Key Issues for Higher Education, 2010

Jan-Martin Lowendahl, Bill Rust, Marti Harris, Annemarie Earley

Higher education CIOs in 2010 confront many operational and market challenges. IT claims roles as part of both the problem and solution. This Key Issues research describes how Gartner’s education research team will support CIOs in their decisions for 2010.
ANALYSIS

Introduction

Higher education is a global community based on a simple mission — educate and/or research. Most institutions share a common cultural base, which fosters national and international collaboration. This spills over into IT services, where sharing experiences and best practices is a way of life.

However, many regional differences overlay this commonality. These distinctions stem from national policies, funding schemes and language-based cultural characteristics. Therefore, higher education CIOs have had to understand many critical factors to exploit global best practices and technology adoption. This reality is further exacerbated by an increasing need to cope with powerful forces of change that buffet the education institutions, including:

- Increasing societal globalization
- Consumerization of technology
- Impact of the financial crisis on education and funding, which is expected to be even more severe in 2010 than 2009 regionally
- Environmentally induced constraints on resources
- A political focus on the cost-effective scalability of education

To address this uncertainty, Gartner divides its 2010 higher education research agenda into two core topics, which follow. In considering them, we submit three key issues for each, which align with our "Run, Grow, Transform" methodology to help guide CIOs with their planning stages and efforts.

Core Topic 1: Higher Education Governance and the Business of Higher Education

This core topic emphasizes the impact of IT on the institution and the need to address IT governance and strategic planning, especially from a change management perspective.

Key Issue: How should education institutions provide or deliver quality IT services, including community management, to best run the institution?

Background and Context of the Key Issue

Higher education has had a self-evident place in society for nearly 1,200 years. (In 859, the University of Al-Karaouine in Morocco was founded, likely the world's oldest continuously operating institution of higher education.) Because of this, there has been a lack of urgency to develop efficient governance. Historically, the societal "business case" for funding education and research has been relatively easily accepted. However, that's no longer true. Whether we like it or not, higher education has become a competitive business, one that demands the capability of effective governance and strategic planning.

Explanation of Impact

The need for efficiency in service delivery will spur education CIOs to focus on the following issues:
• How to use service portfolios to manage cost and stakeholder expectations
• How to choose the right mode of sourcing and service delivery
• How to enable cost containment and cost reduction by data driven management

Summary of Planned Research

We will continue to provide best practices and tools that enhance the ability of IT organizations to deliver IT services efficiently. This research will encompass the cost-effective use of IT services while meeting stakeholders’ day-to-day expectations. We’ll focus on service portfolios for communicating and executing the many tough choices that have arisen from the financial crisis. These initiatives will be complemented by research on sourcing alternatives, driven by the emergence of cloud-computing services, continued political pressure for shared services and open-source software (OSS).

Summary of Relevant Published Research

"Toolkit for IT Executives: Developing Higher Education Benchmarks"
"Case Study: Cutting Costs at Chalmers University Started With Knowing the Numbers"
"Case Study: An Cheim, A Higher Education Shared Service That Works"
"The Benefits of Defining IT as Services in Higher Education: A Tool for Transparency, Trust and Commitment"
"U.S. Economic Stimulus Plan Will Boost IT Spending in Higher Education"
"Financial Slowdown Emphasizes Budget-Planning Effectiveness in Higher Education: But It's About Yield, Not Cost"

Key Issue: How should education institutions ensure effective IT organization, strategic planning and governance to grow the institution?

Background and Context of the Key Issue

The explosion of need for higher education and research in recent years has raised issues of scalability that have been solved with the "industrialization" of many institutions. This industrialization often clashes with traditional collegial leadership and puts institutions in need of new governance frameworks.

Explanation of Impact

To grow the institution, CIOs will need to address and resolve these matters:

• The strategic planning tools to enhance the ability to communicate among stakeholders and have an impact on change management
• Governance models to keep the institution agile
• IT organizational models that deliver effectively and efficiently

Summary of Planned Research

We will continue to deliver best practices and tools that enhance the ability of institutions and CIOs to grow the impact of IT by effective strategic planning that results in institutionally aligned, executable and sustainable decisions.
Summary of Existing Research

"Four 'Business Model' Scenarios for Higher Education: An Introduction to Strategic Planning Through Storytelling"

"Toolkit: Building a Higher Education IT Strategy"

"Higher Education CIOs Guide to Business Processes Improvement"

"The Benefits of a Process View in Higher Education: A Tool for Transparency, Trust and Commitment"

"A Proven Simple Visual Tool to Aid the Service Portfolio Dialogue Between Higher Education Stakeholders"

"Setting IT Priorities in Higher Education"

"Scenario Planning: Exploring Possible Futures for Education"

Key Issue: What organizational strategies will affect delivery of IT services in the future and, thereby, help transform the institution?

Background and Context of the Key Issue

Many societal, technological, economic, environmental and political forces are working together to create a more-competitive global market where an increasing number of stakeholders demand to know the "return on their investment" in higher education. Higher education CIOs must identify, implement, manage and innovate governance initiatives that can help transform their enterprises in this challenging environment.

Explanation of Impact

IT is a part of the problem, as well as the solution to the effects of the forces of change that will transform higher education. CIOs must address these issues to improve their institutions' positioning for competitive excellence:

- Future technology-enabled scenarios requiring institutional preparation
- The transformational ability of Internet-enabled "death of distance" — in a spatial, temporal and social sense
- The changing landscape for supply management that includes such things as OSS for content, services and software, as well as such things as consumerization's impact on student and faculty mobility

Summary of Planned Research

We will continue to look at disrupting and enabling macro forces in general, as well as IT disrupters and enablers, to determine the potential transformative impact on higher education. In 2010, we plan to cover the future of e-learning in the intersection of traditional e-learning platforms, social software and cloud collaboration.

Summary of Existing Research

"The 2009 Higher Education CIO's Agenda: Building Opportunities in a Financially Challenging Environment"

"Predicts 2010: Opportunities for Education Technology Despite Fiscal Constraints"
"Higher Education 'Business Model' Scenarios: 'Only Us U': Brilliance for Market"
"Higher Education 'Business Model' Scenarios: 'Me Not U': Edge in Market"
"Higher Education 'Business Model' Scenarios: 'Everybody's U': Scale of Market"
"Higher Education 'Business Model' Scenarios: 'All About U': Speed to Market"
"IT's Future in Higher Education Spells Agility: The Current Crisis Just Increases the Focus"
"Getting U.S. Higher Education Through a Bad Economy With E-Learning and Social Software"
"The Business Impact of Social Computing on Higher Education"
"Open Source in Higher Education, 2008"

Core Topic 2: Higher Education Applications, Systems and Infrastructure

This core topic deals with our more established coverage of IT.

Key Issue: What technologies and standards should education institutions evaluate and adopt to run the institution?

Background and Context of the Key Issue

Delivering IT services will always be about caring for the details as both the technology and end users tend to be unforgiving toward superficial planning and execution. This is true, regardless of whether institutions provide the service or integrate it from the cloud.

Explanation of Impact

Change always forces people and institutions to constantly re-evaluate current practices and seek new approaches that work better and more efficiently. Disrupting and/or enabling changes include:

- Technologies and habits that students will bring to campus (such as avid use of cloud productivity tools and social software)
- Progress in the area of identity and access management, including its role institution's interaction with society
- Status of higher-education-specific standards, such as metadata for learning objects and how it affect student system design and student mobility

Summary of Planned Research

Gartner will continue to help CIOs keep up with current technological trends so as not to be caught in a dead end and to avoid costly changes in strategy. The 2010 research will include continued coverage of student trends, identity and access management (IAM) and standards.

Summary of Existing Research

"Hype Cycle for Education, 2009"
"Defining the WLAN Experience in Higher Education"
"Lessons Learned From Higher Education and Public-Sector Identity Federations"

"Findings: Bologna Process Demands True International Student and Course Data Standards in Higher Education Throughout the EU"

**Key Issue: How should education institutions select and implement mission-critical administrative and academic systems to grow the institution?**

**Background and Context of the Key Issue**

The higher education IT landscape is increasing in scope and complexity as more services and technologies enter the scene. Moreover, the impact increases simply due to the ubiquity of IT tools and services, and the increasing demand by users.

**Explanation of Impact**

This context requires CIOs to have at hand more-detailed information than ever to grow their institutions. CIOs will need to understand these factors:

- Applications and platforms that best support the learning environment
- Vendors and products of academic and administrative applications that offer the most value
- Best-practices for cost-effective integration of new services

**Summary of Planned Research**

We will continue to assess the higher-education-specific application market, provide best practices for implementation, and provide vendor ratings of mission-critical administrative and academic systems. We'll also identify the functionality that will help your institution grow. We'll cease publishing the "Magic Quadrant for Higher Education Administrative Suites" and gradually replace it with more-focused research on specific applications, such as student information systems and e-learning platforms.

**Summary of Existing Research**

"Magic Quadrant for Higher Education Administrative Suites"

"Q&A: The Role of CRM in Higher Education Student Life Cycle Management"


"Steady-State ERP Costs for Higher Education"

"Higher Education Administrative Applications: Criteria for Evaluation"

"Case Study: Sakai Demonstrates How Community-Source Software Works and Thrives"
Key Issue: What technologies provide the greatest opportunities for transforming learning and research?

Background and Context of the Key Issue

At its core, education is about the "meeting of minds," not bringing bodies together. Realizing this fact opens up new options to transform higher education, because communication is essential for minds to meet. Even if the "business" of higher education is highly individualistic, its core stakeholders — researchers, teachers and students — depend on communities of interest and professional relations to communicate, develop and share ideas. IT has always played an important part in that. However, never before has the meeting of minds been more easily facilitated by technology than today — for example, via social software.

Explanation of Impact

The higher education CIO has a key role as both inspirer and supplier of IT services. In the role of inspirer, CIOs must identify disruptive and enabling technologies that can transform the institution and inject it into the strategic planning.

Summary of Planned Research

We will continue to support CIOs in seeking out transformative technologies. For example, we'll examine how providers of collaboration suites compete for the higher education desktop, explore the impact of social software on institutional key performance indicators (such as retention), and probe the benefits and drawbacks of quick adoption of emerging technology.

Summary of Existing Research

"Hype Cycle for Social Software, 2009"
"Higher Education Q&A: Cloud Computing"
"Cool Vendors in Collaboration, 2009"
"Findings: Higher Education CIOs Must Reinstate the 'Chaotic Sandpit'"
"Technology Adoption in Higher Education: Know Your Businesses"
"Avatars in the Enterprise: Six Guidelines to Enable Success"
"Virtual Worlds: What to Expect in 2009"
"Governments Need to and Can Play a Role in the Online Claims Ecosystem"
"Gartner Higher Education E-Learning Survey 2008-2009: Poised for the Next Step?"
"Findings: Social Learning Platform Emerges to Meet Changing Learner Needs and Expectations"
REGIONAL HEADQUARTERS

Corporate Headquarters
56 Top Gallant Road
Stamford, CT 06902-7700
U.S.A.
+1 203 964 0096

European Headquarters
Tamesis
The Glanty
Egham
Surrey, TW20 9AW
UNITED KINGDOM
+44 1784 431611

Asia/Pacific Headquarters
Gartner Australasia Pty. Ltd.
Level 9, 141 Walker Street
North Sydney
New South Wales 2060
AUSTRALIA
+61 2 9459 4600

Japan Headquarters
Gartner Japan Ltd.
Aobadai Hills, 6F
7-7, Aobadai, 4-chome
Meguro-ku, Tokyo 153-0042
JAPAN
+81 3 3481 3670

Latin America Headquarters
Gartner do Brazil
Av. das Nações Unidas, 12551
9º andar—World Trade Center
04578-903—São Paulo SP
BRAZIL
+55 11 3443 1509