Quick Start | IT Organization, Staffing, and Financing

Available only to institutions that have not participated in CDS for the past 3 years, this quick start module contains only the most basic and high-level organizational, staffing, and financial questions needed to compute CDS Core Metrics. To complete the full IT Organization, Staffing, and Financing module instead, please contact benchmarking@educause.edu.

Questions on IT organization, staffing, and financing are required for all participants. To complete CDS, institutions must complete either the quick start or full version of the IT Organization, Staffing, and Financing module.

In responding to the survey questions in this module, unless specified otherwise, please enter data that describe your IT environment during the prior fiscal year (FY2016–17). Prior fiscal year is defined as the most recent fiscal year ending before July 1, 2017.

NOTES:
- Unless otherwise specified, all questions in this survey request data for the prior fiscal year.
- Throughout the survey, "central IT" refers to the centralized information technology services and support organization reporting to the highest-ranking information technology administrator/officer in the institution.
- For CDS participants from central offices of multicampus systems and community college districts, "institution" refers to the central office only, not the entire multicampus entity. For all other participants, "institution" refers to the individual college or university (typically referred to as a "campus").
- Please refer to the CDS glossary for definitions of other terms in the survey.

Quick Start | IT Organization, Staffing, and Financing

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### Q1–3 | Highest-Ranking IT Officer Position

#### IT Organization, Staffing, and Financing

**Q1–3 | Highest-Ranking IT Officer Position**

1. What was the title of the highest-ranking IT administrator/officer in your institution during the prior fiscal year? (Check all that apply.)

- [ ] Chief information officer (CIO)
- [ ] Chief technology officer (CTO)
- [ ] Chief information technology officer (CITO)
- [ ] Chief digital officer (CDO)
- [ ] Chief learning officer (CLO)
- [ ] Vice president
- [ ] Vice chancellor
- [ ] Vice provost
- [ ] Associate provost
- [ ] Associate vice president
- [ ] Associate vice chancellor
- [ ] Associate vice provost
- [ ] Assistant vice president
- [ ] Assistant vice chancellor
- [ ] Assistant vice provost
- [ ] Dean
- [ ] Executive director
- [ ] Director
- [ ] Other (please specify)
- [ ] Not applicable—position was vacant

2. To whom did the highest-ranking IT administrator/officer in your institution report?

**NOTE: VP/VC = vice president or vice chancellor**

- [ ] President/chancellor/CEO
- [ ] Highest-ranking academic officer (provost, academic VP/VC, dean)
- [ ] Highest-ranking administrative officer (administrative VP/VC, executive VP)
- [ ] Highest-ranking business officer (VP/VC, business officer, CFO)
- [ ] Second-level academic officer (vice provost, assistant or associate provost/academic VP)
- [ ] Second-level administrative officer (assistant or associate administrative VP/VC)
- [ ] Jointly to president/chancellor/CEO and chief academic officer
- [ ] Jointly to president/chancellor/CEO and chief administrative or financial officer
- [ ] Jointly to chief academic officer and chief administrative or financial officer
- [ ] Other (please specify)
- [ ] Not applicable—position was vacant

3. Was the highest-ranking IT administrator/officer a member of the president’s or chancellor’s cabinet?

- [ ] Yes
- [ ] No
Q4 | Technology Adoption

IT Organization, Staffing, and Financing

Q4 | Technology Adoption

4. What was your institution's preferred overall approach to adopting technology?

☐ We were one of the last to adopt new technologies.
☐ We tended to adopt new technologies after our peers did.
☐ We tended to adopt new technologies at the pace of our peers.
☐ We strived to be early adopters of new technologies where we saw exceptional benefits.
☐ We were usually among the very first to adopt new technologies.

Q5 | Service Delivery

IT Organization, Staffing, and Financing

Q5 | Service Delivery

5. To contextualize your institution's central IT financial and staffing data, please indicate the services for which central IT had primary responsibility for providing during the prior fiscal year.

NOTE: Services and service categories were developed by ECAR working groups and published in the Higher Education IT Service Catalog: https://library.educause.edu/resources/2015/4/the-higher-education-it-service-catalog-a-working-model-for-comparison-and-collaboration.

ADMINISTRATIVE AND BUSINESS

☐ a. Alumni and advancement
☐ b. Athletics
☐ c. Auxiliary systems
☐ d. Document imaging and management
☐ e. Faculty information systems
☐ f. Finance, human resources, and procurement systems
☐ g. Library systems
☐ h. Medical and health systems
☐ i. Reporting and analytics
☐ j. Research administration systems
☐ k. Student information systems

COMMUNICATION AND COLLABORATION

☐ l. Collaboration (i.e., technology-enhanced communication)
☐ m. Conferencing (i.e., online conferencing services)
☐ n. E-mail and calendaring
☐ o. Emergency notification
☐ p. Telephony
q. Television
r. Websites

ENDPOINT COMPUTING
s. Network access

t. Endpoint support (desktops, mobile devices, etc.)
u. Printing
v. Software distribution

INFRASTRUCTURE
w. Data center
x. Database (i.e., hosting and administration of databases)
y. Middleware
z. Monitoring
aa. Network
ab. Server infrastructure
ac. Storage

IT PROFESSIONAL SERVICES
ad. Application development
ae. Consulting and advising
af. Business continuity and disaster recovery
ag. Enterprise licensing
ah. IT service management
ai. Portfolio and project management
aj. Training

RESEARCH
ak. Advanced applications
al. Lab-management systems
am. Research computing
an. Visualization

SECURITY
ao. Identity and access management
ap. Secure computing
aq. Security consulting
ar. Security incident response and investigation
as. Security policy and compliance

TEACHING AND LEARNING
at. Assessment systems
au. Classroom technology and support
av. Educational technology consulting and training
aw. E-portfolio sites
ax. Learning management systems
ay. Lecture capture service
az. Technology-enhanced spaces

NOT APPLICABLE

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Q6 | Fiscal Year

IT Organization, Staffing, and Financing

6. In which month and year did your institution’s prior fiscal year end?

- July 2016
- August 2016
- September 2016
- October 2016
- November 2016
- December 2016
- January 2017
- February 2017
- March 2017
- April 2017
- May 2017
- June 2017
- Other (please specify)

Q7 | Central IT Funds Available

IT Organization, Staffing, and Financing

7. Please enter the actual funds available (in U.S. dollars) to central IT from all funding sources during the prior fiscal year from each of the categories listed.

NOTES:
- Expenditure data are requested in Question 8. Funds available need not be equal to total expenditures for the fiscal year. For example, your institution may permit carryover from one fiscal year to the next or may have been provided with project funds that have not yet been spent.
- To answer this question:
  - Enter total funds available first. After entering total funds available, category cells will unlock and item 7 will be calculated automatically.
  - The total of all dollars entered should represent the total funds available to central IT in the prior fiscal year (including funds for compensation and employee-related expenditures, carryover funds, etc.)
  - If you had no funds available from a category area, enter 0.
  - If you had funds available from a category but the amount is impossible to estimate, check “Unable to estimate.”
  - For this question to be complete, all rows must have any of the following: a positive value, 0, or “Unable to estimate” checked.
  - Do not use commas for estimates of 1000 or greater.
**Q8–9 | Central IT Expenditures**

**IT Organization, Staffing, and Financing**

8. Please enter the U.S. dollar (USD) amounts central IT spent during the prior fiscal year from each of the expenditure categories listed.

**NOTES:**
- Funds available are requested in Question 7. Funds available need not be equal to total expenditures for the fiscal year. For example, your institution may permit carryover from one fiscal year to the next or may have been granted project funds that have not yet been spent.
- To answer this question:
  - Enter total expenditure estimate first. After entering total estimate, expenditure category cells will unlock and item 8 will be calculated automatically.
  - The total of all dollars entered should represent the total central IT spent in the prior fiscal year.
  - If you had no expenditures in a category area, enter 0.
  - If you had expenditures in a category but the amount is impossible to estimate, check “Unable to estimate.”
  - For this question to be complete, all rows must have any of the following: a positive value, 0, or “Unable to estimate” checked.
  - Do not use commas for estimates of 1000 or greater.
- Please exclude all depreciation or amortization expenses.
- Categories in this question are meant to be mutually exclusive. Please do not double count expenditures in this question.
- If you provided an amount in Question 7 item 3, you should include the associated compensation expenditures in Question 8 item 1.
- Student employee FTE data are requested in Question 10. Please include compensation for all student employees, regardless of funding source, in item 2 below.
<table>
<thead>
<tr>
<th>ENTER TOTAL EXPENDITURES FIRST</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Staffing:</strong> Compensation (salaries AND fringe benefits) for central IT staff (from any source)</td>
</tr>
<tr>
<td>2. <strong>Staffing:</strong> Compensation for student employees</td>
</tr>
<tr>
<td>3. <strong>Staffing:</strong> Fixed-term labor expenditures</td>
</tr>
<tr>
<td>4. <strong>Staffing:</strong> Professional development (training, education and professional development, training-related travel)</td>
</tr>
<tr>
<td>5. <strong>Operations:</strong> Expenditures for providing in-house infrastructure and services (i.e., &quot;what you do yourself&quot;); include associated one-time project costs; exclude staffing costs accounted for in items 1–4)</td>
</tr>
<tr>
<td>6. <strong>Operations:</strong> Expenditures for services purchased from external providers (i.e., &quot;what you pay someone else to do&quot;); e.g., externally provided help desk, data center, or services provided by multicampus system or district offices; include associated one-time project costs and professional services; exclude staffing costs accounted for in items 1–4)</td>
</tr>
<tr>
<td>7. <strong>Operations:</strong> Expenditures for utilities and space/facilities (if paid separately by central IT)</td>
</tr>
<tr>
<td>8. Other central IT expenditures (describe other expenditures below)</td>
</tr>
</tbody>
</table>

**Other central IT expenditures**

<table>
<thead>
<tr>
<th>9. Were student employees compensated in whole or in part by work study or other sources that you did not report previously (i.e., as part of central IT funds available in Question 7, or that you did not include in item 2 of Question 8)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>○ Yes</td>
</tr>
<tr>
<td>○ No</td>
</tr>
<tr>
<td>○ Not applicable—do not have student employees in central IT</td>
</tr>
</tbody>
</table>

**Q10 | Central IT Staffing**

**IT Organization, Staffing, and Financing**

**Q10 | Central IT Staffing**

10. How many full-time equivalent (FTE) staff—including clerical, support, and management staff—and students were employed in central IT for the prior fiscal year?

**NOTES:**
- For partial FTEs, please use decimal numbers.
- For this question to be complete, all rows must have any of the following: a positive value, 0, or "Unable to estimate" checked.
- Student number should be entered in FTEs. This may be different from the total number of student workers in central IT. For example, 4 students working 10 hours a week each would count as 1 FTE. The following methods may be used to calculate this number:
  - If you know the total number of student worker hours allocated to central IT during the fiscal year, divide that number by 2,000 (number of hours/year based on a 40-hour workweek).
If you know the total number of dollars used for student workers, divide that number by the average hourly wage and then divide the result by 2,000.

Please include fixed-term employees.

<table>
<thead>
<tr>
<th>FTE</th>
<th>Unable to estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL STAFF FTE</td>
<td></td>
</tr>
<tr>
<td>TOTAL STUDENT FTE</td>
<td></td>
</tr>
</tbody>
</table>

Q11 | Distributed IT

IT Organization, Staffing, and Financing

11. Based on the proportions of IT expenditures and staff in central IT as compared to elsewhere in the institution, to what extent is IT at your institution centralized?

<table>
<thead>
<tr>
<th>Proportion of IT expenditures in central IT as compared to elsewhere in the institution</th>
<th>0% centralized (completely distributed IT)</th>
<th>1–24% centralized</th>
<th>25–49% centralized</th>
<th>50–74% centralized</th>
<th>75–99% centralized</th>
<th>100% centralized (no distributed IT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proportion of IT staff in central IT as compared to elsewhere in the institution</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q12 | Multicampus Systems/Districts

IT Organization, Staffing, and Financing

12. In the prior fiscal year, was your institution part of a multicampus system or district?

○ Yes, the response to this module represents the central office only.

○ Yes, the response to this module represents the central office and a campus.

○ Yes, the response to this module represents a campus only.

○ No.

Q13 | Institutions Outside the United States

IT Organization, Staffing, and Financing

13. In the prior fiscal year, was your institution’s primary location outside the United States?

Yes
Q14–15 | Supplemental Information

IT Organization, Staffing, and Financing

14. Please provide, in a paragraph or two, any background information about IT organization, staffing, and financing in your institution that could be useful to other CDS participants who may be using your data in their benchmarking. Examples: We hired a consultant to redesign our funding model; in the past year we migrated student e-mail to a cloud service. (optional)

15. Please provide the name and e-mail address of the person to contact regarding your institution's responses to this module of the CDS survey. (optional)

Q16–19 | Module Feedback

IT Organization, Staffing, and Financing

16. EDUCAUSE welcomes your feedback on this survey module. Please let us know of any technologies, innovations, or challenges important to your institution that are not addressed or are inadequately addressed in this year's survey. We'd also like to know if any questions in this module are not relevant to your institution. How else could this module of the CDS survey be improved? (optional)

17. How many people participated in preparing and completing the answers to the questions in this module? (optional)
   - ○ 1
   - ○ 2–4
   - ○ 5+

18. Approximately how much time did you spend on the following? (optional)
19. How easy was it for you to complete this module? Please take into consideration the amount of time it took, the ease of gathering information needed to answer the questions, the ease of identifying people at your institution to supply the answers, the clarity of the questions, etc. (optional)

- Very difficult
- Difficult
- Somewhat difficult
- Somewhat easy
- Easy
- Very easy

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