



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.

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Q1–3 | Highest-Ranking IT Officer Position

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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.)

- | | |
|--|--|
| <input type="checkbox"/> Chief information officer (CIO) | <input type="checkbox"/> Associate vice chancellor |
| <input type="checkbox"/> Chief technology officer (CTO) | <input type="checkbox"/> Associate vice provost |
| <input type="checkbox"/> Chief information technology officer (CITO) | <input type="checkbox"/> Assistant vice president |
| <input type="checkbox"/> Chief digital officer (CDO) | <input type="checkbox"/> Assistant vice chancellor |
| <input type="checkbox"/> Chief learning officer (CLO) | <input type="checkbox"/> Assistant vice provost |
| <input type="checkbox"/> Vice president | <input type="checkbox"/> Dean |
| <input type="checkbox"/> Vice chancellor | <input type="checkbox"/> Executive director |
| <input type="checkbox"/> Vice provost | <input type="checkbox"/> Director |
| <input type="checkbox"/> Associate provost | <input type="checkbox"/> Other (please specify) <input type="text"/> |
| <input type="checkbox"/> Associate vice president | <input type="checkbox"/> 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

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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

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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

Q6 | Fiscal Year

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Q6 | Fiscal Year

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

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Q7 | Central IT Funds Available

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.

	Prior fiscal year funds available	Unable to estimate
ENTER TOTAL FUNDS AVAILABLE FIRST	Prior fiscal year funds available	Unable to estimate
1. Carryover from the previous fiscal year (if any)	<input type="text"/>	<input type="checkbox"/>
2. Funds allocated to central IT from revenue generated from a general student technology fee (if not included in ongoing base funds)	<input type="text"/>	<input type="checkbox"/>
3. Compensation (salaries AND fringe benefits) for central IT staff paid from another source (if not included in ongoing base funds)	<input type="text"/>	<input type="checkbox"/>
4. Ongoing base funds (including funds for compensation and employee-related expenditures)	<input type="text"/>	<input type="checkbox"/>
5. Funds available from fee-based/cost-recovery services (e.g., network services, computer repairs, printing) charged to entities either internal or external to the institution	<input type="text"/>	<input type="checkbox"/>
6. One-time funds	<input type="text"/>	<input type="checkbox"/>
7. Other (describe other funding source(s) below)	<input type="text"/>	

Other funding source(s)

Q8–9 | Central IT Expenditures

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Q8–9 | Central IT Expenditures

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.

Prior fiscal year expenditures

Unable to estimate

ENTER TOTAL EXPENDITURES FIRST		7
1. <i>Staffing</i> : Compensation (salaries AND fringe benefits) for central IT staff (from any source)	<input type="text"/>	<input type="checkbox"/>
2. <i>Staffing</i> : Compensation for student employees	<input type="text"/>	<input type="checkbox"/>
3. <i>Staffing</i> : <u>Fixed-term labor expenditures</u>	<input type="text"/>	<input type="checkbox"/>
4. <i>Staffing</i> : <u>Professional development</u> (training, education and professional development; training-related travel)	<input type="text"/>	<input type="checkbox"/>
5. <i>Operations</i> : Expenditures for providing in-house infrastructure and services (i.e., "what you do yourself"; include associated one-time project costs; exclude staffing costs accounted for in items 1–4)	<input type="text"/>	<input type="checkbox"/>
6. <i>Operations</i> : Expenditures for services purchased from external providers (i.e., "what you pay someone else to do"; 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)	<input type="text"/>	<input type="checkbox"/>
7. <i>Operations</i> : Expenditures for <u>utilities and space/facilities</u> (if paid separately by central IT)	<input type="text"/>	<input type="checkbox"/>
8. Other central IT expenditures (describe other expenditures below)	<input type="text"/>	

Other central IT expenditures

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)?

- ☐ Yes
- ☐ No
- ☐ Not applicable—do not have student employees in central IT

Q10 | Central IT Staffing

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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.

	FTE	Unable to estimate
TOTAL STAFF FTE	<input type="text"/>	<input type="checkbox"/>
TOTAL STUDENT FTE	<input type="text"/>	<input type="checkbox"/>

Q11 | Distributed IT

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Q11 | Distributed IT

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?

	0% centralized (completely distributed IT)	1–24% centralized	25–49% centralized	50–74% centralized	75–99% centralized	100% centralized (no distributed IT)
Proportion of <i>IT expenditures</i> in central IT as compared to elsewhere in the institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proportion of <i>IT staff</i> in central IT as compared to elsewhere in the institution	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q12 | Multicampus Systems/Districts

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Q12 | Multicampus Systems/Districts

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

Q13 | Institutions Outside the United States

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

- ☐ Yes

Q14–15 | Supplemental Information

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Q14–15 | Supplemental Information

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

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Q16–19 | Module Feedback

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)

Acquiring and processing question data prior to entering data into the survey	<input type="text"/>
Entering data into the survey	<input type="text"/>

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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FOR PRINT ONLY.

Submit official responses through the CDS Portal at www.educause.edu/coredata.