Inside Higher Ed

2025 Survey of

Campus Chief Technology/ Information Officers

A SURVEY BY *INSIDE HIGHER ED* AND HANOVER RESEARCH

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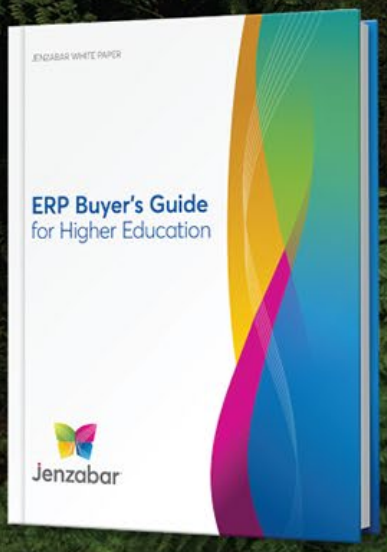

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INTRODUCTION AND METHODOLOGY

This is *Inside Higher Ed*'s fourth annual Survey of Campus Chief Technology/Information Officers. *Inside Higher Ed* and Hanover Research sent survey invitations via email to 2,197 college and university chief technology and information officers (CTOs going forward), with regular reminders sent throughout the Feb. 4 to March 21 field period. Hanover collected 108 fully or partially completed surveys, yielding a 5 percent response rate. The survey is an attempted census of all chief technology and information officers using the most comprehensive sample information available to target all eligible U.S. colleges and universities from the Integrated Postsecondary Education Data System (IPEDS) database. The margin of error is 9 percent given a total n-count of 108. Conclusions drawn from a small sample size (n<20) should be interpreted with caution. In the charts and percentages that follow, some percentages may not total 100 due to rounding.

	All Institutions, by Sector				Public			Private Nonprofit	
	All	Public	Private Nonprofit	For-profit*	Doctoral	Master's/ Bacc.	Associate	Doctoral/ Master's	Bacc.
Total sample size	108	42	63	3	14	5	23	41	22

Note: An asterisk indicates that data is not reported for this group due to small sample size.

KEY FINDINGS

- **Collaboration but untapped potential:** Nearly three in five CTOs (59 percent) are on the president's/chancellor's executive cabinet or council at their institution. Closer to half (53 percent) say their college's leadership team "very much" leverages their knowledge and insights to inform strategic decisions and planning involving technology. Most CTOs (90 percent) somewhat or strongly agree that their central IT department has found effective ways reach out to and partner with other areas of the institution. Just a quarter (26 percent) say that their central IT department is siloed in ways that limit its impact.

- **Mixed views on infrastructure and investments:** Many CTOs (60 percent) somewhat or strongly agree that legacy infrastructure is hampering their institution's ability to be innovative when it comes to technology needs. Asked to rate the effectiveness of their institution's investments over the past decade in information technology resources and services, CTOs are most likely to rate those in on-campus instruction as highly effective (63 percent). But lower-rated areas of IT investment include those in student success: Just 33 percent of respondents say these investments have been highly effective. Some 91 percent of CTOs rate their institution's learning management system's quality as good or excellent, however. Beyond the LMS, most CTOs (83 percent) rate the quality of their institution's IT and digital resources to support teaching and learning as good or excellent. Yet just 26 percent of CTOs rate their institution's IT training for students good or excellent.

- **Despite the AI buzz:** Just a third of CTOs (34 percent) say that investing in generative artificial intelligence (GenAI) is a high or essential priority for their institution. Closer to quarter of CTOs each rate investing in AI agents (28 percent) and predictive AI (24 percent) as a high or essential priority. Asked how they perceive the overall impact of AI on higher education so far, roughly half of CTOs say it's positive (45 percent) or very positive (9 percent). Most of the rest are neutral. Even so, most CTOs think that GenAI has thus far proven to be a moderate (59 percent) or significant (15 percent) risk to academic integrity at their institution.

- **Integrating AI:** Two in three CTOs (66 percent) somewhat or strongly agree that effective channels exist between IT and academic affairs to collaborate on AI policy and other key issues. Nearly the same share (63 percent) say that senior leaders at their institution are engaged in discussions around AI and think it's important. But just one in three CTOs (35 percent) at least somewhat agrees that their institution is handling the rise of AI adeptly—and just 19 percent say the same of higher education overall. Meanwhile, one in three CTOs (32 percent) at least somewhat agrees their institution is significantly more reliant on AI than it was a year ago. The top institutional uses of AI are cybersecurity (51 percent) and virtual assistants and chatbots (49 percent), with public institution CTOs especially likely to report the latter.

KEY FINDINGS (Cont.)

- **AI strategy and access are lacking:** About half of CTOs (53 percent) somewhat or strongly agree that their institution puts more emphasis on thinking about AI for individual use cases than thinking about it at enterprise scale, representing little progress from last year's survey. Just 11 percent of CTOs indicate their institution has a comprehensive AI strategy. Not quite half of CTOs say their college offers students access to GenAI tools, with 27 percent granting access through an institutionwide license, 13 percent through limited department or program access and 5 percent through a custom-built tool. Of this group, half report that the central IT budget covers associated costs. CTOs whose institution does not offer student access to GenAI tools tend to cite concerns about associated costs.

- **Varied approaches to AI governance and partnerships:** Two in five CTOs (42 percent) say their college or university has adopted institutionwide policies or guidelines for the use of AI tools for general use. Fewer have adopted policies around instruction, administrative tasks, research assistance and student services. Some 31 percent say they their institution has no formal policies governing any of these areas. Half of CTOs (53 percent) say their institution has not considered partnering with technology companies to implement AI. Most respondents—74 percent—say their institution has not considered building its own AI technology using open source tools. Some 42 percent say the institution has developed or purchased AI tools for general use.

- **Sustainability efforts lag:** A majority of CTOs (60 percent) say their institution has no sustainability goals related to its technology use. Most also say senior leaders do not take the environmental impact of energy and technology use into account when making decisions about technology (69 percent). Very few CTOs (2 percent) report that their institution's use of AI has greatly or extremely increased its carbon footprint/energy use. But nearly half say it's slightly (30 percent) or moderately (15 percent) increased their institution's energy use.

- **Questioning security:** Just three in 10 CTOs are very (29 percent) or extremely (2 percent) confident that their institution's practices can prevent cyberattacks that could compromise data or intellectual property, or lead to a ransomware event. Within the last 12 months, the most common actions taken to boost security are requiring multi-factor authentication for all employee accounts (90 percent), updating software for security purposes (88 percent) and requiring cybersecurity training of full-time administrative staff (86 percent). Just 26 percent required cybersecurity training of students, representing a slight increase from last year's survey.

KEY FINDINGS (Cont.)

- **Staff retention and recruitment challenges:** Many CTOs (70 percent) somewhat or strongly agree their institution is struggling to hire new technology employees. A significant share, 37 percent, also say their institution is struggling to retain current technology employees. CTOs struggling with recruitment and/or retention are unlikely to blame increased job opportunities elsewhere for employees with AI skills. Instead, the top factor is generally better salaries and/or benefits at other organizations outside higher education.
- **Student success drives digital transformation:** Asked about priority areas for digital transformation at their institution, student-centered functions rank highly from a list of options. About seven in 10 CTOs (68 percent) say that leveraging data for student success is a high or essential priority, followed by teaching and learning (59 percent). Fewer CTOs report that AI (37 percent) and libraries (14 percent) are high priority or essential areas for digital transformation. Commonly cited barriers to meeting digital transformation goals are insufficient number of IT personnel, insufficient financial investment, and data quality and/or integration issues.
- **Emerging technologies:** Just 12 percent of CTOs say their institution has made meaningful investments in quantum computing/high-performance computing, though another 18 percent say the institution has begun investing. On virtual reality and immersive learning, 14 percent of CTOs report meaningful investments with another 30 percent reporting initial investments. These numbers are similar to last year's survey.
- **Little appetite for new OPM partnerships:** Regarding online program managers, 61 percent of CTOs say their institution has not partnered with an OPM and is not considering it. Just 8 percent say their college or university doesn't have an OPM partnership but is considering the idea. Others report having partnerships for a variety of academic programs (3 percent) or for a limited number of academic programs (13 percent). An additional 4 percent report partnerships but indicate their institution won't be renewing the contract.

KEY FINDINGS (Cont.)

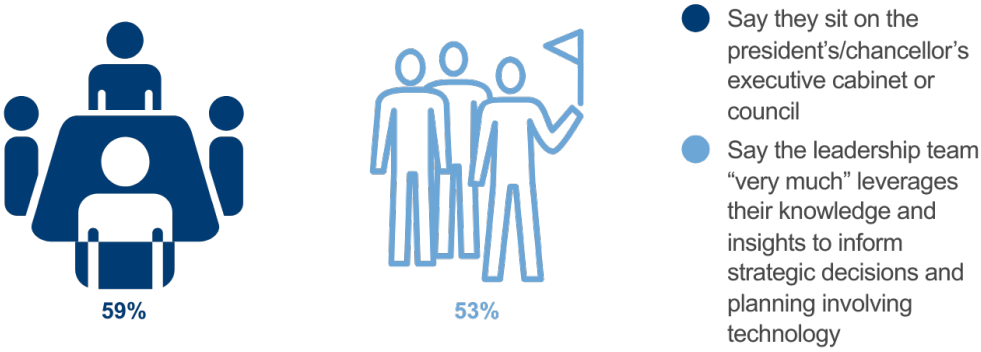
- **Weighing quality and quantity in online course options:** Three in five CTOs (59 percent) express some or strong confidence in the quality of their institution's online and/or hybrid course and program offerings. Half (49 percent) somewhat or strongly agree that student demand for online and/or hybrid course options has substantially increased in the last year, while two in five CTOs (41 percent) indicate that their institution has added a substantial number of new online and hybrid course options over the same period. Public institution CTOs are most likely to report adding online options. Most CTOs somewhat or strongly agree that their institution provides technical support for teaching and/or developing online courses (88 percent), including by investing in technology and instructional resources to improve teaching and learning (77 percent). CTOs are less likely to agree their institution provides other kinds of support, such as additional compensation for the development of online courses (48 percent).
- **Harnessing data for student success:** More than half of CTOs somewhat or strongly agree that their institution effectively uses data to support student success (60 percent); effectively uses data to inform important decisions (56 percent); has a data function structure that supports analytics needs (52 percent); and makes data analytics a strategic priority (52 percent). Fewer CTOs agree that the college or university does things to actively promote a culture of data (36 percent). As for where and how institutions store their data—all with implications for accessibility and data-sharing—half of CTOs (53 percent) report having a data warehouse. Another quarter (26 percent) reporting have a data lake. Just 11 percent report having unified data models, which can reduce data siloes and improve data governance.

INFLUENCE

Three in five respondents (59 percent) are on the president/chancellor's executive cabinet or council at their institution. This is about the same as last year's Survey of Campus Chief Technology/Information Officers, when 63 percent of respondents reported being on the cabinet or council. This year, male CTOs are more likely to say they sit on the cabinet or council than are female CTOs, at 65 percent versus 43 percent, respectively. However, due to the small sample size for female CTOs (n=14), this finding should be interpreted with caution.

On influence this year, half of CTOs (53 percent) say their institution's leadership team leverages their knowledge and insights to inform strategic decisions and planning involving technology "very much." About a quarter (28 percent) say their knowledge is "moderately" leveraged. The rest say their expertise is drawn on "somewhat" (13 percent) or "not at all" (6 percent). These responses, in combination with last year's survey finding that 57 percent of CTOs at least somewhat agreed their institution's senior leaders treat the central information technology office more like a utility than a strategic partner, suggest untapped potential.

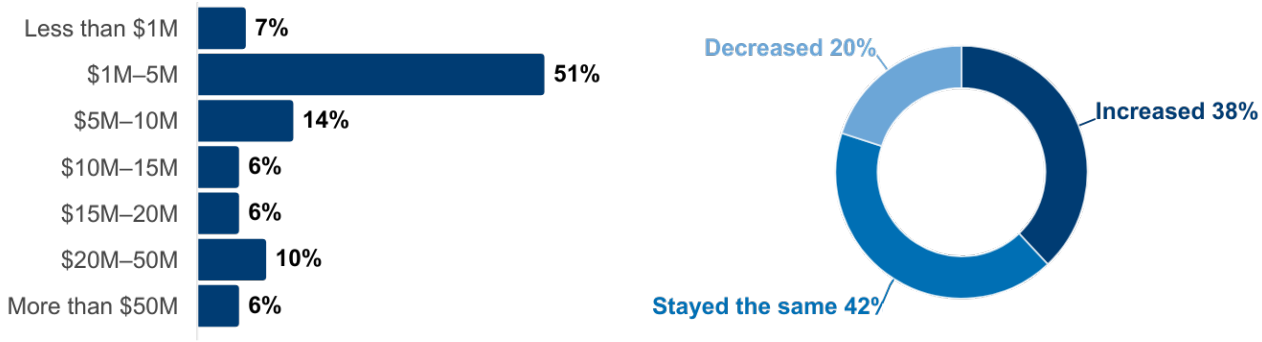
CTOs on their level of influence within their institution:



BUDGET AND INVESTMENTS

The largest share of CTOs (51 percent) report having total central IT operations and services budgets—covering personnel, equipment, projects, software and more—between $1 million and $5 million this fiscal year. The rest range from less than $1 million to more than $50 million. Year over year, about two in five CTOs each report that their central IT budget stayed the same (42 percent) or increased (38 percent). One in five reports a budget decrease (20 percent).

CTOs indicate their institution's total central IT budget for 2024–25 (left) and how that budget fared from last year (right):



Asked to rate the effectiveness of their institution's investment over the past decade in IT resources and services in various areas, CTOs are most likely to rate those in on-campus instruction as very or extremely effective (63 percent). In last year's survey, 56 percent of respondents rated IT investments in on-campus instruction as highly effective. In 2025, other relatively highly rated IT investments include those in student recruitment, online courses and programs, and student financial assistance.

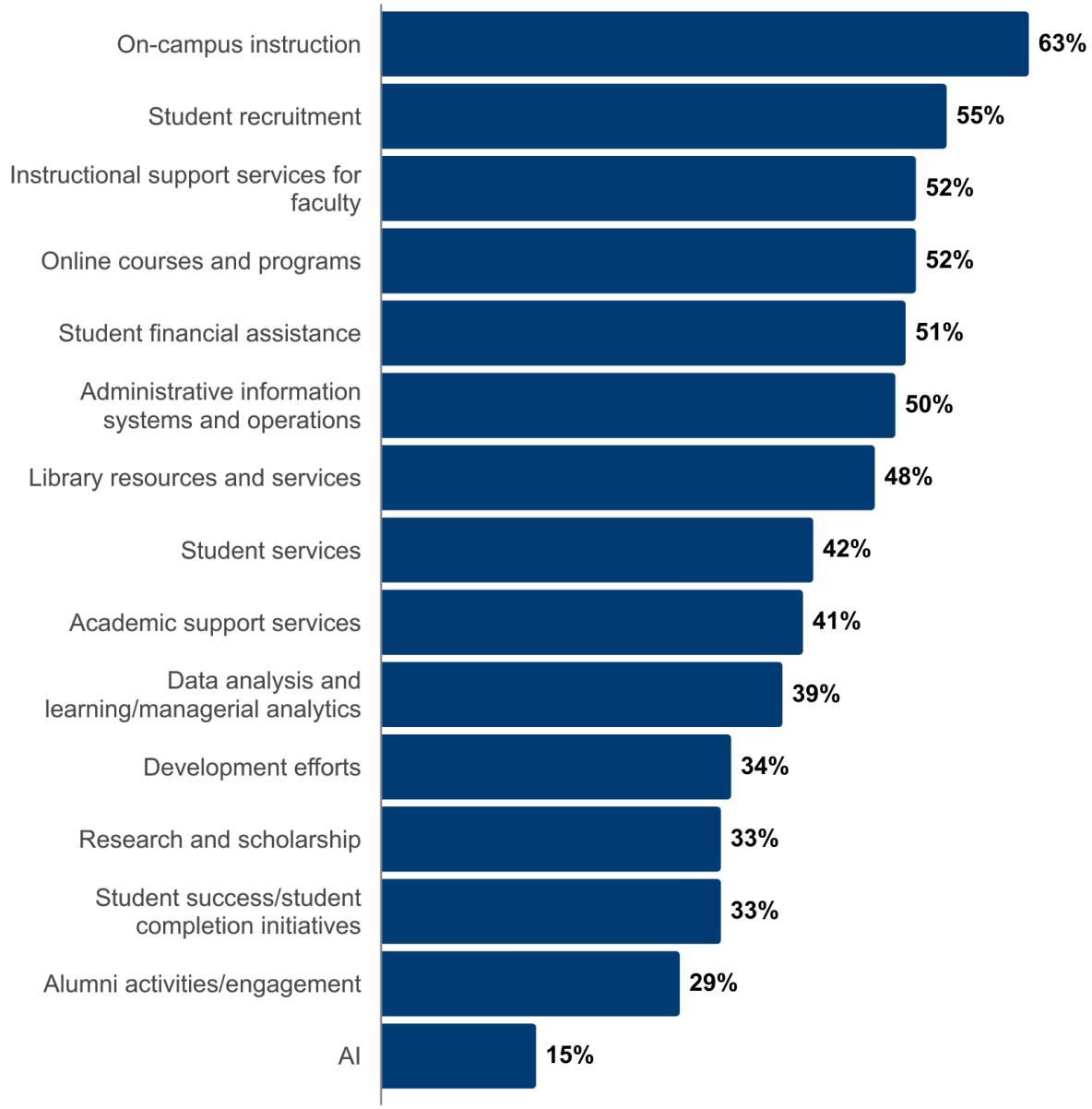
Lower-rated IT investments include those in student success/completion initiatives, research and scholarship, and alumni activities/engagement.

Additionally, at this point, just 15 percent of CTOs rate their institution's investments in artificial intelligence as highly effective.

BUDGET AND INVESTMENTS (Cont.)

Differences emerge by sector, with CTOs at public institutions more likely than their private nonprofit peers to rate investments in administrative information systems and operations as highly effective (63 percent versus 38 percent, respectively). Same for data analysis and learning/managerial analytics (50 percent versus 31 percent) and research and scholarship (50 percent versus 20 percent). Private nonprofit CTOs are more likely than their public counterparts to approve of effectiveness of investments in library resources and services, however (55 percent versus 33 percent, respectively).

CTOs who rate their institution's investment in IT resources and services in these areas over the past decade as very or extremely effective:



BEING A CTO

With technology becoming ever more entwined with core college and university functions such as teaching and learning, most CTOs (90 percent) somewhat or strongly agree that their central IT department has found effective ways to reach out and partner with other areas of the institution. Relatedly, just a quarter of CTOs (26 percent) say that their central IT department is siloed in ways that limit its impact.

Most CTOs also say they enjoy their job (87 percent) and that they'd encourage mentees to pursue the same path (81 percent).

More concerningly, however, three in five CTOs (60 percent) somewhat or strongly agree that legacy infrastructure is hampering their institution's ability to be innovative when it comes to technology needs. This is consistent across sectors.

CTOs who somewhat or strongly agree with the following statements about being a CTO:

87%

I enjoy being a CTO.

81%

I would encourage mentees to become a CTO.

60%

Legacy infrastructure is hampering my institution's ability to be innovative when it comes to technology needs.

90%

Our central IT department has found effective ways to reach out and partner with other areas of the institution.

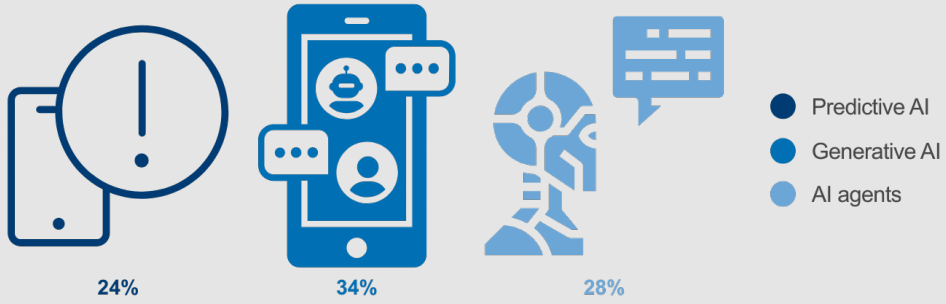
26%

Our central IT department is siloed relative to other parts of the institution in ways that limit our potential impact.

PERCEPTIONS AND EXPERIENCES

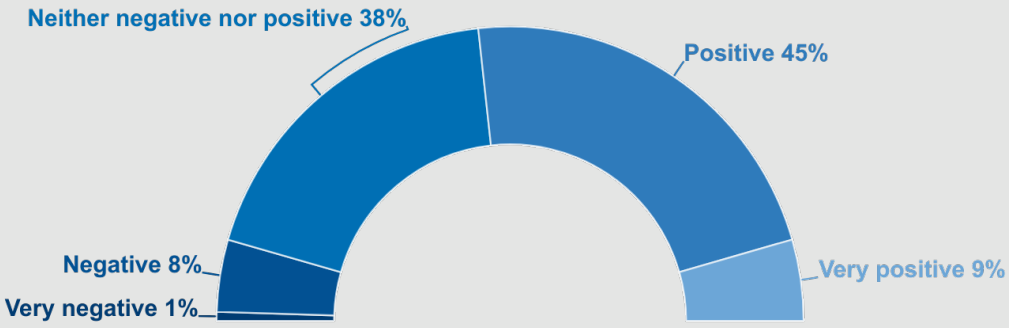
Despite the continued buzz around generative AI in higher education, just a third of CTOs (34 percent) say that investing in GenAI is a high or essential priority for their institution. Another third (32 percent) say investing in GenAI is a "medium" priority for their institution; the rest are split between GenAI being a low priority or not at all a priority. Closer to a quarter of CTOs each say that investing in emerging AI agents (28 percent) and more established predictive AI (24 percent) is a high or essential priority.

CTOs who say investing in these types of AI is a high or essential priority for their institution:



Asked how they perceive the overall impact of AI on higher education so far, more than half of CTOs say it's positive (45 percent) or very positive (9 percent). A significant share of CTOs, 38 percent, say it's neither negative nor positive. Relatively few say it's negative or very negative.

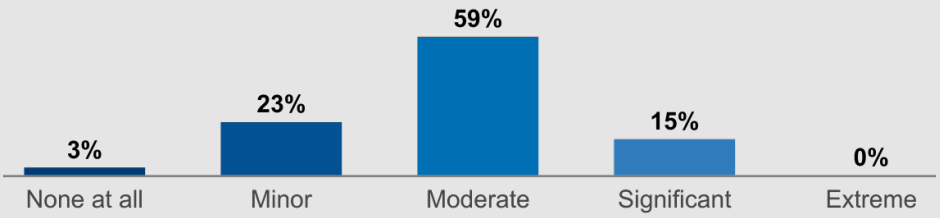
CTOs rate AI's overall impact on higher education so far:



PERCEPTIONS AND EXPERIENCES (Cont.)

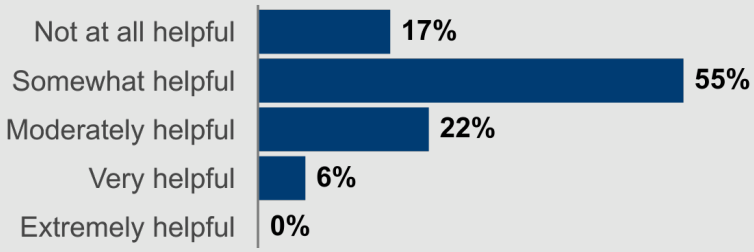
At the same time, most CTOs think that GenAI has thus far proven to be a moderate (59 percent) or significant (15 percent) risk to academic integrity at their institution. Fewer think it's a minor risk (23 percent) or no risk at all (3 percent). But no CTO says it's proven to be an extreme risk.

CTOs on how much of a threat to academic integrity generative AI has proven to be at their institution:



CTOs' positive, if measured, assessment of AI's overall impact may stem from how AI is boosting their institution's capabilities: Most say AI has been somewhat (55 percent) or moderately (22 percent) helpful in this sense.

CTOs on how helpful AI has been in boosting their institution's capabilities:



IT INVESTMENTS AND EFFECTIVENESS

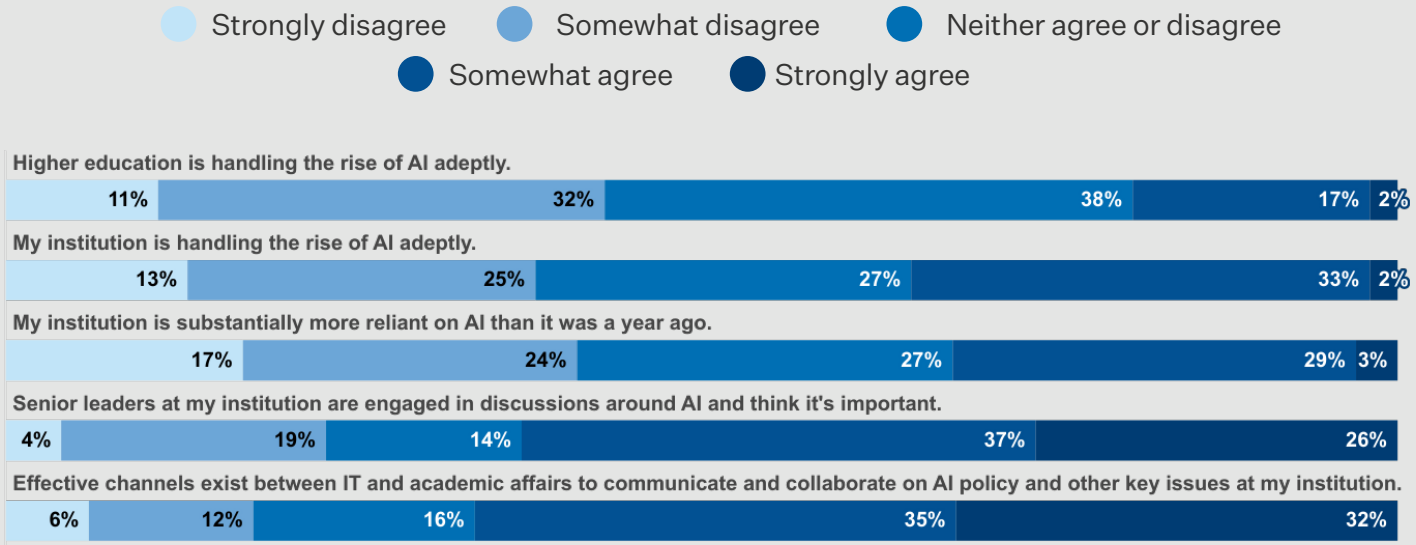
Asked how well their institution is handling the rise of AI, two in three CTOs (66 percent) somewhat or strongly agree that effective channels exists between IT and academic affairs to collaborate on AI policy and other key issues. Nearly the same share (63 percent) say that senior leaders at their institution are engaged in discussions around AI and think it's important. Yet closer to one in three CTOs (35 percent) at least somewhat agree that their institution is handling the rise of AI adeptly—and just 19 percent say the same of higher ed overall.

How does this compare with what presidents think about AI? In *Inside Higher Ed*'s 2025 Survey of College and University Presidents with Hanover, half of presidents (51 percent) somewhat or strongly agreed that their institution is responding appropriately and adeptly to the rise of AI, while fewer (28 percent) said the same of higher education as whole.

Back to CTOs: Those at public institutions are more likely than their private nonprofit peers to agree that senior leaders at their college are engaged in discussions around AI, at 76 percent versus 56 percent, respectively, and that their institution is handling the rise of AI adeptly, at 49 percent versus 25 percent, respectively.

Additionally, one in three CTOs overall (32 percent) at least somewhat agrees their institution is significantly more reliant on AI than it was a year ago.

CTOs indicate their level of agreement with the following statements about AI readiness in higher education generally and at their institution:

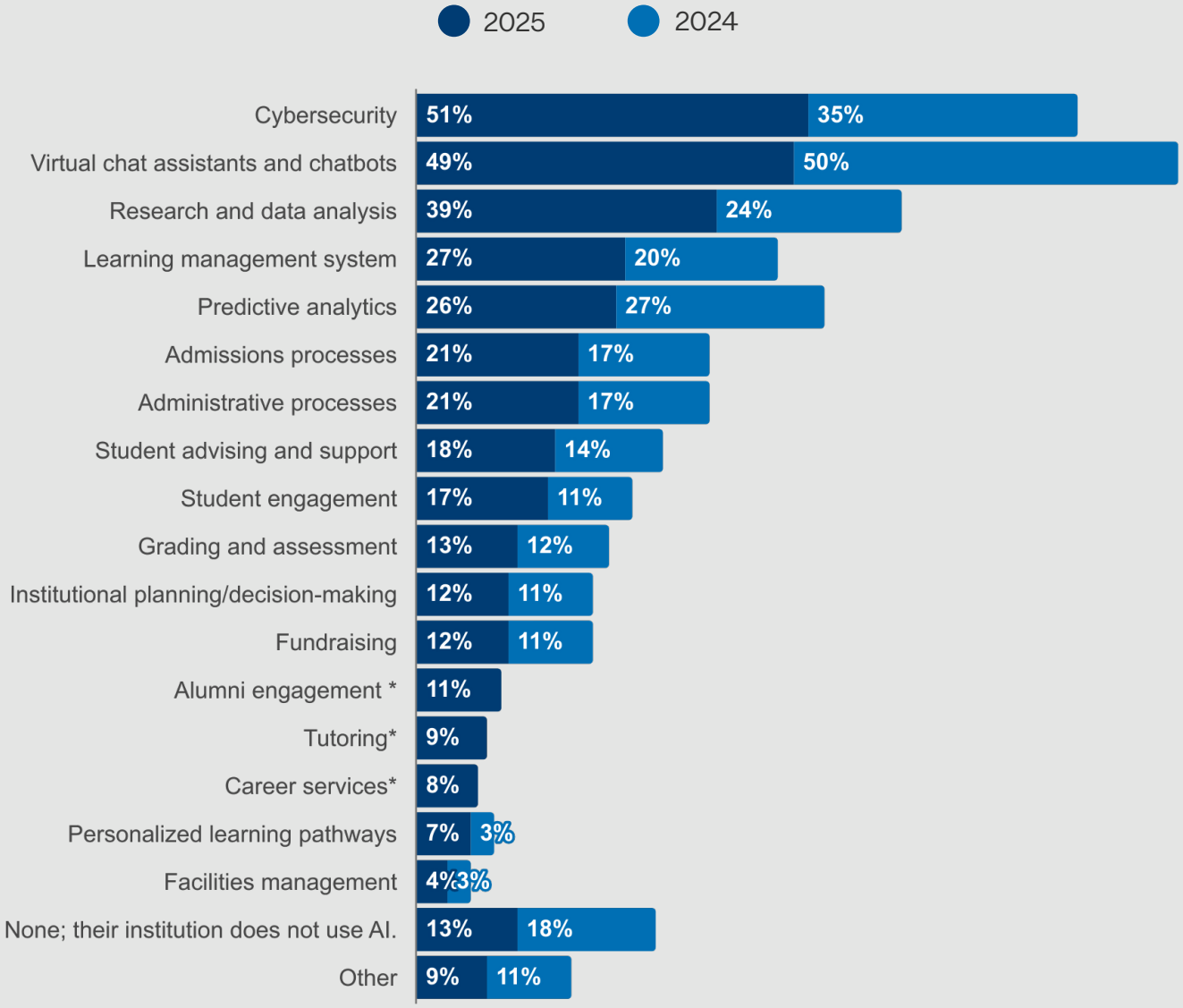


ARTIFICIAL INTELLIGENCE

USES OF AI

Last year, across *Inside Higher Ed*'s campus leader surveys, including that of CTOs, virtual assistants and chatbots were the top reported institutional use of AI. In this year's CTO survey, cybersecurity jumps to the top of a list of possible uses, with 51 percent of CTOs reporting their college uses AI for this. That is up from 35 percent last year. Virtual chat assistants and chatbots still rank highly, with 49 percent of CTOs reporting this use in 2025. There's further stratification in use of virtual chat assistants and chatbots by sector this year, as well, with 68 percent of public institution CTOs signaling their use, versus 37 percent of private nonprofit CTOs. AI's use in research and data analysis moved up the overall list, too, at 39 percent this year versus 24 percent last year.

CTOs who say their institution uses AI in the following areas or ways, with 2024 survey results for comparison where possible:



***New category in 2025; no 2024 comparison available**

USES OF AI (Cont.)

In 2024, 49 percent of CTOs somewhat or strongly agreed that their institution placed more emphasis on thinking about AI for individual use cases than thinking about it at enterprise scale. This year, 53 percent somewhat or strongly agree this is the case, representing little movement. In a parallel finding, 85 percent of CTOs report that their institution has no comprehensive AI strategy; just 11 percent say it does, while 4 percent are unsure.

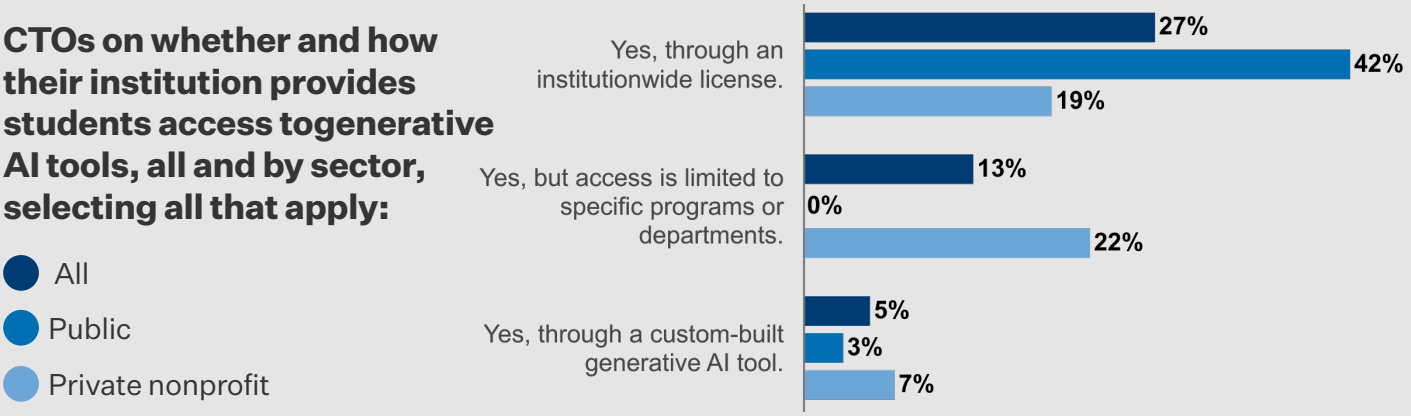
Those CTOs who say their institution is handling the rise of AI adeptly are more likely than the group overall to say that senior leaders are engaged in AI discussions and that effective channels exist between IT and academic affairs for communication on this issue (both 92 percent), and that their institution is substantially more reliant than it was a year ago (53 percent). And while the sample size is small, those CTOs whose institutions have a comprehensive AI strategy (n=11) are also significantly more likely than the group to agree with all of the above. Nearly all of these CTOs also agree that their institution is handling the rise of AI adeptly—a seeming endorsement for having such a strategy. But institution size may to be a factor here, with 27 percent of CTOs representing institutions with more than 10,000 students reporting such a strategy, versus 5 percent of those with 10,000 students or fewer.

STUDENT ACCESS TO GENERATIVE AI TOOLS

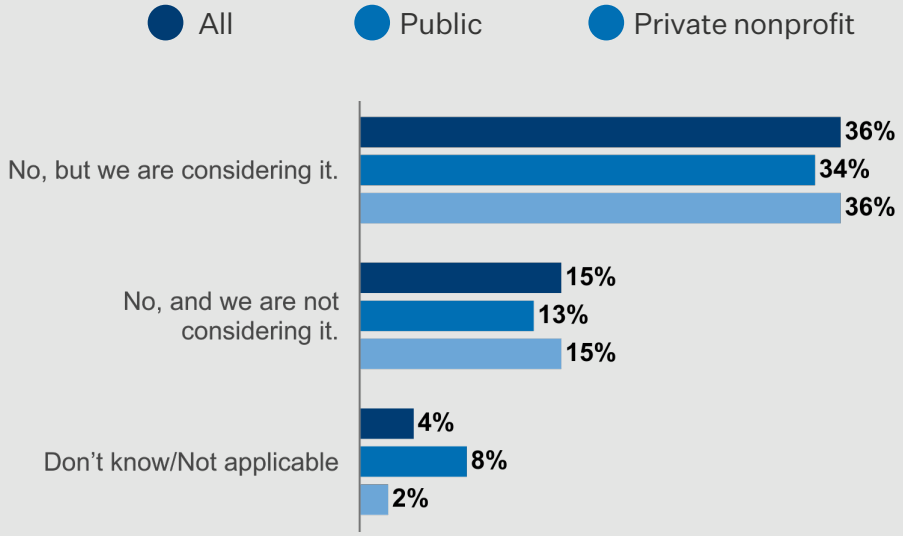
There is significant variety in how institutions are approaching student access to GenAI tools, with implications for digital equity, given increasing student and employer expectations about AI literacy. Some 27 percent of CTOs say their college offers students GenAI access through an institutionwide license, with public nonprofit CTOs especially likely to say this is the case (42 percent versus 19 percent of private nonprofit CTOs). Some 13 percent of all CTOs report that student access to GenAI tools is limited to specific programs or departments, with this subgroup made up entirely of private nonprofit CTOs. And an additional 5 percent of all CTOs report that students at their institution have access to a custom-built GenAI tool.

Roughly half of institutions represented do not offer students access to GenAI tools. Some 36 percent of CTOs report that their college is considering ways to offer access, while 15 percent say their institution is not considering this.

CTOs on whether and how their institution provides students access togenerative AI tools, all and by sector, selecting all that apply:



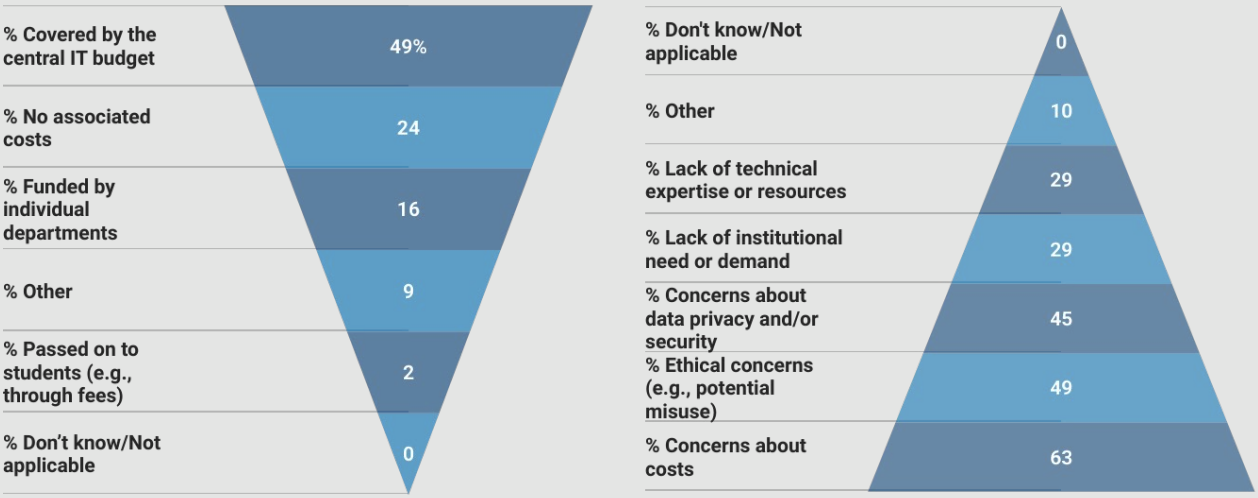
STUDENT ACCESS TO GENERATIVE AI TOOLS (Cont.)



Of those CTOs who report providing some kind of student access to GenAI tools (n=45), half say the associated costs are covered by the central IT budget; most of these are public institution CTOs. Another quarter of those reporting student access say there are no associated costs. Most of the rest indicate that funding comes from individual departments. Almost no one reports that costs are passed on to students.

Among CTOs who do not report providing student access to GenAI tools, the top-cited concern from a list of possibilities is costs. Ethical concerns, such as those around potential misuse and academic integrity, also factor in, followed by concerns about data privacy and/or security. Few say there is no need or insufficient technical expertise to manage implementation.

CTOs whose institution provides student access to generative AI tool(s) say how it's managing associated costs (left, n=45) and CTOs whose institution doesn't provide access say why not (right, n=51), selecting all that apply:

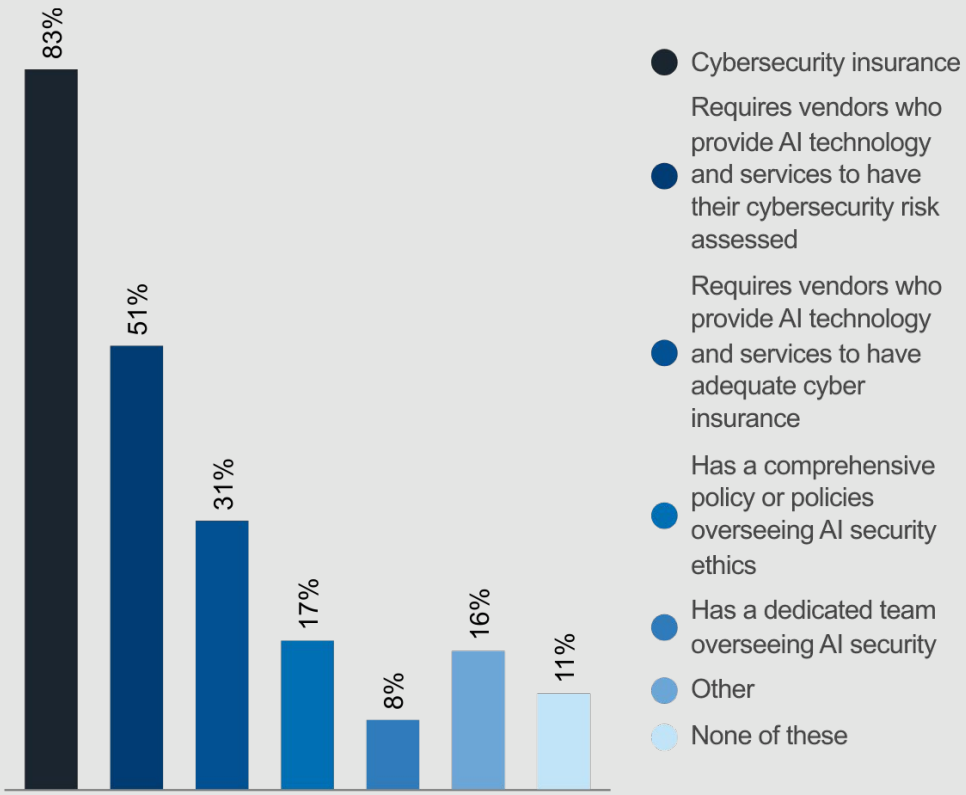


ARTIFICIAL INTELLIGENCE

AI SECURITY AND POLICIES

On mitigating possible security risks associated with AI, most CTOs report their institution has cybersecurity insurance (83 percent). Less common steps taken range from requiring vendors who provide AI technology and services to have their cybersecurity risk assessed (51 percent) to having a comprehensive policy or policies overseeing AI security ethics (17 percent) or having a dedicated team overseeing AI security (8 percent).

CTOs on how their institution is addressing potential security risks associated with the use of AI models, selecting all that apply:



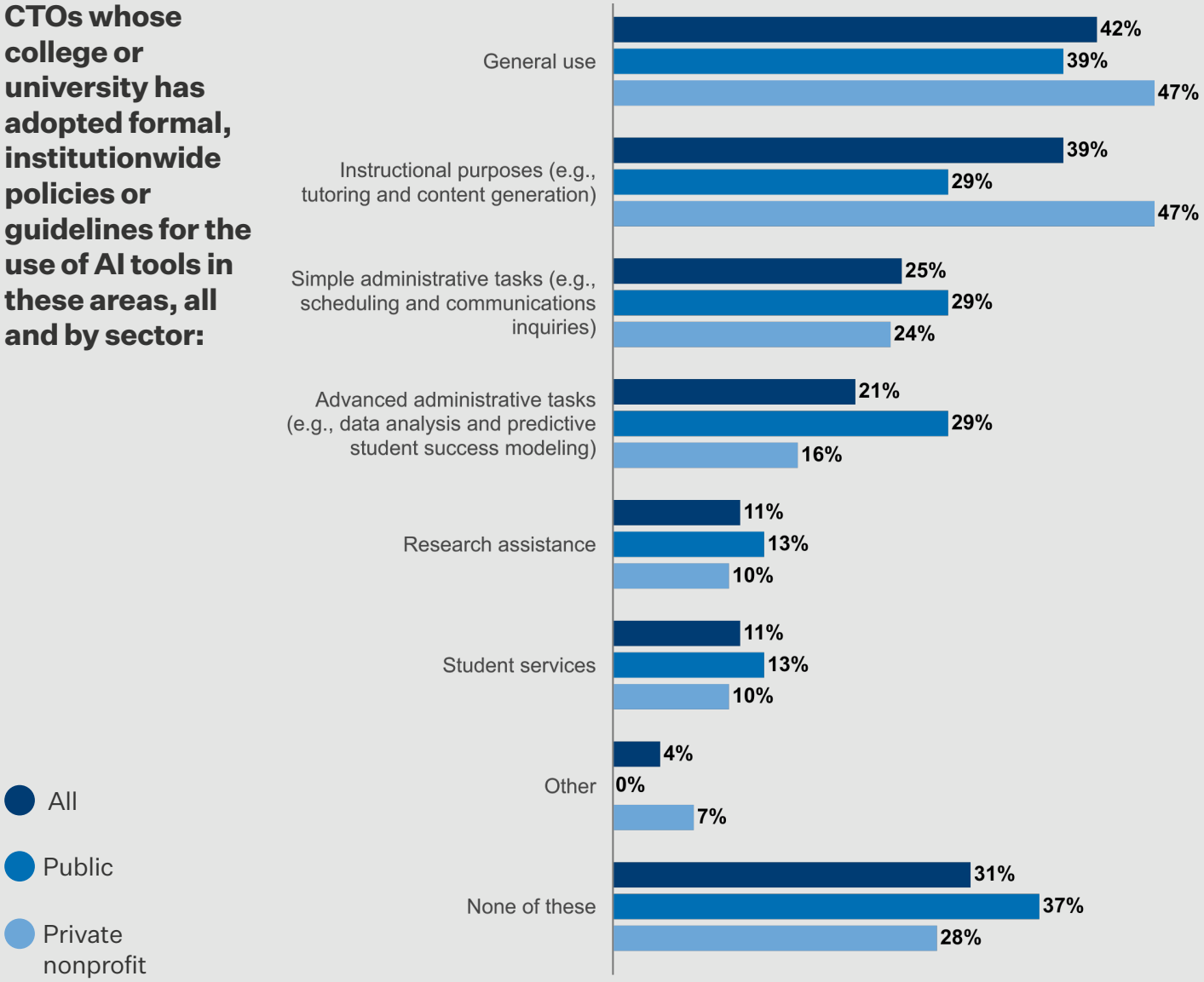
AI SECURITY AND POLICIES (Cont.)

Close to half the sample says their college or university has adopted institutionwide formal policies or guidelines for the use of AI tools for general use (42 percent). Nearly as many report having institutional AI policies for instructional purposes, such as tutoring and content generation (39 percent). Private nonprofit college CTOs are especially likely to indicate this, at 47 percent versus 29 percent of their public counterparts.

A quarter of all CTOs report having policies for simple administrative tasks, such as scheduling and communication (25 percent). Less than a quarter each report having policies for advanced administrative tasks, research assistance and student services.

Some 31 percent say their institution has no formal policies governing any of these areas.

CTOs whose college or university has adopted formal, institutionwide policies or guidelines for the use of AI tools in these areas, all and by sector:



TECH PARTNERSHIPS AND OPEN SOURCE

Just over half of CTOs (53 percent) say their institution has not considered partnering with technology companies to implement AI. The rest are split between currently having such partnerships (27 percent) or considering them (20 percent). Private nonprofit CTOs are especially likely to say their institution has not considered this kind of partnership, at 64 percent versus 34 percent of public institution CTOs.

Numbers to know: AI approaches

66% vs. 36%

Public versus private nonprofit institution CTOs whose college has partnered or is considering partnering with a technology company to implement AI

26%

CTOs (all) whose institution has developed its own AI technology using open source tools or is considering doing so

53%

CTOs (all) who somewhat or strongly agree that their institution emphasizes thinking about AI for individual use cases than at enterprise scale

11%

CTOs (all) who say their institution has a comprehensive AI strategy

TECH PARTNERSHIPS AND OPEN SOURCE (Cont.)

Most respondents (74 percent) say their institution has not considered building its own AI technology using open source tools. Just 10 percent have done this; some 16 percent are considering it.

Nearly half of CTOs (42 percent) say their institution has developed or purchased AI tools for general use. Fewer say their institution has developed AI tools for simple or advanced administrative tasks, instructional purposes, research assistance or student services.

CTOs whose institution has developed or purchased AI tools for use in these areas, all and by sector:

	All	Public	Private nonprofit
Simple administrative tasks (e.g., scheduling and communications inquiries)	32%	39%	29%
Advanced administrative tasks (e.g., data analysis and predictive student success modeling)	25%	24%	24%
Instructional purposes (e.g., tutoring and content generation)	25%	34%	19%
Research assistance	13%	11%	16%
Student services	13%	21%	9%
General use	42%	45%	43%
Other	8%	11%	7%
None of these	26%	18%	31%

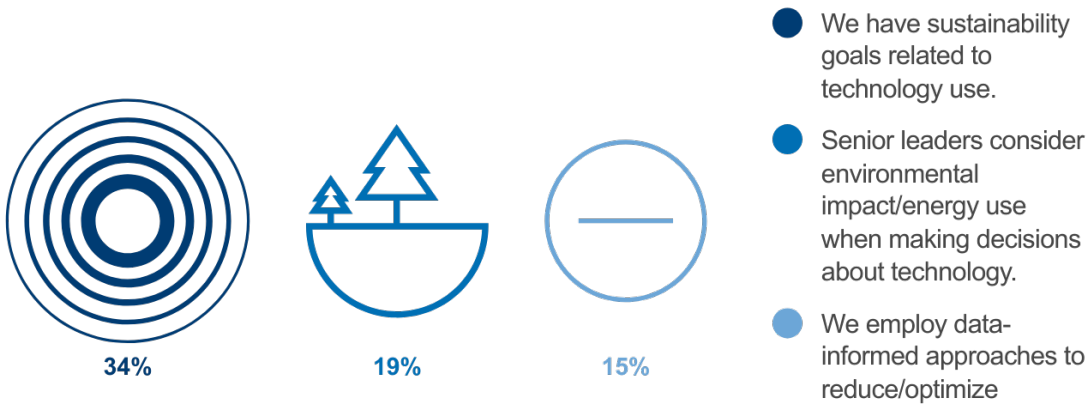
SUSTAINABILITY

GOALS AND DECISION-MAKING

A majority of CTOs (60 percent) say their institution has no sustainability goals related to its technology use. Some 34 percent say their institution does, while the rest aren't sure. CTOs at public institutions are significantly more likely to report having such goals than their private nonprofit peers, at 58 percent versus 17 percent, respectively. By region, provosts in the Midwest are least likely to report having these kinds of goals (21 percent).

Asked whether senior leaders at their institution take the environmental impact of energy and technology use into account when making decisions about technology, nearly seven in 10 CTOs (69 percent) say no. Two in 10 say yes (19 percent), while the rest are unsure.

CTOs who say the following about technology and environmental sustainability at their college or university:

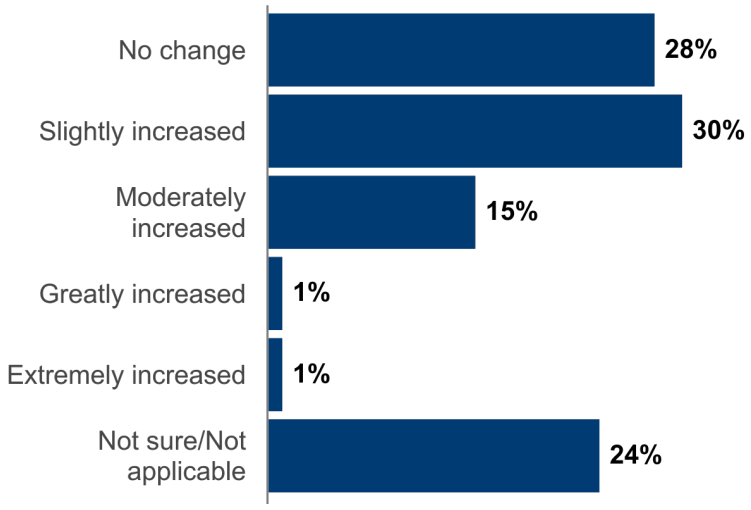


DATA-INFORMED APPROACHES AND AI'S IMPACT

Very few CTOs (2 percent) report that their institution's use of AI has greatly or extremely increased its carbon footprint and electricity use. Nearly half say it's slightly (30 percent) or moderately (15 percent) increased. About a quarter each report no change (28 percent) and being unsure how energy use has been affected (24 percent).

Just 15 percent of CTOs say their institution uses data-informed approaches to reduce or optimize technology-related energy use. Those who do are more likely than those who don't to say AI use has increased their institution's carbon footprint/energy use at least slightly, at 81 percent versus 41 percent, respectively. This could be attributable, in part, to their increased awareness of this issue.

CTOs on how their institution's use of AI has impacted its carbon footprint/electricity use:

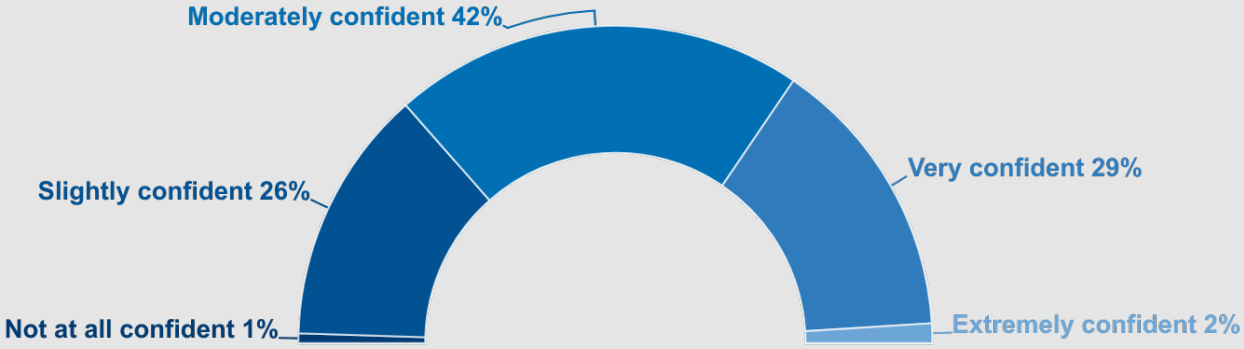


CYBERSECURITY

CONFIDENCE IN PRACTICES

Three in 10 CTOs are very (29 percent) or extremely (2 percent) confident that their institution's practices can prevent cyberattacks that could compromise data or intellectual property, or lead to a ransomware event. The plurality (42 percent) are moderately confident and a quarter (26 percent) are slightly confident.

CTOs' level of confidence that their institution's practices can prevent cyberattacks that could compromise data or intellectual property or lead to a ransomware event:



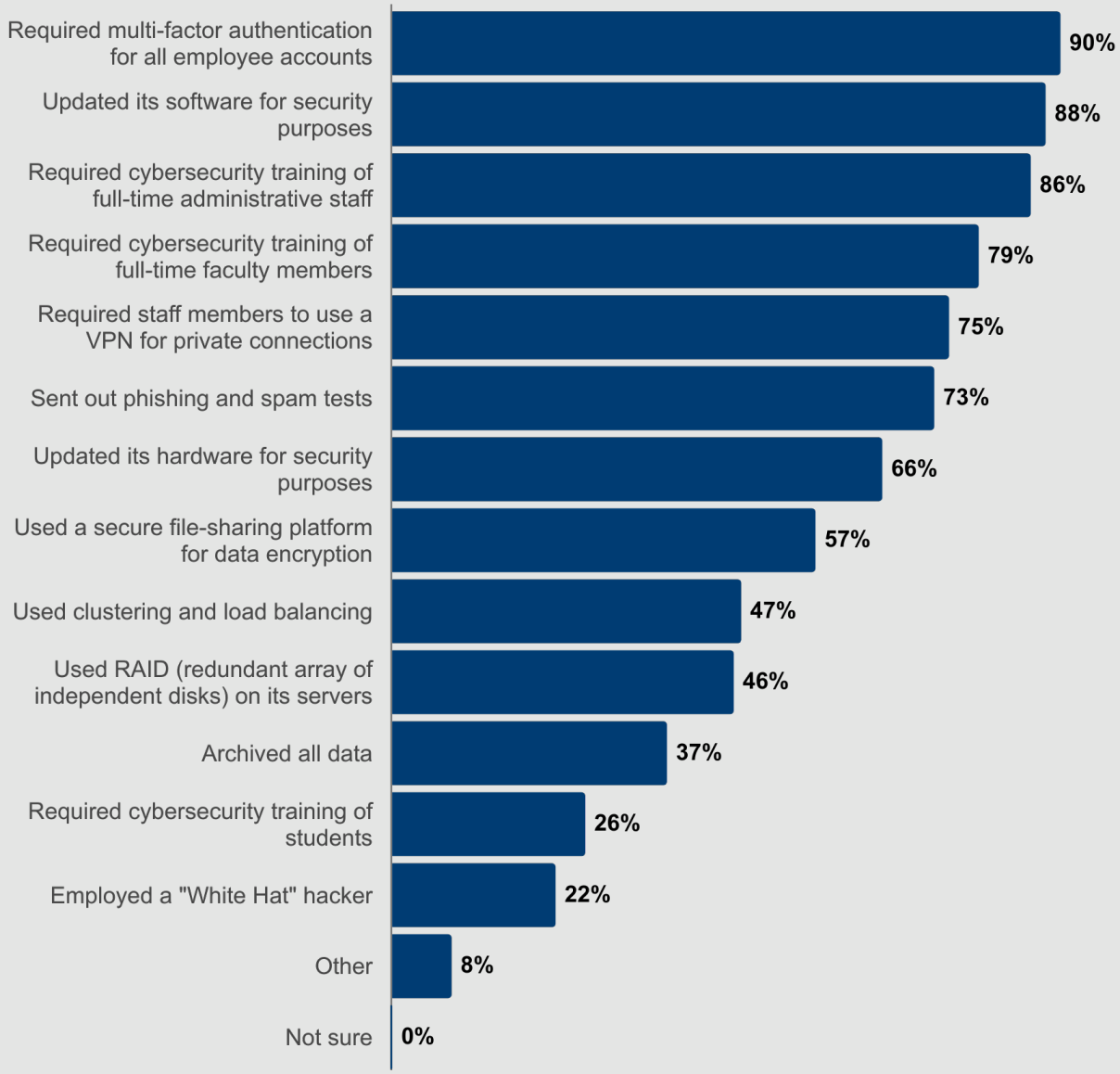
CYBERSECURITY

ACTIONS TAKEN

Within the last 12 months, the most common actions taken to ensure respondent institution's cybersecurity practices are requiring multi-factor authentication for all employee accounts (90 percent), updating software for security purposes (88 percent) and requiring cybersecurity training of full-time administrative staff (86 percent).

Nearly eight in 10 CTOs (79 percent) report their institution also required cybersecurity training of full-time faculty members. But just 26 percent required cybersecurity training of students, up only slightly from last year's 18 percent.

CTOs who say their institution has taken the following actions to improve its cybersecurity practices within the last year, selecting all that apply:



PERSONNEL ISSUES

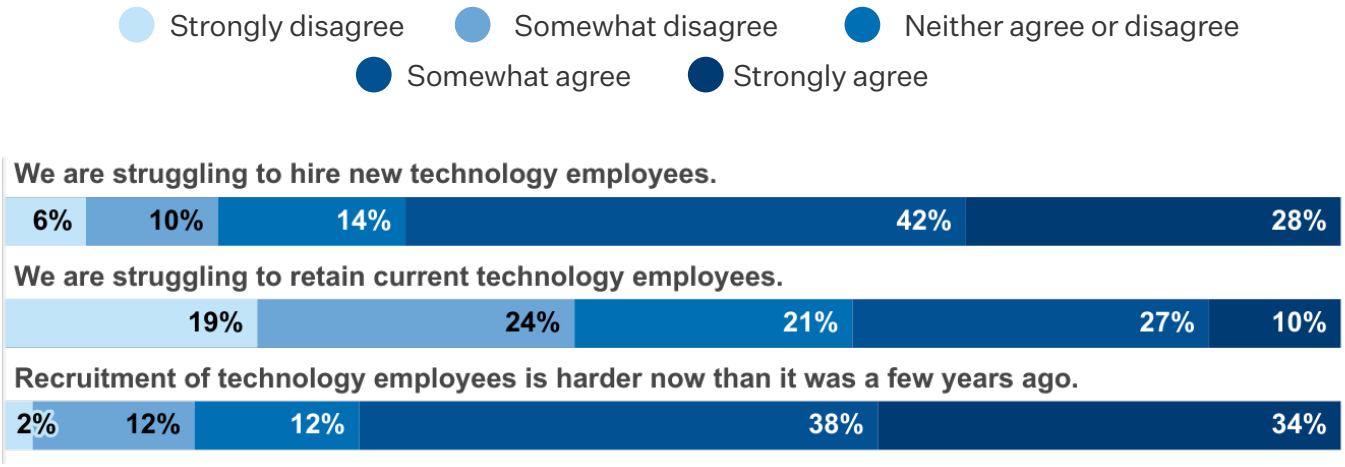
EMPLOYEE RECRUITMENT AND RETENTION

Seven in 10 CTOs (70 percent) somewhat or strongly agree that their institution is struggling to hire new technology employees, nearly the same as last year (68 percent). A significant share, 37 percent, also say their institution is struggling to retain current technology employees—like last year's 40 percent.

Recruitment and retention concerns appear especially acute at private nonprofit colleges and universities: Some 78 percent of CTOs at these institutions this year report struggling to hire new technology employees, compared to 58 percent of public institution CTOs.

Most CTOs also explicitly agree, somewhat (38 percent) or strongly (34 percent), that recruitment of technology employees is harder now than it was a few years ago. By sector, private nonprofit CTOs are

CTOs indicate their level of agreement with the following statements about recruiting and retaining technology employees at their college or university:



As for what's driving these numbers, CTOs struggling with recruitment and/or retention in any way (n=69) are relatively unlikely to blame increased job opportunities elsewhere for employees with AI skills, with just 13 percent citing this from a list of possible options. The top reported driver is a usual suspect for higher ed: better salaries and/or benefits at other organizations outside higher education, at 84 percent. Better salaries and/or benefits at other organizations within higher education (57 percent) and insufficient institutional investment in IT (43 percent) also matter. Remote work opportunities elsewhere factor in, as well, but few CTOs point to factors such as lack of meaningful impact of employees' work (9 percent) or doubts about the institution's commitment to its mission (6 percent).

DIGITAL TRANSFORMATION

PRIORITIES AND GOALS

Asked about priority areas for digital transformation at their institution, student-centered functions top a list of options, with 68 percent saying that leveraging data for student success is a high or essential priority, followed by teaching and learning (59 percent)

Fewer CTOs report that AI (37 percent) and libraries (14 percent) are high priority or essential areas for digital transformation.

Relatively more CTOs at public institutions rank student services as a high or essential priority area for digital transformation than do private nonprofit CTOs, at 69 percent versus 43 percent, respectively.

CTOs on how their institution prioritizes these areas in digital transformation efforts:

	Not a priority	Low priority	Medium priority	High priority	Essential
Administrative/business processes	2%	6%	40%	26%	26%
Artificial intelligence	9%	27%	28%	24%	13%
Data/student success	3%	7%	23%	32%	35%
Libraries	12%	35%	38%	9%	5%
Moving to the cloud	7%	12%	33%	27%	21%
Student services	1%	10%	35%	32%	22%
Teaching and learning	2%	8%	32%	33%	26%

PRIORITIES AND GOALS (Cont.)

About four in 10 CTOs (39 percent) say their institution has set specific goals for digital transformation. Of those (n=41), just over half say they've made moderate progress. Most of the rest have made significant progress.

Numbers to know: Digital transformation

39%

CTOs (all) who say their institution has set specific goals for digital transformation

0%

CTOs with institutional transformation goals (n=41) who say their college has made a complete transformation

53%

CTOs with institutional transformation goals (n=41) who say it will take three or more years to make progress on the most pressing remaining objectives

63%

CTOs with institutional transformation goals (n=41) who say insufficient number of IT personnel is a major hindrance to progress

How long it will take those institutions with transformation goals to make progress on their most pressing objectives? Most say two years (34 percent) or three years (41 percent). Top reported barriers to meeting these goals are insufficient number of IT personnel, insufficient financial investment and data quality and/or integration issues, with more than half the group citing each of these reasons. Few cite senior administrator resistance (7 percent) but more blame faculty and staff resistance (44 percent).

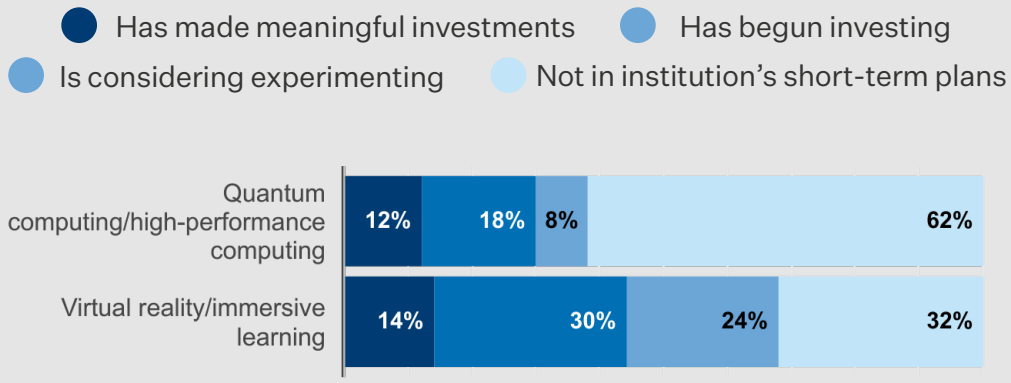
INVESTMENT IN EMERGING TECHNOLOGIES

Just 12 percent of CTOs say their institution has made meaningful investments in quantum computing/high-performance computing, though another 18 percent say the institution has begun investing. Those numbers are comparable to last year's (15 percent and 16 percent, respectively).

On virtual reality and immersive learning, 14 percent of CTOs report meaningful investments, with another 30 percent reporting initial investments. The numbers are similar to last year's, as well.

Public institutions appear to lead on both fronts in 2025, by sector, with 41 percent of public institutions CTOs reporting meaningful or initial investments in quantum computing and 58 percent reporting some level of investment in virtual reality/immersive learning. For private nonprofit CTOs, that's 24 percent and 37 percent, respectively.

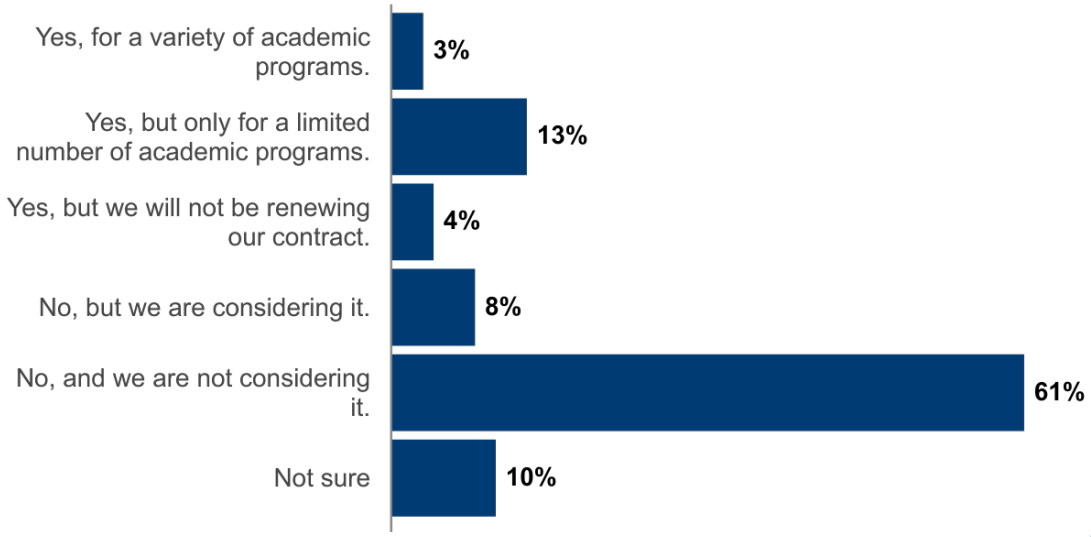
CTOs indicate their institution's level of investment in/ experimentation with these newer technologies:



OPMs

The market for online program managers (OPMs) has contracted significantly within the last few years, which may be reflected in the survey data: Six in 10 CTOs (61 percent) say their institution has not partnered with an OPM and is not considering it. Some 8 percent say the institution doesn't have an OPM partnership but is considering the idea. Others report partnerships for a variety of academic programs (3 percent) or for a limited number of academic programs (13 percent). An additional 4 percent report partnerships but indicate their institution won't be renewing the contract.

CTOs on whether/how their institution has partnered with an OPM:



ONLINE LEARNING: QUALITY AND DEMAND

Three in five CTOs (59 percent) express some or strong confidence in the quality of their institution's online and/or hybrid course and program offerings. Half (49 percent) somewhat or strongly agree that student demand for online and/or hybrid course options has substantially increased in the last year, while two in five CTOs (41 percent) indicate that their institution has added a substantial number of new online and/or hybrid course options over the same period.

Public institutions may be more responsive to increased student demand for online and hybrid options, with 59 percent of public CTOs indicating their college has added a significant number of new offerings in the last year, compared to 29 percent of private nonprofit CTOs.

Numbers to know: Online learning

59%

CTOs who express some or strong confidence in the quality of their institution's online and/or hybrid course and program offerings

49%

CTOs who somewhat or strongly agree that student demand for online and/or hybrid course options has substantially increased since last year at their institution

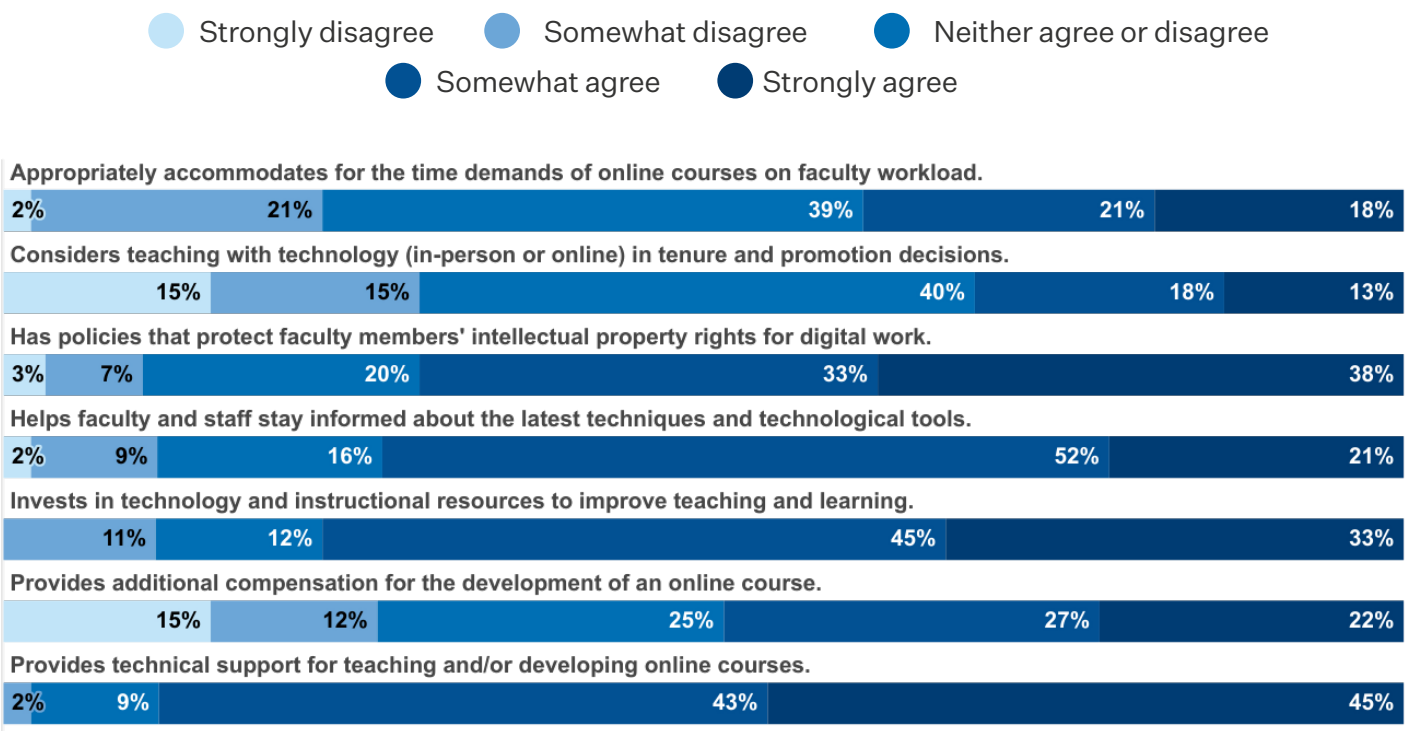
59% vs. 29%

Public versus private nonprofit college CTOs who somewhat or strongly agree their institution has substantially increased online and/or hybrid course options in the last year

SUPPORT FOR TEACHING WITH TECHNOLOGY

Most CTOs somewhat or strongly agree that their institution provides technical support for teaching and/or developing online courses (88 percent); invests in technology and instructional resources to improve teaching and learning (77 percent); helps faculty and staff stay informed about the latest techniques and technological tools (73 percent); and has policies protecting faculty members' intellectual property rights for digital work (71 percent). Similar to last year's survey, however, CTOs are less likely to report their institution provides nontechnical support in this vein, such as additional compensation for the development of online courses (49 percent), or that it considers teaching with technology (in-person or online) in tenure and promotion decisions (31 percent).

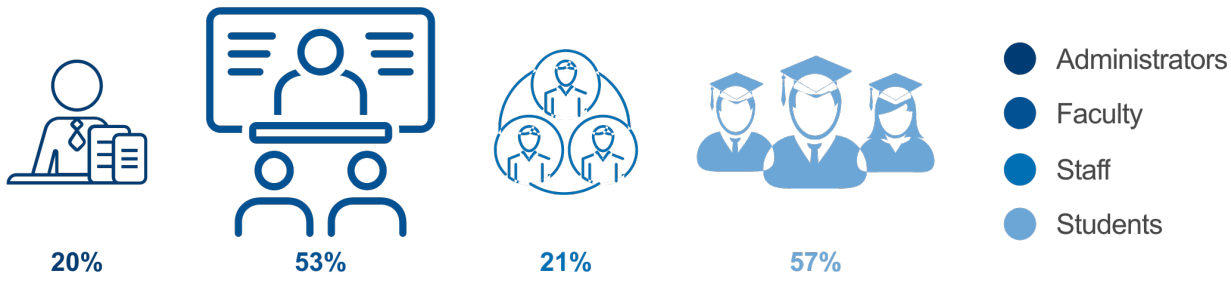
CTOs indicate their level of agreement with the following statements about how their institution supports teaching with technology. The institution:



USE AND QUALITY OF LMS

Asked how effectively various campus groups leverage their institution's learning management system to promote student success, around half of CTOs say that students (57 percent) and faculty (53 percent) do this very or extremely effectively. Ratings are lower for staff and administrators, at 21 percent and 20 percent, respectively. Public institution CTOs are especially likely to say that the faculty at their institution is highly effective at leveraging the LMS for student success, at 67 percent versus 43 percent for private nonprofit CTOs. Taken as a whole, the responses hint that CTOs believe the LMS could be more effectively harnessed for student success.

CTOs who say the following groups are very or extremely effective at leveraging their institution's LMS to promote student success:



Some 91 percent of CTOs also rate their institution's LMS good or excellent in terms of quality.

TECHNOLOGY INFRASTRUCTURE

Beyond the LMS, most CTOs (83 percent) rate the quality of their institution's IT and digital resources to support teaching and learning as good or excellent.

Other highly rated infrastructure elements include WiFi/wireless networks (94 percent); computer networks and data communication (93 percent); and IT security (89 percent).

On accessibility for users with disabilities, 66 percent of CTOs rate their IT resources and services good or excellent. Some 64 percent rate the student portal good or excellent.

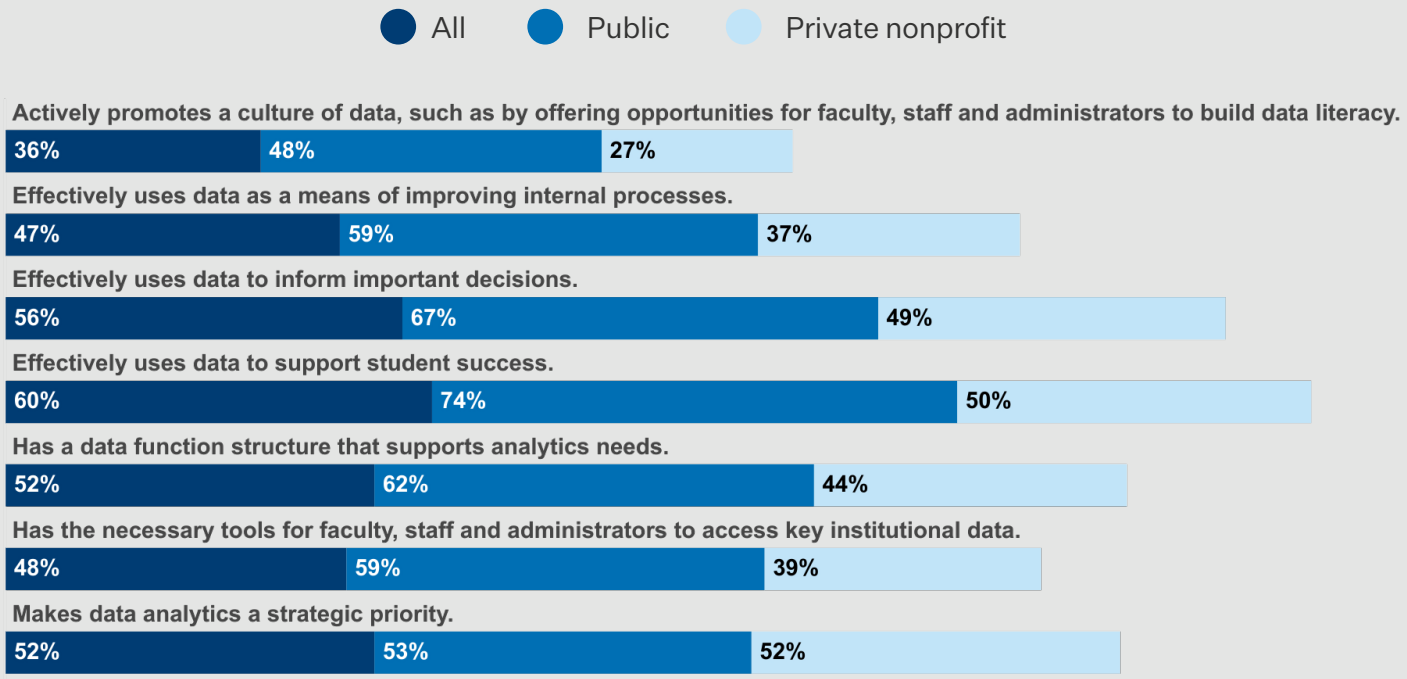
The clearest areas of opportunity exist around mobile apps and services for students, faculty and staff, as well as IT training for students, with 41 percent of CTOs rating the former good or excellent and the latter, 26 percent.

DATA AND ANALYTICS

HARNESSING DATA

CTOs are lukewarm on how well their institution uses data. Roughly half each somewhat or strongly agree that their college effectively uses data to support student success (60 percent); effectively uses data to inform important decisions (56 percent); has a data function structure that supports analytics needs (52 percent); and makes data analytics a strategic priority (52 percent). Fewer CTOs agree that their institution does things to actively promote a culture of data (36 percent). Public institution CTOs are generally more likely than their nonprofit private peers to approve of how their institution harnesses data, including whether it effectively uses data to support student success (74 percent versus 50 percent, respectively).

CTOs who somewhat or strongly agree with the following statements on data analytics and data readiness. Their institution:

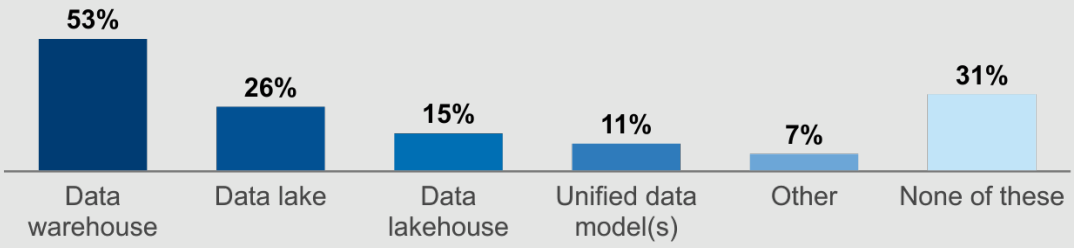


DATA STORAGE

As for where and how institutions store their data—all with implications for accessibility and data-sharing—half of CTOs (53 percent) report having a data warehouse. Another quarter (26 percent) reporting have a data lake. Just 11 percent report having unified data models. Public institution CTOs are more likely than private nonprofit peers to report having a data warehouse, at 65 percent versus 46 percent, respectively.

CTOs who report having a data lakehouse at their institution are most likely to agree that their college makes data analytics a strategic priority (85 percent).

CTOs who indicate their institution has the following for storage and/or use of institutional data, selecting all that apply:



Which of the following best describes your primary role at your institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Chief Technology Officer	14	12	13	17	20	0	27	5
% Chief Information Officer	77	76	79	70	60	93	64	88
% Chief Digital Officer	2	2	2	0	0	7	0	2
% Other senior technology or information officer	7	10	6	13	20	0	9	5
% None of the above	0	0	0	0	0	0	0	0

To whom do you report at your institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% President/Chancellor/Chief Executive Officer	36	45	29	57	20	36	27	29
% Provost/Chief Academic Officer	10	14	8	4	20	29	14	5
% Executive Vice President/Chief Operating Officer/Chief Financial Officer	47	33	57	30	40	36	45	63
% I report to more than one of the roles above.	3	0	5	0	0	0	9	2
% Other	4	7	2	9	20	0	5	0

How many years have you served in your current role at this institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Less than 6 months	2	2	2	4	0	0	0	2
% 6 months to less than 3 years	23	29	21	26	40	29	18	22
% 3 years to less than 5 years	19	29	13	30	20	29	14	12
% 5 years to less than 10 years	23	14	30	9	20	21	23	34
% 10 or more years	33	26	35	30	20	21	45	29

How many years have you worked at any higher education institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Less than 6 months	0	0	0	0	0	0	0	0
% 6 months to less than 3 years	4	5	3	9	0	0	5	2
% 3 years to less than 5 years	0	0	0	0	0	0	0	0
% 5 years to less than 10 years	6	7	6	9	0	7	9	5
% 10 or more years	90	88	90	83	100	93	86	93

What type of higher education institution do you work for?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Public (four year)	18	45	0	0	100	100	0	0
% Private (four year)	57	0	97	0	0	0	100	95
% Community college	20	52	0	96	0	0	0	0
% Private (two year)	2	0	2	0	0	0	0	2
% For-profit institution	1	0	0	0	0	0	0	0
% Graduate-only institution	2	2	2	4	0	0	0	2

What is the current total student population of your institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Less than 1,000	4	0	6	0	0	0	14	2
% 1,000-5,000	55	29	70	48	20	0	86	61
% 5,001-10,000	17	26	11	22	60	21	0	17
% 10,001-20,000	14	19	11	22	0	21	0	17
% 20,001-50,000	6	14	2	9	0	29	0	2
% More than 50,000	5	12	0	0	20	29	0	0

Are you on the president's/chancellor's executive cabinet or council at your institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Yes	59	64	56	78	20	57	55	56
% No	41	36	44	22	80	43	45	44

To what degree does your institution's leadership team leverage your knowledge and insights to inform strategic decisions and planning involving technology?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Not at All	6	5	8	4	20	0	5	10
% Somewhat	13	10	16	4	20	14	9	20
% Moderately	28	31	27	39	0	29	27	27
% Very much	53	55	49	52	60	57	59	44

To what extent do you agree or disagree with the following statements:								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
I enjoy being a CIO/CTO.								
% Strongly Disagree	3	0	3	0	0	0	0	5
% Somewhat Disagree	3	5	2	0	20	7	0	2
% Neither Agree nor Disagree	7	10	6	17	0	0	0	10
% Somewhat Agree	16	19	14	17	20	21	14	15
% Strongly Agree	71	67	75	65	60	71	86	68
I would encourage mentees to become a CIO or CTO.								
% Strongly Disagree	4	2	3	0	0	7	0	5
% Somewhat Disagree	0	0	0	0	0	0	0	0
% Neither Agree nor Disagree	15	14	16	22	0	7	14	17
% Somewhat Agree	28	29	29	30	60	14	36	24
% Strongly Agree	54	55	52	48	40	71	50	54

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
Legacy infrastructure is hampering my institution's ability to be innovative when it comes to technology needs.								
% Strongly Disagree	7	12	5	13	20	7	5	5
% Somewhat Disagree	23	21	24	17	0	36	18	27
% Neither Agree nor Disagree	9	10	8	9	0	14	5	10
% Somewhat Agree	33	31	37	26	40	36	32	39
% Strongly Agree	27	26	27	35	40	7	41	20
Our central IT department has found effective ways to reach out and partner with other areas of the institution.								
% Strongly Disagree	3	0	3	0	0	0	0	5
% Somewhat Disagree	5	5	5	4	20	0	5	5
% Neither Agree nor Disagree	3	2	3	0	0	7	0	5
% Somewhat Agree	41	43	41	61	40	14	50	37
% Strongly Agree	49	50	48	35	40	79	45	49
Our central IT department is siloed relative to other parts of the institution in ways that limit our potential impact.								
% Strongly Disagree	30	31	29	35	20	29	27	29
% Somewhat Disagree	32	36	30	35	0	50	41	24
% Neither Agree nor Disagree	12	10	14	9	20	7	9	17
% Somewhat Agree	18	17	17	13	40	14	14	20
% Strongly Agree	8	7	10	9	20	0	9	10

What was the total budget for central information technology operations and services (e.g., personnel, equipment, operations, projects, software) at your institution for 2024–25?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Less than 1 million dollars	7	10	3	17	0	0	0	5
% Between 1 and 5 million dollars	51	48	54	74	40	7	86	37
% Between 5 and 10 million dollars	14	5	21	0	20	7	9	27
% Between 10 and 15 million dollars	6	10	5	4	20	14	5	5
% Between 15 and 20 million dollars	6	2	8	0	0	7	0	12
% Between 20 and 50 million dollars	10	17	6	4	0	43	0	10
% More than 50 million dollars	6	10	3	0	20	21	0	5

Year over year, did your institution's central IT budget...	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% ...increase?	38	38	35	39	40	36	36	34
% ...stay approximately the same?	42	43	43	52	40	29	45	41
% ...decrease?	20	19	22	9	20	36	18	24

How would you rate the effectiveness of your institution's investment over the past decade in IT resources and services in the following areas?	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
Academic support services (including advising and online student resources)								
% Not at all effective	2	0	3	0	0	0	0	5
% Slightly effective	14	10	17	19	0	0	19	16
% Moderately effective	43	46	42	52	75	29	48	39
% Very effective	33	33	34	19	25	57	33	34
% Extremely effective	8	10	3	10	0	14	0	5
Administrative information systems and operations								
% Not at all effective	3	2	3	4	0	0	5	3
% Slightly effective	13	5	20	0	25	7	14	23
% Moderately effective	34	29	39	35	25	21	32	44
% Very effective	31	44	25	43	25	50	36	18
% Extremely effective	18	20	13	17	25	21	14	13
Alumni activities/engagement								
% Not at all effective	8	16	4	33	0	0	5	3
% Slightly effective	26	29	25	33	25	25	29	23
% Moderately effective	37	26	43	13	25	42	33	49
% Very effective	21	23	21	20	50	17	29	17
% Extremely effective	8	6	7	0	0	17	5	9

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
Artificial intelligence								
% Not at all effective	23	17	28	26	25	0	14	33
% Slightly effective	33	28	38	37	25	15	64	27
% Moderately effective	29	33	26	26	25	46	21	27
% Very effective	15	22	9	11	25	38	0	12
% Extremely effective	0	0	0	0	0	0	0	0
Data analysis and learning/managerial analytics								
% Not at all effective	6	3	8	0	25	0	5	11
% Slightly effective	24	15	31	14	0	21	29	32
% Moderately effective	31	33	31	45	25	14	43	24
% Very effective	29	38	24	32	50	43	19	26
% Extremely effective	10	13	7	9	0	21	5	8
Development efforts								
% Not at all effective	5	6	5	5	0	8	5	6
% Slightly effective	18	19	18	32	0	8	14	20
% Moderately effective	43	42	45	32	50	54	29	54
% Very effective	27	28	27	26	50	23	48	14
% Extremely effective	6	6	5	5	0	8	5	6
Instructional support services for faculty								
% Not at all effective	2	3	2	5	0	0	0	3
% Slightly effective	12	3	19	5	0	0	19	18
% Moderately effective	34	45	29	55	50	29	24	32
% Very effective	36	35	37	23	50	50	29	42
% Extremely effective	16	15	14	14	0	21	29	5
Library resources and services								
% Not at all effective	3	6	2	5	0	8	0	3
% Slightly effective	15	17	14	21	0	15	5	20
% Moderately effective	34	44	29	47	50	38	24	31
% Very effective	37	25	46	26	25	23	52	43
% Extremely effective	11	8	9	0	25	15	19	3

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
On-campus teaching and instruction								
% Not at all effective	0	0	0	0	0	0	0	0
% Slightly effective	8	5	10	4	25	0	5	14
% Moderately effective	29	39	24	48	50	21	19	27
% Very effective	43	37	48	35	25	43	52	46
% Extremely effective	20	20	17	13	0	36	24	14
Online courses and programs								
% Not at all effective	1	3	0	0	0	7	0	0
% Slightly effective	14	10	18	5	25	14	18	18
% Moderately effective	33	33	35	32	50	29	27	37
% Very effective	36	40	35	45	25	36	45	32
% Extremely effective	15	15	12	18	0	14	9	13
Research and scholarship								
% Not at all effective	2	3	2	8	0	0	5	0
% Slightly effective	24	23	25	33	25	14	20	29
% Moderately effective	41	23	53	17	25	29	60	48
% Very effective	22	30	16	42	25	21	5	23
% Extremely effective	11	20	4	0	25	36	10	0
Student financial assistance								
% Not at all effective	1	0	2	0	0	0	0	3
% Slightly effective	8	3	12	0	0	7	15	11
% Moderately effective	40	44	40	52	50	29	35	43
% Very effective	35	44	30	43	50	43	35	27
% Extremely effective	15	10	16	5	0	21	15	16
Student recruitment								
% Not at all effective	0	0	0	0	0	0	0	0
% Slightly effective	11	5	15	9	0	0	14	15
% Moderately effective	35	34	37	48	0	21	24	44
% Very effective	37	49	30	39	100	50	38	26
% Extremely effective	18	12	18	4	0	29	24	15

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
Student services								
% Not at all effective	1	0	2	0	0	0	0	3
% Slightly effective	8	0	14	0	0	0	20	11
% Moderately effective	50	50	52	55	25	50	50	53
% Very effective	36	45	29	41	75	43	30	29
% Extremely effective	6	5	3	5	0	7	0	5
Student success/ student completion initiatives								
% Not at all effective	3	0	5	0	0	0	5	5
% Slightly effective	14	10	18	17	0	0	21	16
% Moderately effective	50	51	51	48	75	50	47	53
% Very effective	28	32	26	30	25	36	26	26
% Extremely effective	5	7	0	4	0	14	0	0

How much of a priority are the following focal areas in terms of digital transformation efforts at your institution?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
Administrative/business process								
% Not a priority	2	0	3	0	0	0	0	5
% Low priority	6	5	7	4	25	0	5	8
% Medium priority	40	44	38	43	50	43	36	39
% High priority	26	29	25	35	0	29	27	24
% Essential	26	22	27	17	25	29	32	24
Artificial intelligence								
% Not a priority	9	10	8	13	0	7	0	13
% Low priority	27	27	27	39	50	0	41	18
% Medium priority	28	20	35	22	0	21	45	29
% High priority	24	29	20	17	50	43	9	26
% Essential	13	15	10	9	0	29	5	13
Data/student success								
% Not a priority	3	0	5	0	0	0	0	8
% Low priority	7	2	10	0	0	7	14	8
% Medium priority	23	22	23	26	25	14	23	23
% High priority	32	37	31	43	25	29	36	28
% Essential	35	39	31	30	50	50	27	33

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
Libraries								
% Not a priority	12	15	9	19	0	14	5	11
% Low priority	35	31	40	33	25	29	38	42
% Medium priority	38	41	39	38	50	43	38	39
% High priority	9	8	11	10	25	0	14	8
% Essential	5	5	2	0	0	14	5	0
Moving to the cloud								
% Not a priority	7	7	7	4	0	14	5	8
% Low priority	12	12	11	13	25	7	9	13
% Medium priority	33	34	34	35	50	29	32	36
% High priority	27	27	26	35	25	14	36	21
% Essential	21	20	21	13	0	36	18	23
Student services								
% Not a priority	1	0	2	0	0	0	0	3
% Low priority	10	3	15	5	0	0	23	10
% Medium priority	35	28	41	33	25	21	36	44
% High priority	32	41	26	43	0	50	23	28
% Essential	22	28	16	19	75	29	18	15
Teaching and learning								
% Not a priority	2	0	3	0	0	0	0	5
% Low priority	8	5	10	4	0	7	14	8
% Medium priority	32	29	35	35	25	21	32	37
% High priority	33	29	37	30	0	36	32	39
% Essential	26	37	15	30	75	36	23	11

Has your institution set specific goals for digital transformation?

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Yes	39	44	34	35	25	64	41	31
% No	61	56	66	65	75	36	59	69

How much progress has your institution already made toward its digital transformation goals?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% No progress	0	0	0	0	0	0	0	0
% Minimal progress	7	6	10	0	0	11	22	0
% Moderate progress	54	50	62	50	100	44	33	83
% Significant progress	39	44	29	50	0	44	44	17
% Complete transformation	0	0	0	0	0	0	0	0

How long will it take to make progress on the most pressing remaining goals?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Less than a year	0	0	0	0	0	0	0	0
% 1 year	12	11	10	0	0	22	22	0
% 2 years	34	50	19	63	0	44	22	17
% 3 years	41	33	52	38	100	22	56	50
% 4 years	2	0	5	0	0	0	0	8
% 5 or more years	10	6	14	0	0	11	0	25

What are your institution's biggest challenges when it comes to achieving its digital transformation goals? Please select all that apply.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Resistance among staff and faculty	44	44	43	50	0	44	44	42
% Goals that are incomplete or ineffective	15	17	14	25	100	0	22	8
% Insufficient financial investment	56	50	67	38	100	56	78	58
% Insufficient number of IT personnel	63	61	67	50	0	78	67	67
% Lack of centralized coordination	0	0	0	0	0	0	0	0
% Other	15	6	24	0	0	11	33	17
% My institution does not face any challenges in completing our digital goals.	2	0	5	0	0	0	0	8
% Lack of centralized coordination/siloed systems	27	22	29	38	0	11	33	25
% Data quality and/or integration issues	51	39	62	38	100	33	67	58
% Resistance among senior leadership	7	11	5	13	0	11	0	8

Which of the following best describes your institution's experimentation/ investment in these new technologies?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
Quantum computing/high performance computing								
% We've made meaningful investments.	12	13	12	5	25	21	5	17
% We've begun investing.	18	28	12	18	0	50	23	6
% We're considering experimenting.	8	8	7	5	0	14	5	8
% It's not in our short-term plans.	62	53	69	73	75	14	68	69
Virtual reality/immersive learning								
% We've made meaningful investments.	14	13	15	14	0	14	5	22
% We've begun investing.	30	45	22	45	75	36	23	22
% We're considering experimenting.	24	28	20	27	0	36	18	22
% It's not in our short-term plans.	32	15	42	14	25	14	55	35

As it stands, how much of a priority is investing in the following kinds of artificial intelligence for your institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
AI Agents								
% Not a Priority	17	12	20	17	0	7	18	21
% Low Priority	23	24	23	39	25	0	23	24
% Medium Priority	32	29	33	30	0	36	32	34
% High Priority	24	32	18	9	75	57	23	16
% Essential	4	2	5	4	0	0	5	5
Generative AI								
% Not a Priority	16	15	17	22	0	7	14	18
% Low Priority	18	17	20	22	50	0	27	16
% Medium Priority	32	34	30	35	0	43	36	26
% High Priority	24	22	25	13	50	29	18	29
% Essential	10	12	8	9	0	21	5	11
Predictive AI								
% Not a Priority	18	15	21	17	25	7	19	22
% Low Priority	22	22	21	35	0	7	19	22
% Medium Priority	37	41	34	35	75	43	48	27
% High Priority	19	17	19	13	0	29	14	22
% Essential	5	5	5	0	0	14	0	8

Based on your experience so far, how do you perceive the overall impact of artificial intelligence on higher education?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Very negative	1	2	0	4	0	0	0	0
% Negative	8	7	8	9	0	7	9	8
% Neither negative nor positive	38	29	44	39	50	7	50	41
% Positive	45	49	41	35	25	79	36	44
% Very positive	9	12	7	13	25	7	5	8

Please indicate how much you disagree or agree with the following statements related to higher education and AI:								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
Effective channels exist between IT and academic affairs to communicate and collaborate on AI policy and other key issues.								
% Strongly disagree	6	7	5	4	0	14	0	8
% Somewhat disagree	12	7	15	13	0	0	14	16
% Neither agree nor disagree	16	17	17	22	0	14	14	18
% Somewhat agree	35	27	38	26	50	21	36	39
% Strongly agree	32	41	25	35	50	50	36	18
Higher education is handling the rise of AI adeptly.								
% Strongly disagree	11	15	8	13	0	21	9	8
% Somewhat disagree	32	37	27	43	25	29	32	24
% Neither agree nor disagree	38	32	44	30	75	21	41	46
% Somewhat agree	17	15	19	9	0	29	18	19
% Strongly agree	2	2	2	4	0	0	0	3
My institution is handling the rise of AI adeptly.								
% Strongly disagree	13	17	12	22	0	14	5	16
% Somewhat disagree	25	24	27	35	25	7	41	18
% Neither agree nor disagree	27	10	37	9	0	14	36	37
% Somewhat agree	33	46	23	30	75	64	18	26
% Strongly agree	2	2	2	4	0	0	0	3
My institution is substantially more reliant on AI than it was a year ago.								
% Strongly disagree	17	15	17	18	0	14	14	19
% Somewhat disagree	24	18	29	27	0	7	45	19
% Neither agree nor disagree	27	30	27	32	50	21	23	30
% Somewhat agree	29	33	25	18	50	50	18	30
% Strongly agree	3	5	2	5	0	7	0	3
Senior leaders at my institution are engaged in discussions around AI and think it's important.								
% Strongly disagree	4	2	5	4	0	0	0	8
% Somewhat disagree	19	15	22	17	0	14	32	16
% Neither agree nor disagree	14	7	17	13	0	0	23	14
% Somewhat agree	37	46	32	43	75	43	32	32
% Strongly agree	26	29	24	22	25	43	14	30

In what areas or ways is your institution currently using artificial intelligence? Please select all that apply.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Admissions processes	21	24	20	23	33	23	19	21
% Student advising and support	18	24	14	9	0	54	5	18
% Learning Management Systems (LMS)	27	32	24	32	0	38	14	29
% Research and data analysis	39	37	41	27	0	62	33	45
% Virtual chat assistants and chatbots	49	68	37	73	33	69	24	45
% Predictive analytics to predict student performance and trends	26	32	24	18	33	54	19	26
% Administration processes (e.g., scheduling, resource allocation)	21	26	19	14	0	54	24	16
% Cybersecurity	51	61	46	55	33	77	62	37
% Grading and assessment	13	16	12	18	0	15	5	16
% Institutional planning and decision-making	12	16	10	9	0	31	10	11
% Facilities management	4	5	3	0	33	8	5	3
% Student engagement	17	26	10	23	0	38	14	8
% Personalized learning pathways	7	5	8	5	0	8	0	13
% Fundraising	12	11	14	5	0	23	24	8
% Other	9	3	14	0	0	8	19	11
% None of the above—my institution does not currently utilize AI.	13	3	19	5	0	0	14	21
% Tutoring	9	16	5	14	33	15	0	8
% Alumni engagement	11	13	10	9	0	23	14	8
% Career services	8	11	7	9	0	15	10	5

Does your institution provide students with access to generative AI tools? Please select all that apply.	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Yes, through an institution-wide license	27	42	19	36	33	54	24	16
% Yes, but access is limited to specific programs or departments	13	0	22	0	0	0	19	24
% Yes, through a custom-built generative AI tool	5	3	7	0	0	8	5	8
% No, but we are considering it	36	34	36	36	33	31	33	37
% No, and we are not considering it	15	13	15	18	0	8	19	13
% Don't know/Not applicable	4	8	2	9	33	0	0	3

How is your institution managing the costs of these generative AI tools (n=45)?	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% They are covered by the central IT budget.	49	76	32	88	100	63	30	33
% They are funded by individual departments.	16	6	21	13	0	0	20	22
% Costs are passed on to students (e.g., through fees).	2	0	4	0	0	0	0	6
% There are no associated costs.	24	12	32	0	0	25	40	28
% Other	9	6	11	0	0	13	10	11
% Don't know/Not applicable	0	0	0	0	0	0	0	0

What are the primary reasons your institution is not providing access to generative AI tools for students (n=51)? Please select all that apply.	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Concerns about costs	63	56	73	42	100	80	64	79
% Concerns about data privacy and/or security	45	33	57	25	0	60	45	63
% Lack of institutional need or demand	29	22	30	25	0	20	45	21
% Ethical concerns (e.g., potential misuse, academic integrity)	49	39	60	42	0	40	64	58
% Lack of technical expertise or resources to manage implementation	29	44	20	50	0	40	18	21
% Other	10	0	13	0	0	0	27	5
% Don't know/Not applicable	0	0	0	0	0	0	0	0

Which of the following measures has your institution taken to address potential security risks associated with the use of AI models? Please select all that apply. My institution...	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% ...has a comprehensive policy or policies overseeing AI security ethics.	17	13	20	0	33	31	29	16
% ...has a dedicated team overseeing AI security.	8	5	10	5	0	8	10	11
% ...has cybersecurity insurance.	83	82	85	82	100	77	95	79
% ...requires vendors who provide AI technology and services to have their cybersecurity risk assessed.	51	53	51	45	67	62	43	55
% ...requires vendors who provide AI technology and services to have adequate cyber insurance.	31	24	37	18	0	38	33	39
% ...has other measures in place to address potential security risks (please specify):	16	18	15	9	0	38	19	13
% None of the above	11	13	8	14	0	15	0	13

In which of the following areas has your college or university adopted institution-wide formal policies or guidelines for the use of artificial intelligence tools? Please select all that apply.	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Simple administrative tasks (e.g., scheduling and communications inquiries)	25	29	24	9	33	62	33	19
% Advanced administrative tasks (e.g., data analysis, predictive student success modeling, etc.)	21	29	16	9	33	62	19	14
% Instructional purposes (e.g., tutoring and content generation)	39	29	47	14	33	54	43	49
% Research assistance	11	13	10	5	0	31	5	14
% Student services	11	13	10	9	0	23	5	14
% Other	4	0	7	0	0	0	19	0
% None of the above	31	37	28	59	0	8	19	32
% General use	42	39	47	14	67	77	57	41

For which of the following areas has your institution developed or purchased artificial intelligence tools? Please select all that apply.	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Simple administrative tasks (e.g., scheduling and communications inquiries)	32	39	29	32	0	62	33	27
% Advanced administrative tasks (e.g., data analysis, predictive student success modeling, etc.)	25	24	24	14	0	46	24	24
% Instructional purposes (e.g., tutoring and content generation)	25	34	19	36	33	31	5	27
% Research assistance	13	11	16	5	0	23	19	14
% Student services	13	21	9	18	0	31	5	11
% Other	8	11	7	9	33	8	10	5
% None of the above	26	18	31	23	33	8	33	30
% General use	42	45	43	32	33	69	43	43

Which of the following best describes your institution's relationship with technology companies when it comes to implementing artificial intelligence? My institution...	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% ...currently has a partnership or partnerships with technology companies to implement artificial intelligence.	27	37	22	18	33	69	19	24
% ...is considering partnering with technology companies to implement artificial intelligence.	20	29	14	36	0	23	10	16
% ...has not considered partnering with technology companies to implement artificial intelligence.	53	34	64	45	67	8	71	59

To what extent is your institution considering using open source artificial intelligence models to develop your own AI technology? My institution...	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% ...is currently building our own technology using open source.	10	8	12	0	33	15	5	16
% ...is considering building our own technology using open source.	16	24	12	27	0	23	19	8
% ...has not considered building our own technology using open source.	74	68	76	73	67	62	76	76

To what extent do you agree or disagree with the following statement: My institution places more emphasis on thinking about AI for individual use cases than thinking about it on the enterprise-scale level.	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Strongly disagree	7	11	3	9	0	15	5	3
% Somewhat disagree	14	16	12	9	33	23	5	16
% Neither agree nor disagree	21	29	17	32	0	31	19	16
% Somewhat agree	35	29	41	32	67	15	52	35
% Strongly agree	18	13	21	14	0	15	19	22
% Not sure	4	3	5	5	0	0	0	8

Does your institution have a comprehensive AI strategy?	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Yes	11	16	9	14	0	23	0	14
% No	85	74	91	82	67	62	100	86
% Not sure	4	11	0	5	33	15	0	0

Does your institution have sustainability goals related to its technology use?	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Yes	34	58	17	64	33	54	29	11
% No	60	37	76	32	33	46	67	81
% Not sure	6	5	7	5	33	0	5	8

To your knowledge, do senior leaders at your institution take the environmental impact of energy/technology use into account when making decisions about technology?	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Yes	19	24	17	18	67	23	24	14
% No	69	66	71	77	0	62	67	73
% Not sure	12	11	12	5	33	15	10	14

To what extent do you believe that your institution's use of AI has increased its carbon footprint and electricity use?	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% No change	28	24	31	27	33	15	19	38
% Slightly increased	30	24	36	27	0	23	57	24
% Moderately increased	15	18	12	5	0	46	14	11
% Greatly increased	1	3	0	5	0	0	0	0
% Extremely increased	1	3	0	0	33	0	0	0
% Not sure/Not applicable	24	29	21	36	33	15	10	27

Does your institution use data-informed approaches to reduce/optimize technology-related energy use?	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Yes	15	21	12	9	0	46	24	5
% No	76	74	78	86	100	46	62	86
% Not sure	9	5	10	5	0	8	14	8

How confident are you that your institution's practices can prevent cyber attacks that could compromise data or intellectual property or lead to a ransomware event?	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Not at all confident	1	0	2	0	0	0	0	3
% Slightly confident	26	24	27	23	67	15	30	25
% Moderately confident	42	42	43	32	33	62	40	44
% Very confident	29	32	29	45	0	15	30	28
% Extremely confident	2	3	0	0	0	8	0	0

Within the last 12 months, which of the following has your institution undertaken to improve its cybersecurity practices? Please select all that apply.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Required cybersecurity training of full-time administrative staff	86	95	82	91	100	100	75	86
% Required cybersecurity training of full-time faculty members	79	84	79	82	100	85	70	83
% Required cybersecurity training of students	26	34	21	27	0	54	20	22
% Updated its software for security purposes	88	84	91	91	33	85	95	89
% Updated its hardware for security purposes	66	68	64	59	67	85	70	61
% Used a secure file-sharing platform for data encryption	57	58	57	45	0	92	60	56
% Required staff members to use a VPN for private connections	75	82	75	77	67	92	80	72
% Employed a "White Hat" hacker	22	18	25	14	0	31	25	25
% Required multi-factor authentication for all employee accounts	90	92	89	91	67	100	90	89
% Sent out phishing and spam tests	73	68	79	64	100	69	70	83
% Archived all data	37	39	36	36	67	38	40	33
% Used clustering and load balancing	47	50	48	32	0	92	45	50
% Used RAID (redundant array of independent disks) on its servers	46	42	50	36	0	62	45	53
% Other	8	8	9	5	33	8	20	3
% Not sure	0	0	0	0	0	0	0	0

To what extent do you agree or disagree with the following statements related to hiring and retention at your institution? My institution is struggling to...	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
...hire new technology employees.								
% Strongly disagree	6	11	4	0	0	31	5	3
% Somewhat disagree	10	18	5	14	0	31	10	3
% Neither agree nor disagree	14	13	13	14	0	15	15	11
% Somewhat agree	42	37	45	45	67	15	45	46
% Strongly agree	28	21	33	27	33	8	25	37
...retain its current technology employees.								
% Strongly disagree	19	21	14	18	0	31	10	17
% Somewhat disagree	24	32	18	27	33	38	25	14
% Neither agree nor disagree	21	18	23	18	0	23	35	17
% Somewhat agree	27	18	34	27	33	0	20	42
% Strongly agree	10	11	11	9	33	8	10	11

To what extent do you agree or disagree with the following statement: Recruitment of technology employees is harder now than it was a few years ago.	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Strongly disagree	2	3	2	5	0	0	0	3
% Somewhat disagree	12	16	7	9	0	31	10	6
% Neither agree nor disagree	12	11	14	0	0	31	15	14
% Somewhat agree	38	42	36	50	67	23	45	31
% Strongly agree	34	26	41	32	33	15	30	47
% Don't know/Not applicable	1	3	0	5	0	0	0	0

Which of the following factors do you believe are responsible for your institution's difficulties retaining or hiring technology employees (n=69)? Please select all that apply.	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Limited remote work options at my institution	30	41	24	38	67	33	14	29
% More flexible remote work policies at other organizations within higher education	25	36	20	31	67	33	21	19
% More flexible remote work policies at other organizations outside of higher education	42	50	40	38	100	67	57	32
% Better salaries and/or benefits at other organizations within higher education	57	64	53	50	100	100	21	68
% Better salaries and/or benefits at other organizations outside higher education	84	86	87	81	100	100	93	84
% Lack of meaningful impact of their work	9	14	7	13	0	33	7	6
% Lack of recognition/appreciation for their work	19	18	18	13	33	33	7	23
% Employees no longer believe my institution is pursuing its mission	6	5	7	6	0	0	7	6
% Lack of work/life balance at my institution and/or excessive workloads	16	27	9	25	33	33	0	13
% Recent reductions in project or team budgets	20	14	24	0	67	33	29	23
% Insufficient investment in IT	43	32	49	19	67	67	43	52
% Increased job market opportunities for employees with AI skills	13	18	11	19	0	33	7	13
% Other	3	9	0	13	0	0	0	0
% Not sure	3	0	4	0	0	0	0	6

As many know, online program managers (OPMs) are for-profit companies that can help colleges and universities create and run online programs. Has your institution partnered with an OPM? Choose the most appropriate response for your situation:	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% No, but we are considering it.	8	11	7	0	33	23	5	8
% No, and we are not considering it.	61	68	57	77	33	62	85	42
% Not sure/don't know.	10	13	9	14	0	15	5	11
% Yes, for a variety of academic programs.	3	3	2	5	0	0	0	3
% Yes, but only for a limited number of academic programs.	13	5	20	5	33	0	5	28
% Yes, but we will not be renewing our contract.	4	0	5	0	0	0	0	8

To what extent do you agree or disagree with the following statements related to digital learning at your institution?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
I am confident in the quality of our online/hybrid course and program offerings.								
% Strongly disagree	5	3	7	5	0	0	8	6
% Somewhat disagree	15	15	16	15	0	17	0	21
% Neither agree nor disagree	21	24	20	30	0	17	17	21
% Somewhat agree	37	38	36	25	50	58	50	30
% Strongly agree	22	21	22	25	50	8	25	21
Student demand for online and/or hybrid course options has substantially increased since last year.								
% Strongly disagree	10	3	13	5	0	0	31	6
% Somewhat disagree	11	3	17	0	0	9	23	15
% Neither agree nor disagree	30	41	24	37	0	55	8	30
% Somewhat agree	30	22	35	16	100	18	31	36
% Strongly agree	20	31	11	42	0	18	8	12
We have added a substantial number of new online/hybrid course options in the last year.								
% Strongly disagree	14	3	22	5	0	0	50	9
% Somewhat disagree	22	18	25	15	0	25	6	34
% Neither agree nor disagree	23	21	24	20	0	25	13	29
% Somewhat agree	28	35	22	25	100	42	13	26
% Strongly agree	14	24	8	35	0	8	19	3

To what extent do you agree or disagree with the following statements about your institution's support for using technology in teaching? My institution...								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
...appropriately accommodates for the time demands of online courses on faculty workload.								
% Strongly disagree	2	0	3	0	0	0	0	4
% Somewhat disagree	21	19	24	18	0	22	27	22
% Neither agree nor disagree	39	41	38	53	100	11	27	43
% Somewhat agree	21	15	24	12	0	22	36	17
% Strongly agree	18	26	12	18	0	44	9	13
...considers teaching with technology (in-person or online) in tenure and promotion decisions.								
% Strongly disagree	15	0	21	0	0	0	21	21
% Somewhat disagree	15	20	12	17	0	29	14	11
% Neither agree nor disagree	40	45	36	50	100	29	14	53
% Somewhat agree	18	10	24	8	0	14	43	11
% Strongly agree	13	25	6	25	0	29	7	5
...has policies that protect faculty members' intellectual property rights for digital work.								
% Strongly disagree	3	4	0	7	0	0	0	0
% Somewhat disagree	7	7	7	7	0	9	11	4
% Neither agree nor disagree	20	21	20	33	50	0	5	30
% Somewhat agree	33	29	37	27	0	36	26	44
% Strongly agree	38	39	37	27	50	55	58	22

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
...helps faculty and staff stay informed about the latest techniques and technological tools.								
% Strongly disagree	2	0	4	0	0	0	0	6
% Somewhat disagree	9	9	8	5	0	17	0	12
% Neither agree nor disagree	16	15	17	20	50	0	15	18
% Somewhat agree	52	44	58	55	0	33	60	58
% Strongly agree	21	32	13	20	50	50	25	6
...invests in technology and instructional resources to improve teaching and learning.								
% Strongly disagree	0	0	0	0	0	0	0	0
% Somewhat disagree	11	6	13	5	0	8	5	18
% Neither agree nor disagree	12	14	11	14	50	8	0	18
% Somewhat agree	45	37	50	43	0	33	55	47
% Strongly agree	33	43	26	38	50	50	40	18
...provides additional compensation for the development of an online course.								
% Strongly disagree	15	12	18	21	0	0	40	9
% Somewhat disagree	12	8	15	7	0	11	20	13
% Neither agree nor disagree	25	24	24	21	50	22	20	26
% Somewhat agree	27	24	27	21	0	33	10	35
% Strongly agree	22	32	15	29	50	33	10	17
...provides technical support for teaching and/or developing online courses.								
% Strongly disagree	0	0	0	0	0	0	0	0
% Somewhat disagree	2	3	2	0	0	8	0	3
% Neither agree nor disagree	9	11	8	14	50	0	0	12
% Somewhat agree	43	29	53	38	0	17	69	45
% Strongly agree	45	57	37	48	50	75	31	39

How effectively do you think the following groups are leveraging your institution's learning management system to promote student success?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
Administrators								
% Not at all effective	24	24	25	25	100	17	42	19
% Slightly effective	20	31	14	38	0	25	0	19
% Moderately effective	37	34	39	25	0	50	33	41
% Very effective	16	3	20	0	0	8	25	19
% Extremely effective	4	7	2	13	0	0	0	3
Faculty								
% Not at all effective	3	0	6	0	0	0	10	3
% Slightly effective	7	12	4	5	50	17	5	3
% Moderately effective	37	21	48	26	0	17	40	53
% Very effective	42	55	33	53	50	58	40	29
% Extremely effective	11	12	9	16	0	8	5	12
Staff								
% Not at all effective	19	19	21	29	100	0	27	19
% Slightly effective	29	37	24	43	0	33	18	26
% Moderately effective	31	30	33	14	0	50	36	32
% Very effective	15	4	19	0	0	8	18	19
% Extremely effective	6	11	2	14	0	8	0	3
Students								
% Not at all effective	2	0	4	0	0	0	5	3
% Slightly effective	9	12	6	10	100	8	10	3
% Moderately effective	32	30	35	35	0	25	40	32
% Very effective	46	42	48	40	0	50	35	56
% Extremely effective	11	15	7	15	0	17	10	6

How would you rate the following components of the technology infrastructure at your institution?	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
AV-enabled classrooms								
% Very poor	2	3	2	5	0	0	0	3
% Poor	3	3	4	5	0	0	0	6
% Fair	13	9	16	10	0	8	21	13
% Good	47	44	45	45	100	33	37	50
% Excellent	35	41	33	35	0	58	42	28
Campus website services								
% Very poor	0	0	0	0	0	0	0	0
% Poor	2	0	4	0	0	0	5	3
% Fair	23	28	21	26	50	27	37	12
% Good	52	56	48	58	50	55	37	55
% Excellent	23	16	27	16	0	18	21	30
Computer networks and data communication								
% Very poor	0	0	0	0	0	0	0	0
% Poor	2	6	0	5	0	8	0	0
% Fair	4	6	4	0	50	8	0	6
% Good	40	38	42	55	0	17	53	36
% Excellent	53	50	54	40	50	67	47	58
CRM resources/deployment								
% Very poor	2	0	4	0	0	0	6	3
% Poor	4	0	4	0	0	0	0	6
% Fair	29	30	31	38	50	17	35	28
% Good	51	60	47	56	50	67	47	47
% Excellent	13	10	14	6	0	17	12	16
Disaster planning								
% Very poor	2	3	2	5	0	0	0	3
% Poor	10	9	12	10	0	8	5	15
% Fair	38	38	38	40	100	25	37	39
% Good	40	41	40	40	0	50	47	36
% Excellent	9	9	8	5	0	17	11	6

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
ERP/enterprise systems								
% Very poor	2	3	2	5	0	0	6	0
% Poor	12	9	14	15	0	0	12	16
% Fair	26	29	24	20	100	33	24	25
% Good	48	50	47	45	0	67	53	44
% Excellent	12	9	12	15	0	0	6	16
IT accessibility: IT resources and services for users with disabilities								
% Very poor	1	3	0	0	50	0	0	0
% Poor	3	3	2	5	0	0	0	3
% Fair	29	29	31	35	0	25	32	30
% Good	48	47	50	40	0	67	58	45
% Excellent	18	18	17	20	50	8	11	21
IT and digital resources to support faculty research								
% Very poor	3	4	0	11	0	0	0	0
% Poor	6	0	10	0	0	0	6	13
% Fair	37	26	43	22	0	33	50	38
% Good	40	57	33	44	100	58	39	29
% Excellent	15	13	14	22	0	8	6	21
IT and digital resources to support teaching and instruction								
% Very poor	1	3	0	5	0	0	0	0
% Poor	1	0	2	0	0	0	0	3
% Fair	15	15	15	20	0	8	5	21
% Good	56	53	58	50	100	50	58	58
% Excellent	27	29	25	25	0	42	37	18
IT security (network attacks, secure databases, identity mgmt., etc.)								
% Very poor	0	0	0	0	0	0	0	0
% Poor	1	3	0	0	50	0	0	0
% Fair	10	15	8	25	0	0	11	6
% Good	62	65	60	55	50	83	63	58
% Excellent	27	18	33	20	0	17	26	36

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
IT training for faculty								
% Very poor	1	3	0	5	0	0	0	0
% Poor	5	0	8	0	0	0	5	9
% Fair	41	41	39	50	50	25	21	50
% Good	42	53	37	40	50	75	53	28
% Excellent	11	3	16	5	0	0	21	13
IT training for students								
% Very poor	10	12	7	15	50	0	6	7
% Poor	26	26	27	30	0	25	19	31
% Fair	39	35	42	35	50	33	50	38
% Good	21	24	20	15	0	42	19	21
% Excellent	5	3	4	5	0	0	6	3
Learning management system (LMS)								
% Very poor	0	0	0	0	0	0	0	0
% Poor	0	0	0	0	0	0	0	0
% Fair	9	12	8	10	0	17	11	6
% Good	46	56	38	65	0	50	37	39
% Excellent	45	32	54	25	100	33	53	55
Mobile apps/services for students, faculty, and staff								
% Very poor	4	6	2	6	50	0	0	3
% Poor	17	16	20	22	0	8	27	16
% Fair	38	44	35	44	50	42	33	35
% Good	28	28	28	22	0	42	27	29
% Excellent	12	6	15	6	0	8	13	16
Student information systems								
% Very poor	3	0	6	0	0	0	11	3
% Poor	11	15	10	20	0	8	5	12
% Fair	24	15	31	15	50	8	37	27
% Good	46	56	38	45	50	75	37	39
% Excellent	16	15	15	20	0	8	11	18

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
Student portal								
% Very poor	1	0	2	0	0	0	0	3
% Poor	9	6	13	5	50	0	27	6
% Fair	26	24	29	25	50	17	27	30
% Good	44	47	42	50	0	50	33	45
% Excellent	20	24	15	20	0	33	13	15
Telecommunications and phone system								
% Very poor	1	0	2	0	0	0	0	3
% Poor	1	3	0	5	0	0	0	0
% Fair	19	26	15	30	50	17	21	12
% Good	44	35	52	30	50	42	58	48
% Excellent	35	35	31	35	0	42	21	36
User support services								
% Very poor	0	0	0	0	0	0	0	0
% Poor	1	3	0	0	50	0	0	0
% Fair	10	9	12	10	0	8	21	6
% Good	53	47	58	60	0	33	47	64
% Excellent	36	41	31	30	50	58	32	30
Video capture and services/delivery infrastructure								
% Very poor	1	0	0	0	0	0	0	0
% Poor	6	9	4	17	0	0	0	6
% Fair	23	13	31	11	0	17	35	28
% Good	46	50	45	44	100	50	59	38
% Excellent	24	28	20	28	0	33	6	28
WiFi/Wireless networks								
% Very poor	0	0	0	0	0	0	0	0
% Poor	0	0	0	0	0	0	0	0
% Fair	6	9	4	15	0	0	0	6
% Good	45	44	44	50	50	33	63	33
% Excellent	49	47	52	35	50	67	37	61

Does your institution have any of the following regarding the storage and/or use of institutional data? Please select all that apply.	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Data warehouse	53	65	46	55	50	83	42	48
% Data lake	26	21	31	10	0	42	21	36
% Data lakehouse	15	21	12	10	0	42	11	12
% Unified data model(s)	11	12	12	5	0	25	11	12
% Other	7	3	10	0	0	8	16	6
% None of the above	31	26	33	35	50	8	37	30

To what extent do you agree or disagree with the following statements? My institution...	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
...actively promotes a culture of data, such as by offering opportunities for faculty, staff and administrators to build data literacy.								
% Strongly disagree	12	6	14	0	0	17	6	19
% Somewhat disagree	27	21	33	26	50	8	44	26
% Neither agree nor disagree	25	24	27	32	0	17	17	32
% Somewhat agree	22	30	18	26	50	33	28	13
% Strongly agree	14	18	8	16	0	25	6	10
...effectively uses data as a means of improving internal processes.								
% Strongly disagree	6	0	8	0	0	0	0	13
% Somewhat disagree	29	26	33	30	50	17	17	42
% Neither agree nor disagree	19	15	22	10	0	25	39	13
% Somewhat agree	35	41	31	35	50	50	44	23
% Strongly agree	12	18	6	25	0	8	0	10
...effectively uses data to inform important decisions.								
% Strongly disagree	5	0	6	0	0	0	0	10
% Somewhat disagree	24	15	31	16	0	17	33	29
% Neither agree nor disagree	15	18	14	16	50	17	22	10
% Somewhat agree	36	42	35	37	50	50	39	32
% Strongly agree	20	24	14	32	0	17	6	19
...effectively uses data to support student success.								
% Strongly disagree	5	0	6	0	0	0	0	10
% Somewhat disagree	19	12	25	20	0	0	18	29
% Neither agree nor disagree	16	15	19	5	50	25	29	13
% Somewhat agree	38	41	35	50	0	33	35	35
% Strongly agree	22	32	15	25	50	42	18	13

	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
...has a data function structure that supports analytics needs.								
% Strongly disagree	8	3	10	5	0	0	0	17
% Somewhat disagree	25	21	29	15	0	33	39	23
% Neither agree nor disagree	15	15	17	10	0	25	17	17
% Somewhat agree	34	41	29	40	100	33	28	30
% Strongly agree	18	21	15	30	0	8	17	13
...has the necessary tools for faculty, staff and administrators to access key institutional data.								
% Strongly disagree	7	0	10	0	0	0	11	10
% Somewhat disagree	27	21	33	20	50	17	22	39
% Neither agree nor disagree	19	21	18	20	50	17	17	19
% Somewhat agree	29	41	22	35	0	58	28	19
% Strongly agree	19	18	16	25	0	8	22	13
...makes data analytics a strategic priority.								
% Strongly disagree	7	0	10	0	0	0	0	16
% Somewhat disagree	24	24	25	35	0	8	35	19
% Neither agree nor disagree	18	24	13	20	50	25	6	16
% Somewhat agree	35	35	38	25	50	50	47	32
% Strongly agree	16	18	15	20	0	17	12	16

What is your age?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Under 30	1	0	0	0	0	0	0	0
% 30 to 39	3	9	0	15	0	0	0	0
% 40 to 49	20	24	18	25	0	25	17	19
% 50 to 59	41	35	46	35	50	33	50	44
% 60 to 69	29	29	28	20	50	42	28	28
% 70 and older	2	0	4	0	0	0	0	6
% Prefer not to respond	3	3	4	5	0	0	6	3

What is your gender?								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Female	16	12	18	10	0	17	28	13
% Male	78	76	80	75	100	75	72	84
% Non-binary/Gender non-conforming	1	3	0	5	0	0	0	0
% Not listed/Prefer to self-describe (specify, if desired):	0	0	0	0	0	0	0	0
% Prefer not to respond	5	9	2	10	0	8	0	3

With which of the following categories do you identify? Please select all that apply.								
	All Institutions, by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Assoc.	Master's/ Bacc.	Doctoral	Bacc.	Doctoral/ Master's
% Asian	10	0	14	0	0	0	22	9
% American Indian or Alaskan Native	1	0	2	0	0	0	0	3
% Black or African American	2	6	0	10	0	0	0	0
% Hispanic or Latin(o/a/x)	2	3	2	5	0	0	0	3
% Middle Eastern or North African	0	0	0	0	0	0	0	0
% Native Hawaiian or Pacific Islander	0	0	0	0	0	0	0	0
% White	76	79	76	75	100	83	72	78
% Not listed/Prefer to self-describe	0	0	0	0	0	0	0	0
% Prefer not to respond	9	15	6	15	0	17	6	6

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