

Information Technology Funding in Higher Education: Survey Questionnaire

Thank you for participating in the study being conducted by the EDUCAUSE Center for Applied Research (ECAR). This survey is a critical component of the study and seeks to understand how IT funding priorities are established and implemented in higher education.

This survey should be completed by the individual at your institution with primary oversight for information technology (IT) budgets and funding. Tests indicate that the survey can be completed in approximately 25 minutes. If you wish to print a copy of the survey before completing it online, a .pdf version is available at <http://www.educause.edu/ir/library/pdf/ecar_so/ers/si/esi04c.pdf>.

Please complete this survey by Tuesday, February 10, 2004. As thanks for your time and valuable input, each participant is entitled to receive a summary of key findings from the study. In addition, three survey respondents will be selected at random to receive a complimentary copy of the final report or, for ECAR subscribers, one additional complimentary admission to an annual ECAR Research Symposium at San Diego's landmark Hotel Del Coronado.

We appreciate your time and participation. If you have any questions or concerns, please e-mail <ecar@educause.edu>.

Click the Next button to begin the survey. Once again, thank you for your input!

Section 1: About You and Your Institution

Please enter the survey ID number that you received by electronic mail to begin this survey. If you do not have this ID number, you may find it using the EDUCAUSE institution ID lookup Web page.

This survey need not be completed at a single sitting. You may save your responses and return to the survey at a convenient time. If you wish to exit before submitting your final answers, set a Favorite (Bookmark) for the survey and then click the SAVE button. If cookies are enabled, when you return to the survey you will be taken to the place you left off. You may complete or revise your answers until you click the FINISH button. Please submit your survey before the Tuesday, February 10, 2004, expiration date.

1.1 Survey ID [Required]

1.2 Your name

1.3 Please describe your primary function within the institution. Check all that apply.

- senior IT leader
- senior business officer for the institution
- financial administrator within the IT organization
- leader of administrative technologies
- leader of academic/research computing
- leader of instructional technologies
- other

1.4_1.9 What functions report to the senior IT leader at your institution? Check all that apply.

- 1.4 administrative computing
- 1.5 instructional technologies
- 1.6 academic/research computing
- 1.7 data communications
- 1.8 voice communications
- 1.9 library

1.10 To whom does the senior IT leader report?

- president/chancellor
- provost/chief academic officer
- chief business officer
- other administrative officer
- other academic officer

1.11 Is the senior IT leader a member of the president/chancellor's cabinet?

- no
- yes

1.12 Is the senior IT leader a member of the institutional committee that develops the annual operating budget?

- no
- yes

- 1.13 **Is the senior IT professional at your institution a member of the institutional committee that develops the annual capital budget?**
- no
 - yes
- 1.14 **Which statement best describes your institution's budget philosophy?**
- All revenues are collected centrally and expenses are allocated to each department
 - Responsibility center management or variation: some or all revenues are collected and retained by academic colleges and central administration is funded through a "tax" on individual units
 - Tubs on their own bottom: all academic units retain their own revenue and central administration is funded only on a fee for service basis
 - Other
 - Don't know
- 1.15_1.16 **Which statement best describes the financial authority of the senior IT leader at your institution?**
- The senior IT leader approves all expenditures.
 - The senior IT leader approves all significant institutional IT expenditures.
 - The senior IT leader approves all significant central IT expenditures.
 - The senior IT leader approves all moderate sized, central expenditures.
 - The senior IT leader must seek approval from more senior officers for moderate central IT expenditures.
 - other
 - 1.16 describe "other" (optional)
- 1.17_1.23 **Please indicate the extent to which you agree or disagree with the following statements about the senior IT leader's influence over institutional IT expenditure decisions. (1=very strongly disagree, 2= strongly disagree, 3=disagree, 4=neutral, 5=agree, 6=strongly agree, 7=very strongly agree)**
- 1.17 The senior IT leader greatly influences all expenditure decisions for administrative systems.
 - 1.18 The senior IT leader greatly influences all expenditure decisions for data communications.
 - 1.19 The senior IT leader greatly influences all expenditure decisions for desktop computing.
 - 1.20 The senior IT leader greatly influences all expenditure decisions for networks within campus buildings.
 - 1.21 The senior IT leader greatly influences all expenditure decision for instructional technologies.
 - 1.22 The senior IT leader greatly influences all expenditure decisions for academic/research technologies.
 - 1.23 The senior IT leader greatly influences all expenditure decisions for web support services.
- 1.24_1.29 **Which of the following technologies have you implemented in the last five years? Check all that apply.**
- 1.24 a complete vendor-supported Enterprise Resource Planning (ERP) system
 - 1.25 a vendor-supported financial system
 - 1.26 a vendor-supported human resource system

- 1.27 a vendor-supported student information system
- 1.28 a vendor-supported alumni/development system
- 1.29 a vendor-supported course management system

1.30 Have you implemented a high speed network?

- no
- yes, campus wide
- yes, partially deployed

1.31_1.35 Please indicate the extent to which you agree or disagree with the following statements regarding your institution. (1=very strongly disagree, 2=strongly disagree, 3=disagree, 4=neutral, 5=agree, 6=strongly agree, 7=very strongly agree)

- 1.31 Technology is a source of competitive advantage for my institution.
- 1.32 The institution's identity is tied to technology.
- 1.33 The institution only uses vended software for central IT applications.
- 1.34 The institution keeps current with all new releases of vended software.
- 1.35 The institution is an early adopter of technology.

Section 2: Institutional IT Funding

- 2.1 **In FY04, what is your institution's approximate central IT budget?** Drop down menu starting at less than \$1 million and increasing in \$1 million increments to over \$30 million
- 2.2 **In FY04, what is your institution's approximate total budgeted expenditures (from all budgets) for technology?** Drop down menu starting at less than \$1 million and increasing in \$1 million increments to over \$60 million.
- 2.3 **What is the approximate percent change in the size of the institution's central IT operating budget from FY01 to FY03?** Drop down menu starting at -15% increasing in 5% increments to +15%, including "other."
- 2.4_2.11 **Please rate the following sources of IT funding at your institution. (1=None, 2=Very minor source, 3=Minor source, 4=Average source, 5=Above average source, 6=Major source, 7=Very major source)**
- 2.4 direct state allocation for specific technology expenditure
 - 2.5 direct state allocation of funds to the IT budget for general operating costs
 - 2.6 operating appropriation to central IT organization from the institutional budget
 - 2.7 student technology fee(s)
 - 2.8 resale of services to other units on campus (charge-backs)
 - 2.9 resale of services to external entities
 - 2.10 external grants, contracts or partnerships
 - 2.11 technology transfer royalties
- 2.12_2.16 **Please indicate the extent to which you agree or disagree with the following statements about your institution's one-time investments in technology? (1=very strongly disagree, 2=strongly disagree, 3=disagree, 4=neutral, 5=agree, 6=strongly agree, 7=very strongly agree)**
- 2.12 The central IT budget has declined significantly since FY01.
 - 2.13 The central IT budget share of the total institutional budget has declined significantly since FY01.
 - 2.14 My institution made significantly higher levels of one-time investments in technology in the three fiscal years prior to the year 2000 than in the last three fiscal years.
 - 2.15 My institution's level of one-time investment in technology will be in decline for the next three years.
 - 2.16 My institution's FY05 central IT budget will be less than the FY04 budget.
- 2.17_2.28 **Please identify which of the following items in which your campus made the largest one-time investments during the period FY01 to FY03. Check the three largest.**
- 2.17 academic/research computing
 - 2.18 administrative systems
 - 2.19 data center/computer operations
 - 2.20 desktop/user support services
 - 2.21 instructional technologies
 - 2.22 IT security
 - 2.23 media services
 - 2.24 network services
 - 2.25 print services
 - 2.26 telephone services

- 2.27 web development/hosting
- 2.28 other

2.29_2.40 Please identify which items you project to be the areas of largest planned investment during the period of FY04 to FY06. Check the three largest.

- 2.29 academic/research computing
- 2.30 administrative systems
- 2.31 data center/computer operations
- 2.32 desktop/user support services
- 2.33 instructional technologies
- 2.34 IT security
- 2.35 media services
- 2.36 network services
- 2.37 print services
- 2.38 telephone services
- 2.39 web development/hosting
- 2.40 other

2.41_2.48 Please indicate the extent to which you agree or disagree with the following statements about your institution's funding for technology. (1=very strongly disagree, 2=strongly disagree, 3=disagree, 4=neutral, 5=agree, 6=strongly agree, 7=very strongly agree)

- 2.41 The institution currently provides sufficient funding to meet its strategic objectives for administrative computing.
- 2.42 The institution currently provides sufficient funding to meet its strategic objectives for academic/research computing.
- 2.43 The institution currently provides sufficient funding to meet its strategic objective for data communications.
- 2.44 The institution currently provides sufficient funding to meet its strategic objectives for instructional technology.
- 2.45 The institution is projected to have sufficient funding to keep current with technology advancements in administrative computing.
- 2.46 The institution is projected to have sufficient funding to keep current with technology advancements in academic/research computing.
- 2.47 The institution is projected to have sufficient funding to keep current with technology advancements in data communications.
- 2.48 The institution is projected to have sufficient funding to keep current with technology advancements in instructional technology.

Section 3: The Information Technology (IT) Budget

3.1_3.2 What has been the fastest growing component of the IT budget in the last three years?

- hardware purchases
- network equipment
- software purchases
- hardware and software maintenance contracts
- staff compensation
- management compensation
- consulting
- contract software development services
- outsourcing contract services
- staff training
- other
- 3.2 describe "other" (optional)

3.3_3.4 What do you anticipate will be the fastest growing component of the IT budget in the next three years?

- hardware purchases
- network equipment
- software purchases
- hardware and software maintenance contracts
- staff compensation
- management compensation
- consulting
- contract software development services
- outsourcing contract services
- staff training
- other
- 3.4 describe "other" (optional)

3.5 Please indicate approximately what percent of your FY04 central IT budget is committed to contractual payments to vendors to support and maintain existing technologies. Drop down starting with 0 and increasing by 10% to 100%.

3.6_3.11 Please indicate the extent to which you agree or disagree with each of the following statement about the central IT budget. (1=very strongly disagree, 2=strongly disagree, 3=disagree, 4=neutral, 5=agree, 6=strongly agree, 7=very strongly agree)

- 3.6 The central IT budget contains adequate funds to maintain critical IT operations reliably.
- 3.7 The central IT budget contains adequate funds to keep current with vendor mandated upgrades.
- 3.8 The central IT budget contains adequate funds to research and experiment with emerging technologies.
- 3.9 The central IT budget contains adequate funds to respond to new user needs and interests.
- 3.10 The central IT budget contains adequate funding to implement the institution's stated strategy for technology.

- 3.11 The base IT operating budget always increases sufficiently to maintain new technology.
- 3.12_3.13 **How is the budget allocated to maintain technology once it has been implemented?**
- separate annual budget request
 - included in the project budget
 - funds are automatically set aside when a new technology is implemented via a funding formula
 - other
 - 3.13 describe "other" (optional)
- 3.14_3.15 **How is the cost of major upgrades to vended software funded?**
- from existing IT operating budget
 - one-time addition to IT operating budget
 - funds obtained via the normal IT project funding process
 - one-time charge-back to user departments
 - from specific funds set-aside for this purpose
 - other
 - 3.15 describe "other" (optional)
- 3.16 **What percentage of your IT budget do you view as a fixed cost (e.g., committed to full time employee compensation, multi-year contractual commitments or other expenses that would be difficult to discontinue in less than one year)?** Drop down list starting with less 0% and increasing by 10% to 100%
- 3.17 **Is the institution pursuing an explicit strategy to increase the flexibility of the IT budget by moving more costs from fixed to variable.**
- no
 - yes
- 3.18 **There is value in increasing the variable portion of the budget, but we have been unable to do so.**
- no
 - yes
- 3.19 **To what degree are you able to carry any remaining budget balances over into the next fiscal year?**
- not at all
 - partially
 - fully
- 3.20 **Are you able to reallocate funds from their original budgeted purposes to new areas during a fiscal year?**
- not at all
 - partially
 - fully
- 3.21 **What are your planned annual expenditures in FY04 for consulting firms (excluding independent contractors)?**
- \$0
 - \$1 to \$250,000

- \$251,000 to \$500,000
- \$501,000 to \$750,000
- \$751,000 to \$1 million
- \$1.01 million to \$2.0 million
- \$2.01 million to \$3.0 million
- over \$3 million

3.22_3.27 Please check all of the following that apply to your institution's use of consulting firms. Check all that apply.

- 3.22 Consultants are used for large implementation projects.
- 3.23 Consultants are used to provide expertise, not present in the IT organization.
- 3.24 Consultants are used as staff augmentation during peaks in workload.
- 3.25 The use of consultants is part of an explicit strategy to have more variable costs in the IT organization
- 3.26 Consultants are never used.
- 3.27 Other

3.28 What are your planned annual expenditures in FY04 for independent contractors?

- \$0
- \$1 to \$250,000
- \$251,000 to \$500,000
- \$501,000 to \$750,000
- \$751,000 to \$1 million
- \$1.01 million to \$2.0 million
- \$2.01 million to \$3.0 million
- over \$3 million

3.29_3.34 Please check all of the following that apply to your institution's use of independent contractors.

- 3.29 Contractors are used to staff large implementation projects.
- 3.30 Contractors are used to provide expertise, not present in the IT organization.
- 3.31 Contractors are used as staff augmentation during peaks in workload.
- 3.32 The use of contractors is part of an explicit strategy to have more variable costs in the IT organization.
- 3.33 Contractors are never used.
- 3.34 Other

3.35 How do you use external software development firms?

- do not use
- only to absorb spikes in IT workload
- external development firms are an integrated component of the IT staffing plan

3.36 Do you presently outsource IT-related functions within your institution?

[Required] [If yes, go to 3.37. If no, go to 3.53]

- no
- yes

3.37_3.49 Which of the following functions are you presently outsourcing? Check all that apply.

- 3.37 all central IT staff and services

- 3.38 administrative systems-transaction systems operations (finance, HR, student information)
- 3.39 administrative systems – application development (finance, HR, student information)
- 3.40 data center/computer operations
- 3.41 desktop/user support services
- 3.42 instructional technologies
- 3.43 IT security
- 3.44 media services
- 3.45 network services
- 3.46 print services
- 3.47 telephone services
- 3.48 web development/hosting
- 3.49 other IT services

3.50_3.51 What was the primary driver in your decision to outsource?

- improved service quality
- annual cost savings
- lack of in-house expertise
- more predictable costs
- reduced risk
- other
- 3.51 describe “other” (optional)

3.52 In the next three years, how do you anticipate that your use of outsourcing will change? Then proceed to 3.61

- increase
- decrease
- stay the same

3.53_3.60 Why don't you outsource IT services? Check all that apply.

- 3.53 union contracts prohibit outsourcing
- 3.54 political pressures
- 3.54 negative impact on public image of the institution
- 3.56 lack of qualified suppliers
- 3.57 risk
- 3.58 low financial returns
- 3.59 historically, it has not been done here
- 3.60 other

3.61_3.62 Who has responsibility to manage and monitor the IT budget on a day to day basis?

- senior IT leader
- financial manager within the IT organization
- administrator outside the IT organization
- other
- 3.62 describe “other” (optional)

3.62_3.68 What is the background of the individual who manages the IT budget on a day to day basis had? Check all that apply.

- 3.62 prior position in financial management at this institution
- 3.63 prior position at the institution

- 3.64 prior position in higher education
- 3.65 prior position in a budget office
- 3.66 trained as a CPA or MBA
- 3.67 no financial credentials
- 3.68 no previous financial management experience

3.69_3.74 Please indicate the extent you agree or disagree with each of the following statements pertaining to the IT budget and costs at your institution. (1=very strongly disagree, 2=strongly disagree, 3=disagree, 4=neutral, 5=agree, 6=strongly agree, 7=very strongly agree)

- 3.69 It is easy to identify the cost of major activities (e.g., software development, network maintenance, etc.)
- 3.70 It is easy to identify costs by program area (e.g., library information systems, administrative computing, learning technologies etc.)
- 3.71 The annual IT budget always anticipates all the costs of providing central IT services.
- 3.72 The IT organization rarely requests supplemental funding for items not included in its original budget.
- 3.73 The institutional senior leadership knows how its total technology expenditures (from all budgets) are allocated in a given year.
- 3.74 The institutional senior leadership actively manages its total technology expenditures even if they do not reside in a single budget unit.

3.75_3.81 Please indicate the extent to which you agree or disagree with each of the following statements pertaining to the IT budget and costs at your institution. (1=very strongly disagree, 2=strongly disagree, 3=disagree, 4=neutral, 5=agree, 6=strongly agree, 7=very strongly agree)

- 3.75 The central IT budget process ensures that our customers get good value for their IT investments.
- 3.76 The central IT budget has sufficient funds to foster IT experimentation.
- 3.77 The central IT budget maintains financial reserves.
- 3.78 The central IT budget process helps align IT priorities with institutional priorities.
- 3.79 The central IT budget process makes it possible to respond to the changing IT environment.
- 3.80 The central IT budget process is institutionalized (not person-dependent)
- 3.81 The central IT budget process is based on a set of well-understood management principles.

Section 4: Use of Charge-backs and Student Technology Fees

4.1 Do you use charge-backs for any centrally provided IT services? [Required] [If yes, go to 4.2. If no, go to 4.33.]

- no
- yes

4.2_4.13 Please indicate which central IT services are charged back to other budget units on campus. Check all that apply.

- 4.2 administrative systems – transaction systems operations (finance, HR, student information)
- 4.3 administrative systems – application development (finance, HR, student information)
- 4.4 data center/computer operations
- 4.5 desktop/user support services
- 4.6 instructional technologies
- 4.7 IT security
- 4.8 media services
- 4.9 network services
- 4.10 print services
- 4.11 telephone services
- 4.12 web development/hosting
- 4.13 other

4.14_4.15 How are rates for charge-back services set?

- actual cost of providing the service
- cost of the service plus an additional charge to fund equipment renewal and replacement
- cost of the service plus an additional charge to support the cost of running other centrally provided technology services
- rates are based on individual negotiations
- other
- 4.15 describe “other” (optional)

4.16_4.23 Why are charge-backs used? Check all that apply.

- 4.16 rations scarce IT resources
- 4.17 supplements the IT department budget
- 4.18 provides users options as to how much service they buy
- 4.19 consistent with how the institution charges for all its services
- 4.20 mandated by central administration
- 4.21 institutional policy permits it
- 4.22 historically, it has been done that way
- 4.23 other

4.24 How do you see your use of charge backs continuing in the next three years?

- stay the same as today
- increased use
- decrease use

4.25_4.32 Please indicate the extent to which you agree or disagree with the following statements. (1=very strongly disagree, 2= strongly disagree, 3=disagree, 4=neutral, 5=agree, 6=strongly agree, 7=very strongly agree)

- 4.25 The rates charged for IT services accurately reflect the cost of providing the service.
- 4.26 Overhead is always included in the cost charged for an IT service.
- 4.27 The use of charge-backs makes users less willing to adopt new technology.
- 4.28 The presence of charge-backs makes it more likely that departments will develop their own shadow IT services.
- 4.29 The presence of charge backs makes users more likely to comply with institutional IT policies.
- 4.30 The time spent negotiating charge-backs is a significant distraction to the IT organization.
- 4.31 The time and effort required to administer charge-backs, outweighs the value of having them.
- 4.32 I believe my institution should discontinue the use of charge-backs.

4.33_4.39 Please indicate the reason you do not use charge-backs. Check all that apply.

- 4.33 difficult to administer
- 4.34 inconsistent with the budget practices of the institution
- 4.35 creates a disincentive to adopt technology
- 4.36 creates a disincentive to use central IT services
- 4.37 not an effective financial control
- 4.38 historically, it has not been done here
- 4.39 other

4.40 Do you plan to begin to use charge-backs in the next three years?

- no
- yes

4.41 Does the institution collect a student technology fee? [Required] [If yes, go to

4.42. If no, go to 4.59.]

- no
- yes

4.42_4.53 What services does the student fee fund? Check all that apply.

- 4.42 administrative systems – transaction systems operations (finance, HR, student information)
- 4.43 administrative systems – application development (finance, HR, student information)
- 4.44 data center/computer operations
- 4.45 desktop/user support services
- 4.46 instructional technologies
- 4.47 IT security
- 4.48 media services
- 4.49 network services
- 4.50 print services
- 4.51 telephone services
- 4.52 web development/hosting
- 4.53 other IT services

4.54_ 4.58 **Please indicate the extent to which you agree or disagree with the following statements. (1=very strongly disagree, 2= strongly disagree, 3=disagree, 4=neutral, 5=agree, 6=strongly agree, 7=very strongly agree)**

4.54 The student technology fee fully covers the cost of the technology services it supports.

4.55 The institution's student technology fee is not likely to rise in the next three years.

4.56 Students understand the need for the student technology fee.

4.57 Students understand what services are funded by the student technology fee.

4.58 Students believe they get commensurate value for their technology fee.

4.59_ 4.65 **Why have you elected not to charge a student technology fee? Check all that apply.**

4.59 my institution does not charge any fees to students for any service

4.60 difficult to change the fee once it is set

4.61 could negatively impact student satisfaction with campus IT services

4.62 creates a disincentive to using campus IT services

4.63 IT funding is sufficient without charging a student fee

4.64 would require approval from state government

4.65 other

4.66 **Do you plan to institute a student technology fee in the next three years?**

no

yes

Section 5: IT Project Decision Making

5.1 Does the institution have a single senior level IT advisory group? [Required] [If yes, go to 5.2. If no, go to 5.23.]

- no
- yes

5.2_5.11 Which campus stakeholder groups are represented on the advisory group? Check all that apply.

- 5.2 senior administrators (president/chancellor, vice presidents, cabinet-level officers)
- 5.3 deans
- 5.4 faculty
- 5.5 students
- 5.6 department heads (non-IT)
- 5.7 chief information officer(s)
- 5.8 chief technology officer(s)
- 5.9 college/university librarians (non-IT)
- 5.10 central IT management
- 5.11 department IT management

5.12 Who is the chair of the advisory group?

- senior IT leader
- chief business officer
- faculty member
- president/chancellor
- provost/ academic VP
- other

5.13_5.22 What authority does the advisory group possess? Check all that apply.

- 5.13 develop IT strategy
- 5.14 identify potential IT projects
- 5.15 prioritize IT projects
- 5.16 recommend projects for funding
- 5.17 authorize funding for projects
- 5.18 provide feedback on proposed projects
- 5.19 set IT fees
- 5.20 set IT policy
- 5.21 no authority, just advisory
- 5.22 other

5.23 Is there a formal process to consider IT projects for funding?

- no
- yes, using the same process as other major funding requests
- yes, using a different process

5.24_5.32 Who must approve an IT project for funding under \$1 million? Check all that apply.

- 5.24 senior IT leader
- 5.25 chief business officer
- 5.26 IT advisory committee
- 5.27 budget committee

- 5.28 budget director
- 5.29 board of trustees
- 5.30 provost/academic VP
- 5.31 president/chancellor
- 5.32 other

5.33_5.41 **Who must approve an IT project between \$1 million and \$5 million? Check all that apply.**

- 5.33 senior IT leader
- 5.34 chief business officer
- 5.35 IT advisory committee
- 5.36 budget committee
- 5.37 budget director
- 5.38 board of trustees
- 5.39 provost/academic VP
- 5.40 president/chancellor
- 5.41 other

5.42_5.50 **Who must approve an IT project over \$5 million? Check all that apply.**

- 5.42 senior IT leader
- 5.43 chief business officer
- 5.44 IT advisory committee
- 5.45 budget committee
- 5.46 budget director
- 5.47 board of trustees
- 5.48 provost/academic VP
- 5.49 president/chancellor
- 5.50 other

5.51_5.59 **When IT projects are presented for approval, the proposal contains a business case with which of the following elements? Check all that apply.**

- 5.51 budget for implementation
- 5.52 budget for the full life cycle costs of supporting the technology
- 5.53 analysis of the cost savings made possible by the technology
- 5.54 analysis of the revenue opportunities supported by the project
- 5.55 funding strategy for the project
- 5.56 analysis of alternative scenarios to the preferred option
- 5.57 summary of qualitative benefits
- 5.58 other
- 5.59 no business case is prepared

5.60_5.67 **What criteria does the institution use to evaluate IT projects? Check all that apply.**

- 5.60 no standard set of criteria
- 5.61 cost
- 5.62 risk
- 5.63 potential for cost savings
- 5.64 potential for improve compliance
- 5.65 potential for improved productivity
- 5.66 fit with stated IT strategy
- 5.67 fit with stated campus strategy

5.68_5.78 Please state the degree to which you agree or disagree with the following statements. (1=very strongly disagree, 2= strongly disagree, 3=disagree, 4=neutral, 5=agree, 6=strongly agree, 7=very strongly agree)

- 5.68 It is easier to obtain funding for an IT project co-sponsored by a user.
- 5.69 It is easier to obtain funding for an IT project identified in the campus IT plan.
- 5.70 It is easier to obtain funding for an IT project identified in the institution's strategic plan.
- 5.71 It is easier to obtain funding for an IT project presented with a business case.
- 5.72 Business cases for IT projects are viewed more skeptically than those for other types of projects.
- 5.73 IT business cases effectively identify how to capture the benefits of technology.
- 5.74 IT business cases accurately predict the benefits of new technology.
- 5.75 IT business cases accurately present the one-time costs of the project.
- 5.76 IT business cases accurately present the recurring supporting costs of new technology.
- 5.77 The IT staff is well-skilled at preparing a business case.
- 5.78 The IT staff collaborates effectively with individuals outside IT to create a business case for a project.

Section 6: Emerging Financial Strategies

6.1 Is the institution facing increased pressure to reduce the costs of IT services?

- no
- yes

6.2_6.7 What drives the need to reduce central IT costs? Check all that apply.

- 6.2 general institutional budget climate calls for cutbacks in all expenses
- 6.3 reductions in state budget allocation specific to technology
- 6.4 reduction in general state budget allocation
- 6.5 combat perception that IT has received too much funding in prior years
- 6.6 need to create financial flexibility to invest in new IT priorities.
- 6.7 other

6.8_6.21 What IT cost containment strategies are your institution currently pursuing? Check all that apply.

- 6.8 outsourcing
- 6.9 use of external software development firms
- 6.10 cuts in service levels
- 6.11 staff layoffs
- 6.12 salary freezes
- 6.13 cuts in benefits
- 6.14 across the board budget cuts
- 6.15 eliminate duplicate IT organizations on campus
- 6.16 minimize the number of technologies supported on campus
- 6.17 decrease funds available for equipment renewal and replacement
- 6.18 use open source technologies
- 6.19 consortia or shared purchases with other institutions
- 6.20 shared implementations of technology with other institutions
- 6.21 other

6.22_6.35 Which of the following strategies to reduce IT costs is your institution most likely to implement? Select three.

- 6.22 outsourcing
- 6.23 use of external software development firms
- 6.24 cuts in service levels
- 6.25 staff layoffs
- 6.26 salary freezes
- 6.27 cuts in benefits
- 6.28 across the board budget cuts
- 6.29 eliminate duplicate IT organizations on campus
- 6.30 minimize the number of technologies supported on campus
- 6.31 decrease funds available for equipment renewal and replacement
- 6.32 use open source technologies
- 6.33 consortia or shared purchases with other institutions
- 6.34 shared implementations of technology with other institutions
- 6.35 other

6.36_6.42 Please indicate the extent to which you agree or disagree with the following statements. (1=very strongly disagree, 2=strongly disagree, 3=disagree, 4=neutral, 5=agree, 6=strongly agree, 7=very strongly agree)

- 6.36 Reducing the cost of information technology will always require cuts in service.

- 6.37 Outsourcing holds the potential to provide IT services at a lower cost.
- 6.38 The use of external software development firms is critical to containing costs in the future.
- 6.39 My institution will become more likely to pursue shared IT services (with other institutions) as a as a way to reduce IT costs.
- 6.40 Centralized management of technology is more cost effective than decentralization.
- 6.41 My institution is receiving substantial value for its investments in information technology.
- 6.42 Information technology initiatives support new revenue opportunities for the institution.

6.43_ 6.51 How is your institution working to increase the resources available to fund technology? Check all that apply.

- 6.43 expanding the use of charge-backs
- 6.44 increasing technology fees to students
- 6.45 featuring technology priorities in campus fundraising plans
- 6.46 providing services externally to raise revenues
- 6.47 providing products externally to raise revenues
- 6.48 pursuing technology transfer
- 6.49 pursuing corporate partnerships
- 6.50 pursuing grant funding
- 6.51 other

6.52_ 6.58 How does your institution evaluate the value of its information technology investments? Check all that apply.

- 6.52 regular meetings with stakeholders
- 6.53 visiting committees
- 6.54 user satisfaction surveys
- 6.55 quantitative evaluations of the actual benefits realized
- 6.56 qualitative evaluations of the actual benefits realized
- 6.57 no regular method to evaluate the value of technology
- 6.58 other

6.59_6.70 What method have you found to be the most effective for assessing IT value?

- regular meetings with stakeholders
- visiting committees
- user satisfaction surveys
- quantitative evaluations of the actual benefits realized
- qualitative evaluations of the actual benefits realized
- no regular method to evaluate the value of technology
- other
- 6.70 describe "other" (optional).

Section 7: CONCLUSION

7.1 May we contact you to obtain further insights or clarification on your responses?

- no
- yes

7.2 Do you wish to receive a copy of the key findings from this study?

- no
- yes

7.3 If you have any other comments or insights about IT strategy in higher education, please feel free to share them with us below. [paragraph memo field]

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– END SURVEY –