conference program committees—256 for advisory committees and 270 for program committees, with 168 indicating interest in both committee types).
- Added five new Constituent Groups in 2007: Business Continuity Management, IT Accessibility, IT Architects, IT Strategic Planning, and Professional

Development/Staff Management. Ended one CG for low level of interest: Enterprise Electronic Content Management.

- Increased Constituent Group electronic discussion list subscriptions by 22.7 percent, resulting in 18,157 total subscribers.
- Conducted the eighth annual EDUCAUSE Current Issues Survey and developed associated member resources. Survey results and analysis by the Current Issues Committee were published in *EQ* and *EDUCAUSE Review* and on the EDUCAUSE web site.
- Conducted a successful election by voting representatives to fill two slots on the Board of Directors.
- Planned and implemented a half-day corporate forum attended by more than 60 higher education and corporation executives.
- Created public web site applications allowing the 7,700 .edu domain holders to pay the newly approved annual fee. Designed and implemented internal applications and business processes for Member Services staff to assist in applying payments and managing outstanding invoices. Sent over 25,000 payment notices via e-mail and paper to domain contacts from May through December and received 6,900 payments (the remaining 800 unpaid domain names were put on hold and eventually deleted from the .edu registry).
- Developed a collection of essays that discuss the delivery of IT-enabled services in the “Web 2.0” era for publication in 2008, as part of the Grand Challenges Initiative. Essays describe a vision of college and university interaction with the “cloud” of services provided in the web and highlight such issues as the drivers and vectors of change in higher education, IT governance, service strategy, and IT architecture. Twenty prominent leaders from higher education and information technology contributed to this work.
- Navigated a critical issue relating to the granting of a critical patent to EDUCAUSE member Blackboard, including engaging in a dialog with Blackboard executive leadership and the chair of the Sakai Board of Directors and crafting a letter and consensus by the EDUCAUSE Board of Directors to the CEO of Blackboard. The EDUCAUSE position has been received well by members and in the press, and resulted in Blackboard’s promise to not enforce specific patent rights against open source course management software solutions.
- Maintained effective and productive relations with corporate partners through active participation in numerous corporate advisory bodies and through the EDUCAUSE corporate forum at the EDUCAUSE 2007 conference in Seattle.
- Maintained and enhanced EDUCAUSE international relations through our strong links with EUNIS (European IT directors), UCISA (UK IT leaders), CAUDIT (Australian IT directors), and CAUL (Australian university librarians).
- Deepened EDUCAUSE ties in the international higher education community by delivering keynote and other addresses in Australia, Canada, China, England, Ireland, France, Japan, The Netherlands, and Norway. In addition, EDUCAUSE met with the boards of CAUDIT (Australian university IT directors), CANIT (Canadian university IT directors), CAUL (Australian university library directors), JISC (UK higher education IT funding council), EUNIS (European IT directors), SCONUL (UK university library directors), the CIOs of Scandinavian universities, and a variety of

rectors, presidents, and vice-chancellors of European and Australian universities.

Annual Conference

- Held E2007 October 22–26 at the Washington State Convention Center in Seattle. For the first time in EDUCAUSE history we capped registrations—full-conference registrations at 4,350 and exhibitors at 2,000—because of facility size. Registrations reached capacity a month before the meeting.
- Continued strong corporate support of conference activities, with the exhibit space for E2007 sold out with more than 200 corporations at E2007, with many corporate presentations and workshops.
- Featured general session speakers Doris Kearns Goodwin, Pulitzer Prize–winning author and historian; Bruce Schneier, security technologist and author of *Beyond Fear*; and Mara Liasson, NPR, moderating a presidential panel comprising Robert Mendenhall, Western Governors University; Charlene Nunley, Montgomery College (emerita); and David Ward, American Council of Education.
- Continued the “featured speaker” track introduced at E99, with eight distinguished invited guests and/or panels anchoring the concurrent track presentations on key issues facing higher education IT professionals. Featured speakers were Ted Dodds, Richard Katz, Jody Clarke, Chris Dede, Tracy Futhey, Jeffrey Lehman, Brian Hawkins, Julie Evans, Greg Jackson, James Farmer, David Koehler, William Thompson, Jr., Bradley Wheeler, Catherine Kelley, Jonathan Matthews, David TH Tan, and Peter Siegel.
- Continued the in-depth postconference evaluation process that measures overall performance and serves as a benchmark for longitudinal measurements to allow comparison with future annual conferences.
- Developed a conference online evaluation application, allowing just-in-time evaluations on site for most conference sessions.
- Produced podcast interviews of conference attendees for the second year. These interviews were conducted by member volunteers.

Professional Development

- Held the eighth Frye Leadership Institute to develop future leaders in information resources. Cosponsored by the Council for Library and Information resources (CLIR) and Emory University, the Frye Institute was held at Emory University in June 2007, with 45 participants selected from a pool of over 190 applicants.
- Conducted the EDUCAUSE Institute programs (two management programs, one leadership program, and one learning technology leadership program) with more than 200 total participants and with all four events selling out well in advance of the programs and receiving strong evaluations.
- Continued curriculum updating and revision for all the institute programs.
- Served 2,281 members of the EDUCAUSE community at regional conferences. Almost 80 percent of these attendees do not attend the EDUCAUSE annual conference. The number of attendees who are new to EDUCAUSE have ranged from 59 percent at MARC to 73 percent at WRC, thus EDUCAUSE reaches a broader set of the membership through these events. Fifteen pre-conference seminars were

offered at the regionals on topics ranging from podcasting to effective use of data to project management. Other content offered at all regionals included information developed from the EDUCAUSE Summit on Identity Management, and community college hot topics.

- Developed and delivered a conference orientation session at each regional conference. The regional conferences offered our membership many professional development opportunities, with 65 regional program committee members, 772 speakers or discussion session leaders, and 210 session conveners. A new regional adjunct reader program will further expand volunteer opportunities by at least 85 members.
- Delivered the fourth Western Regional Conference in San Francisco, California.
- Delivered the fifth Midwest Regional Conference in Chicago, Illinois.
- Delivered the sixth Mid-Atlantic Regional Conference in Baltimore, Maryland.
- Delivered the seventh Southwest Regional Conference in Austin, Texas.
- Delivered the seventh Southeast Regional Conference in Atlanta, Georgia.
- Delivered the third Policy Conference (formerly Networking) in Washington, D.C.
- Continued to provide professionally written summaries of selected regional and security conference sessions.
- Offered the annual Net@EDU Member Meeting at Tempe, AZ, including plenary sessions and Working Group meetings.
- Delivered the second Enterprise Conference in Chicago, Illinois. The conference focused on issues facing those who work primarily in administrative and enterprise systems and again received one of the highest ratings of any conference.
- Continued successful partnerships with our affiliates NERCOMP and SAC to deliver annual conferences with each group. Began planning to rename and relocated SAC.
- Delivered the final SAC seminars in Snowmass, CO, and began planning for a change of venue and a re-invigoration of this annual leadership conference.
- Continued the EDUCAUSE Seminars with two topics offered—a repeat of last year’s Survival Training for New Managers was offered once and a new security seminar on sensitive data handling was offered three times. These seminars, led primarily by members, served 161 attendees, 114 of whom were new to EDUCAUSE.
- Continued the professional development department in *EQ*, with four articles published this year on practical topics related to IT career and staff development.
- Hosted the twelfth annual Seminar for the Institute for Computer Policy, in conjunction with Cornell University.
- Continued the EDUCAUSE Live! series of twice-monthly webcasts on key issues in higher education information technology. Webcasts are archived and available for download/streaming. Began planning for a new EDUCAUSE Live “Spotlight on” series of which the first topic area offered will be identity management.
- Delivered the fifth Security Professionals Conference in Denver, Colorado.
- Partnered with the American Association of State Colleges and Universities (AASCU) and the University of Central Florida for the fourth year to offer an invitational conference for presidents, provosts, CFOs, and CIOs. Campus planning is integrated into the conference ensuring that executive teams return to campus with a plan of action.
- Hosted a Cyberinfrastructure Summit in Denver in July, a facilitated, in-depth

conversation with approximately 50 key stakeholders from a range of disciplines and campuses.

- Hosted an Information Technology Governance Summit in Denver in September, a facilitated event with about 40 key stakeholders from higher education.
- Maintained and enhanced EDUCAUSE international relations through our strong links with EUNIS (European IT directors), UCISA (UK IT leaders), CAUDIT (Australian IT directors), and CAUL (Australian university librarians).

Communications and Publishing

- Sent press releases to media contacts to promote major association program activities, new resources, and legislative/regulatory advocacy.
- Produced the EDUCAUSE Core Data Service *Fiscal Year 2006 Summary Report*, a monograph containing statistical analysis and discussion of the data from the Core Data Service survey conducted in 2007.
- Published six issues of *EDUCAUSE Review*, including the annual conference issue which set records both in number of ad pages and in ad revenue, with a 17 percent revenue increase over the next-highest issue (last year's conference issue). The double-length (148 pages) November/December 2007 issue features a section in which 13 CIOs/VPs offer their views on the place of central IT within the college/university. The magazine and its publisher/editor received four design/publication excellence awards.
- Published four issues of *EDUCAUSE Quarterly*.
- Managed more than 300 communication projects connecting programs, publications, events, and policy announcements to more than 25,000 individuals in the association database, as well as the broader higher education community.
- Sent more than 10 press releases to media contacts to promote major association program activities, new resources, and legislative/regulatory advocacy.
- Collaborated with the Information Services team to integrate an association news blog, RSS news feed, and podcasts into a mix of promotional tactics to reach community members who have adopted the new technology.

Administration and Finance

- Managed the EDUCAUSE budget process and worked with each manager to stay within budget.
- Provided oversight and direction to the investment firm managing EDUCAUSE reserves, managed the investment plan using Board-approved deviations, and realized significant growth in the portfolio value compared to the previous year.
- Continued to provide a very high level of customer service for .edu domain administration, as well as to EDUCAUSE members.
- Received an unqualified audit for FY2006 and no audit findings related to our federal grants or other operational efforts.
- Continued a robust staff development program that included a series of brown-bag discussions, formal workshops, and book discussions.

Program Highlights for 2008: New Initiatives

The activities described in this document encompass a wide range of strategic and functional initiatives. The following initiatives will be major areas of emphasis for 2008.

Background to new Program Plan initiatives

In 2007, EDUCAUSE began a set of Grand Challenges initiatives to more effectively align efforts of the association and the broader IT community with the challenges being faced by the broader higher education community. The goals of this initiative were described in an essay in *EDUCAUSE Review*—see <http://www.educause.edu/ir/library/pdf/erm06312.pdf>. The initiatives that were identified and begun in 2007 will be continued in 2008, as these are large and complex programs that cannot be concluded in a single year, as was pointed out when this program was approved by the EDUCAUSE Board.

Initiatives to address the Grand Challenges

Renewing and rethinking campus IT services

A great number of campus-based information technology services have evolved by accident—artifacts of the political and economic decentralization of colleges and universities. History has left a spotty legacy, and the elephant in higher education’s room is an expensive patchwork of IT services that too often incorporates redundant investments (witness multiple e-mail services, portals, web sites), deficient services (see the ECAR research study *Good Enough: IT Investment and Business Process Performance*), heightened risk (IT security), missed opportunities (campus cyberinfrastructure), and occasional outright service failures. The net effect of an “unguided service delivery architecture” is the perception of higher average costs and of lower service levels for IT in higher education.

The challenge is to articulate and ideally to demonstrate enhanced service delivery architectures that incorporate enhanced IT governance, management, service quality, and economics. This is emphatically not merely the re-centralization of IT; it needs to be a serious effort at the institutional optimization of IT. Included in this work would be an analysis of scale economics in IT. Where does centralization make sense (infrastructure, messaging, IT security, middleware)? How do standards get adopted? What are ways to think about aggregation points for service (for example, what is the right level of aggregation for mail services, the central IT organization, or Google)? How should institutions govern and finance the emerging cyberinfrastructure? How should they invest in “the commons” while continuing to leverage the innovative propensities of local academic units? Significant EDUCAUSE leadership in this area signals that the IT community is serious about managing costs of IT and the quality of services and exploring the establishment of a functional shared services enterprise.

This program/project features three essential deliverables:

- A conceptual framework that articulates a new service-delivery paradigm/

architecture and that details the governance, service, management, and economics of the framework.

- A research project that assesses the state of the practice regarding key elements of the patchwork of IT services with an eye to enhancing our understanding of (1) the gap between the “as is” state and the desired state; (2) effective practices now in use; and (3) policies, practices, and incentives that may impede higher education’s adoption of new service delivery approaches.
- A business plan to undergird and provide feasibility for a significant project to demonstrate the viability of a new service delivery approach.

Improving student retention and graduation through analytics

Analytics is an emerging discipline that marries large data sets, statistical techniques, and predictive modeling. Whether the catalyst for adopting analytics is a call for accountability from outside higher education or the need for scorecards or decision-making models within, analytics is in higher education’s future. IT and institutional leaders need to begin to understand analytics as well as the changes it may require in data standards, tools, processes, organizations, and institutional culture.

As an initial step in improving the awareness and accessibility of information about analytics, EDUCAUSE will explore the state of analytics in higher education and develop educational resources. As a starting point, we will synthesize and report on the “state of analytics in higher education” and integrate analytics into EDUCAUSE programming (conferences, publications) to increase community awareness.

Beyond explaining analytics to the community, we will explore its application to one of higher education’s most challenging problems: student success. Student success can be defined in many ways—student retention and graduation are among the most common. Using these measures, American higher education faces significant challenges. Approximately 40 percent of students in four-year institutions graduate in four years; only 60 percent graduate by the end of six years. Graduation rates are uneven when considering ethnic groups in particular. The six-year graduation rate for Asian students is 65 percent, followed by white students at 60 percent. Latino student graduation rates are 47 percent, followed by African-Americans at 40 percent and Native Americans at 39 percent.

Most research and intervention programs focused on student retention and graduation have been hypothesis driven. Analytics and data-based decision making go beyond descriptive statistics; they use tools such as predictive modeling or optimization routines. Already used to create a competitive edge for major corporations, tools such as multi-attribute utility theory or failure analysis promise new insights and perhaps new breakthroughs in student success. Analytics represents an application of IT that would bring great value to higher education in multiple areas, not just student success.

The goal of this EDUCAUSE initiative is to identify how information from sources

such as course management systems and student information systems can identify at-risk students through analytics and predictive modeling, alert key stakeholders, and suggest interventions. Academic success dashboards would likely emerge from this work as well, such as performance metrics that enable institutional leaders to monitor academic risk and success at the level of the department, division, or institution.

The project involves three phases:

- Explore applicable work, identifying useful retention and graduation studies in higher education as well as approaches from other sectors that might apply to retention and graduation.
- Define a pilot project(s) and enlist collaborators (corporate and institutional).
- Synthesize the results and disseminate findings. If successful, modify the pilot and expand participation.

Managing cyberinfrastructure strategically

Cyberinfrastructure (CI) presents a great challenge to campus IT leaders. They face unprecedented demands for the support of CI components that are increasingly difficult to support at the level of departments and laboratories. Ongoing thorny issues of system administration, security, business continuity, upgrade and replacement cycles, access, collaboration, and replacement funding call for a more strategic, institutional strategy. This growing problem is one of the largest, most complex, and most expensive areas of concern for IT in higher education today.

EDUCAUSE will build on recent activities such as the ECAR study on IT engagement in research and the formation of the new Campus Cyberinfrastructure (CCI) working group in Net@EDU to address the grand challenge issues of CI in three initial ways. First, EDUCAUSE will provide immediate and practical advice for campus IT leaders who face the new challenges of CI. Following the successful model of the EDUCAUSE/Internet2 Security Task Force, we will collect examples, perform studies, commission papers, convene workshops, and benchmark other efforts to build a corpus of effective strategies, “how to” and “the case for” papers, and other practical advice about dealing with pressing issues of CI on campus. At the request of NSF, EDUCAUSE will serve as the repository for strategic plans and other information related to the NSF CI initiative. We will share our findings widely with our community through all appropriate channels, filling an important void.

Second, we will explore critical issues of governance that make cyberinfrastructure so difficult to address as a campus issue. Much of CI is funded and governed by separate departments and labs, yet it increasingly requires central support and planning. As CI expands and proliferates, “business as usual” will no longer suffice. What new business models might work better? What relationship does the new CI have with traditional IT services? How can CI serve the arts and humanities? How can smaller institutions participate? How can we better collaborate across institutions with respect to CI? As a first step, EDUCAUSE is exploring sponsoring an Executive Summit to

work toward solutions to IT governance issues that complicate the effective support of IT (and CI) on campus.

Third, EDUCAUSE will attempt to develop an effective “Federal Strategy” to influence policy issues of the funding agencies for CI. Present government funding policies can distort campus business and planning models for CI. The funding agencies, however, have expressed the need for more effective coordination and communication with institutional leaders (such as the CIO or VP for research) in the development and support of CI. EDUCAUSE will partner with appropriate organizations and agencies to identify and recommend policy changes that could help all concerned better meet their objectives.

IT workforce development

One major sustainability issue that is closely associated with both IT costs and the delivery of institutional services is the issue of the IT workforce. Most analyses, including one performed by ECAR in 2004, suggest we will see an acceleration in the retirement of baby boomers across all levels of higher education and IT. This tidal wave of retirements is exacerbated for higher education by a number of factors:

- The output of U.S.–trained computer scientists has declined sharply since the mid 1990s.
- The IT recession of the late 1990s is over, and IT employment in 2006 equals the peak of employment during the dot-com boom. During that boom, IT recruitment and retention was a top-of-mind concern among higher education IT leaders.
- To date, higher education has shown a reticence to engage in alternative sourcing arrangements (outsourcing, shared services), which have been and are likely to be a major strategy that private corporations will use to cope with the same workforce issues.

These factors conspire to create a picture of a labor market that will become very tight. Combined with declining enrollments and reduced state and federal spending, such factors suggest a possible gathering storm around the IT workforce in general and IT leadership in particular.

To address these needs, EDUCAUSE can take advantage of its already strong position in IT management and leadership development. The EDUCAUSE Institute Management and Leadership programs and the Frye Institute are well-established and widely known residential programs to prepare future leaders, and all have strong reputations among members. The executive workshops at the Seminars on Academic Computing provide leadership development experiences for even the most seasoned professionals. In 2005, a new leadership program for IT staff working in educational technologies was added, and a curriculum review of the leadership and management offerings in 2005 has strengthened all the programs.

EDUCAUSE could build on an already strong base by exploring a range of activities

to address the development of the IT workforce in higher education:

- Creating programs for accelerated leadership development (fast track to IT management or leadership)
- Designing and testing new programs for recruiting students into higher education's IT workforce
- Creating specialized IT worker recruitment tools for higher education

