

The Economic Downturn and Its Impact on IT: Suggestions for EDUCAUSE Response

A Special Report for EDUCAUSE



This study was commissioned by EDUCAUSE and conducted by Dr. Leora Lawton, TechSociety Research (<http://www.techsociety.com>).

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TOPLINE SUMMARY

In January 2009, EDUCAUSE surveyed a sample of its membership with two goals in mind: to understand the financial impact on institutions in terms of the extent of cuts and the coping strategies, and to identify areas where EDUCAUSE can help.

Key Findings

- ◆ *Financial Impact:* Two-thirds of all institutions and half of central IT are experiencing cuts of an average of 7%; these cuts are expected to grow to 9%. Large public institutions have felt the largest impact. The biggest areas of budget cuts are hiring and travel, followed by capital projects and equipment.
- ◆ *Cost-Saving Responses:* Many responses under way are the reductions in hiring and travel already mentioned. Some institutions are emphasizing reduced energy consumption, efficiencies, centralization or virtualization, intergroup buying or training strategies, and e-learning.
- ◆ *EDUCAUSE Responses:* Clearly online delivery of information, including meetings, is sought. Local events without air travel are also helpful.
- ◆ *Topics in Demand:* Respondents want EDUCAUSE to facilitate sharing communal wisdom about best practices in sustainability, centralization, virtualization, e-learning, and open-source applications. Respondents want resources to help them understand ROI for these and other areas and are very interested in strategic change, teaching and learning, and collaboration between IT and libraries.
- ◆ *Attendance at EDUCAUSE Events:* As expected, decision makers expect attendance at many face-to-face events to drop. Curiously, however, individual respondents tend to see themselves as relatively immune to travel cuts.

Respondent Recommendations

Respondents say that EDUCAUSE has an opportunity to position itself as a partner, not just a resource. Members need EDUCAUSE more than ever. While the association will also feel the pinch, meeting member needs is vital in this difficult time.

Conclusions

The recession is viewed as long-lasting, and respondents see the communal wisdom in EDUCAUSE as important to their ability to cope with the budget challenges. They want to respond in a way that will leave them wiser and more capable.

EXECUTIVE SUMMARY

Introduction

This report summarizes the results of a survey EDUCAUSE conducted to understand how the economic downturn is affecting colleges and universities and investigate steps the association might take to ameliorate the situation for both itself and its member institutions. The economic downturn has put pressure on higher education institutions to make difficult decisions about funding, in areas including teaching, research, and IT. In turn, EDUCAUSE will likely feel the effects of the economy through declines in attendance at conferences and membership. Both for institutions and for EDUCAUSE, adjustments due to the current financial situation are likely to be long term, if not permanent, and so the situation calls for a strategic vision. EDUCAUSE conducted this study with two overarching goals in mind:

- ◆ To understand the financial impact on institutions in terms of the extent of cuts and the coping strategies
- ◆ To identify areas where EDUCAUSE can help

Methodology

The first part of this study consisted of interviews—ranging from 25 to 55 minutes—with six senior IT administrators. Their detailed answers in this qualitative process provided content and direction for the quantitative portion—a survey instrument, designed to take approximately 10 minutes to complete, that covered five topics:

- ◆ Extent of budget cuts
- ◆ Tactical responses to cuts
- ◆ Strategic planning
- ◆ Steps for EDUCAUSE to take
- ◆ Potential impact on EDUCAUSE events

The survey, which was open January 6–13, 2009, included numeric as well as text (open-ended) questions, allowing for a rich set of data for analysis. Of those invited by e-mail to take the web-based survey, 577 individuals from 409 institutions responded—a response rate of 8.8%, yielding a margin of error of +/- 4%.

Because the survey oversampled for CIOs, they represent 30% of the sample, which provides a large and well-informed respondent base. Even though there were multiple responses from the same institution in 102 cases, a statistical analysis indicated that controlling for multiresponse did not alter survey results. The resulting sample is representative of the membership in that proportions of Carnegie class, FTE, control, and job title corresponded well to the actual membership.

One of the distinctive features of this survey is that whereas some other surveys focus on steps an association might take to minimize the recession's impact on its

own revenues and membership levels and to cut costs and increase revenues, this study focuses also on what EDUCAUSE can do to help its members.

Key Findings

The findings from the study fall generally into five areas: the current financial situation on campus, what institutions are doing, what EDUCAUSE might do, areas of interest for next steps, and the likely impact on EDUCAUSE events.

Financial Impact

Respondents report both institutional and IT-specific budget cuts, and large public institutions have felt the largest impacts. The most common areas of budget cuts are hiring and travel, followed by capital projects and equipment.

- ◆ Two-thirds of respondents indicate that their institution has experienced budget cuts of an average of 7% overall. These cuts are expected to rise to 9%.
- ◆ The average cut for IT units is the same as for the total institution (7%), with about half currently facing budget reductions.
- ◆ Public institutions are more affected than private colleges and universities. Also, large public institutions are more likely to have cuts, and the cuts are larger compared to smaller, public institutions. Variances by FTE for private institutions were not significant.
- ◆ CIOs report cuts more frequently than do faculty. Among faculty who report cuts, however, a larger proportion report deeper cuts, compared to the CIO respondents.
- ◆ Most CIOs (88%) have at least some discretion in how to allocate cuts, but 61% have had mandatory restrictions. Among those without complete discretion, the most common budget reduction strategy is a hiring freeze, either through leaving positions unfilled (75%) or not hiring new positions (69%). Nearly half (43%) have travel freezes.

Cost-Saving Responses

Many of the cost-saving adjustments under way are the reductions in hiring and travel already mentioned. Some institutions are emphasizing reduced energy consumption, efficiencies, centralization or virtualization, intergroup buying or training strategies, and e-learning.

- ◆ Common steps to reducing costs and improving efficiencies include leaving positions open (56%), encouraging faculty and staff to reduce energy consumption (44%), curtailing or disallowing travel (44%), and implementing server centralization (39%) and virtualization (38%). Various operations have been brought in-house, such as web design and hosting, and some institutions have reduced contract employees and some forms of IT support.
- ◆ Responses that have not been widely implemented or considered include centralizing support, extending maintenance cycles, implementing automatic power-downs, and negotiating better pricing for goods and services.

- ◆ Through their open-ended comments, respondents offered many suggestions to other institutions for reducing costs, for both immediate as well as forward-looking steps. These included sustainability measures, reorganizations of staff and operations, and reviews to uncover less obvious areas where changes could be made. Other ideas focused around e-learning initiatives and working with internal or external groups for economies of scale.

Suggested EDUCAUSE Responses

Clearly online delivery of information, including meetings, is sought. Local events without air travel are also helpful.

- ◆ Because of pressure on travel budgets, four of five respondents want to see more webinars, podcasts, and other web-based events.
- ◆ Three-quarters want to see more white papers informing them about economic conditions and possible responses.
- ◆ Respondents strongly recommend local professional development events, which are more accessible because they do not require air travel.

Topics in Demand

The sharing of communal wisdom covering best practices in issues such as sustainability, centralization, virtualization, e-learning, and open-source applications is at the top of the list of steps respondents want to see EDUCAUSE take. In addition, there is a clamor for total cost and ROI for these and other areas, and advice on strategic changes to develop collaborative synergy for teaching and learning with IT and library services.

- ◆ Desired topics for web-based events include best practices in centralization (58% of CIOs and 49% of the total sample), the role of IT in long-term institutional goals (47% of CIOs), and sharing of communal wisdom (39% of CIOs).
- ◆ About one-third of respondents want help in fostering change for sustainability, product evaluations, and product ratings.
- ◆ Open-ended suggestions for topics EDUCAUSE could cover in its physical and virtual meetings include the need for more assistance in teaching and learning, not just, for example, about the software for online collaborations, but also to assist faculty in adjusting to these technologies and effectively incorporating them into their teaching repertoire.
- ◆ Institutions need assistance in promoting structural change regarding IT within the institution, particularly around ROI, and helping staff and administrators make cultural transitions.

Attendance at EDUCAUSE Events

As expected, decision makers expect attendance at many face-to-face events to drop. Curiously, however, individual respondents tend to see themselves as relatively immune to travel cuts.

- ◆ Those who make the decisions to send people to conferences expect to see a decrease in attendance at all forms of events—an average decrease of 18%. There does not seem to be a drop-off in individual expectations about attending the annual conference, however, and respondents see attendance at regional conferences increasing (from 9% in 2008 to 14% in 2009).
- ◆ Those at private institutions and at smaller public institutions are considerably more likely to expect to attend both the annual and regional conferences.

Respondent Suggestions

Respondents say that EDUCAUSE has an opportunity to position itself as a partner, not just a resource. Members need EDUCAUSE more than ever. While the association will also feel the pinch, meeting member needs is vital during this difficult time. Not surprisingly, CIOs see the need more critically than others. They want assistance in strategic vision and in implementations that alter “the way things have been done,” both to sell the changes to the rest of the institution and to ensure their effective and efficient implementation.

- ◆ *EDUCAUSE needs to develop programs initially that are meaningful for large, public institutions, which will be hurting more so than the private institutions.*
- ◆ *It is easier for larger colleges to do open-source implementations. Smaller institutions might form a consortium or other interinstitutional collaboration.*
- ◆ *The annual and regional conferences could feature sessions on techniques and strategies for greater IT efficiencies, so that the ROI for the dollar spent attending can be realized quickly.*
- ◆ *Be flexible enough to meet the needs of specialized members—for example, member institutions outside the United States.*
- ◆ *While online events are desirable, they should not be informercials.*
- ◆ *Work with corporations to come up with cost-effective solutions with long-term business viability in mind. Both thin clients and open source are viewed as possible cost-efficiencies.*
- ◆ *Thin clients might be appropriate in some settings, but this step is a cultural transition. Veterans of mainframe use won't have a problem with the concept, but those who grew up on personal computers might.*
- ◆ *Open-source solutions are another way to reduce costs, but this must be done with a total ROI picture in terms not just of institutional support but for teaching and research goals as well. ROI on equipment life spans (which, how long) would be very practical.*

Conclusions

Because the recession is viewed as a long-lasting challenge, respondents see the communal wisdom in EDUCAUSE as extremely important to their ability to cope with the budget challenges. They want to respond in a way that will leave them wiser and more capable.

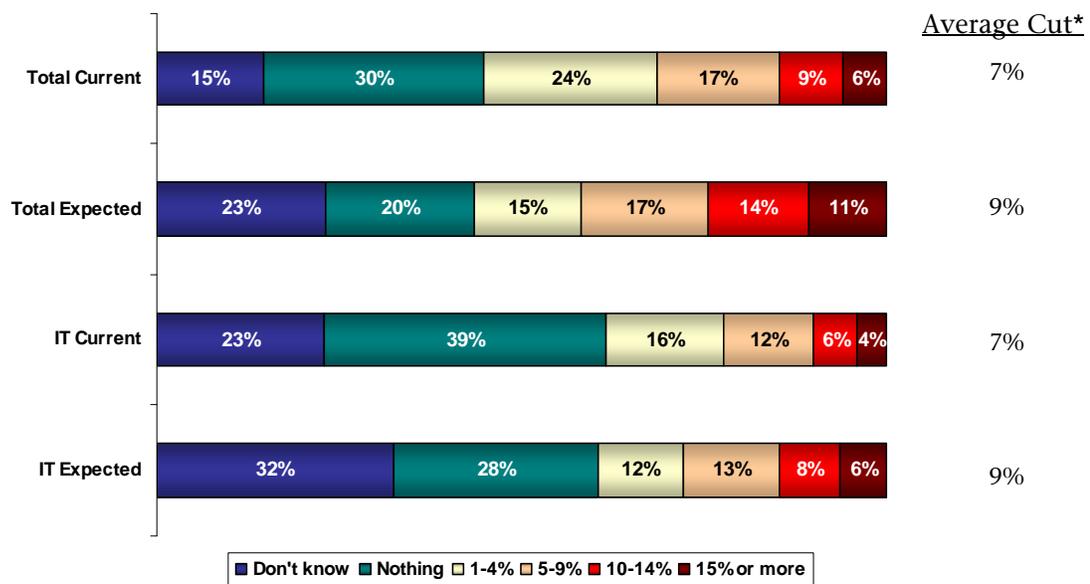
- ◆ The budget cuts facing member institutions in general, and IT units in particular, are likely to result in fewer who are able to attend the annual conference and more interested in local and online content.
- ◆ The situation for private institutions is likely to deepen during the next two to three years; being prepared for their challenges will be valuable.
- ◆ Because many institutions will be losing staff positions, EDUCAUSE has an opportunity to help members see how to do as much (or more) with less through greater efficiencies.
- ◆ Some cost-savings measures are risky in the long run. Shifting costs from one unit in the institution to another (or simply to students, staff, or faculty) might not achieve the overall goals of the institution. On the other hand, charging for some services (printing, for example) might benefit not just cost but also sustainability and efforts to reduce waste.
- ◆ Communal wisdom is one of EDUCAUSE's most valuable resources, and it needs to be directed to certain areas rather than simply allowing the "invisible hand" of interest definition to operate.
- ◆ Topics for web-based options are also relevant for face-to-face conferences.
- ◆ Low rates of experimentation with some activities, such as renegotiated licensing agreements or cloud computing, suggest that opportunities exist for more efficient use of budgetary dollars.
- ◆ Because the economic changes are not just endemic but also far-reaching, strategic vision for IT is critical. Reducing costs will not be sufficient; fundamental changes and "outside the box" approaches will be essential.
- ◆ EDUCAUSE corporate members also face strain from loss of revenue. With many respondents mentioning interest in open-source software, for example, some corporate members would benefit from understanding where their market share is at risk.

DETAILED RESULTS

Financial Impact

The first set of survey questions concerned the current and anticipated budget cuts for the institutions overall and the central IT units in particular. Excluding “Don’t know” responses, a large majority (65%) have already experienced institutional budget cuts, and this number is expected to rise to 74% during the 2008–2009 academic year (see Figure 1). IT budgets have been hit less severely—about 49% have already experienced cuts, and about 58% expect some reductions in their budgets by the end of the academic year. The average size of budget cuts is 7%, for both institutional and IT budgets, and this number is expected to climb to 9%. Insights from the qualitative interviews indicates that many expect the economic situation to get worse before it gets better.

Figure 1. Current and Anticipated Cuts for Institutions Overall and IT Specifically

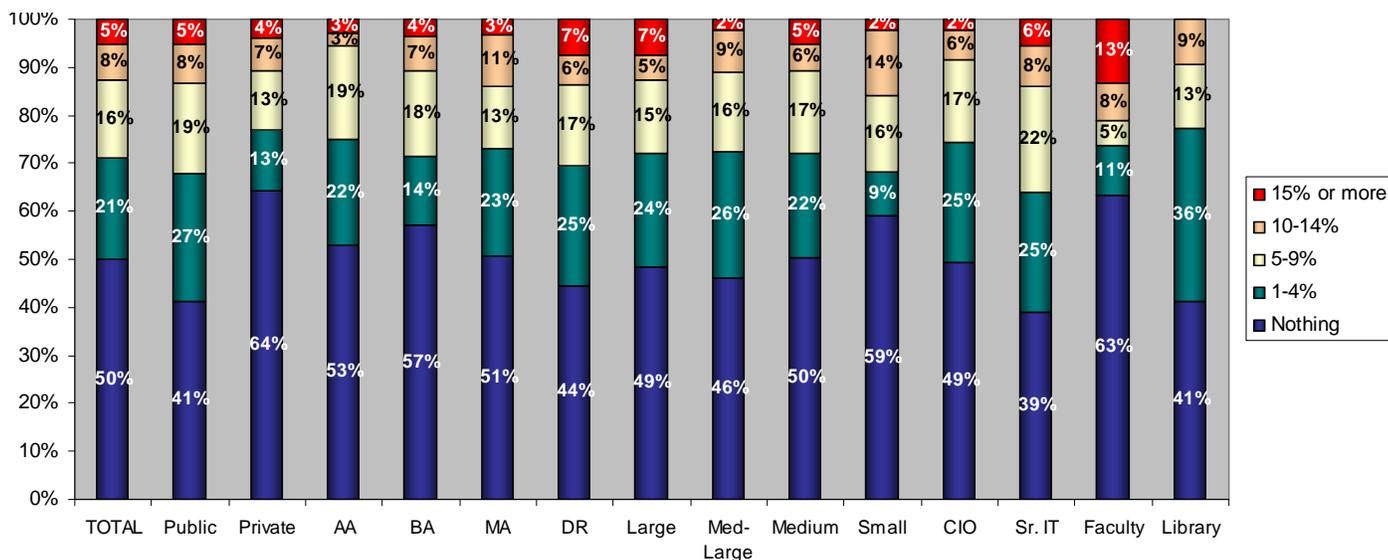


* Excludes those who say “none” or “don’t know.”

At this point, smaller reductions are more common than larger cuts, with fewer than one in seven grappling with cuts of greater than 10%. Indeed, 30% of institutions and 39% of IT departments have had no reductions at all.

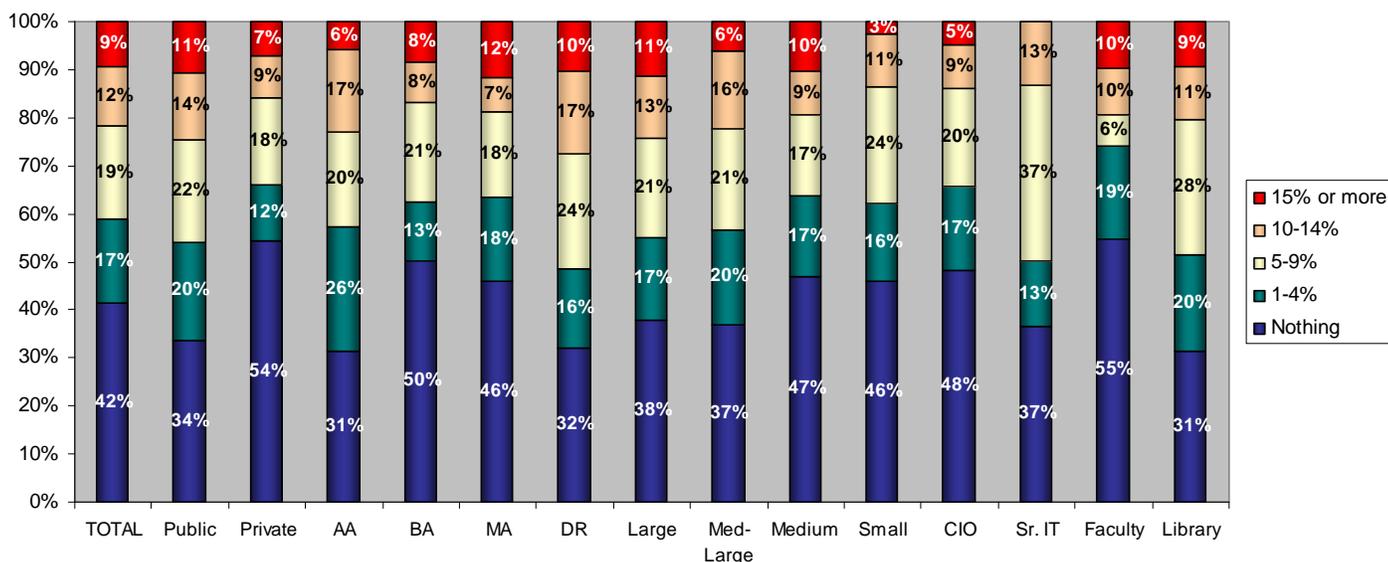
When looking at the different subgroups in Figure 2 for cuts experienced in IT, the patterns in the qualitative interviews are confirmed. Public institutions are affected more than private—59% of publics have had cuts, compared to 36% of private institutions. Libraries have been hard hit, with 58% reporting some kind of budget reduction, and yet no library respondent reports reductions of 15% or more.

Figure 2. Cuts Already Experienced by IT



The pattern for anticipated reductions in IT budgets is somewhat more severe (see Figure 3). There is a sense that those who have been spared thus far are concerned that the budget crisis will catch up to them eventually and not be too kind—for almost all groups, both the frequency and level of cuts are higher in the anticipated numbers compared to the current actual.

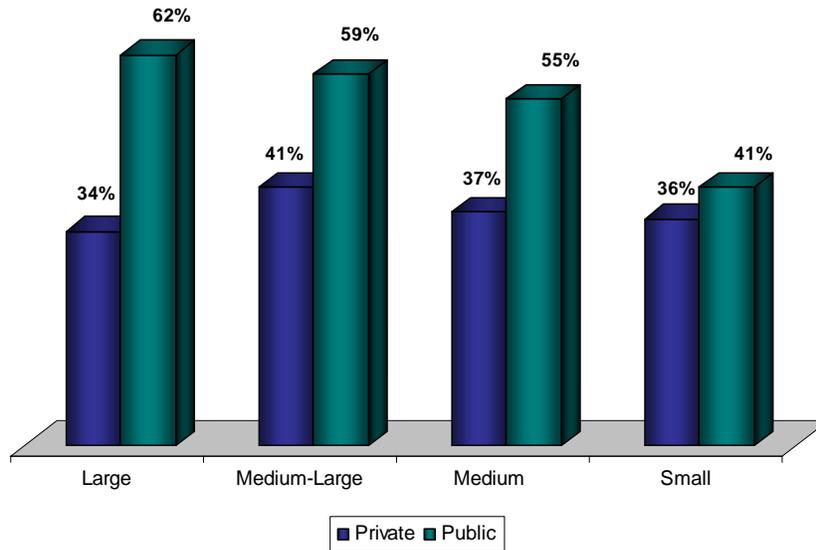
Figure 3. Anticipated Cuts by IT



Large institutions are more likely to have already experienced budget cuts, and they anticipate more, although part of that may be due to the public/private pattern. To test that, we looked at control and FTE (see Figure 4). For every FTE category, publics are more likely to have experienced cuts, with the gap more pronounced for larger

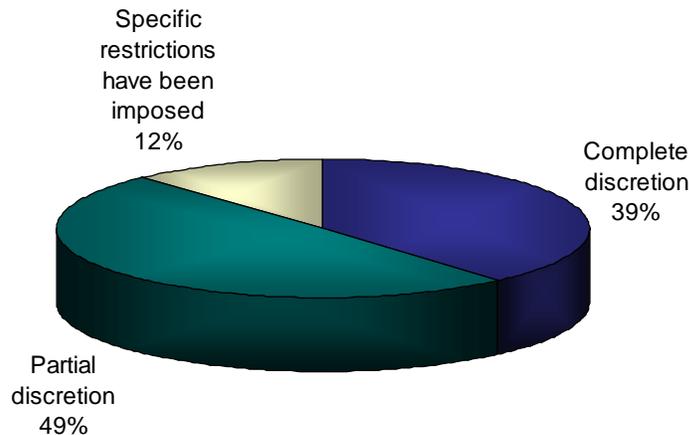
institutions. In fact, private colleges and universities do not report large differences in presence of budget reductions across FTE (ranging from 34% to 41%), whereas the publics show a decreasing pattern from large to small (62% to 41%).

Figure 4. Percentage of Institutions Currently Experiencing Any Cuts in IT, by Control and FTE



Among respondents who have experienced cuts, nearly 90% have either partial (49%) or complete (39%) discretion in what areas must be cut (see Figure 5). Still, most (61%) have had budgets cuts imposed on them in at least one area.

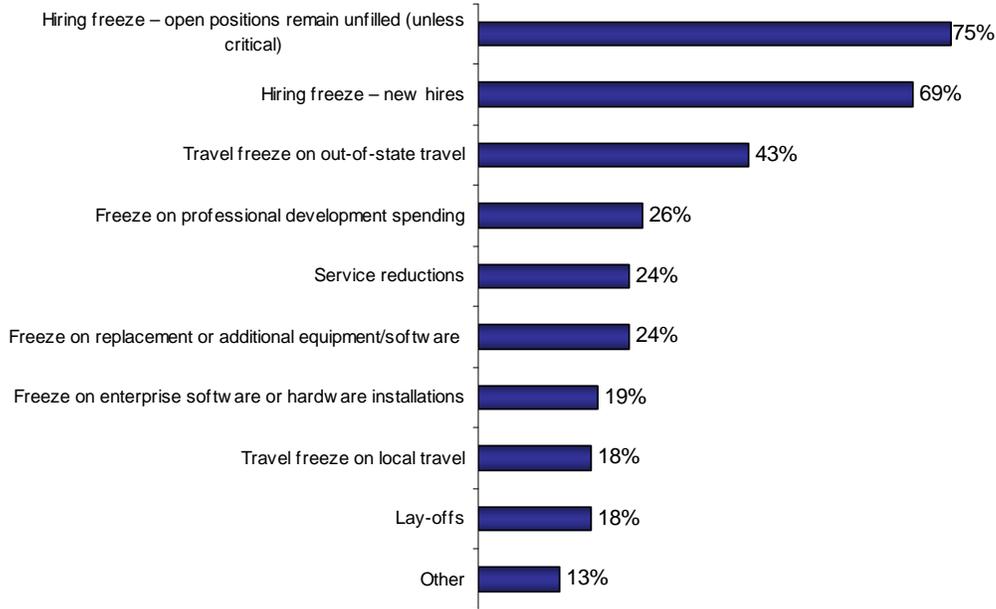
Figure 5. Discretion Levels Among Those with Required IT Cuts (N = 249)



Of those required to cut specific areas, the most common is a hiring freeze to leave open positions unfilled (75%) (see Figure 6). A second common form of hiring freeze is disallowing new hires (69%), and nearly half of respondents (43%) have travel freezes. There were just 19 open-ended responses to this section, and those

comments support the overall pattern in Figure 6: no raises, no furloughs, no food at events, employee work reduction, reduction in retirement incentives, personnel reductions, and no stipends for in-house faculty development programs.

Figure 6. Required Spending Cuts, Among Those Without Complete Discretion (N = 153)



Cost-Saving Responses

The survey asked about the kinds of steps taken by IT units to be more efficient with their budgets, regardless of whether they have been asked to reduce spending. As shown in Table 1, the current actions, plus those being considered, are a clear sign that many IT units have been proactive in handling the crisis. Nevertheless, aside from travel and hiring restrictions and steps toward energy efficiency, all of the identified cost-saving activities are off the table for at least one-third of respondents. The last column shows percentages of those who have not taken any action in these areas, and these percentages are broken out by total sample, CIOs only, and library staff only, which were the most informative comparisons.

Actions with low rates of implementation or with higher rates of consideration and planning are areas where EDUCAUSE may have opportunities for the greatest impact. For example, respondents express considerable interest in renegotiating contracts, but relatively few have pursued this.

Table 1. Possible Actions to Reduce Costs or Improve Efficiencies

Action	Already Taken	Planned or Considered	No Action Taken (No/Don't Know)		
			Total	CIOs	Library
Left vacant positions unfilled	56%	21%	23%	26%	27%
Campaign to encourage staff and faculty to conserve energy	44%	24%	32%	33%	26%
Travel curtailed or disallowed	44%	28%	28%	24%	25%
Centralized servers	39%	21%	39%	28%	27%
Increased efficiencies through upgrades or virtualization	38%	30%	32%	23%	17%
Extended replacement cycles	32%	33%	35%	30%	26%
Professional development funds curtailed	31%	29%	40%	38%	40%
Emphasizing local or on-site professional development over travel	29%	32%	39%	35%	32%
Replacement of less efficient equipment with energy-efficient models	29%	22%	50%	35%	40%
Reduced or removed overtime	26%	17%	57%	55%	58%
Postponed or canceled large upgrades or installations	24%	33%	44%	39%	40%
Centralized support positions	24%	24%	52%	60%	47%
Extended maintenance cycles	23%	31%	46%	44%	37%
Automatic power-downs of computers	22%	26%	52%	42%	46%
Cloud computing, e.g., using Gmail for student e-mail accounts	21%	31%	48%	41%	35%
Renegotiated purchasing/licensing agreements	21%	36%	44%	40%	35%
Relied more on student help	19%	22%	59%	60%	66%
Billing for selected services provided to institutional departments or individuals	18%	16%	66%	64%	69%
Worked with the local power utility to reduce energy consumption	16%	14%	71%	77%	59%
Offering continuing education (non-degree) programs in IT	14%	7%	79%	86%	78%
Outsourced operations	10%	23%	67%	59%	65%
Provide IT consulting services in the local community	3%	5%	92%	92%	92%
Brought functionality back in-house	3%	5%	92%	91%	90%

If strategic changes are going to be made, then discussions will have to go beyond IT units to encompass dialogue with many other units in the institution. A quote from the qualitative interview process summarizes the concern about a low level of strategic involvement:

One of the dangers of budget cuts on the scale currently being experienced at many institutions is that IT may devolve from being a strategic organization and emerge as primarily tactical or operational.

That is, when funding for innovation and new initiatives dries up, IT leaders may be tempted (or forced by circumstance) to pull back from longer-range strategic thinking (and action) and, instead, tilt the focus toward getting through the day—simply making sure that basic services remain intact and are deliverable. In higher education, the core competencies of instruction and research are (or can be) strategic differentiators. IT in support of instruction and research also tends to spawn new initiatives and innovations. If we lose the money to experiment, to try and to fail (occasionally), to adopt best practices from elsewhere that serve as innovations on our own campuses, and to stay current with emerging consumer technologies, then we've lost a good bit of our strategic value to our institutions.

The survey asked respondents, "What else have you done or are planning to do to deal with the budget constraints in terms of staffing, sustainability, cost savings, or revenue generation?" This question elicited 252 comments, some of which are listed in the categories below. Note that some solutions fall into multiple categories. Additionally, 37 respondents identified previously outsourced operations that were brought back in-house, including web design, hosting, and application design; server support functions and field-based support; library catalog, acquisitions, and billing; finance systems; computer repair; and bulk e-mail messaging.

While most institutions are thinking creatively about ways to address the economic downturn, local contexts differ sufficiently to make nearly all ideas conditional. Note, for example, that while eliminating contractors is seen by some as a cost-savings effort, others find relying *more* on contractors to be a savings. In other words, a given response doesn't necessarily guarantee a certain kind of outcome; rather, the response must be tailored to the situation.

Sustainability

- ◆ *Integrate room scheduling system with HVAC—planned operation for Spring 09.*
- ◆ *Reduce energy consumption on desktop computers via new software.*
- ◆ *In terms of sustainability, we are early in our campus process, but we see IT as critical to reducing travel costs through hybrid courses and telecommuting.*
- ◆ *Turning off every other light in corridors.*
- ◆ *We have an active sustainability committee that is searching out the areas of recycling, purchasing, energy, etc., to look for cost savings but also to increase our green efforts at environmental sustainability.*
- ◆ *Presented "value proposition" to president on a "green campus" utilizing utility savings to reinvest in infrastructure to provide end-point monitoring.*
- ◆ *Our institution has adopted many policies on sustainable development, including Energy Policy, Integrated Transport Policy, Sustainability Policy, Waste Management Policy, Facilities Directorate Policies Version, and External Relationship Management Policy.*

Printing

- ◆ *We stopped printing meeting agendas and minutes; we print on both sides of the paper now.*
- ◆ *We moved the publication of our magazine to web only.*
- ◆ *Started charging students for computer printing in library.*
- ◆ *Reduced printing through use of website posting for orientation, class, and symposium materials. Moved to online course evaluation.*
- ◆ *“Green lab” using paper that was already printed on one side.*

Operations and Reorganizations

- ◆ *Whenever possible, the college is redeploying current staff members to fill high-need vacant positions.*
- ◆ *Retooling staff for planned moves to priority areas.*
- ◆ *We are looking at virtualization, although that requires an investment in order to save money. Any new servers we buy will be with VM in mind going forward.*
- ◆ *Considering more aggressive move toward Google Apps/Gmail/Google Calendar to reduce cost/overhead for calendar/scheduling/e-mail.*
- ◆ *Consolidating decentralized IT services.*
- ◆ *Use contractors for short projects.*
- ◆ *We are exploring with our network group whether we can improve wireless service in the residence halls and then turn off the wired network. We are also considering eliminating phones in offices of faculty since many of them are not here much. The IT staff has switched to cell phone only where coverage allows.*
- ◆ *Upgraded secretarial technical skills to reduce incidence of low-level technical service calls.*
- ◆ *Trained and employed underutilized evening staff to support technical aspects of evening events, reducing need for overtime.*
- ◆ *Acquired high-quality portable videoconferencing equipment to reduce travel costs for professors, speakers, and interviewing graduates.*
- ◆ *Over intersession, did a two-week shutdown of several buildings on campus.*
- ◆ *Where possible use student workers funded through work/study.*
- ◆ *Expanding the network capability to enable centralized support, implementing virtualization more widely, especially in the research community, and using videoconferencing to deliver classes to multiple sites and for meetings.*

Review and Audits

- ◆ *We are simultaneously doing a planning exercise we’re calling ITS 2.0, looking at where we want to be in ~2012. In managing our budget reductions, we want to do so in a way that positions us for the future. We have teams looking at future service needs*

and at workforce needs. For current budget cuts, we are doing a cost analysis for each major service area. In considering things like sourcing e-mail to Google or Microsoft, we want to really understand what we might or might not save. Everything is on the table; no cost item is sacrosanct. We're also doing cost comparisons based on the EDUCAUSE Core Data Service.

- ◆ *We are much more conscientious about requests for new staff and faculty machines. Instead of purchasing large servers we are building them ourselves where possible. The gain here is monetary over the short term, but long term for employee knowledge and specialization.*
- ◆ *Except for holding off on recruitment for unfilled positions, we have not been given a directive for budget cuts this year. I have been notified that capital expenditures for next year may well be significantly reduced. To that end, we have begun planning in ITS to prepare for significant budget cuts next year by deciding what projects or funding requests can be delayed. In other words, we're prioritizing right now in preparation for anticipated cuts.*
- ◆ *Provide inexpensive short-term solutions consistent with strategic direction rather than comprehensive solutions with enterprise ROI.*
- ◆ *Discussion of greater centralization of what in the past was not enterprise IT responsibilities and then significantly restrict alternatives.*
- ◆ *We've organized committees to look at specific areas and come up with cost-saving ideas. These committees are meeting right now and will provide all feedback to our chancellor for further action.*

E-Learning

- ◆ *Leverage online learning to address institutional efficiencies and enrollment gains, with associated institutional support.*
- ◆ *The university faculty are developing hybrid courses, which can be offered in off-campus locations. More faculty are putting courses into online formats.*
- ◆ *We are offering more courses online, which has two benefits. The tuition rate is higher, so more revenue is generated; classroom space isn't utilized, allowing for the scheduling of more classes on campus. The additional revenue generated in our particular college is used to offset a huge budget reduction for part-time faculty teaching.*

Cooperative Groups

- ◆ *Worked together with other colleges to provide professional development.*
- ◆ *Work with local universities to develop consortial sharing of licenses, training programs, etc.*
- ◆ *Partner with academic and administrative units to share personnel.*
- ◆ *Look at new partnerships across institutions to leverage efficiencies and economies of scale.*
- ◆ *Increasing partnerships among campus units.*

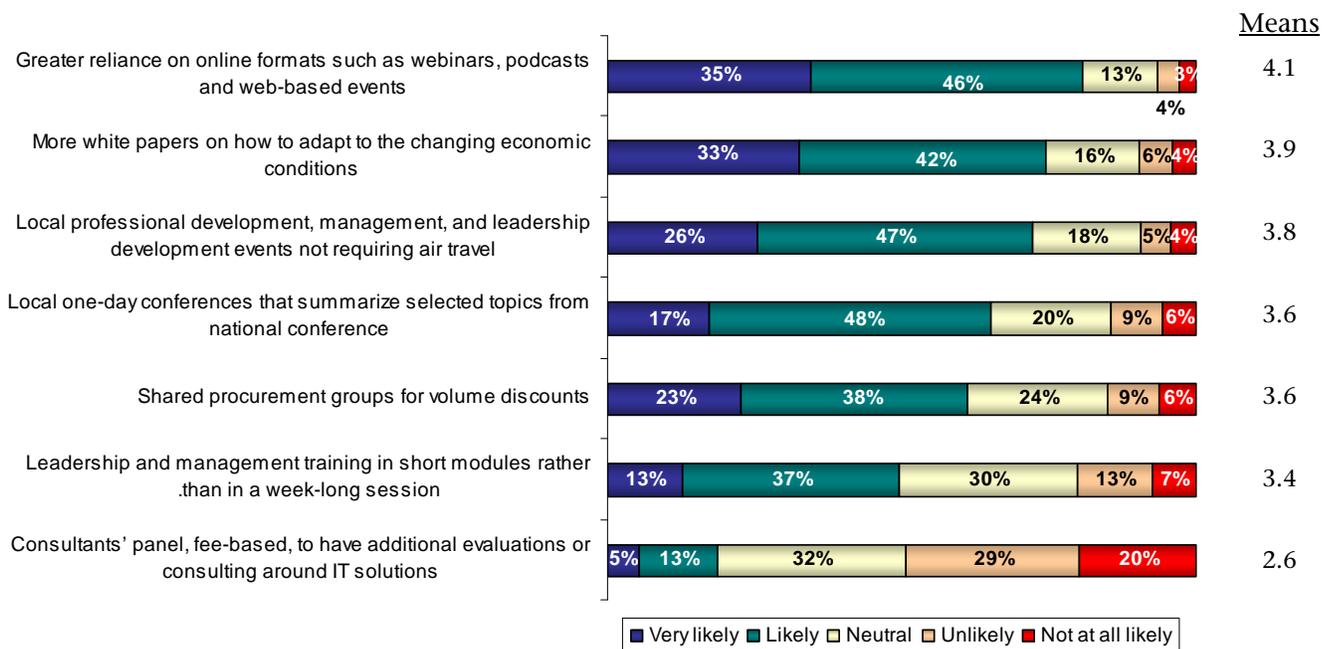
Revenue Generation

- ◆ Consider offering evening/weekend/summer courses to increase revenue for college as a whole (we're a four-year, private liberal arts college that doesn't currently do this).
- ◆ Take more time [to] apply for more grants.
- ◆ Our institution plans to develop retail and commercial zones on its land to generate revenue. We are also trying to encourage research, development, and securing patents for revenue generation.... In addition, the institution is trying to use its football program and plans for a new stadium to generate funds.
- ◆ Some of us are taking courses in online course development. We hope to be able to generate revenue by offering some open courses, which are linked to ongoing professional development.
- ◆ Working with local Workforce One (former unemployment office) to bring additional students to campus; tuition paid by state.

Suggested EDUCAUSE Responses

EDUCAUSE undertook this study not simply to document member experiences but also to identify steps the association might take to support institutions in these challenging financial times. Given the current and anticipated cuts in travel, it's not surprising that at the top of the list of suggested responses for EDUCAUSE is greater use of web-based events for community engagement (see Figure 7). The second request is for white papers dealing with the economic situation and the ways different campuses are dealing with it, and third is for local face-to-face events, which are more accessible for institutions under travel restrictions.

Figure 7. Interest in Potential EDUCAUSE Services

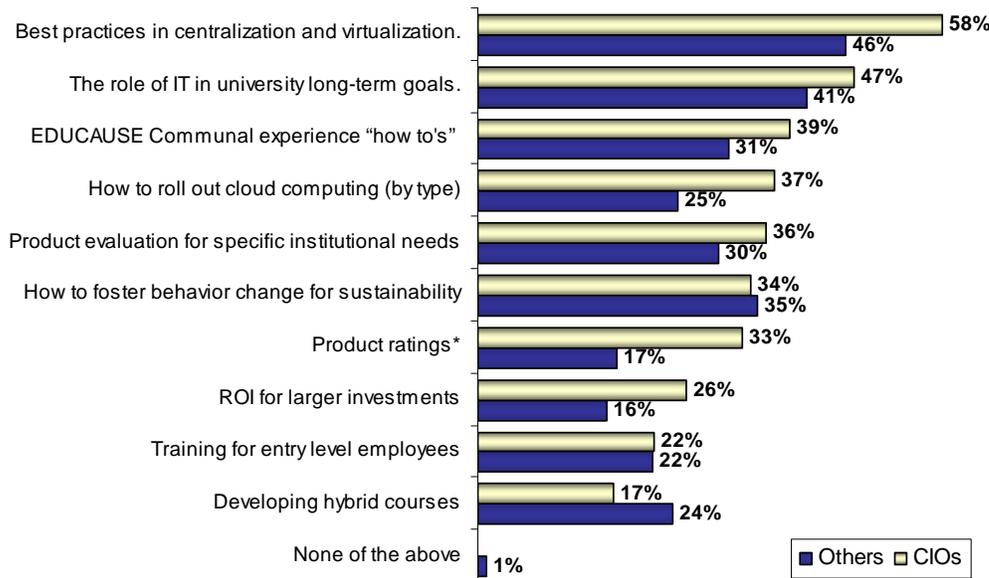


Topics in Demand

Given the high interest in web-based options for learning and disseminating information, it's important to know which topics are of the greatest need. Figure 8 shows that nearly 60% of CIOs want to know more about centralization and virtualization. This is not surprising, given the level of activity in these areas, as indicated in Table 1, and the fact that of the five most implemented actions listed in Table 1, these are arguably the two for which the best path is least obvious. Clearly many services can be centralized, but which ones and how they are best tackled are unknowns.

The second most requested topic is understanding IT's role in the long-term goals of the institution. Even at colleges and universities where IT is involved in strategic planning, it is typically the newest member of the discussion, and many institutions remain ambivalent about IT's part in long-range strategic vision.

Figure 8. Highest Priority for Content of EDUCAUSE Web-Based Options—CIOs Compared to All Others



In open-ended comments, over 100 respondents provided suggestions for topics EDUCAUSE could cover in its web-based options and at face-to-face events. The most notable theme from these comments is *teaching and learning*. The second common thread surfacing in these comments was about change—in behavior, culture, risk tolerance, and demonstrating ROI.

Teaching and Learning

- ◆ *New technologies and how to integrate them into the curriculum (need to get faculty on board). Best practices for reducing or limiting the time burden for faculty who teach or would like to teach online courses. How to redesign a classroom-based course into an online course. Evaluation of student outcomes—formative and summative assessments.*

- ◆ *Seek ways to involve and support higher-ed. faculty.*
- ◆ *It has been my experience that most faculty and administrators have a misguided view of online teaching and learning. They believe that these courses can be taught by graduate students (cost reducing) and that regular faculty (tenure-track or not) are not necessary for this purpose.... I hope higher education does not become weakened by this narrow view of the importance of quality instruction in and out of the classroom.*
- ◆ *Expand focus on faculty activities and contributions. Exclusivity to IT and administration hurts credibility and limits buy-in.*
- ◆ *We are an academic technology unit—not the central IT unit. I would like to see strategies for using academic IT for reducing costs for students and the institution.*
- ◆ *The efficiencies (many of them, sustainability-wise) of hybrid courses and some guidance about how to get resistant professors engaged in online course support and in sustainability measures.*

Change

- ◆ *EDUCAUSE could probably help with products to educate executives (and the community) about the nature of IT services and decisions regarding their costs and benefits.*
- ◆ *Finding ways to quickly and intelligently communicate with our customers why change is needed is an important first step to leveraging resources appropriately now and in the future. I think this is an area where EDUCAUSE can be very helpful...case studies, successes, shared experience (through surveys like this) will get us there.*
- ◆ *Leveraging technology for institutional efficiency and effectiveness. I think presidents and other senior executives need this. They generally look at traditional budget-cutting only.*
- ◆ *Training for employees ready to take on more responsibility and initiative for mission of the college.*
- ◆ *Infrastructure efficiency and consortium or group purchasing.*
- ◆ *Collaboration between campus IT and libraries*
- ◆ *Practical “green computing” research from desktop to machine room. There’s a lot of hype around this topic, and it gets the attention of upper management when claims are made about thin clients or software to manage desktops.*

Impact on EDUCAUSE Events

Another possible area of impact is attendance at events. Based on this survey, at least, the annual conference might not be severely impacted in terms of attendance in 2009. In fact, slightly *more* respondents believe they will attend the annual conference in 2009 than in 2008 (see Table 2). Respondents anticipate an even greater increase in attendance at regional conferences for 2009. As of this writing, however, registration numbers for regional events have not borne out this forecast.

Table 2. Past and Expected Attendance at EDUCAUSE Events

Event	Attended in 2008	Plan to Attend in 2009	Don't Know 2009 Plans
EDUCAUSE Annual Conference	20%	22%	45%
EDUCAUSE Regional Conferences	9%	14%	45%
ELI Annual Meeting	3%	2%	45%
EDUCAUSE Institutes	3%	3%	46%
ECAR Symposium	1%	2%	47%
Enterprise Information and Technology Conference	1%	2%	46%

Because the annual and regional conferences have more attendees than other EDUCAUSE events, Table 3 breaks down anticipated attendance at those events by control, Carnegie class, FTE, and job title. Respondents from private schools and smaller schools are more likely to attend, which is consistent with the scenario of budget cuts seen earlier.

Table 3. Individual Expected Attendance at EDUCAUSE Events, by Control, Carnegie Class, FTE, and Job Title

Group	EDUCAUSE Annual Conference	EDUCAUSE Regional Conferences
TOTAL	22%	14%
Public	17%	12%
Private	28%	21%
AA	23%	18%
BA	39%	20%
MA	22%	17%
DR	15%	13%
Large	15%	10%
Medium-Large	17%	14%
Medium	30%	17%
Small	27%	23%
CIO	42%	18%
Senior IT	9%	16%
Faculty	11%	9%
Library	24%	17%

Despite the relatively sanguine outlook of many individuals about attendance at EDUCAUSE events in 2009, nearly all of those who have decision-making authority about who should actually attend events expect to send fewer people in 2009 than in 2008, with the exception of small institutions (see Table 4). Faculty also report a negligible difference in anticipated attendance. The average difference represents about a 22% drop in attendance. One might ask why this number seems at odds with Table 2. One reason is that individuals may be unaware that their travel funds

are in jeopardy—indeed, some people in the survey commented that they didn’t not feel knowledgeable enough to address these issues.

The fact that large and medium-large institutions face the largest drops in attendees (28% and 29%, respectively) suggests an opportunity for EDUCAUSE to conduct regional events in areas that serve large numbers of individuals who would be able to attend a local professional development event.

Table 4. Group Level Past and Expected Attendance at EDUCAUSE Events, by Control, Carnegie Class, FTE, and Job Title

Group	Number of Face-to-Face Events in 2008	Expected Number of Face-to-Face Events in 2009	Percentage Difference
TOTAL	6.7	5.1	-24%
Public	7.5	5.7	-24%
Private	5.8	4.3	-26%
AA	4.8	3.4	-29%
BA	3.3	2.9	-12%
MA	4.8	4.1	-15%
DR	10.7	7.5	-30%
Large	10.8	7.8	-28%
Medium-Large	7.6	5.4	-29%
Medium	4.6	3.9	-15%
Small	2.9	3.2	10%
CIO	5.9	4.9	-17%
Senior IT	7.5	6.1	-19%
Faculty	5.0	5.0	0%
Library	7.3	4.9	-33%

Closing Comments

Many respondents thanked EDUCAUSE for conducting this survey. One particular comment echoes the sentiments of many: “Thanks for asking and your willingness to assist during these challenging times.”

Another respondent offered this advice: “PLEASE do NOT focus entirely just on the U.S. situation! There is a world beyond the U.S. borders!” Clearly the economic downturn is a global problem, and, as such, it might represent an opportunity for EDUCAUSE to develop new strategies for engagement with the international community.

Similarly, the relationships that EDUCAUSE and its member institutions have with corporations might take on a new dimension as a result of the economic changes. Vendors are likely to turn to EDUCAUSE for insight about steps they can take to build or maintain their value to the higher education community and to weather the economic storm.