

EDUCAUSE 2008 Program Plan

prepared for the *EDUCAUSE Board of Directors*
December 2007

Table of Contents

Overview

Introduction	3
Functional Areas of the EDUCAUSE Program	3
Program Highlights from 2007.....	5
Program Highlights for 2008: New Initiatives	14

Programs

1 - Leading Edge Initiatives	
1-1 Policy Program.....	19
1-2 Net@EDU	22
1-3 EDUCAUSE Learning Initiative (ELI) and Teaching and Learning.....	24
1-4 EDUCAUSE Center for Applied Research (ECAR)	28
1-5 Outreach and Liaison.....	32
2 - Member Programs and Services	
2-1 Member Programs	35
2-2 Information Resources.....	38
2-3 EDUCAUSE-Wide Networking Initiatives	41
2-4 Corporate Relations	43
2-5 Member Services	45
2-6 Information Technology	48
3 - Annual Conference	51
4 - Professional Development	54
5 – Marketing Communications and Publishing	
5-1 Marketing Communications	58
5-2 Publishing.....	60
6 - Administration and Finance	64

Appendices

A - Budget Highlights	67
B - EDUCAUSE Leadership	69

OVERVIEW

EDUCAUSE Program Plan for 2008

Introduction

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.

- 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

PROGRAMS

1 – Leading Edge Initiatives

1-1 *EDUCAUSE Policy Program*

Mission

Success in the application of information technology to improve and transform higher education depends on many factors. Some of these factors hinge primarily on the rapid advance of the underlying technologies. Others involve broader issues of the costs and benefits of education in the 21st century, and of the transformation of our society at many levels in response to the pressures and opportunities of modern global communications. In fact, the ongoing convergence of many forms of telecommunications into an integrated digital system represents such a sweeping change that it challenges basic laws and regulations that have been used for years to shape the industry and its customers. Higher education, which deals primarily in knowledge, information, and communications, must play an informed, active role in the public policy discussions that will shape the evolution of the new systems and services. The mission of the EDUCAUSE policy activity is therefore to:

Advance the evolution of a policy environment that best supports the transformation of higher education through information technologies.

Vision

A primary goal of EDUCAUSE is to help higher education adapt information technology to improve affordable access to quality education. This process is expected to encompass a wide range of activities, and should result in the evolution of a rich matrix of educational opportunities that dramatically expand those available today. We imagine a future in which:

Learners everywhere have affordable, convenient access to quality education. Higher education uses information technologies to best support the full range of its activities.

Principles

The EDUCAUSE policy program plans and evaluates its agenda and activities according to four principles that explain how we consult with and learn from members and partners, how we restrict our activities to what we can do well, how we cooperate with our many partner organizations in policy for information technology, and how we serve the entire organization:

- The policy program follows the needs of members and other stakeholders.
- The policy program evaluates its work to deliver only high-quality programs.
- The policy program works closely with its partner organizations.

- The policy program shares its results with the entire association and the broader community.

Activity 1. Shared policy development

GOAL

Work with members and partners to maintain an up-to-date list of the most critical policy issues that affect members, the EDUCAUSE policy position on each, and corresponding recommended actions.

PRIORITIES FOR 2008

- Continue to use our system of communications to include the concerns and advice of our members and other stakeholders regarding issues of general interest in campus and state policy as well as federal concerns.
- Support and consult the EDUCAUSE Network Policy Council as an important resource for network-related policy issues.
- Refine our systems of communications and participation for those members who seek to press policy initiatives in their institutions and regions.
- Continue to test these systems, evaluate the initial results, and revise as needed.

The EDUCAUSE policy staff will refine its regular procedures to involve the members and partners of EDUCAUSE in identifying, tracking, and selecting our most important policy issues, as well as advocating for our best organizational response.

Activity 2. Database of presentations and reports

GOAL

Maintain on the EDUCAUSE web site relevant presentations, reports, white papers, testimony, and advice based on hard data and compelling anecdotes for the use of members and partners of EDUCAUSE as well as the association's policy staff.

PRIORITIES FOR 2008

- Extend and refine the family of documents and processes to update them promptly to reflect changes in the list of issues and positions.
- Evaluate and improve previous editions through discussions with staff, members, and knowledgeable experts.
- Continue to work with EDUCAUSE web development and Information Resource Center staff to build comprehensive, well-coordinated, and accessible presentation of all such policy-related presentations and documents.
- Utilize the blogs, FAQs, podcasts, and EDUCAUSE-Live archives on the EDUCAUSE web site for just-in-time publication of information and the expression of expert opinions of staff on policy topics.

EDUCAUSE policy staff will maintain a set of documents, articles, handouts, and presentations that they can use to effectively disseminate issues, positions, and actions. These publications will help make our positions clear, and can be used as tools for discussion and action by members and partners.

Activity 3. Education and advocacy

GOAL

Distribute and present our family of documents in appropriate ways to educate and motivate members, partners, and targeted policy leaders.

PRIORITIES FOR 2008

- Work with members to lead the development of new policy in critical areas of EDUCAUSE expertise such as telecommunications reform, cybersecurity, privacy, data retention, intellectual property, copyright infringement on campus networks, networked administrative systems, and distributed learning.
- Refine our program of involving members and their government relations representatives in grass-roots advocacy with their respective members of Congress and federal agencies. Encourage EDUCAUSE members to advocate before local and state lawmakers (when appropriate).
- Expand joint efforts with institutional government relations representatives and with other associations for the EDUCAUSE Policy Conference.
- Continue regular contributions to *Washington Update*, *EDUCAUSE Review*, *EDUCAUSE Quarterly*, and related publications.
- Improve our web presence regarding policy positions.
- Make high-quality presentations to targeted audiences.
- Continue to strengthen our schedule of regular contacts with key policy leaders.
- Evaluate our success and improve our programs on a regular basis.

The EDUCAUSE policy staff will refine its approach to policy visits and documents to maximize awareness of issues and EDUCAUSE positions among members and partners as well as our overall impact on policy makers.

Activity 4. Partnerships**GOAL**

Cooperate with association partners, taking the lead as appropriate, to more rapidly and effectively achieve mutual goals and establish recognition of EDUCAUSE as a trusted source of information on policy issues regarding information technology and networking for partner organizations as well as relevant policy makers.

PRIORITIES FOR 2008

- Help to lead efforts with other associations to represent higher education in public-private partnerships established to implement homeland security directives for critical infrastructure protection and the National Strategy to Secure Cyberspace.
- Continue to lead a partnership of EDUCAUSE, ACE, and NACUA to support a robust policy environment for higher education in the .edu top-level domain.
- Work with the E-Authentication Partnership, Internet2, and others to help define a successful, broad-based policy environment for identity management.
- Help coordinate the partnership of EDUCAUSE and Cornell University to support the Institute for Computer Policy and Law.
- Work with members and lead a broad coalition of partners to promote the higher education viewpoint on Telecommunications Reform.
- Work with ACE, AAU, NASULGC, and others to strengthen higher education's

role in the activities of the Joint Committee of the Entertainment and Higher Education Communities in dealing with campus file sharing.

- Evaluate additional potential partners for specific activities and benefits.
- Evaluate the status and results of each partnership on an annual basis.

1-2 Net@EDU

Mission

Rapid advances in information technology, and especially in global networking, will have a profound impact on activities and opportunities in higher education. Advanced networks are expected to affect nearly all of our activities, both on campus and off, sometimes in revolutionary ways. EDUCAUSE must help higher education to chart the best course through these sometimes chaotic waters, achieving a persistent but evolving environment that can support systemic innovation and the transformation of our core activities. The mission of Net@EDU is focused on understanding and shaping this new environment:

Advance the evolution of a global networking environment that best supports the transformation of higher education through information technology.

Vision

The vision for Net@EDU focuses on outcomes for higher education and education networks, not on the details of networking:

Learners everywhere have affordable, convenient access to quality education through the global network. Higher education uses the network as the standard, natural path for all types of communications and collaboration.

Principles

The EDUCAUSE Net@EDU program plans and evaluates its agenda and activities according to four principles that explain how we consult with and learn from our members and partners, how we tailor our activities to what we can do well, how we cooperate with our partner organizations in government and industry networking, and how we serve the entire organization in addition to our own members:

- Net@EDU follows the needs of its members and other stakeholders.
- Net@EDU evaluates its work to deliver only high-quality programs.
- Net@EDU works closely with its partner organizations.
- Net@EDU shares its results with the entire association and the broader community.

Activity 1. Leading-edge development of network technology

GOAL

Work with partners and members to realize significant advances in the network environment of higher education.

PRIORITIES FOR 2008

- Continue to work with NSF and others to help shape the development of NSF cyberinfrastructure and related federal projects and programs. Help to roll out critical projects for our members and the entire community as recommended by participants in the EDUCAUSE Summit on Cyberinfrastructure.
- Work with members and partners to identify the most appropriate network projects for implementation.
- Refine and support a regular system of member-driven working groups focused on the technology developments of greatest interest to our members; current projects include the implementation of campus cyberinfrastructure; networked identity management; converged communications services; and state networks for research and education.
- Request and administer grants from NSF and others as appropriate to further these goals.

A major focus of Net@EDU is to advance the leading edge of networking for higher education on behalf of our members and the entire organization. This will often mean coordinating and brokering trials and early adoptions of promising new technologies among our members and partners and broadly sharing the results. Additional important activities will focus on the development of inter-institutional agreements and standards of operation required for networked collaboration and e-business.

Activity 2. Leading-edge development of network policy

GOAL

With the EDUCAUSE Network Policy Council, play a central role in the identification of issues and shaping of policy for networking in higher education.

PRIORITIES FOR 2008

- Improve communication channels to members and partners such as the research and education networks for related issues and analysis.
- Continue to refine regular discussion lists and focus groups in Net@EDU for member input on policy issues.
- Continue regular visits and presentations with policy leaders in academia, government, and industry.
- Provide a voice for higher education in the revisions of the Telecommunications Act of 1996 as they are addressed by Congress.

Net@EDU will provide a core of active, interested members who wish to participate early in the policy cycle for matters that impact networking. Their involvement and expertise will help to form EDUCAUSE policy positions in networking and will contribute to the broader discussion throughout EDUCAUSE.

Activity 3. Partnerships

GOAL

Cooperate with the association's partners, taking the lead role where appropriate, to more rapidly and effectively achieve our mutual goals.

PRIORITIES FOR 2008

- Partner with Internet2, the Department of Homeland Security, NSF, ACE, and others to support the higher education response to the National Infrastructure Protection Plan.
- Partner with members, the Federal PKI Steering Committee, Internet2, the E-Authentication Partnership, and vendors to develop a robust approach to identity management across the broad community.
- Partner with Internet2 and the GRID project to support the further development of the NSF Middleware Initiative.
- Partner with members, NSF, Internet2, NLR, and vendors to improve the implementation of broadband networking.
- Begin to build an effective partnership with the CCI Working Group, NSF, DoE, NIH, NASA, Internet2, NLR, and vendors to explore and address policy and business issues of cyberinfrastructure for research.
- Work with the FCC and the courts on emerging issues of spectrum reallocation and management.
- Work with a coalition of higher education and industry associations as well as consumer groups to represent our viewpoints in proposed revisions of the Telecommunications Act of 1996, in particular the issue of net neutrality.
- Identify potential partners for specific activities and benefits.
- Continue to support well-defined relationships and agreements for partnerships of greatest potential.
- Evaluate the status and results of each partnership on an annual basis.

Net@EDU will actively seek recognition as a well-qualified contact and broker for joint activities that can advance the state of networking for higher education.

1-3 *EDUCAUSE Learning Initiative (ELI) and Teaching and Learning*

Mission

The mission of the EDUCAUSE Learning Initiative (ELI) is to advance learning through IT innovation. The ultimate goal is student success—a goal all colleges and universities share. ELI also provides a venue for experimentation; its work is mainstreamed to EDUCAUSE members once it reaches the appropriate level of maturity.

Vision

EDUCAUSE envisions education that is active, learner-centered, and integrative, occurring in formal and informal environments, using technology as appropriate to ensure positive learning outcomes and student success. The resulting education provides learners with the competencies they need in a rapidly changing, competitive world and establishes a sense of moral and civic engagement that pervades their lives.

Principles and Focus

With its mission of leveraging IT innovation across the learning enterprise, ELI has three foci: learners, learning principles and practices, and learning technologies.

- *Learners:* Effective teaching and learning is, first and foremost, about the learner. We believe that our efforts begin with understanding the learner, whether he or she is a Net Generation student; an adult learner; or a faculty member, staff member, or administrator seeking to use technology to improve a student's success.
- *Learning principles and practices:* Learning science has identified a number of principles that can guide the selection of pedagogies and technologies to support successful learning. ELI emphasizes those principles, but goes a step farther by linking them to practices that work. We focus on practices that work for multiple institutions and are adaptable to each institution's unique needs and circumstances.
- *Learning technology:* The term "learning technology" encompasses information and instructional technology, as well as telecommunications tools, applications, and systems that support learning. ELI explores the possible benefits and challenges of individual learning technologies, but also considers the potential impact their integration may have on advancing teaching and learning. To maximize the transformative effect of learning technologies, we look for uses of learning technology that are replicable across institutions and disciplines.

ELI ascribes to the EDUCAUSE philosophy that the focus should not be technology, *per se*, but how technology enables institutions to achieve their goals.

Activity 1. Build the visibility and reputation of the EDUCAUSE Learning Initiative

GOALS

ELI has established its program and products. For example, the recognition of the 7 *Things You Should Know About...* series is strong. The next step is to build the visibility and reputation of ELI among EDUCAUSE members as well as throughout higher education. Quality resources are being developed by ELI; the current emphasis is on ensuring that those resources reach the diverse audiences concerned with teaching and learning (e.g., instructional technologists, information technology professionals, CIOs, academic affairs personnel, faculty, and librarians).

PRIORITIES FOR 2008

- Continue to energize EDUCAUSE members and others in higher education about ELI's direction and programs.
- Expand the engagement of groups such as academic and student affairs

administrators and faculty while continuing to serve information and instructional technology professionals.

- Ensure key associations and partners are aware of ELI and the value it brings to colleges and universities.
- Ensure the web site and all collateral are compelling and reflect the ELI direction and image.
- Build on enthusiasm about ELI, leveraging it to increase visibility, membership, and influence.

Activity 2. General ELI program and events

GOALS

ELI serves as a thought leader for advancing learning through IT innovation. This requires building awareness, developing the professional competencies of our members, and helping institutions integrate necessary components. Our general programs and events provide face-to-face and online forums for building awareness and skills.

PRIORITIES FOR 2008

- Conduct an annual meeting to allow ELI members to explore new ideas, share best practices, and collaborate.
- Experiment with new ways of making events better learning environments that more actively engage participants.
- Deliver focus sessions to help members explore specific issues in greater detail and inform future EDUCAUSE teaching and learning programs.
- Hold monthly web seminars on major teaching, learning, and technology topics; these events provide members with professional development opportunities they can access without having to leave campus.
- Visit institutions and deliver presentations on teaching and learning to deepen ELI's image as a thought leader in academia, government, and industry.
- Work with the New Media Consortium (NMC) to produce the annual Horizon report, which highlights promising new technologies.
- Promote the recognition and documentation of teaching and learning innovations through ELI activities and publications, as well as those of the Advisory Committee on Teaching and Learning (ACTL).
- Monitor the effectiveness of programs and publications, adjusting as necessary.
- Streamline processes and increase efficiency.

Activity 3. Knowledge creation and communication

GOALS

ELI's value proposition—awareness, enablement, and integration—depends on knowledge creation, sharing, and communication. Much of this knowledge creation comes from the community or through alliances with other organizations. ELI will continue experimenting with alternative media in 2008 to expand our offerings beyond text.

PRIORITIES FOR 2008

- Continue the development and delivery of ELI resources: *7 Things You Should Know About ...* briefs, white papers, podcasts, screencasts, and blogs.
- Continue to make modifications to the ELI web site that are responsive to member needs and overall EDUCAUSE directions.
- Continue the release of web-based tools that help institutions create knowledge on their own campuses (such as ELI guides to blogging, podcasting, and conducting workshops on learning spaces and the Net Generation).
- Continue highlighting exemplary programs or ELI resources in a special section on the ELI home page.
- Effectively link to resources, within and outside EDUCAUSE, that provide important information to members.
- Make ELI meeting resources available to members for their own use in professional development.

Activity 4. Member relations

GOALS

ELI is a member-based organization, relying on members for both funding and participation. It seeks input from members on innovations and emerging issues. ELI will create a variety of mechanisms for members to participate in the work of the organization.

PRIORITIES FOR 2008

- Continue to grow ELI membership.
- Communicate more effectively with members, especially with new members.
- Survey members about their satisfaction with ELI programs and services; make changes as necessary.
- Solicit member feedback at major meetings, such as the ELI Annual Meeting and through tools, such as web polls.
- Use the ELI volunteer process to allow members to volunteer for specific ELI activities.
- Engage members in the exploration of new topics.
- Encourage members to share their innovative efforts with the ELI community via our Innovation Submission Process.

Activity 5. Relationships and alliances with other organizations

GOALS

Build on mutual interest and complementary expertise to advance ELI goals through relationships with associations, colleges/universities, corporations, and government agencies. Such relationships will promote best practices and develop practical activities leading toward mutual goals.

PRIORITIES FOR 2008

- Maintain strong relationships with existing partners such as CNI and NMC.
- Where possible, engage in joint programming with presidential associations such as AASCU, NASULGC, or ACE.

- Meet on a regular basis with liaisons from affiliated organizations.
- Synchronize the ELI activity calendar with those of partner organizations when possible.
- Improve corporate ties with firms interested in teaching and learning.

Activity 6. ELI–EDUCAUSE program coordination

GOALS

Ensure strong program coordination with other EDUCAUSE programs and make ELI activities known to the broader EDUCAUSE membership.

PRIORITIES FOR 2008

- Collaborate with the EDUCAUSE marketing and publishing groups to ensure that activities support the overall content and programmatic directions of the association.
- Work with EDUCAUSE professional development to ensure teaching and learning activities serve both ELI and EDUCAUSE members.
- Ensure that there is an ELI presence at EDUCAUSE regional events, such as a preconference workshop.
- Ensure that ELI material is integrated into the EDUCAUSE Information Resource Center.
- Work with the editors of *EDUCAUSE Review* and *EDUCAUSE Quarterly* to ensure that high-priority teaching and learning issues are represented in the magazines.

1-4 EDUCAUSE Center for Applied Research (ECAR)

Mission

The mission of the EDUCAUSE Center for Applied Research is to foster better decisions about the management, use, socialization, and impacts of information technologies by developing and disseminating high quality and focused research and analysis.

Vision

EDUCAUSE will be viewed as a premier creator of original data, knowledge, and thought in areas of consequence to IT decision-makers within higher education and the corporate community focused on IT in higher education. Research created or sponsored by EDUCAUSE will be known widely for its practical applicability, originality, depth, reliability, and relevance.

Principles

- ECAR research activities reinforce the EDUCAUSE position of trust within higher education. Research methods and practices will be ethical and academically credible.
- ECAR engages members as much as possible in developing its agenda for research.
- EDUCAUSE is a faithful steward of information acquired in the course of research.
- Corporate or foundation financial support of ECAR-sponsored research is not allowed to intrude on the integrity of any research initiative. However, ECAR actively solicits corporate and foundation views about research priorities and future directions.
- ECAR accomplishes a portion of its program through work with other research organizations. ECAR research alliances and partnerships are based on mutual respect, compatible missions, and mutual adherence to these principles.

Activity 1. Sustaining the ECAR research enterprise

GOAL 1

Operate within the approved program and resource plan for ECAR.

ECAR has been successful in its first six years of operations. In 2008 ECAR will continue to evaluate and refine its blend of subscriptions, sales, and sponsorships and adjust efforts to reflect the preferences of the markets served by ECAR. One area of focus will be to continue to develop consortial subscription programs that make ECAR programs affordable to more EDUCAUSE members. Already 150 out of 460 subscribers (32 percent) participate under special university system or consortium pricing. Effectively, this means that ECAR has been able to exceed its business plan objectives while significantly reducing its cost to subscribers. ECAR will continue to identify the key challenges that will guide the development of its research agenda, and update resource plans that specify the sources and uses of human talent and capital required to accomplish the plan. ECAR will continue to build a roster of talented fellows and a network of research organizations focused on problems of interest to ECAR subscribers and EDUCAUSE members. In 2008, ECAR will continue to provide three Burton Group research studies to ECAR subscribers. ECAR will also extend its research activities in the international arena. Already, ECAR has conducted research in Canada, the UK, and The Netherlands. There are currently 54 non-U.S. ECAR subscribers. In 2006, ECAR was approached by EUNIS in Europe and CAUDIT in Australia to increase both the subscriber bases and the research agenda of ECAR in those regions. In response, EDUCAUSE Vice President and ECAR Director Richard Katz and two ECAR fellows have spent significant time abroad developing a body of research data and case studies, and meeting with ECAR subscribers and prospective subscribers to promote these goals.

PRIORITIES FOR 2008

- Continually refine a framework of major challenges facing higher education within the scope of EDUCAUSE research interests and capability.
- Enhance the processes and procedures to identify research priorities and projects within the framework of strategic challenges.
- Monitor feedback on the quality and relevance of ECAR products and services.

- Continue to implement a set of research projects and develop documentation of ECAR research practices and methods.
- Continue to manage the ECAR financial plan for accomplishing the delivery of anticipated projects and deliverables within parameters approved by the Board of Directors.

GOAL 2

Continue to develop and manage an institutional image for ECAR.

In 2008, effort will continue to be directed to extending the awareness of the ECAR brand by other higher education executives, professional associations, and others.

PRIORITIES FOR 2008

- Continue to publicize the program and products of ECAR through various print media, collateral materials, and the EDUCAUSE web site, and through a program of regular press announcements.
- Monitor the use and satisfaction of ECAR products by university system members and members of the Council of Independent Colleges (CIC) consortium to enhance the likelihood of their continued participation in 2007.
- Continue to diminish ECAR financial reliance on corporate sponsorship in favor of institutional and corporate subscriptions. Currently ECAR has three corporate sponsors, down from seven when ECAR was founded.
- Maintain the web site for ECAR within established and evolving EDUCAUSE web context.
- Continue to deliver ECAR research presentations in a variety of non-EDUCAUSE venues, particularly in higher education presidential associations.
- Engage in significant research and liaison activity in Europe and the Asia Pacific regions to promote awareness of and support for ECAR and the base of research knowledge of IT practices in higher education.
- Continue to publish select ECAR research findings and summaries broadly within EDUCAUSE, to promote awareness of ECAR and as a service to EDUCAUSE members. Continue to make ECAR publications available to all EDUCAUSE members 18 months after their initial publication.

Activity 2. Implementing an applied research program**GOAL**

Implement an “applied research” program as approved in the business plan described above. Implement the approved financial and business plan.

PRIORITIES FOR 2008

- Maintain a balanced portfolio of research.
- Implement a product portfolio of balanced complexity, ranging from short, frequently issued research advisories to complex major research studies.
- Engage the EDUCAUSE members and ECAR subscribers actively in ECAR research activities. Implement forums, workshops, focus groups, and symposia as methods of both collecting data and information and sharing research results. Use

EDUCAUSE members as providers of research, and as subject-matter expert advisors on research efforts.

- Develop a scalable presence in national survey activity of student and faculty information technology preferences, use, and engagement.
- Continue to develop the sponsorship element of the ECAR program and revenue plan.
- Develop a searchable repository of ECAR tables and charts that subscribers can use to copy into presentations that they make on campus.

Activity 3. Developing and maintaining a web of collaboration

GOAL

Make ECAR indispensable to other EDUCAUSE programs and to EDUCAUSE members.

EDUCAUSE has become preeminent in the collection and dissemination of information about the management and use of information technology in higher education. ECAR presents an opportunity to add further value to members and to higher education by providing new mechanisms for discovering new practical knowledge in traditional areas of interest. The success of ECAR will depend in part on how tightly EDUCAUSE is able to integrate new research capabilities into existing programmatic directions and efforts. ECAR success will also depend on its ability to leverage itself by association with compatible research organizations.

PRIORITIES FOR 2008

- Continue to work with appropriate staff to ensure that content developed by ECAR is made available to existing EDUCAUSE publications and conferences.
- Continue to work with ELI, Net@EDU, and EDUCAUSE executives to ensure the incorporation of their program priorities into the ECAR agenda.
- Engage EDUCAUSE members in ECAR research by convening advisory groups in conjunction with major ECAR research efforts.
- Develop and execute a strategy of partnering with key private and public organizations to create a web of collaboration designed to leverage the scope and reach of ECAR.
- Develop, research, and publish a special report on research cyberinfrastructure in association with the 2007 Summit and in conjunction with EDUCAUSE Vice President Mark Luker.
- Develop and publish a special report in conjunction with the American Association of Medical Colleges (AAMC) on IT engagement in research in U.S. schools and colleges of medicine.
- Identify and implement opportunities for international collaboration with JISC, CAUDIT, SURF, EUNIS, UCISA, and other EDUCAUSE partners.

1-5 Outreach and Liaison

Mission

The mission of EDUCAUSE outreach and liaison efforts is to work with a variety of higher education associations and federal agencies to advance and leverage the objectives of the association, to better serve the EDUCAUSE membership.

Vision

EDUCAUSE will establish itself as a partner in the broader academic environment, connecting, cooperating, and partnering with the six presidential higher education organizations in Washington as well as with library associations, other technology associations, other higher education management organizations, federal agencies, and international organizations.

Principles

- EDUCAUSE is willing to work with all other higher education organizations if these efforts advance the stated objectives of EDUCAUSE and interests of its membership.
- Joint partnerships are entered into only if there is full cost recovery or if the subsidization is budgeted and integrated within the larger program efforts.
- Service on joint partnership arrangements and/or service on advisory boards must fall within the guidelines of the EDUCAUSE conflict of interest policy.
- EDUCAUSE advocacy efforts are educational in nature, and members of the EDUCAUSE staff or their agents do not participate in lobbying efforts that would jeopardize the 501(c)(3) status of the association.

Activity 1. Advocacy and advancement of policy positions

GOAL

Work to clarify, define, and advocate positions with regard to key national and campus-based policy issues.

The impact of government legislation, regulation, and investments in the Internet and other critical aspects of information technology require that EDUCAUSE be vigilant on matters of policy that affect the membership. Issues such as telecommunications, copyright, databases, privacy, wiretapping, domain names, and many more directly affect association members on a national and international basis. It is important for EDUCAUSE to communicate these activities and convey key issues and positions through the EDUCAUSE communication program.

PRIORITIES FOR 2008

- Support and coordinate the major presidential organizations and other partners in the development and communication of IT policy for the higher education community.
- Lead ad-hoc coalitions as required for critical issues such as telecommunications law and broadband deployment in Congress and the FCC.
- Work with Internet2, National LambdaRail, and others on the policy issues of the

- NSF Cyberinfrastructure initiative, the Global Environment for Network Innovations (GENI), and other forward-looking programs.
- Contribute leadership to the Secretariat of the American Council on Education (ACE), the primary higher education council in Washington, D.C.
 - Lead and coordinate IT policy positions with the presidential associations through the Monday Group of ACE.
 - Work with NACUBO and NACUA on key issues related to security, identity management, business continuity, and disaster recovery.
 - Work with CNI, ARL, and other library associations with regard to policy issues related to intellectual property, and with CNI, ARL, CLIR, and the ALA on policy issues that transcend libraries and technology groups on campus.
 - Work with the Department of Homeland Security on the articulation of cybersecurity strategies for higher education with the national strategy, with the National Science Foundation and the National Institutes of Health on issues of networking and identity management, and with the Department of Education on issues related to education statistics.
 - Continue to staff the Technology Task Force of the Joint Committee of Higher Education and the Entertainment Community.
 - Support and promote the EDUCAUSE Network Policy Council and the EDUCAUSE/Cornell Institute for Computer Policy and Law.

Activity 2. Networking with other associations in educational and professional development activities

GOAL

Cooperate with and support other associations in their efforts to serve their constituencies when these have high overlap with EDUCAUSE.

Because of the pressure on information resource professionals, it is imperative that EDUCAUSE leverage its resources and cooperate with related groups to present professional development opportunities, and to work in collaboration with related groups to maximize these offerings and their impact. Since the presidential organizations have as their membership the same institutions as EDUCAUSE, it is in the best interest of the association to work closely with them in joint projects, collaborative efforts, and service on their councils, committees, and task forces.

PRIORITIES FOR 2008

- Work with AASCU in the development of joint programs to educate college and university presidents, CFOs, CAOs, and CIOs on critical issues in IT and the management of this resource.
- Work with the Council on Library and Information Resources to continue to enhance the curriculum of the Frye Leadership Institute to prepare future generations of information resources leaders.
- Work with the AAU to develop executive team workshops on the emerging issues of campus cyberinfrastructure.
- Develop approaches to executive development on other issues related to information technology, especially for presidents and provosts, working in concert

- with the presidential organizations.
- Serve on the National Science Foundation Cybersinfrastructure Advisory Committee.
 - Work with NACUBO in developing programs in support of CFOs and business officers related to technology planning and leadership.
 - Work with the Council of Independent Colleges (CIC) to develop programs of relevance to the small college community.
 - Work with CAUDIT and CAUL to continue professional development activities and conferences in Australia.
 - Work with UCISA and EUNIS to continue professional development activities and conferences in the U.K. and the European communities respectively.
 - Work with CHEMA members (ACUTA, CUPA, NACUBO, SCUP) to define projects of joint interest to the combined memberships.
 - Work with Internet2 and NLR on special initiatives of concern to the technology community, especially as related to issues of advanced networking and middleware.
 - Work with DHS, FTC, National Cyber Security Partnership, National Security Alliance, US-Cert, the REN-ISAC, and others to improve cybersecurity in higher education.
 - Serve on the NSF Business and Operations Advisory Committee and the inter-agency Middleware and Grid Infrastructure Coordination team (MAGIC).
 - Work with the E-authentication Partnership, the Post-Secondary Electronics Council, The International Conference on ID-management, InCommon, and federal agencies on the emerging standards for digital identification.
 - Continue to stay abreast of key campus issues by making regular campus visits, and giving campus presentations on key issues of concern to the membership.

2 - Member Programs and Services

2-1 Member Programs

Mission

The mission of EDUCAUSE member programs is to support a range of activities that will (1) encourage involvement and identification with the association by a wide range of members; (2) help focus the offerings of the association for sub-communities within its diverse constituencies; (3) provide mechanisms through which members can easily network with those who share common needs and exchange timely, pertinent information; and (4) support the association's position as a useful and customizable resource for its members.

Vision

EDUCAUSE will be the indispensable nexus of professional activity and community for IT leaders and professionals in higher education. EDUCAUSE members will understand, value, and seek out opportunities for engagement through committee service, constituent groups, and other forms of community.

Principles

- EDUCAUSE is committed to serving the needs of members, as evidenced in programs that encourage their participation and mechanisms through which they can readily share vital, timely information.
- EDUCAUSE is a resource for the professional growth of its constituents.
- EDUCAUSE builds connections across the broad spectrum of higher education to support institutions in their efforts to adapt and thrive in this era of transformational change.
- EDUCAUSE is uniquely positioned to identify and give visibility to high quality professional practices, and thus provide needed guidance to institutions looking for solutions to shared challenges.

Activity 1. Member committees

GOAL

Bring member expertise and perspectives to the management of EDUCAUSE and its program activities, and create a sense of ownership among members.

PRIORITIES FOR 2008

- Highlight, in the annual call for volunteers, the broad array of professional engagement opportunities that can enhance one's application profile for advisory and program committee assignments.
- Promote the value of committee involvement to members.
- Explore other possibilities for encouraging fresh perspectives and engaging

members who have not had a voice in committee activities.

Activity 2. Constituent and discussion groups

GOAL

Facilitate communication among special/focused interest groups of the association's diverse membership and the broader IT community to provide easy access for information sharing.

PRIORITIES FOR 2008

- Continue supporting more than 30 constituent groups, 50 group leaders, and more than 17,000 subscribers.
- Work with executive staff and information technology staff to explore appropriate technologies for occasional real-time constituent group web/teleconferencing.
- Encourage constituent group leaders to expand uses of content presentation in the enhanced Connect environment.
- Continue to monitor and assess effectiveness and value of policy refinements regarding participation of corporate members and news media, and monitor effectiveness and value.

Activity 3. Community development

GOAL

Offer a comprehensive web-based environment for learning, sharing, and connecting members through a community that will serve as a focal point for enhanced electronic communication and collaboration, foster a stronger sense of community, and open new avenues for interaction with and contributions by all constituents.

The need for a community of peers is likely the first and most basic motivation for establishing professional associations like EDUCAUSE. To thrive in the digital age, EDUCAUSE must embrace the role that emerging online community tools and environments can serve in meeting the needs and expectations of its members by (1) providing tools that will enable communities to “build themselves” to meet real needs as they arise, and (2) developing new, flexible mechanisms (time and place independent) by which individual members and groups of members can easily network with those who share common needs to exchange timely, pertinent information and work collaboratively with others to solve common problems.

PRIORITIES FOR 2008

- Encourage appropriate use of emerging technologies among committees and other association groups to build community and support collaborative work. Assess possibilities for wider use.
- Allocate significant and high-visibility web space to support community interactions.
- Promote member use of the Peer Directory through promotional activity, as well as encouraging committee members, constituent group leaders, and volunteer applicants to create profiles.

- Monitor the use and assess the value of the Peer Directory and emerging technologies.

Activity 4. Diversity

GOAL

Ensure participation in EDUCAUSE activities by the full spectrum of higher education institutions, and support professional growth of individuals with solid IT experience and potential who, because of limited finances and/or professional isolation, find it difficult to keep up with the transformational changes occurring in higher education.

EDUCAUSE approaches these challenges by (1) offering fellowship support to individuals from economically disadvantaged institutions to allow them to attend association events, and (2) structuring dues so as to lower the financial barriers to membership for many such institutions.

PRIORITIES FOR 2008

- Expand awareness of fellowship opportunities through promotion of the program and its value to recipients.
- Assess opportunities and resources of particular value to less technologically advanced institutions.
- Define priorities and strategies for reaching specific categories of higher-need institutions, including new possibilities for identifying financial need and avenues through which to carry forward connections to minority populations begun with the AN-MSI grant program.

Activity 5. Awards and recognition

GOAL

Identify, honor, and bring visibility to a comprehensive and complementary range of professional achievement, as both reward for exemplary work and a means of identifying models for professional growth and activity. Current awards recognize individual leadership (Leadership Award), individual contributions to professional publication (*EDUCAUSE Quarterly* Contribution of the Year Award), and IT-oriented groundbreaking solutions to major challenges in higher education (Catalyst Award).

PRIORITIES FOR 2008

- In cultivating nominees for the Catalyst Award, emphasize collaborative higher education-based innovations and initiatives that are people-based and not exclusively focused on technologies/systems per se.
- Consider for Catalyst Award nominees people who have changed the direction of information technology in higher education, those who have significantly mentored rising members of the profession, and projects that demonstrate the ability of the community to meet major challenges.
- Select winners for the three award programs that the community will see as truly meriting recognition.

- Produce an award video for the annual conference that highlights winners' achievements in an exciting, concise, and professional presentation.

2-2 Information Resources

Mission

The mission of EDUCAUSE Information Resources efforts is to develop a comprehensive, cohesive, integrated approach to (1) identifying the information and data members need; (2) developing, capturing, and collecting timely information; (3) adding value to that information by analyzing, interpreting, aggregating, and/or summarizing it; and (4) disseminating information through a combination of communications technologies, including multimedia and push and pull technology.

Vision

EDUCAUSE members will view EDUCAUSE as a primary and indispensable source of information and a locus for interaction with colleagues about information technology management and use in higher education. They will be able to find this information and interaction through web-based interfaces and technologies. EDUCAUSE will be viewed by external publics (government, corporate sector, and others) as an authoritative source of information related to information technology in higher education.

Principles

- EDUCAUSE is informed and guided by both member needs and the needs of higher education in developing new information resources and products.
- EDUCAUSE engages members as much as possible in developing content for new information products and services.
- EDUCAUSE effectively uses the tools technology provides to develop and deliver new information resources and products.
- EDUCAUSE bases Information Resources program activities on knowledge management processes built on an effective information collection strategy and a taxonomy of topics related specifically to higher education information resources management and use.

Activity 1. Data collection

GOAL

Continue development of the member data collection and sharing program to enable EDUCAUSE to provide the data that all EDUCAUSE members need for campus decision-making and to establish a repository of data about IT issues and practices in higher education.

EDUCAUSE offers two key mainstream activities that relate to data collection:

– *Annual Current Issues Survey*

EDUCAUSE launched the first annual Current Issues Survey in 2000 to capture information from institutional primary representatives about current and emerging campus IT-related issues. The survey has been repeated annually since then, and survey results are summarized and shared through a comprehensive article in *EDUCAUSE Quarterly* and a digest version in *EDUCAUSE Review*, targeted to IT leaders and senior administrators. The survey was developed and continues to be updated through input from the EDUCAUSE Current Issues Committee.

– *EDUCAUSE Core Data Service*

A total of 959 institutions completed the 2006 Core Data Service (CDS) survey in 2007. Developed by a Research Task Force in 2001, the CDS is a member-based data service for collecting “core” campus data for the purpose of peer comparisons and information sharing, through a web-based database. The initiative was designed not to duplicate but to cooperate with existing IT-related data collection efforts and to allow partnerships with other associations in such efforts. Members and selected non-members are invited to complete the survey component of the CDS annually in January, with a target survey submission deadline of mid to late March. The database component of the service is updated and released in the spring and a public report of aggregated data is issued in the fall. Those who complete the survey and access the database service are enthusiastic about this benchmarking tool which has long been sought as a missing element for IT strategic planning and campus assessment. For the second consecutive year, the survey incorporated two questions that allowed the CDS interactive database service to provide the same benchmarks previously available through the COSTS project, which merged last year with the CDS. In 2007, we had 100 percent participation by the Consortium of Liberal Arts Colleges (CLAC) schools, and once again provided CLAC with an extraction of data for all CLAC schools for their analysis.

PRIORITIES FOR 2008

- Conduct the 2007 Current Issues Survey (in December of 2007) and report the results in *EDUCAUSE Quarterly*, *EDUCAUSE Review*, and on the web, comparing the results with previous surveys and articulating the substance of the issues.
- Make appropriate changes to the CDS survey and the interactive database service for the coming year and continue efforts to increase the number of member institutions and invited non-members that participate.
- Look for ways to leverage the valuable data captured through the core data survey, for example, by periodically analyzing data of special interest and publishing reports of those analyses to inform campus IT issues.

Activity 2. Electronic information services and content strategy

GOAL

Develop a strategic plan and directions to facilitate the coordination and development of electronic information services and content.

The continued success of EDUCAUSE in an increasingly networked world will depend on our ability to (1) effectively present on our web site content and services that are of high value to members; (2) leverage or repurpose content in multiple ways to serve a variety of information needs and access points; (3) create diverse mechanisms to continually develop new content, including engaging members in content generation and experience sharing; (4) find ways to capture tacit as well as explicit knowledge from members and staff, and add analytical value to factual content; and (5) fully implement the Information Resources and Content Strategy as an integral part of the association's future strategy.

PRIORITIES FOR 2008

- Continue to develop a strategy and framework for more effectively leveraging and coordinating current content as well as establishing new content delivery channels and mechanisms.
- Formalize and implement changes to support the directions of the EDUCAUSE content strategy. Such elements will include:
 - implementation of new mechanisms for forming community around content
 - a process for making editorial decisions for quick, timely dissemination of information
 - mechanisms for creating and effectively presenting EDUCAUSE Library content
 - Engaging members and partners in content creation and contribution.
- Develop content for the EDUCAUSE web site with respect to the top issues that have been identified through the work of the Current Issues Committee as well as other EDUCAUSE programs.
- Continue to evaluate documents in the EDUCAUSE Library to keep the taxonomy up to date and accommodate emerging concepts in the field; develop new policy and procedures as needed for collection development and archiving.
- Continue to revise interfaces on the web to convey the concept of a broader set of online information services and improved accessibility, including expanding search capabilities and information aggregation functionality, and enabling more effective browsing.

2-3 EDUCAUSE-Wide Networking Initiatives

Mission

The mission of EDUCAUSE-wide networking initiatives is to provide member participation and planning in a variety of projects that promise to have significant impact on the future of networking in higher education.

Vision

Through participation in well-chosen networking initiatives, EDUCAUSE and its members have the opportunity to help shape the networking environments of the future to best meet the needs of higher education.

Principles

- EDUCAUSE focuses on networking initiatives that are thought to play a strategic role in the evolution of networking for higher education.
- EDUCAUSE includes members, vendors, government agencies, and other partners in networking initiatives to achieve the best results for all.
- EDUCAUSE networking initiatives provide members with institutional guidance, professional development, and a voice in strategic decisions.

Activity 1. .edu top-level domain administration

GOAL

Maintain a secure, integrated, efficient, and easily navigable system for administering the .edu top-level domain, including a welcoming and integrated entry-point for users, data security and integrity, and operational excellence. Implement a clear and effective process for related policy development with ACE, NACUA, and the Department of Commerce.

PRIORITIES FOR 2008

- Continue to work with ACE and NACUA to support a policy process and the board to consider and recommend changes (if any) in governing principles of .edu.
- Develop modifications in the governing cooperative agreement, as required, with the Department of Commerce.
- Offer a robust web presence for the public to request and administer .edu domains.
- Refine the technical architecture for administration of the .edu top-level domain including security, privacy, and performance, with continuing support for IPv6.
- Maintain an internal system to validate, authorize, and complete requests related to the .edu domain.
- Create an auditing process to review all procedures and verify accuracy at regularly scheduled intervals.
- Continue to develop communication mechanisms to correspond with new, existing, and potential .edu top-level domain holders.
- Maintain and improve the business process that supports charging for names in .edu.

Activity 2. Cybersecurity

GOAL

Partner with Internet2, the Department of Homeland Security, NSF, and others to support the higher education contribution to The Commission on Cyber Security for the 44th President. Help our members develop effective plans to improve the security of their cyber infrastructure.

PRIORITIES FOR 2008

- Continue to strongly support the activities of the EDUCAUSE/Internet2 Computer and Network Security Task Force.
- Plan and implement the higher education components of The Commission on Cyber Security for the 44th President.
- Obtain strong executive support and endorsement for these plans.
- Communicate the plans widely in policy circles and for professional development.
- Continue to support the national meeting for security professionals in higher education and the new Cybersecurity Summit for NSF Large Facilities.

Activity 3. Identity Management Initiative

GOAL

Help our members implement improved identity management solutions to better address pressing issues of e-learning, e-business, cybersecurity, privacy requirements, the Sarbanes-Oxley Act (SOX), and inter-institutional collaboration.

PRIORITIES FOR 2008

- Reduce the cost and complexity to our members of identity management solutions through promotion and expansion of the Identity Management Services Program.
- Follow up on the successful Identity Management Summit with a wide range of outreach activities, particularly focusing on stakeholders from outside the traditional IT community.
- Develop and offer a more comprehensive PD program for identity management.
- Experiment with new identity management solutions for EDUCAUSE internal operations.
- Begin to use these solutions in selected communications with members.

Activity 4. Extending the NSF Middleware Initiative

GOAL

Partner with members, Internet2, and the GRIDS Center to offer relevant, high-quality educational programs and services about middleware to the higher education community.

PRIORITIES FOR 2008

- Communicate the value of an enterprise middleware infrastructure through existing EDUCAUSE publications, services, and partner organizations, such as AACRAO and NACUBO.
- Develop deployment materials to assist campuses in their implementations.
- Offer single and multi-day workshops for campus management and technology professionals on the deployment of enterprise middleware.
- Work with the GRIDS Center to further develop and present a consistent message for the NSF Middleware Initiative (NMI).

Activity 5. Issues of Peer-to-Peer Filesharing and Online Content

GOAL

Serve as a neutral, high-quality source of information for our members and others on the technical, business, and policy issues of peer-to-peer (P2P) filesharing and online digital services.

PRIORITIES FOR 2008

- Work with ACE, AAU, NASULGC, and others to strengthen higher education’s role in the activities of the Joint Committee of the Entertainment and Higher Education Communities in dealing with campus file sharing.
- Continue to provide staff support for the Technology Task Force of the Joint Committee of Higher Education and the Entertainment Communities.
- Organize Requests for Information, workshops, and other activities to gather the latest information on these emerging technologies and services.
- Document and share the results with the academic community to help support institutional decisions regarding adoption or implementation.

Activity 6. Projects Recommended at EDUCAUSE Summits

GOAL

Introduce new projects and programs in response to participant-expert recommendations at recent EDUCAUSE Summits.

PRIORITIES FOR 2008

- Complete a new ECAR study, a digest of critical documents, and a “how to” guide to help CIOs advance their campus cyberinfrastructure.
- Incorporate issues of IT governance as appropriate throughout our programming.

2-4 Corporate Relations

Mission

The mission of the EDUCAUSE Corporate Relations Program is to promote the meaningful exchange of information and priorities between members who represent colleges and universities and those who supply goods and services to them.

Vision

EDUCAUSE will be respected for its integrity and balance by its institutional members and association peers for its conduct of corporate relations and will be viewed as a trusted and indispensable partner by its corporate members.

Principles

- EDUCAUSE is a real partner and strives to provide meaningful value to corporations in recognition of their participation with the association.
- EDUCAUSE interactions with corporations will be characterized by the same high degree of professionalism as those with institutional members. Wherever possible, the association’s approach with corporate members will be personalized and collegial.

- EDUCAUSE always respects the proprietary nature of information or products shared by corporations and will be an exemplar with respect to its management of software and hardware licenses.
- EDUCAUSE Board policy limits corporate access to EDUCAUSE institutional members. EDUCAUSE strictly limits access to institutional member demographic information for the purpose of broadcast e-mail communications.
- EDUCAUSE maintains strict editorial control of material published with corporate sponsorship. Corporate presentations at EDUCAUSE events are intended to be educational, not product or service sales presentations.
- EDUCAUSE does not endorse specific corporations or their products and services. It acknowledges corporate participation publicly, but in ways that do not suggest endorsement.
- EDUCAUSE balances conflicting corporate objectives. It recognizes both the length of its relationships with corporations and the level of financial involvement in determining priority access to sought-after EDUCAUSE services and venues.
- EDUCAUSE is accountable primarily to its institutional members. If conflicts arise, institutional member objectives take precedence over corporate member objectives.

Activity 1. Corporate participation in EDUCAUSE conferences

GOAL

Expand corporate participation in the annual conference in rough proportion to the growth of the conference generally, and expand corporate activity in other conferences as appropriate.

Currently, sales of annual conference exhibition, presentation, and sponsorship activities are conducted via a scheduled and well-executed annual process. In fact, a majority of these opportunities are sold prospectively during the annual conference itself. The corporate exhibition of the EDUCAUSE annual conference is a critical event for institutional members, corporate members, and EDUCAUSE itself.

PRIORITIES FOR 2008

- Handle corporate sales and administrative activities professionally and effectively; ensure that corporate memberships in EDUCAUSE are priced competitively and that member benefits deliver value; recognize corporate membership and conference involvement in positive and visible ways.
- Continue to deliver a Corporate Forum at the annual conference to bring leaders of EDUCAUSE member corporations together with leaders from member higher education institutions.
- Continue to expand corporate participation in other EDUCAUSE conference programs in ways that complement the EDUCAUSE regional conference strategy.
- Enhance promotional strategies to increase corporate awareness of possibilities for participation through such avenues as regional marketing, use of mail and e-mail, promotion of all EDUCAUSE opportunities at each event, emphasis on benefits to the participating corporation.
- Involve key corporate leaders in invitational forums organized by EDUCAUSE to ensure the inclusion of this important perspective.

Activity 2. Corporate partnerships

GOAL 1

Develop broad partnerships with corporations whose mission, methods, and objectives correspond closely to EDUCAUSE mission and programs.

EDUCAUSE sees the potential for corporate members to be more actively involved in the diverse programs of the association. This involvement can range from engagement in complex processes for creating voluntary software specifications to partnering with EDUCAUSE on the development of needed new programs to the full sponsorship of major EDUCAUSE conference events and publications.

PRIORITIES FOR 2008

- Educate corporate members about the broad programmatic opportunities available with EDUCAUSE; develop print and web-based informational materials, including catalogues of sponsorship opportunities.
- Continue to work with the EDUCAUSE policy office to ensure the success of the Network Security Forum.
- Continue to provide incentives for corporations to participate with EDUCAUSE more broadly than through the annual conference; recognize publicly those who demonstrate significant levels of programmatic and financial commitment.
- Develop advisory mechanisms and forums for EDUCAUSE leaders and leaders of key EDUCAUSE corporate partners to discuss issues of common concern and possibilities for combined action.
- Involve corporations judiciously and effectively in the planned EDUCAUSE executive forums in 2008 and in efforts related to the EDUCAUSE Grand Challenges initiative.

2-5 Member Services

Mission

The mission of the Member Services program is to provide a welcoming single entry point for integrated member and customer interactions and front-line service, to provide efficient and effective customer transactions, and to ensure the integrity of the internal database through accurate, rule-based data entry.

Vision

The vision of Member Services is to ensure that EDUCAUSE members, potential members, and others who contact the association, make purchases, or register for events are treated in a courteous, professional manner that makes them appreciate EDUCAUSE. The service they receive should exceed their expectations.

Principles

- EDUCAUSE strives to be an exemplar in doing business in ways that combine high

levels of service with innovative uses of information technology.

- EDUCAUSE provides customers with intuitive self-service options in its service delivery processes.
- EDUCAUSE provides outstanding service through a trained and knowledgeable staff.
- EDUCAUSE balances the desire to exceed the expectations of its customers with the need to serve customers efficiently, effectively, and promptly.
- EDUCAUSE service providers continually take the initiative to enhance service delivery processes and procedures.

Activity 1. Electronic delivery of services

GOAL

Automate member services processes wherever possible to streamline business processes and minimize difficulties for members and staff, increase efficiency of data entry, and ensure database security and accuracy.

PRIORITIES FOR 2008

- Refine online registration forms to ensure accuracy and efficiency of data entered by members.
- Improve mechanisms for converting member-entered data into the association management package.
- Further integrate automatic credit card billing into EDUCAUSE processes for member use.
- Enhance electronic processes for billing of subscriptions and orders.
- Further enhance the electronic billing system for .edu domain renewals.
- Continue to evaluate ways to streamline processes and procedures.

Activity 2. Database cleanliness, accuracy, and integrity

GOAL

Ensure the cleanliness, accuracy, and integrity of the EDUCAUSE database.

The EDUCAUSE database is one of the most valuable assets of the association. Ensuring its accuracy and integrity supports the efficiency of the back office operations. Membership audits and consistency checks will help to reduce returned mail and increase the satisfaction of members.

PRIORITIES FOR 2008

- Ensure that all core membership information is centralized and secondary databases are only implemented when necessary.
- Conduct regular membership data audits, sending out information at least annually.
- Confirm all name badge information with conferees before the conference.
- Expand the automated quality control reports which check for database integrity.
- Develop a mechanism to check for and eliminate duplicate records.
- Continue collaboration and cooperation with information services and event services to develop processes for operational aspects of the association.

Activity 3. Training and redundancy

GOAL

Ensure that the member service staff is thoroughly knowledgeable about all aspects of the association so they can provide the assistance and information customers need.

One of the strategies for ensuring the best member service is to provide redundancy in every position to reduce stress and distribute the work load. Broad new EDUCAUSE programs and projects demand new strategies for communicating specifics to the staff and membership.

PRIORITIES FOR 2008

- Continue to develop the staff intranet as a question and answer resource.
- Continue to use team approaches to problem analysis and solving.
- Continue to update procedural documentation that will be available to all staff on all aspects of member service.

Activity 4. Member service excellence

GOAL

Ensure that EDUCAUSE has a reputation for providing excellent customer services.

EDUCAUSE will be a leader in providing value for its members' and customers' investments of time and money, which includes outstanding customer service. EDUCAUSE will strive not only to satisfy customer needs, but to demonstrate real care for customers and to deploy creative integration of techniques and innovative technologies to serve them. EDUCAUSE will be recognized for service excellence by both customers and other professional associations.

PRIORITIES FOR 2008

- Use feedback mechanism to enhance services that will demonstrate to customers that the association cares about their comments.
- Turn around all registrations and orders by the end of the business day after they are received.
- Ensure quick, efficient handling of customer needs at event registration counters, minimizing lines.
- Ensure quick answering and handling of telephone calls and information requests.
- Ensure accurate entry of membership changes in representative status.
- Ensure accurate billing of products and services.

2-6 Information Technology

Mission

The mission of Information Technology is to provide a well-designed and carefully maintained information technology infrastructure to ensure a stable, up-to-date environment for providing resources and services to internal and external customers,

and to provide information technology support to enable internal and external customers to perform their jobs effectively and efficiently.

Vision

Information technology is a core component of the association. To enable the association to fulfill its mission, the Information Technology department will be the leader of information technology use among associations and an early follower of university information technology models.

Principles

- Stability, compatibility, scalability, redundancy, security, and currency are the basis of the association's information technology standards, as identified in an IT standards document.
- All hardware, operating systems, and software are legal, appropriately licensed, and up to date.

Activity 1. Infrastructure

GOAL

Provide a stable information technology environment that enables internal and external customers to effectively, efficiently, and securely perform their jobs, and communicate with peers and with each other.

Information technology and networking are the lifeblood of the organization. EDUCAUSE has staff working in several different locations. A secure, reliable, standardized infrastructure will help to reduce support costs. A well-designed infrastructure will also help break down barriers of remote and mobile professionals in communicating with each other. Maximizing up-time of all systems is essential to enable the staff to support the membership.

PRIORITIES FOR 2008

- Continue to evaluate new technologies, and implement them when appropriate.
- Deploy a standardized technology platform that is communicated to staff, including hardware, software, and networking.
- Enhance functionality and redundancy necessary to support the administration of the .edu domain.
- Enhance redundancy and security for all infrastructure elements. Ensure that disaster recovery documents and procedures are up to date.
- Ensure that all IT operational processes are documented.

Activity 2. Technical architectures and database administration

GOAL

Provide appropriate technical architectures and solid database administration to support internal data resource/knowledge management requirements.

The EDUCAUSE database is one of the most valuable resources that EDUCAUSE

owns. A robust, integrated environment that allows access to this information any time, anywhere empowers members and staff to be more effective. An integrated approach is critical to ensuring secure and accurate member information.

PRIORITIES FOR 2008

- Continue to expand the existing (database) quality control reports and tools, to enable customer services to maintain high data integrity.
- Maintain the infrastructure for completion, collection, and reporting of campus technology survey data.

Activity 3. EDUCAUSE web site

GOAL

Continue to develop and implement a strategy to build the next-generation web presence for EDUCAUSE.

The EDUCAUSE web site should offer a comprehensive environment for learning, sharing, and connecting for both staff and members. The web site will take advantage of a sound technical architecture, member involvement, and a knowledge-management approach to the content on the site.

PRIORITIES FOR 2008

- Track the needs of users of the web site through usage statistics, surveys, and advisory committees.
- Working with both internal and external association constituencies, develop the most effective information architecture, navigation, and search tools for the site.
- Develop mechanisms for members to customize both their association and knowledge-based information needs.
- Evaluate and implement additional collaborative tools for communication among our constituencies.
- Improve business processes through enhanced web applications.

Activity 4. Staff and event technology support

GOAL

Ensure that staff have the software and hardware environments required to efficiently do their jobs.

Ensure that technology needs are met for all EDUCAUSE events.

PRIORITIES FOR 2008

- Design and provide training tools for standard software and hardware, such as documentation, training guides, training sessions, and so on.
- Continue to develop and maintain service-level agreements to support user services and technology leadership/support roles.
- Provide excellent customer support and service to all EDUCAUSE staff.
- Provide appropriate infrastructure and support to attendees and staff at all

EDUCAUSE events.

3 - Annual Conference

Mission

The mission of the EDUCAUSE annual conference is to provide a forum in which (1) the most current issues and concerns regarding the introduction, use, and management of information resources and technologies in higher education can be presented, addressed, and discussed by members; (2) personal and professional networking can take place; (3) relevant products and services can be demonstrated by corporate members.

Vision

The EDUCAUSE annual conference will (1) provide an educational experience with content that is relevant to all membership segments; (2) provide the opportunity for people to share experiences with one another; (3) provide members an opportunity to give presentations, with quality of content and presentation being the prime criteria for selection; (4) provide access to the corporate community in a relevant and objective manner; (5) be accessible financially to all institutional and corporate members; and (6) promote member loyalty and participation.

The annual conference is the signature event of the association, attracting over 7,000 attendees in 2006. 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.

Principles

- EDUCAUSE preserves the best and most meaningful elements of past conferences, while creating new and innovative features to accommodate evolving needs of the members as well as the increased size and complexity of the annual conference, and to reinforce the identity of the association.
- EDUCAUSE empowers the Program Committee to solicit and select high-quality sessions, while maintaining vigilance to keep the program consistent with the EDUCAUSE mission.
- EDUCAUSE solicits input from members to guide its decisions about program content and format.
- The EDUCAUSE annual conference is economically self-sufficient and cost competitive and produces high value to participants and attendees.
- The annual conference provides a venue for EDUCAUSE members to showcase effective and innovative campus programs and practices.

Activity 1. Program planning

GOAL

Develop a conference program that (1) addresses the most current and important issues and concerns regarding the uses and management of information technology in

higher education, (2) reflects and serves the interests of the broad constituency of the association, and (3) establishes a conference character and format representative of the EDUCAUSE culture.

PRIORITIES FOR 2008

- Provide program sessions that address current topics of interest to the diverse membership of EDUCAUSE while drawing upon the evaluation results and suggestions from last year's conference.
- Secure high-profile and high-quality plenary speakers.
- Provide opportunities for presentation and professional development to members.
- Provide opportunities for involvement for members through such roles as session facilitators/conveners, bloggers, and audio interviews.
- Provide opportunities for personal and professional networking to attendees.
- Continue to evaluate new formats and delivery mechanisms for conference content, including facilitated discussions, panels, podcasts, short interviews, and blog coverage.

Activity 2. Conference logistics

GOAL

Plan all aspects of conference logistics so that the experience of each person involved in planning and attending the conference is positive, comfortable, and enjoyable.

PRIORITIES FOR 2008

- Make the conference experience as comfortable and easy to navigate as possible for each attendee.
- Overcome the effects of the large size of the conference by providing opportunities for people to meet in small, intimate groups.
- Continue and improve the online process for making hotel reservations that allows all registered attendees equal access to the hotel block.
- Reformat the on-site registration process to make it more efficient for all attendees.

Activity 3. Corporate participation

GOAL

Provide corporate representatives the opportunity to partner with EDUCAUSE by contributing to the content and resources of the conference.

The corporate exhibition at the EDUCAUSE annual conference is designed to be large and significant, while maintaining appropriate balance with institutional program interests. Corporate participants will be afforded numerous opportunities to participate in the EDUCAUSE 2007 program.

PRIORITIES FOR 2008

- Provide opportunities for corporate representatives to interact with institutional attendees.
- Provide opportunities for institutional members to see the latest in products and services related to the use and management of information technology in higher

education.

- Provide preference for corporate participation to EDUCAUSE corporate members/partners.
- Work cooperatively with corporate members through sponsorships and product donations, to both decrease the association's direct expense and provide visibility to corporate members.
- Use staff knowledge to facilitate a match between corporate resources and campus needs.

4 - Professional Development

Mission

The mission of the EDUCAUSE Professional Development program is to develop and deliver timely and relevant educational experiences and opportunities for the EDUCAUSE professional community. The EDUCAUSE professional development program seeks to inform higher education leaders about key issues related to the management and use of information technology.

Vision

EDUCAUSE will be the educational provider of first choice among campus professionals and leaders who are responsible for managing information technology in higher education. Whether online or face-to-face, EDUCAUSE conferences, workshops, seminars, and other events will be viewed as indispensable elements of participants' professional development. Educational programs will be considered relevant, timely, and accessible. The logistical elements of these programs will be known for their quality and attention to detail and quality of participant service. EDUCAUSE educational programs will demonstrate new learning principles by incorporating educational technologies in appropriate and cost-effective manners.

Principles

- EDUCAUSE delivers high quality educational opportunities to all segments of higher education. To accomplish this, face-to-face events will be offered at prices and in locations that make educational opportunity accessible to all interested participants. Access to EDUCAUSE events will also be facilitated by the award of fellowships based on a combination of merit and institutional need.
- The EDUCAUSE Professional Development Program is economically self-sufficient, allowing for cross subsidies when called for by higher policy objectives.
- EDUCAUSE fosters members' learning and professional development by engaging practitioners in the planning and delivery of learning opportunities.
- EDUCAUSE promotes the awareness of sound information technology practices throughout the academy by developing EDUCAUSE educational programs in conjunction with others, including higher education presidential associations, learned societies and associations, management associations, and others.
- EDUCAUSE programs are informed and guided by both member needs and the needs of higher education in developing a cohesive educational curriculum and a responsive schedule of program offerings.

Activity 1. Educational programming

GOAL

Plan and deliver an educational program that provides members with a wide range of choice and that is accessible not only geographically and economically but also via the network.

PRIORITIES FOR 2008

- Maintain a conference, seminar, and workshop program that offers members a range of choices as to program content, event location, time, and price.
- Continue to offer the regional conferences, the EDUCAUSE Institute programs, the Frye Institute, seminars and special-topic conferences in 2008.
- Continue the EDUCAUSE Summits, which operated as a pilot initiative in 2006. Identify topics of strategic importance to the community and use the output of the summits to inform EDUCAUSE programming.
- Working in partnership with the Advisory Group on Enterprise Information Systems and Services (AGEISS), develop and hold the third Enterprise Technology Conference in May of 2008 to provide professional development opportunities for those who work in the administrative and enterprise systems areas.
- Continue a series of one-day regional EDUCAUSE Seminars on “hot topics.” Led by expert members of our community and/or EDUCAUSE staff, these events provide day-long opportunities for interactive exploration of each topic.
- Continue the EDUCAUSE Live! series offerings of two or more events per month as well as “Spotlight” series of events and seminars on late-breaking news items of special interest to our community.
- Work with directors and faculty of the EDUCAUSE Institutes (Management Program, Leadership Program and Instructional Technology Leadership Program) to update curricula and share strategies and to maintain vibrant, current and complementary programs. Map curricula to management and leadership core competencies as identified for higher education technology professionals. Continue to update the “roadmap” web page that clarifies the EDUCAUSE management and leadership curricular path for the higher education IT community.
- Launch the new Seminars for IT Leadership. In the tradition of the Seminars on Academic Computing (SAC), the Seminars for IT Leadership will continue to bring together current and future leaders in higher education information technology to share experiences in a relaxed but intellectually stimulating environment. The program will provoke and encourage participants toward a dynamic, creative, and strategic vision of the possibilities and challenges of information technologies in higher education and will inform the work of EDUCAUSE and actively contribute to the broader higher education community.
- With the Professional Development Committee, assess areas of greatest campus need in professional development (PD), to inform EDUCAUSE plans.
- Promote the Ryland Fellowship program as a resource that makes EDUCAUSE PD programs accessible to deserving professionals who work at economically disadvantaged institutions.

Activity 2. Affiliate and partnered programs**GOAL**

Provide opportunities for education and engagement of a broad cross section of higher education’s leadership by developing and delivering programs in association with others.

PRIORITIES FOR 2008

- Reinforce and support existing affiliate relationships with the Northeast Regional Computing Program (NERCOMP), and deliver the NERCOMP conference in its new location in 2008.
- Work with the NERCOMP board to co-brand management and leadership workshops targeted at new supervisors and managers.
- Continue the collaborative educational strategy for and with higher education's presidential associations, particularly the American Council on Education (ACE), the National Association of State Universities and Land Grant Colleges (NASULGC), the American Association of Community Colleges (AACC), the American Association of State Colleges and Universities (AASCU), and the Council for Independent Colleges (CIC). Continue to offer IT educational programs for presidents and senior executives.
- Maintain partnerships with higher education management associations such as the National Association of College and University Business Officers (NACUBO), the American Association of College and University Registrars (AACRAO), the Society of College and University Planners (SCUP), the Council on Library and Information Resources (CLIR), ACRL and others.
- Establish new partnerships with other organizations when the benefits to the EDUCAUSE professional development program warrant it.

Activity 3. Member involvement

GOAL

Engage the membership in the planning, development, and delivery of the EDUCAUSE professional development program.

PRIORITIES FOR 2008

- Maintain an active and engaged professional development committee whose work is focused on providing advice and counsel about strategy and topics, and on giving EDUCAUSE feedback on PD curriculum, priorities, events, and issues.
- Proactively involve EDUCAUSE advisory committees and groups in development and assessment of educational programming.
- Engage members in ad-hoc advisory capacities.
- Continue to expand opportunities for member engagement and volunteerism.

Activity 4. Integration with other EDUCAUSE programs

GOAL

Organize the content of the EDUCAUSE professional development program to promote the transfer of knowledge and community engagement with other major EDUCAUSE programs.

PRIORITIES FOR 2008

- Provide programmatic planning and support for educational events sponsored by ELI, Net@EDU and its working groups, NMI, ICPL, AGEISS, Security Task Force, and policy programs.
- Involve the EDUCAUSE executive team in the programmatic planning and

- delivery of all EDUCAUSE professional development programs.
- Ensure that EDUCAUSE executives and program managers participate regularly as presenters at key partner association events to promote awareness of EDUCAUSE programs.
 - Play a key role in the EDUCAUSE Content and Community Initiatives, as a content provider, content source, and a place to foster community development.

5 – Marketing Communications and Publishing

5-1 *Marketing Communications*

Mission

The mission of Marketing Communications (MarComm) is to ensure that communications with the membership, the higher education community, and the media about association activities, programs, services, resources, and events appropriately represent the association, strategically support its value proposition, and are produced with consistent quality. MarComm fulfills this mission by developing effective marketing communication strategies and tactics with an eye to member needs and association objectives.

Vision

EDUCAUSE will be seen as a trusted provider of news, policy background, information resources, professional development opportunities, and other timely information. EDUCAUSE communication strategies will demonstrate innovative and effective use of information technologies and will both contribute to members' understanding of the association's value proposition and reinforce the association's status as a premier organization supporting the higher education IT community.

Principles

- MarComm staff executes communications projects with professionalism and skill, fostering satisfaction and trust among EDUCAUSE members and staff.
- MarComm is timely in distributing communications, making effective use of project management tools and communication strategies and tactics.
- MarComm is flexible, responsive, and, with appropriate quality controls and resource considerations, collaborates with program and operational teams and departments as required to meet the goals of the association.
- MarComm ensures image consistency, quality, and integrity in all uses of logos and other design features of print and electronic representations.
- MarComm ensures factual accuracy in all communication channels and materials.
- EDUCAUSE communications are clear, direct, and reliable, aiming at brief, action-oriented messages that make readers want to connect with association resources.
- MarComm is innovative, open to suggestions about more effective ways of communicating, and contributes ideas proactively based on understanding of marketing communications best practices and new directions.
- MarComm contributes to the association's strategic planning by both viewing operational projects within the larger context and participating in projects with other teams.

Activity 1. Member communications**GOAL**

Communicate effectively with members to keep them informed about association activities, services, resources, events, and news that is important to the field.

Use an integrated marketing communications approach, disseminating information through multiple channels which reflect members' varying preferences for information delivery. These include:

- EDUCAUSE web site promotional tactics, including Google keymatch search
- Search engine optimization (SEO) techniques and best practices
- Targeted e-mails and the *EDUCAUSE Online* monthly newsletter
- Print advertising and news column in EDUCAUSE magazines
- EDUCAUSE News blog postings and corresponding topical RSS feeds
- Press releases to targeted media contacts
- Print collateral, general session walk-in slides, and exhibit booth at EDUCAUSE and affiliate events
- Print direct mail

PRIORITIES FOR 2008

- Through feedback and guidance of association leaders, member community, and design team, manage RFP for a design firm and design approach for association web, electronic, and print materials. Conduct search in the context of association priorities and communication objectives, on schedule to implement in Q2 production.
- Adapt, using analytics and industry best practices, the association's communication strategy and tactics in support of prioritized association initiatives and member preferences.
- Continue to streamline business processes to enhance responsiveness and agility in meeting general association and specific program, niche, or communities' communication goals.

Activity 2. Media relations**GOALS**

- Take a proactive approach to keeping selected news media abreast of association news, activities, and issues in the field.
- Build organizational identity and knowledge of what we stand for among the news media and other organizations.

PRIORITIES FOR 2008

- Continue refining the association's media contact list and structure the underlying iMIS database to allow creation of selective lists, to send press releases on particular categories of activity to appropriate media outlets.
- Improve response capability so EDUCAUSE can answer a wide range of media questions quickly for reporters on deadline, while at the same time making the need for positive promotion of association news and key messages the driving priority.

- Develop a set of regularly updated talking points, associated resources, and contact list of executives and key senior staff appropriate to speak to the media about major topics and issues.

5-2 Publishing

Mission

The mission of the EDUCAUSE Publishing Program is to advance professional thought and practice by creating, organizing, and disseminating critical recorded information to members and others to keep them informed about information technology trends, issues, practices, policy, and future directions as they relate to higher education. The program accomplishes its mission by publishing e-books, magazines, monographs, reports, white papers, and other print and nonprint materials, and by maintaining an extensive web site, online communications, and additional electronic resources. Publishing staff provide editorial support to other areas of the organization to maintain the consistency and quality of all EDUCAUSE materials, whether print or electronic, informational or promotional. The program also fosters members' professional development by providing publishing channels for their ideas and innovations.

Vision

EDUCAUSE publications and electronic resources will be the resources of choice among those seeking quality information about the leadership, management, and use of information technology services in higher education. EDUCAUSE members, both as consumers and contributors, will express high levels of satisfaction with EDUCAUSE publications and electronic resources. Higher education leaders and policymakers—as well as IT practitioners and managers—will look to EDUCAUSE publications for leading ideas and directions.

Principles

- EDUCAUSE publications and online resources support members' institutions by providing information that creates a compelling future vision, clarifies complex national and institutional policies, and guides action with practical and timely information.
- EDUCAUSE publications and online resources serve policymakers as well as practitioners.
- EDUCAUSE is recognized as a leading integrator of the spectrum of available publishing media. Use of print, web, and multimedia will be thoughtful, purposeful, and exemplary.
- Through its actions, EDUCAUSE endeavors to promote and maximize the intellectual property rights of authors.
- EDUCAUSE publications and online resources are an important means of fostering members' professional development and the transfer of technology and knowledge from EDUCAUSE initiatives in the areas of applied research, advanced networking,

policy, and teaching and learning. In this light, the publishing program strives to refine leading conference presentations and research findings into appropriate publications and online materials.

- Nearly all EDUCAUSE publications are freely and publicly accessible in downloadable formats.
- EDUCAUSE leadership as a publisher depends on knowledge of issues and thought leaders, on strong editorial skills, and on good membership linkages.

Activity 1. Planning

GOAL

Create a cohesive plan and strategy for EDUCAUSE publications and online resources. EDUCAUSE publications and online resources should be organized to support each other in a strategic way, with deliberate efforts to pursue new online and print publishing opportunities. The publishing landscape now involves a blend of print and online formats, with new access technologies mirroring a rich variety of content consumption preferences. Careful monitoring, evaluation, and adaptability will ensure that the publishing program makes the most appropriate use of all types of media to carry out its objectives.

PRIORITIES FOR 2008

- Work closely within EDUCAUSE to integrate traditional forms of publishing with new technologies for self- and group content generation. Enhance and transform traditional forms with new publication technologies that will add value to association content and foster community connection.
- Explore opportunities for corporate sponsorship of monographs, EDUCAUSE Quarterly, special projects, books, and e-books.

Activity 2. EDUCAUSE magazines

GOAL

Develop specific agendas for EDUCAUSE magazines compatible with the overall publishing plan.

EDUCAUSE Quarterly (EQ) and *EDUCAUSE Review* are the two flagship publications of EDUCAUSE. *EQ*, distributed to more than 8,400 information technology leaders and professionals, provides members with practical information that they can apply directly to their professional lives. This journal serves as a publishing outlet for many EDUCAUSE members, giving them the opportunity to share their knowledge with their colleagues and to advance at their institutions by publishing their work in a peer-reviewed journal.

EDUCAUSE Review, an award-winning magazine with a current readership of more than 20,000, complements *EQ* by exploring broader information technology developments and trends, and what these mean for higher education. The magazine is sent to presidents, chancellors, and other thought leaders in higher education and the corporate community, as well as to EDUCAUSE representatives, non-IT staff, faculty

members, and librarians. Written by those in the field, the magazine is designed to stimulate creative thinking and give readers the information they need to understand today's information technology developments and policy issues and to assert a leadership role in the transformation of education.

PRIORITIES FOR 2008

- Explore ways to integrate magazines, books, and monographs with the emerging Connect and community-generated content sector of the EDUCAUSE online environment.
- Maintain clear differentiation of the role, scope, and content of EDUCAUSE publications and position them for future opportunities.
- Draw budgets for each publication that accurately reflect costs and permit analysis to achieve cost savings.
- Ensure regular inclusion of information about major EDUCAUSE initiatives—ECAR, policy, Net@EDU, ELI—through coordination with those programs.
- Seek new material from EDUCAUSE conferences, from thought leaders, and from members of the EDUCAUSE executive team, by editorial planning meetings and active solicitation.
- Continue providing electronic options for magazines, including HTML and PDF files of content, and web extras (e.g., online-only articles and comment feature).

Activity 3. Books, monographs, and publishing support

GOAL

Ensure that EDUCAUSE continues as a robust and leading source of professional literature for the practitioner as well as the strategist and policymaker, and that EDUCAUSE and its members are recognized as sources of thought leadership in higher education.

EDUCAUSE monographs and books provide in-depth, detailed information on specific topics. They are particularly useful when a subject needs more attention than can be given in a journal or magazine article, or on the web. The monographs are extended papers, usually written by one or two authors, on subjects that require more timely delivery than production of a book can deliver. They are published on an occasional basis according to member need and author availability. Books are typically collections of extended articles on a common theme of current importance, written in such a way that they have a longer shelf life than most other publications, and of a depth and analytical approach that make them likely to be at the top of the “thought leadership” stack. One copy of EDUCAUSE books and monographs is generally provided at no cost to each EDUCAUSE campus as a membership benefit.

PRIORITIES FOR 2008

- With the first three e-books published between 2005 and 2006, review and refine the e-book publishing strategy to meet the community's needs and to improve the editing and production processes.
- Propose new books to EDUCAUSE leadership as appropriate, with a focus on developing e-books that can be printed out as needed by the reader rather than

- printed books that require storage and sales management.
- Continue to offer publishing support to other departments, particularly for production of conference programs.
 - Continue to support editing and production of ECAR research bulletins and studies.
 - Continue to support writing, editing, and production of ELI print and web publications as requested.

6 - Administration and Finance

Mission

The mission of the EDUCAUSE administration is to provide quality financial, human resources, office management, and logistical support to the association in an efficient and an effective manner.

Vision

Services will be provided to the association in a manner that is unobtrusive and demonstrates prudent stewardship of member resources, while providing EDUCAUSE management with timely, supportive assistance in achieving the larger educational goals of the association.

Principles

- EDUCAUSE uses the best and most current accounting procedures and principles in the administration of the association.
- The human resource policies of the association are driven by an attempt to support the staff, to clarify the obligations and rights of the staff, and to protect the association from unnecessary litigation.
- The association works in compliance with all pertinent regulatory requirements.
- EDUCAUSE strives to maintain a safe working environment.
- The association is committed to diversity in both its membership and its staff, and is an equal opportunity employer.
- The office is maintained in a manner that meets the employees' requirements for supplies and support, and that provides an atmosphere that is pleasant and conducive to quality work efforts.
- EDUCAUSE adheres to appropriate investment guidelines and strategies that protect and maximize the value of the association's financial and tangible assets.
- EDUCAUSE regularly assesses itself on a systematic and comprehensive basis.

Activity 1. Assessment

GOAL

Monitor the success of EDUCAUSE in the critical areas of Member Satisfaction, Internal Processes, Financial Outcomes, and Impact/Outreach/ Innovation.

EDUCAUSE has developed a set of metrics to help the Board of Directors, management staff, and certain member committees track the association's performance in vital functional areas. These diagnostic tools, based on the Balanced Scorecard approach, provide simple indicators of performance that can be quickly understood and easily compared from year to year.

PRIORITIES FOR 2008

- Track outcomes for use in assessment of association performance and in strategic planning.

- Monitor metric warning lights that are intended to call for immediate management attention.
- Present the definition of the metrics and their outcomes on the EDUCAUSE web site.

Activity 2. Administrative structure

GOAL

Provide physical and logistical administrative infrastructure support to ensure the efficient operation of EDUCAUSE.

Administrative functions should be handled in a transparent fashion so as not to detract from the provision of services to the membership.

PRIORITIES FOR 2008

- Maintain internal procedures to handle all personnel, operational, and financial processes consistently across all association offices and remote locations.
- Maintain all necessary insurance coverage for the operation of EDUCAUSE.

Activity 3. Finance

GOAL 1

Supply useful and functional financial reporting systems and controls to provide adequate financial protection and financial data needed by managers.

The purpose of any financial system is to maximize the control and planning functions of an organization, within the financial parameters in which it is working. These objectives should be accomplished using the iMIS and Great Plains Dynamics systems to their capacities, and supplementing these systems with customized reports, internal analyses, and external audited statements.

PRIORITIES FOR 2008

- Provide a budget system that offers defined methods of reporting for each layer within the organization.
- Provide standardized, documented procedures that will operate across all units of the organization (Boulder and Washington offices, ELI, Net@EDU, grants).
- Manage within the given financial parameters of the organization, with a reasonable but not excessive contingency level.
- Manage within the investment plan approved by the Board, using all fixed income earnings as income in the operating budget.
- Continue to develop reports that are easily understood by the Board, the management of EDUCAUSE, and the membership.
- Provide expertise in federal grant administration.

GOAL 2

Assure that financial obligations of the association are satisfied in a timely manner and that monies due the association are collected in timely manner.

It is the responsibility of the Accounts Receivable and Accounts Payable functions to assure that dues, registrations, subscriptions, and orders are collected promptly, and that the good standing of the association is protected by the prompt payment of all valid invoices.

PRIORITIES FOR 2008

- Work to ensure that obligations to EDUCAUSE are paid on a timely basis.
- Pay all approved invoices on a weekly basis.

GOAL 3

Provide oversight and direction to FISN, the investment firm managing EDUCAUSE reserves.

PRIORITIES FOR 2008

- Monitor investment reports and understand and respond to variances from planned performance if they exist.
- Provide FISN with investment guidelines as determined by the Board of Directors.

GOAL 4

Assure that funds not under the control of FISN are managed to maximize earnings.

PRIORITIES FOR 2008

- Invest funds from the Janus Money Market account in Federal securities when they will not be required for operating expenses in the short term (three months).

Activity 4. Human resources

GOAL

Create a positive working environment that is characterized by respect, good service to the membership, clear expectations for staff employment, and fair compensation.

The staff of EDUCAUSE are critical to achieving the mission of the association. This association is committed to ensuring both that staff enjoy the benefits of a positive working environment and that they are of the caliber necessary to deliver the services EDUCAUSE members expect.

PRIORITIES FOR 2008

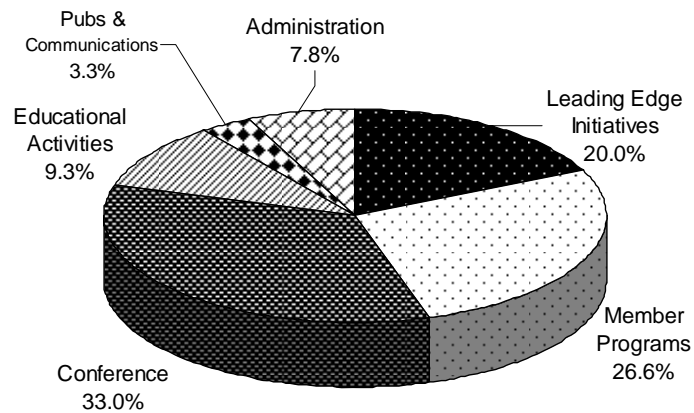
- Maintain up-to-date job descriptions for each position within EDUCAUSE.
- Maintain employment guidelines that are sensitive to employee needs and that assure EDUCAUSE is complying with all employment laws and regulations.
- Provide for efficient and accurate payroll processing.
- Provide a comprehensive benefit package for employees.
- Provide staff development training opportunities through in-house seminars and brown bag lunches.

APPENDIX A

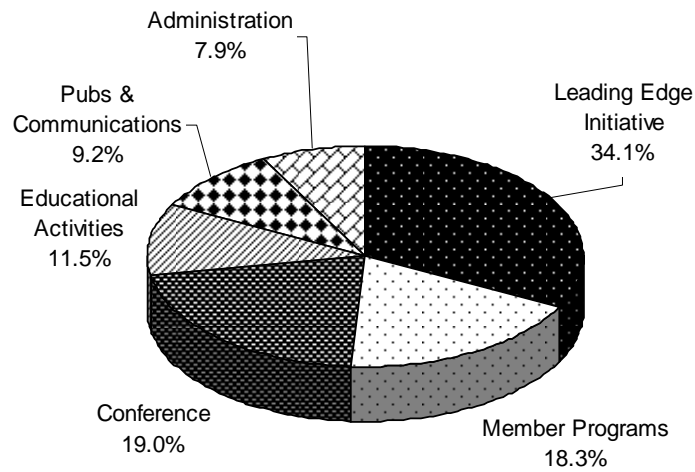
Budget Highlights

The expenditure patterns of the association can be seen in the pie charts below, reflecting the gross pattern of commitments to six major functional areas.

EDUCAUSE Revenue by Function, 2008



EDUCAUSE Expense by Function, 2008



EDUCAUSE 2008 BUDGET

<i>Function</i>	<i>Program</i>	<i>Revenue</i>	<i>Expense</i>	<i>Gain (Loss)</i>	<i>% Total Expense</i>
Leading Edge Initiatives					
	Fed Rels & Outreach	231,610	1,925,085	(1,693,475)	
	ELI	759,530	1,067,245	(307,715)	
	NET@EDU	591,280	908,284	(317,004)	
	ECAR	1,735,852	1,735,552	300	
	Subtotal	\$3,318,272	\$5,636,166	(\$2,317,894)	34.1%
Member Programs and Services					
	Inst. Membership	3,425,953	173,885	3,252,068	
	Corp Membership	492,855	53,256	439,599	
	Awards	60,565	131,327	(70,762)	
	Grand Challenges	0	440,000	(440,000)	
	E-Content	0	1,008,309	(1,008,309)	
	Summits	0	115,437	(115,437)	
	NSF Grants	146,492	145,497	995	
	.edu domain Services	275,000	206,008	68,992	
	Information Services	0	744,980	(744,980)	
	Subtotal	\$4,400,865	\$3,018,698	\$1,382,167	18.3%
Annual Conference	Subtotal	\$5,465,101	\$3,141,363	\$2,323,738	19.0%
Publications & Communications					
	EDUCAUSE Review	540,500	724,959	(184,459)	
	EDUCAUSE Qtrly	10,300	219,386	(209,086)	
	Pubs & Comm	0	425,617	(425,617)	
	Edupage	0	0	0	
	Books & Monographs	0	159,227	(159,227)	
	Subtotal	\$550,800	\$1,529,190	(\$978,390)	9.2%
Educational Activities / Professional Development					
	General	0	229,406	(229,406)	
	Institutes	341,220	382,074	(40,854)	
	One Day Seminars	35,800	35,433	367	
	Regionals	733,201	724,995	8,206	
	Affiliates	424,996	525,250	(100,254)	
	Subtotal	\$1,535,218	\$1,897,159	(\$361,941)	11.5%
Administration					
	Board	0	68,000	(68,000)	
	Fin & Admin	1,287,910	1,249,194	38,716	
	Subtotal	\$1,287,910	\$1,317,194	(\$29,284)	8.0%
Operating Budget TOTAL		\$16,558,166	\$16,539,769	\$18,397	
Transition Expense		0	\$157,000	\$(157,000)	
Total Budget		\$16,558,166	\$16,696,769	\$(138,603)	

APPENDIX B

EDUCAUSE Leadership

EDUCAUSE is governed by a Board of Directors that works with executive staff to define association directions and priorities. A Member Committee program enriches and influences the association's activities by providing guidance through structured input from representatives from all types and sizes of institutions and from various segments of the IT profession, as well as providing an opportunity for individual members to develop professionally through their committee participation. In addition, advisory groups are affiliated with specific programs such as Net@EDU and ELI.

Board of Directors

David L. Smallen, *Chair*
Vice President, Information Technology
Hamilton College

Lucinda T. Lea, *Vice Chair*
Vice President for Information Technology & CIO
Middle Tennessee State University

Tracy Mitrano, *Secretary*
Director of IT Policy and Computer Policy and Law
Program
Cornell University

Scott E. Siddall, *Treasurer*
Affiliated Scholar
Kenyon College

Jerry D. Campbell
President
Claremont School of Theology

Rebecca L. King
Director, Information Systems & Services
Baylor University

Thomas L. Maier
Vice Chancellor for Information and Instructional
Technology/CIO
Board of Regents of the University System of Georgia

Marilyn A. McMillan
Associate Provost and Chief Information Technology
Officer
New York University

Margaret F. Plympton
Vice President for Finance & Administration
Lehigh University

Carrie E. Regenstein
Executive Director, Computing Services
Carnegie Mellon University

Kathleen Curry Santora
Chief Executive Officer
National Association of College & University
Attorneys (NACUA)

Diana G. Oblinger, *Ex Officio*
President
EDUCAUSE

Member Committee Chairs

ADVISORY COMMITTEES

Advisory Committee on Teaching & Learning

Veronica Diaz
Instructional Technology
Manager
Maricopa Community College
District

Advisory Group on Enterprise Information Systems & Services

Colin Currie
Director, Administrative
Information Services
Princeton University
Princeton, NJ

Current Issues Committee

Debra H. Allison (Debi)
Deputy Chief Information
Officer
Miami University

EQ Editorial Committee

Timothy Chester (Tim)
Chief Information Officer
Pepperdine University

Evolving Technologies Committee

Beth Forrest Warner
Assistant Vice Provost,
Information Services
University of Kansas

Fellowship Advisory Group

no chair

Nomination & Election Committee

Linda L. Deneen
Director, Information
Technology
University of Minnesota Duluth

Professional Development Committee

Linda A. Cabot
Vice President of Information
Technology
Cardinal Stritch University

Recognition Committee

John H. Gregory
Executive Director, Information
Technologies
University of Maine

COMMITTEES

EDUCAUSE 2008 Program Committee

Darrel Huish
Chief Information Officer
Maricopa Community College
District

Mid-Atlantic Regional Program Committee

Celeste M. Schwartz
Vice President for Information
Technology
Montgomery County
Community College

Midwest Regional Program Committee

Gary K. Allen
VP for Information Technology
& CIO
University of Missouri System

Southeast Regional Program Committee

Michael Dieckmann (Mike)
Senior Associate Vice President
and CIO
University of West Florida

Southwest Regional Program Committee

Kay Rhodes
Associate Vice Chancellor,
System CIO
Texas Tech University

Western Regional Program Committee

A. Michael Berman (Michael)
Senior Vice President/Chief
Technology Officer
Art Center College of Design

NERCOMP

David G. Wedaman (Dave)
Associate Director for Research
and Instruction Services
Brandeis University

PROGRAM

Advisory Groups for Leading-Edge Programs

Net@EDU Advisory Committee

Earning L. Blythe (Erv)
Vice President for IT
Virginia Tech

Jill Gemmill
Exec Dir, Cyberinfrastructure
Integration/ Research
Assistant Professor
Clemson University

James A. Jokl (Jim)
Director of Communications &
Systems

University of Virginia
Dorette R. Kerian
Director, ITSS
University of North Dakota

John T. Killebrew
Director, NCREN
MCNC

Steven L. Smith (Steve)
Chief Information Technology
Officer
University of Alaska

Mark A. Luker, *Staff Liaison*
Vice President
EDUCAUSE

Steven L. Worona, *Staff Liaison*
Director of Policy & Networking
Programs
EDUCAUSE

EDUCAUSE Learning Initiative (ELI) Advisory Board

Susan E. Metros, *Chair*
Deputy CIO & Associate Vice
Provost
University of Southern
California

Malcolm B. Brown
Director of Academic
Computing
Dartmouth College

W. Gardner Campbell (Gardner)
Professor of English
University of Mary Washington

Alan R. Cattier
Director, Academic
Technologies
Emory University

Linda A. Jorn
Director, Digital Media Center,
Office of Information
Technology
University of Minnesota

Lucinda T. Lea
Vice President for Information
Technology & CIO
Middle Tennessee State
University

Clifford A. Lynch
Executive Director
Coalition for Networked
Information

Diana G. Oblinger, *Ex Officio*
President
EDUCAUSE

Julie K. Little, *Staff Liaison*
Associate Director, ELI
EDUCAUSE



EDUCAUSE

2008 Program Plan

December 2007