The 2011 In*side Higher Ed* Surveys of Presidents & Business Officers
Kenneth C. Green • Campus Computing & Inside Higher Ed.

CAMPUS 2011 TECHNOLOGY
18TH ANNUAL EDUCATION TECHNOLOGY CONFERENCE

The *INSIDE HIGHER ED* Surveys of College Presidents & Business Officers

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Campus Technology 2011
27 July 2011

Focus

Key issues confronting presidents and business officers across all sectors and segments in the wake of the economic downturn:

- The most important issues confronting institutions.

- Strategies deployed during the downturn.

- Campus strategies absent major political consequences on campus.

- Which groups helped the campus maneuver through the downturn?

- The effectiveness of campus investments in information technology.

- Institutional effectiveness on critical metrics.

- Perspectives on key issues that affect higher ed.

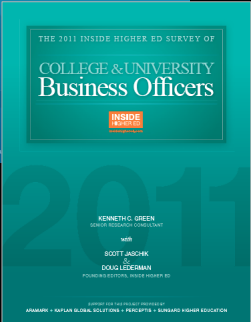# The 2011 In*side Higher Ed* Surveys of Presidents & Business Officers
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Methodology

Presidents:
956 Survey Participants
- 561 public institutions
  - 61 universities
  - 105 master's institutions
  - 51 baccalaureate colleges
  - 344 community colleges
- 356 private institutions
  - 29 universities
  - 111 master's institutions
  - 197 baccalaureate colleges
  - 19 associate colleges
- 39 for-profit institutions

Business Officers:
606 Survey Participants
- 305 public institutions
  - 47 universities
  - 56 master's institutions
  - 29 baccalaureate colleges
  - 173 community colleges
- 292 private institutions
  - 25 universities
  - 81 master's institutions
  - 178 baccalaureate colleges
  - 9 associate colleges
- 9 for-profit institutions

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Key Issues for Presidents

- **It's all about the money**
  - State support for publics
  - Tuition issues for private

- **Strategies: Not much innovation**
  - Budget cuts dominate

- **Politics: If only I could**
  - Personnel issues

- **Ambivalent about IT effectiveness**
  - Libraries rank highest

- **Using data for decisions**
  - We must do better

- **Expectations for online ed**
  - Enrollments and revenue

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What Really Matters

"The two most important issues affecting my institution over the next 2-3 years." (percentages)

ALL INSTITUTIONS

- Budget Shortfalls (49%)

- Rising Tuition/Affordability (27%)

- Changes in State Support (27%)

- Increased Competition for Students (17%)

- Remediation/Student Readiness (14%)

Public Institutions
- Budget shortfalls (62%)
- Changes in State Support (43)
- Remediation/Student Readiness (20%)

Private Institutions
- Rising Tuition/Affordability
- Increased Competition for Students (35%)
- Budget shortfalls (32%)

For-Profit Institutions
- Potential cuts in Fed aid programs (49%)
- Increased Competition (28%)
- Rising Tuition & Remediation (*TIE:* 26%)

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Strategies Used to Address the Financial Consequences of the Economic Downturn

(percentages)

ALL INSTITUTIONS

- Budget cuts targeting adm. operations & programs (58%)

- Increased tuition by 5 pct or more (39%)

- Budget cuts targeting academic programs (36%)

- Hiring freeze for admin. positions (35%)

- Launching/expanding online ed programs (34%)

Public Institutions
- Budget cuts targeting admin. (64%)
- Increased tuition by 5 pct or more (49%)
- Budget cuts targeting aca. programs (44%)

Private Institutions
- Budget cuts targeting admin. (52%)
- Allowed the discount rate to rise (49%)
- Creation of new programs (33%)

For-Profit Institutions
- Budget cuts targeting admin. (38%)
- Launching/expanding online ed programs (64%)
- Hiring freeze for adm positions. (64%)

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If Only I Could Do It
Absent the political costs, strategies presidents would like to deploy (percentages for very likely - 6/7; scale: 1=not likely; 7=very likely)

ALL INSTITUTIONS

- Outsourcing various campus services (36%)
- Mandating retirement of older faculty (36%)
- Altering the tenure policy (36%)
- Increasing teaching loads (34%)
- Significantly increasing tuition(35%)

Public Institutions
- Outsourcing selected services (44%)
- Increasing teaching loads (38%)
- Altering the tenure policy (37%)

Private Institutions
- Mandating retirement of older fac. (43%)
- Altering the tenure policy (31%)
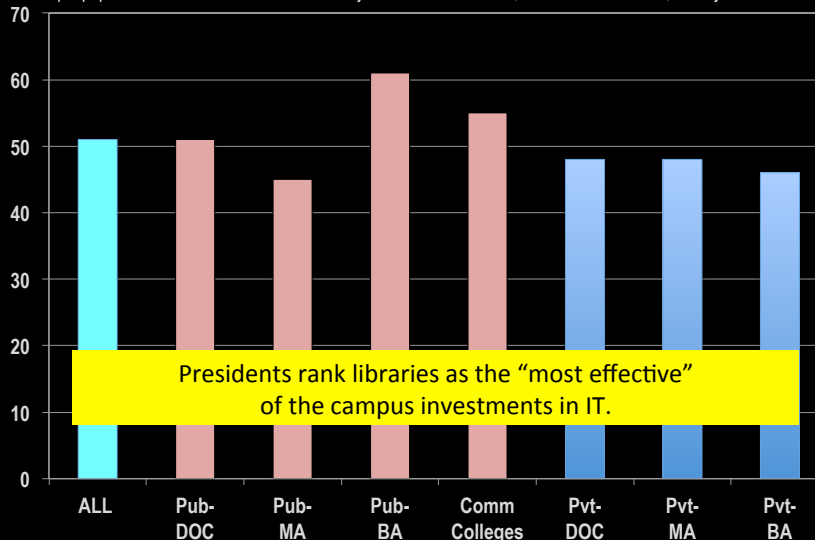- Increasing teaching loads (27%)

For-Profit Institutions
- Increasing teaching loads (44%)
- Altering the tenure policy (36%)
- Significant cuts to the budget for athletic programs (31%)

Presidents
The Effectiveness of Technology Investments

pct pf presidents who rate investment as very effective/ score of 6/7; scale: 1=not effective; 7=very effective

Presidents rank libraries as the "most effective" of the campus investments in IT.

ALL | Pub-DOC | Pub-MA | Pub-BA | Comm Colleges | Pvt-DOC | Pvt-MA | Pvt-BA

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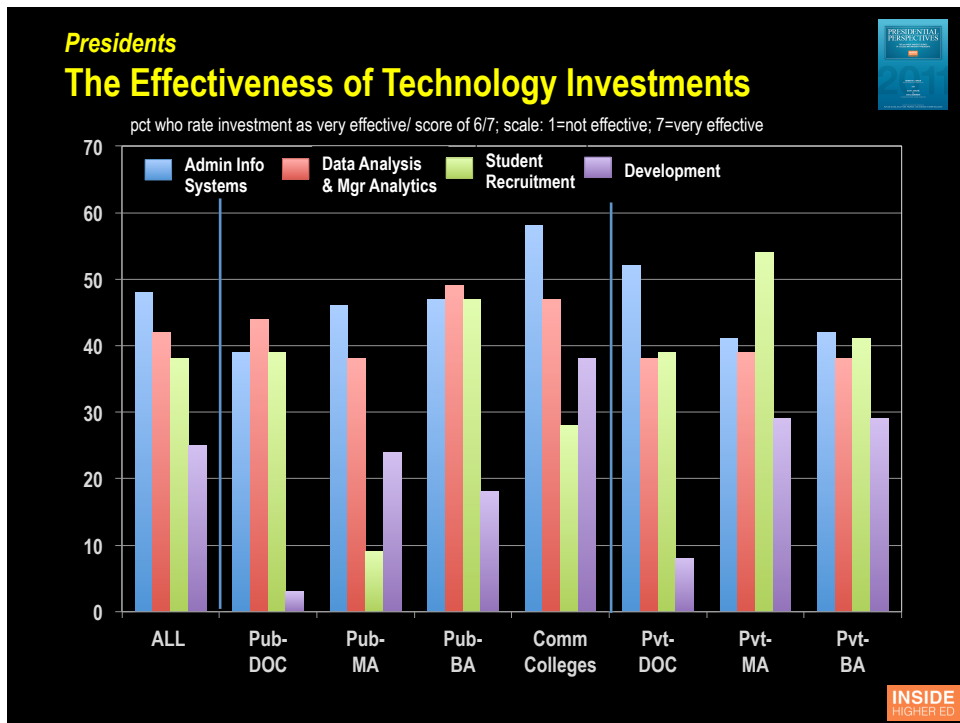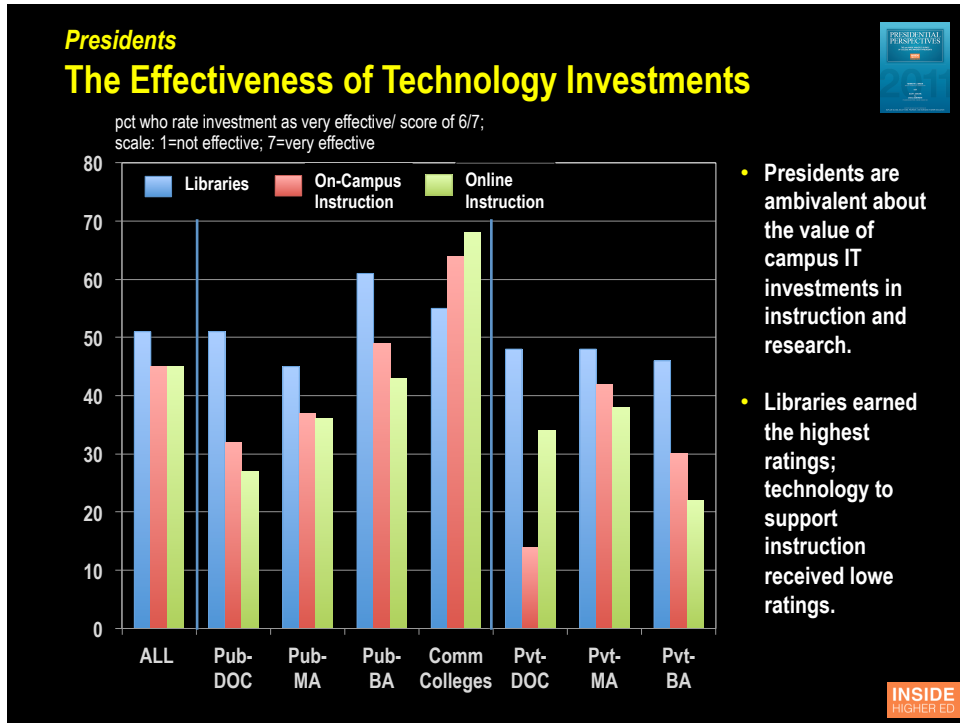
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Presidents
Using Data to Aid and Inform Decision-Making

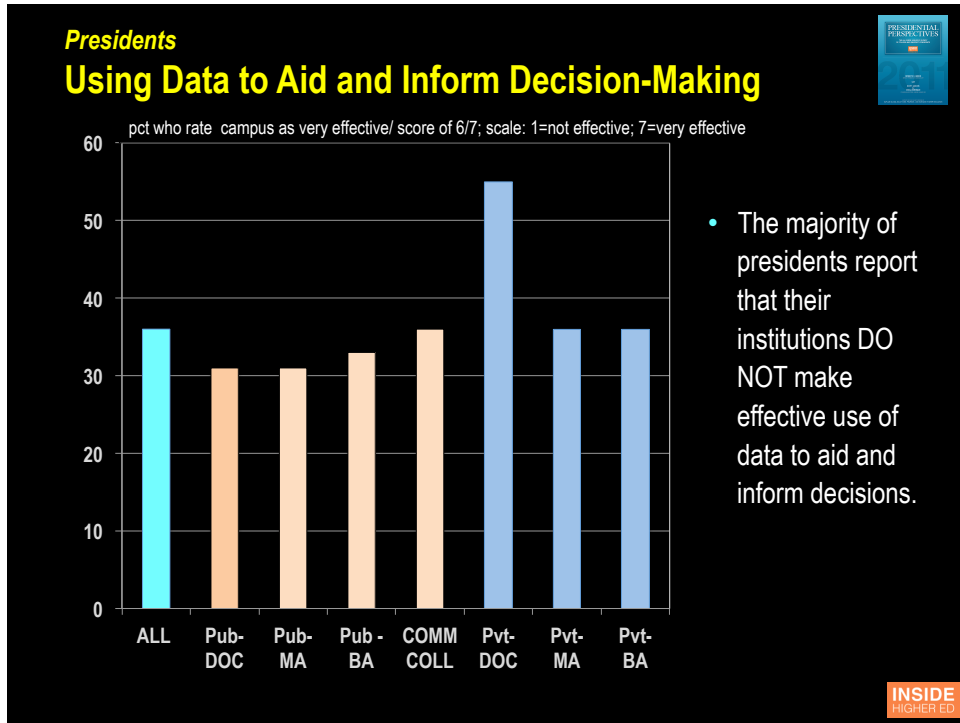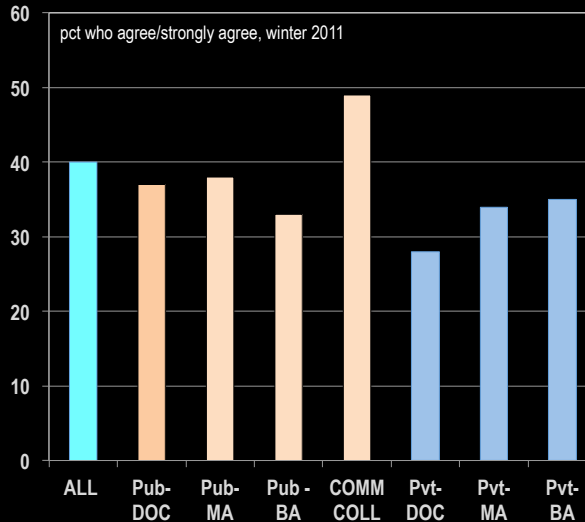pct who rate campus as very effective/ score of 6/7; scale: 1=not effective; 7=very effective

- The majority of presidents report that their institutions DO NOT make effective use of data to aid and inform decisions.

Presidential Perspectives

Pct who "agree/strongly agree"	ALL	PUBLIC	PRIVATE	PROFIT
Faculty are realistic about the financial challenges confronting my institution.	48	47	50	43
Faculty have been supportive of efforts to address the budget problems confronting my institution.	72	70	77	54
The tuition discount at my institution is dangerously high.	19	13	31	5
Greater transparency in decision-making by colleges will result in better decisions.	77	78	77	77
The adaptation of nationally comparable measures of student learning have improved the quality of undergraduate education.	40	44	34	41
Launching online ed programs provides a way for my institution to increase net tuition revenues.	69	73	61	83

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Going Online:
Connecting the Dots?

QUERY: Do campus officials really understand the investment in infrastructure required to support online courses and programs?

- Presidents are ambivalent about the instructional effectiveness of IT investments

- Presidents view "going online" as a way to reach more students and generate more revenue

- *Missing connection:* IT is the infrastructure for online programs!

Presidential Perspectives 2011

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Key Issues for CFOs

- **Financial health?**
  - 69 pct say good/excellent
- **Impact of budget cuts?**
  - Minimal, save for morale
- **Key Issues**
  - Cuts in state support
  - Rising tuition/affordability
  - Cuts in fed. student aid
- **Campus strategies**
  - Outsourcing services
  - Increasing collaboration
  - Increasing enrollment

- **Budget models**
  - Some migration
  - Often not effective
- **Increase revenue**
  - Increase net tuition revenue
  - More full-pay students
- **Reduce expenses**
  - Using metrics for analysis
  - Cut low-enrollment programs
- **Who understands issues?**
  - Presidents and boards

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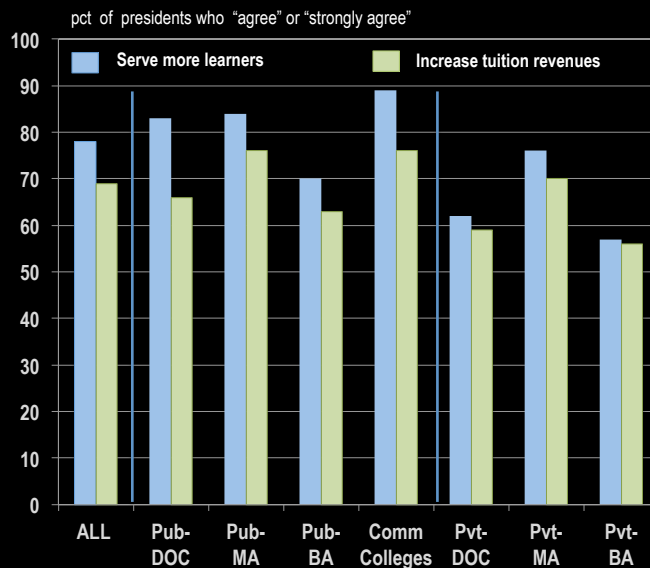### Kenneth C. Green • Campus Computing & Inside Higher Ed.

Business Officers
Rating the Financial Health of Campuses

- The majority of business officers report their campuses are financially healthy.

Budget Cuts Over the Past Three Years Have Done Major Damage to Programs and Services at My Institution
(percentage who disagree/strongly disagree, spring 2011)

- The majority of business officers report that budget cuts have done little damage, save for the impact on morale.

My Institution Can Make Additional and Significant Budget Cuts Without Hurting Quality
(percentage who agree/strongly disagree, spring 2011)
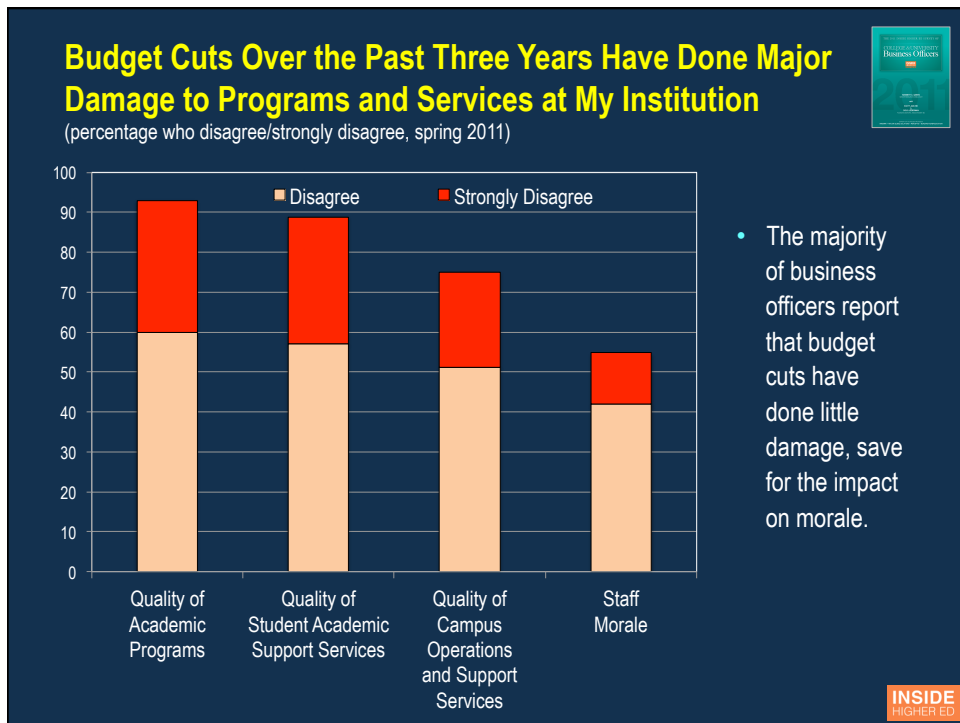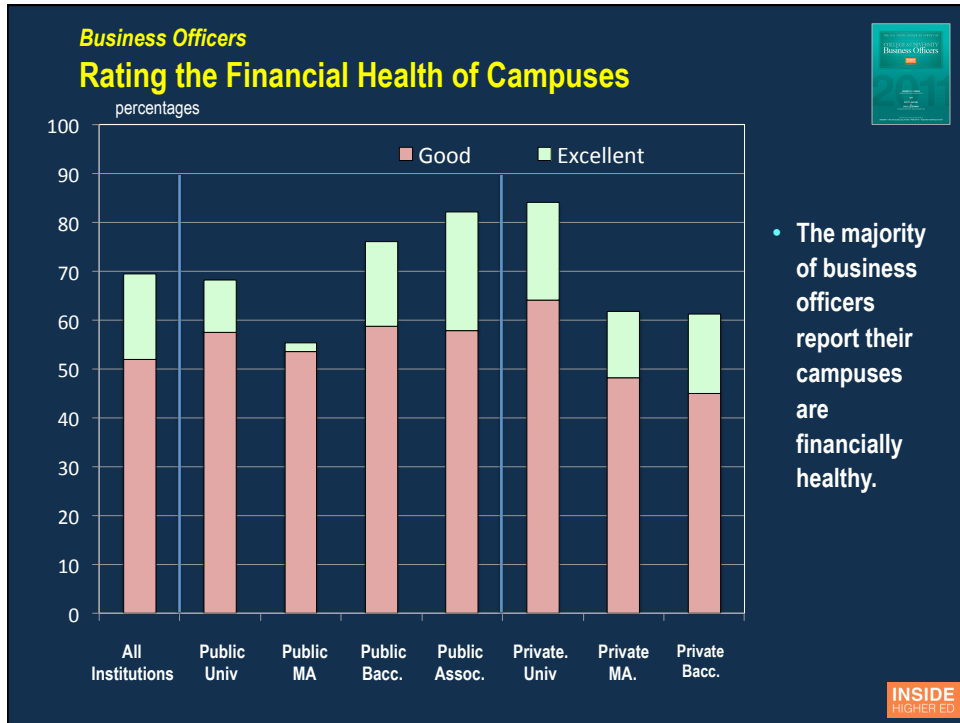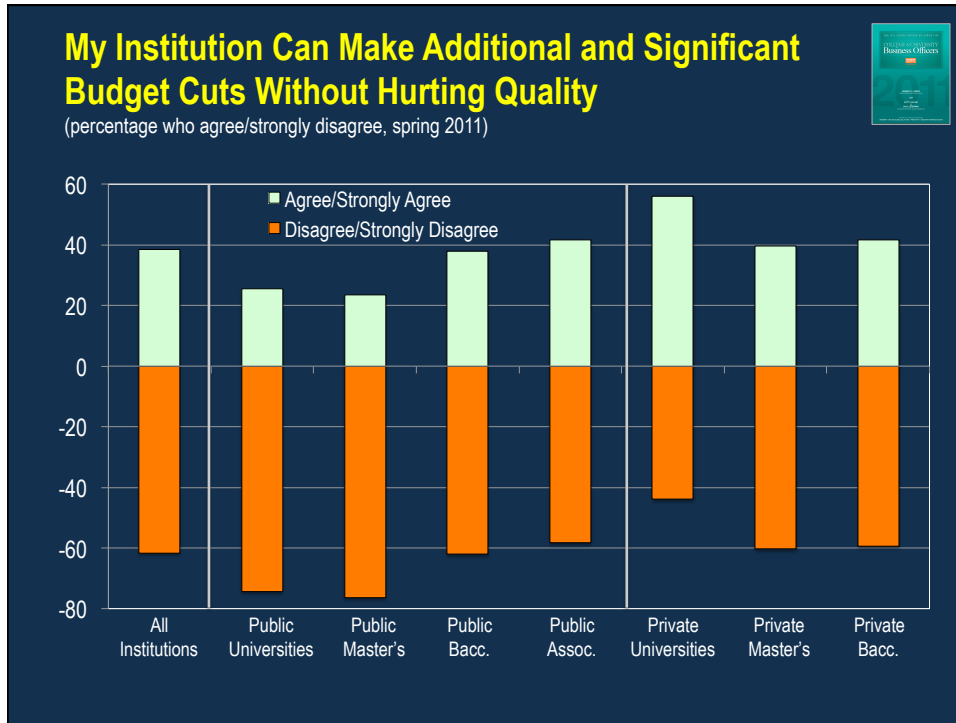
What Really Matters?

"The two most important financial issues affecting my institution over the next 2-3 years." (percentages)

ALL INSTITUTIONS

- Potential cuts in core state funding (35%)

- Rising Tuition/Affordability (32%)

- Potential cuts in federal student aid programs (27%)

- Inadequate enrollment/tuition revenue (21%)

- Budget shortfalls (20%)

Public Institutions

• Potenial cuts in state support (66%)
• TIE: Budget shortfalls; rising tuition; cuts in federal student aid programs (24%)
• State imposed limits raising tuition (12%)

Private Institutions

• Rising Tuition/Affordability (36%)
• Inadequate enrollment/tuition revenue (33%)
• Potential cuts in federal student aid programs (28%)

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Strategies to Reduce Expenses

How important are various strategies for reducing operating expenses? (score: 6/7; scale: 1=not important; 7=very important)

ALL INSTITUTIONS

- TIE: cut low-enrollment programs & use metrics to identify problems and solutions (51%)

- Making efficient use of facilities (47%

- Use tech tools/analytics for program evaluation (39%)

- Using technology to reduce instructional costs (36%)

Public Institutions

- TIE: Cut low-enrollment programs and make more efficient use of facilities (52%)
- Use metrics to identify problems and solutions (50%)
- TIE: Use tech tools/analytics for program evaluation and use technology to reduce instructional costs(42%)

Private Institutions

- Use metrics for to identify programs and solutions (51%)
- Cut low-enrollment programs (49%)
- Make more efficient use of facilities (43%)

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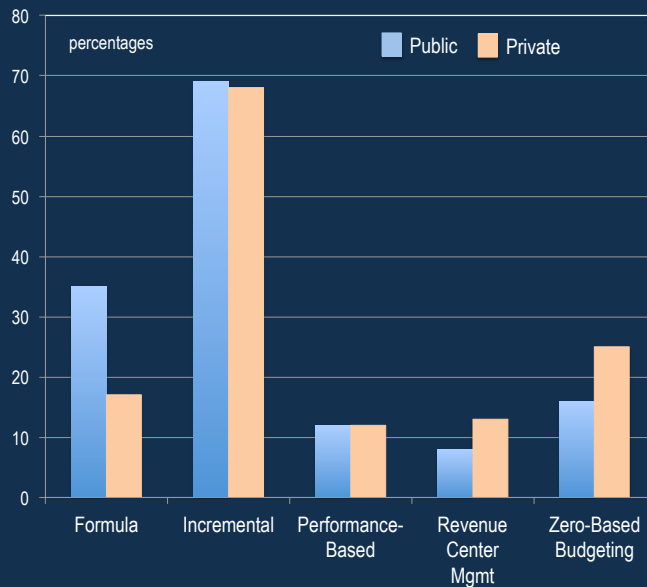
Budget Models

- Most campuses do not use performance-based budget models.

- Some small movement to performance models over the past three years.

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Rating the Effectiveness of the Budget Model
(percentage rating the model as 6/7;
scale: 1= not effective; 7=very effective; spring 2011)

Public   Private

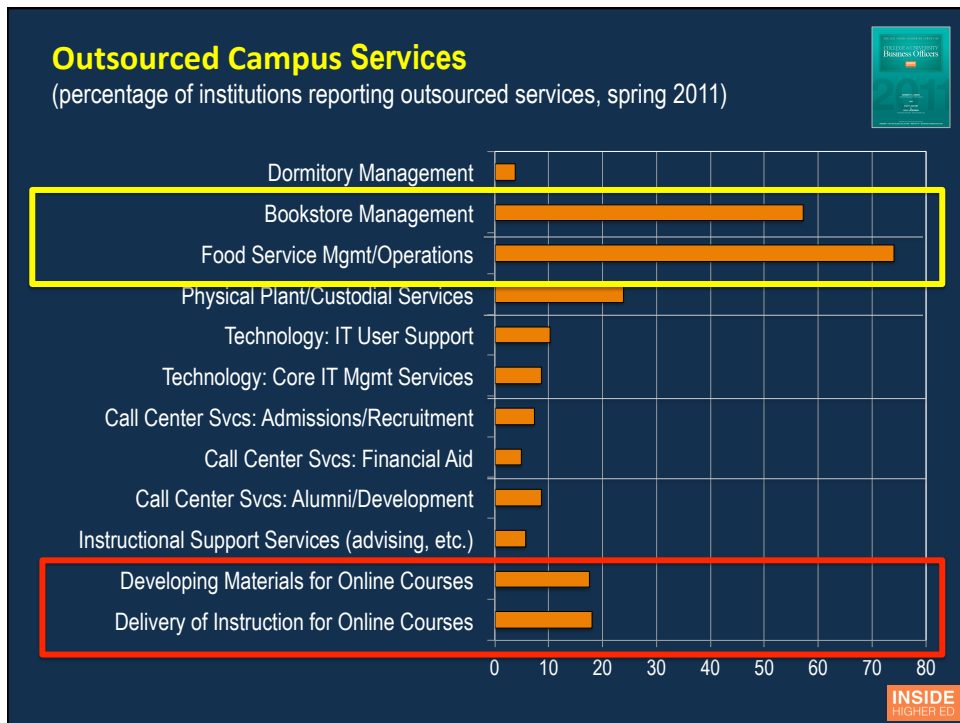- Low levels of satisfaction with current budget models for addressing complex financial challenges

Outsourced Campus Services
(percentage of institutions reporting outsourced services, spring 2011)

Dormitory Management
Bookstore Management
Food Service Mgmt/Operations
Physical Plant/Custodial Services
Technology: IT User Support
Technology: Core IT Mgmt Services
Call Center Svcs: Admissions/Recruitment
Call Center Svcs: Financial Aid
Call Center Svcs: Alumni/Development
Instructional Support Services (advising, etc.)
Developing Materials for Online Courses
Delivery of Instruction for Online Courses

0 10 20 30 40 50 60 70 80

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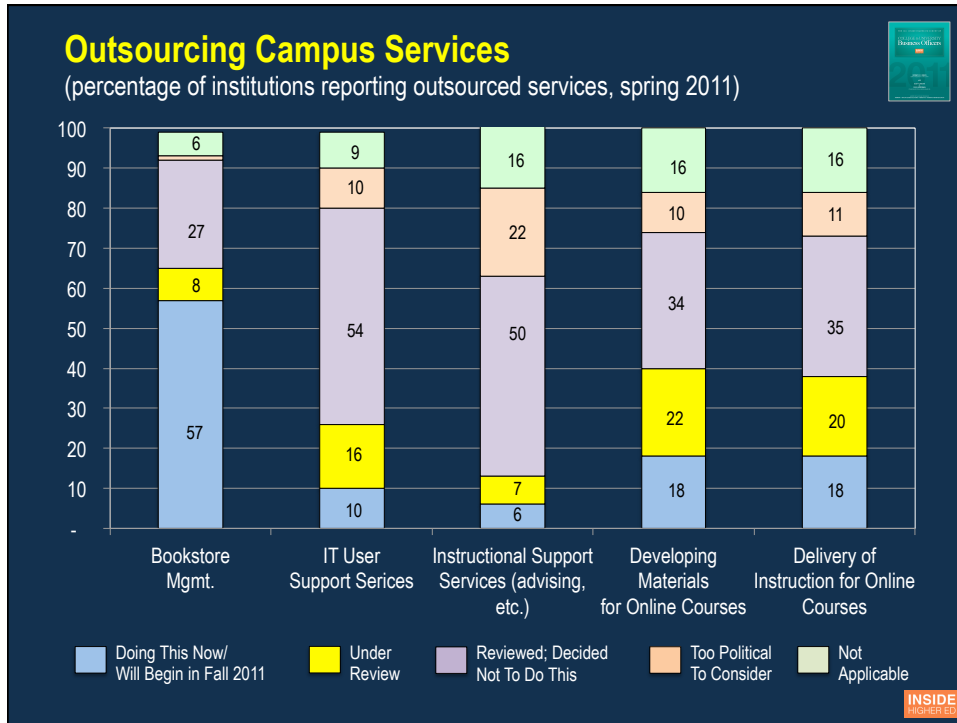
Outsourcing Campus Services
(percentage of institutions reporting outsourced services, spring 2011)

Service	Doing This Now/Will Begin in Fall 2011	Under Review	Reviewed; Decided Not To Do This	Too Political To Consider	Not Applicable
Bookstore Mgmt.	57	8	27		6
IT User Support Serices	10	16	54	10	9
Instructional Support Services (advising, etc.)	6	7	50	22	16
Developing Materials for Online Courses	18	22	34	10	16
Delivery of Instruction for Online Courses	18	20	35	11	16

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Five Key Issues

- **THE NEW NORMAL:** the "old days" are gone.

- **STRATEGIES:** alternatives to just cutting budgets and programs?

- **METRICS:** Presidents and BizOfficers have faith in data, would like to make better use of data.

- **ONLINE ED:** High expectations (again) vs. imple-mentation challenges.

- **OUTSOURCING:** New willingness to explore options and opportunities.

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