16TH ANNUAL HIMSS LEADERSHIP SURVEY

February 14, 2005

Healthcare CIO Results: **Final Report**

HIMSS Foundation

Sponsored by SUPERIOR CONSULTANT

16th Annual HIMSS Leadership Survey

Sponsored by Superior Consultant Company/ACS Healthcare Solutions

Final Report: Healthcare CIO

Sponsored by Superior Consultant Company/ACS Healthcare Solutions, the 16th Annual HIMSS Leadership Survey reports the opinions of information technology (IT) executives from healthcare provider organizations across the U.S. regarding the use of IT in their organizations. The study was designed to collect information about IT priorities, technology adoption, application usage and other crucial factors in the use of IT to enhance healthcare.

Three other groups were also included in this study. Data collected from vendor chief executive officers (CEOs), provider CEOs and medical and nursing executives will be released in three separate reports in the spring of 2005.

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1. Executive Summary

Increasing patient safety/reducing medical errors is among the top business issues that will most impact healthcare in the next two years, according to healthcare IT executives who participated in the 16th Annual HIMSS Leadership Survey. Focus on this issue is further demonstrated by participant responses regarding their current/future top IT priorities and the importance of IT applications. When asked to identify their organization's top IT priorities, both today and in the next two years, implementing technology to reduce medical errors/promote patient safety topped the list of current priorities and was second only to implementing an electronic medical records (EMRs) system among future priorities. In addition to citing the implementation of an EMR as a top future priority, respondents also identified it as the IT application that would be most important to their organization in the next two years. Respondents are also likely to identify clinical applications as important. Bar coded medication management technology, clinical information systems and computerized provider order entry (CPOE) software were all identified by at least half of survey respondents as important future applications for their healthcare organization. All of these applications can have a significant impact on improving patient safety and reducing medical errors.

Other key survey findings and comparisons to 2004 results include:

Financial support: Financial support for IT continues to be an issue for healthcare IT executives. Twenty percent of respondents cited lack of adequate financial support as the most significant barrier to successfully implementing IT at their organization.

Security concerns: An internal breach of security continues to be the primary security concern identified by healthcare IT executives and the majority of organizations use multiple technologies to secure their data. Seventy percent of respondents indicated they plan to implement single sign-on in the next two years. Only 21 percent of respondent facilities are currently using this security tool.

Top technologies: High-speed networks, the Intranet, wireless information systems and client server systems continue to be the technologies that are most frequently cited as currently being in use at respondent's facilities.

Technology adoption: Nearly 60 percent of respondents cited personal digital assistants (PDAs), bar coding technology and speech recognition as technologies their facility plans to implement in the next two years. While only 18 percent of respondents report a fully operational EMR is in place at their organization, nearly two-thirds indicated they have either developed a plan to implement an EMR system or they have begun to install EMR hardware and software.

Web site use: A majority of respondents (76 percent) indicate their facility plans to add patient scheduling to their Web site in the next two years. Only 16 percent of respondents indicate that this functionality is currently available on their organization's Web site.

IT budgets: Three-quarters of respondents reported that their IT budgets will increase in the next year. Most of the increases should be substantial, with 56 percent reporting a projected increase of at least six percent.

IT staffing: While nearly two-thirds of respondents indicate that the number of FTEs in their IT department will increase in the next 12 months, the change will be small. Sixty-two percent of respondents indicated that their staff would increase by less than 10 percent.

IT outsourcing: Nearly three-quarters of respondents' facilities currently outsource one or more IT functions. The use of outsourcing over the next two years is not expected to decrease.

Vendor satisfaction: In general, respondents were satisfied with the IT products/services they receive from suppliers, application vendors and consulting firms—69 percent of respondents indicated that they were either satisfied or very satisfied.

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2. Methodology

To ensure the most informed, representative coverage of the field possible, data was solicited from one individual—a senior IT executive – per healthcare organization. Nearly 3,000 chief information officers (CIOs)/directors of information systems at healthcare facilities across the United States were invited to participate via e-mail.

A total of 253 respondents completed the self-administered, Web-based questionnaire between December 6, 2004 and January 26, 2005. These individuals oversee the technology operations at over 550 hospitals located throughout the United States.

Three other groups were also included in this study. Data collected from vendor chief executive officers (CEOs), provider CEOs and physician and nursing executives will be released in three separate reports in the spring of 2005.

3. Profile of Survey Respondents[1]

Nearly 90 percent of survey respondents were chief information officers (CIOs) or directors of information systems (IS). Specifically, 63 percent of respondents were corporate (system level) CIOs/IS directors; another 25 percent were hospital CIOs or IS directors. This is similar to the sample last year. The remaining respondents reported their position as department head/director, manager or "other."

Over half of the survey respondents report they work either at the corporate offices of a multi-hospital system (35 percent) or at a multi-hospital system (18 percent). Another 37 percent report that they work at a stand-alone hospital. Thus, 89 percent of respondents worked for an organization headed by a hospital, compared to 86 percent in 2004 and 89 percent in 2003. Other types of healthcare facilities represented include physicians' offices, mental/behavioral health facilities, long-term care facilities and home health agencies.

Respondents who work in a hospital setting were asked to identify the number of hospitals at which they oversee the technology decisions. Approximately 60 percent of respondents who work in a hospital report that they oversee technology decisions at one hospital, with another 23 percent reporting that they oversee technology at two or three hospitals. Six percent of respondents oversee the technology decisions at ten or more hospitals.

Annual gross revenue for the provider organizations represented in this year's survey were:

- $50 million or less—14 percent;
- $51 million to $200 million—26 percent;
- $201 million to $350 million—14 percent;
- $351 million to $500 million—13 percent;
- $501 million to $1 billion—13 percent;
- More than $1 billion—13 percent; and
- Don't Know/Not Applicable—9 percent[2].

For the third consecutive year, the majority of respondents were from the East North Central region.[3] This was closely followed by the South Atlantic[4] and West South Central[5] regions.

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[1] From year to year, the HIMSS Leadership Survey does not survey an identical group of individuals. However, each year, one CIO per organization is invited to participate in the survey. Based on the similarities in respondent characteristics from one year to the next, associations will be drawn between 2003, 2004 and 2005 data.

[2] Numbers add up to more than 100 percent due to rounding

[3] Illinois, Indiana, Michigan, Ohio, Wisconsin

[4] Washington, DC, Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, West Virginia

[5] Arkansas, Louisiana, Oklahoma, Texas

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The number of full-time equivalent employees (FTEs) reported to be employed in the IT departments of participant's organizations were:

- Fewer than Five—8 percent;
- Five to Nine—15 percent;
- 10 to 24—26 percent;
- 25 to 50—21 percent;
- 51 to 75—6 percent;
- 76 to 100—9 percent;
- More than 100—15 percent.

Nearly half of respondents (46 percent) indicated that their organization's total IT operating budget was 2.5 percent or less of the organization's total general budget, with another third (34 percent) indicating that this amount is between 2.6 to 3.5 percent. Eleven percent of respondents indicated that their organization spends 3.6 percent or more of its total general budget on IT. Eight percent of respondents did not report this information.

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Figure 3. Participant Profile—Number of Hospitals
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Figure 6. Participant Profile—Number of IT FTEs
Figure 7. Participant Profile—IT Budget as a % of Operating Budget

4. IT Priorities

Patient safety and HIPAA compliance remain top priorities for IT executives. Implementation of electronic medical record systems is anticipated to be a priority in the next two years.

Asked to identify their facility's top IT priorities today, survey participants most frequently cited technology to reduce medical errors/promote patient safety (53 percent). This is followed by upgrading security on IT systems to meet HIPAA (Health Insurance Portability and Accountability Act) requirements (44 percent). These were also the top two identified in the 2004 and 2003 studies.

For the second consecutive year, replacing/upgrading inpatient clinical systems also topped the list of current IT priorities; it was identified by 38 percent of respondents.

While upgrading security on IT systems to meet HIPAA requirements continues to be of importance to survey respondents, upgrading systems to meet other areas of HIPAA requirements are not of as high a priority level to respondents. Only 16 percent of respondents identify implementing privacy modifications to meet HIPAA requirements is a priority, and 11 percent indicate that implementing EDI to meet HIPAA requirements is a priority.

Overall, the change in percent of respondents identifying items as a priority was minimal, when compared to 2004 data. Areas which showed an increase in importance are as follows:

- Implementing ambulatory care systems (18 percent, compared to 12 percent in 2004)
- Replacing/upgrading inpatient financial/administrative systems (15 percent, compared to 9 percent in 2004)

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Those areas showing the most decrease in importance are:

- Upgrading network infrastructure (25 percent, compared to 32 percent in 2004)
- Improving IS departmental services, cost effectiveness and efficiencies (22 percent, compared to 29 percent)

Survey respondents were also asked to identify what their facility's top IT priorities would be over the next two years. Implementing an electronic medical record was most frequently cited by respondents (54 percent). This is followed by implementing technology to reduce medical errors/promote patient safety (42 percent) and replacing/upgrading inpatient clinical systems (33 percent). Although in a different order, these three areas were also among the top three identified in the 2004 study. As noted previously, HIPAA requirements continue to decline in importance as deadlines for compliance pass. Only seven percent of respondents indicate that upgrading security on IT systems to meet HIPAA requirements will be a priority at their organization in the next two years.

Compared to current IT priorities, implementing an EMR is anticipated to increase in importance over the next two years. Twenty-nine percent of respondents indicated it was among their top IT priorities today, compared to 54 percent who indicate it will be among their top priorities in the next two years. Speech recognition technology is also expected to increase in importance. Twelve percent of respondents identify it as a current priority, compared to 28 percent who note that it will be among their top priorities in the next two years.

For the third consecutive year, increasing patient safety/reducing medical errors ranked highest among the business issues respondents believed would have the most impact on healthcare in the next two years; it was identified by 57 percent of respondents in 2005. This can be compared to 64 percent of respondents in 2004 and 63 percent in 2003. Respondents also believe that patient/customer satisfaction (44 percent) and improving quality of care (42 percent) will be business issues that will continue to have future impact on healthcare. While cost pressures are still presumed to have a significant impact on healthcare, the number of respondents identifying this as an area of importance has declined (54 percent of 2004 respondents compared to 40 percent of respondents in 2005).

Also showing a large decline was the area of nursing shortage. This was identified by 34 percent of 2004 respondents and only 18 percent of respondents in 2005.

Figures:

Figure 8. Current IT Priorities (Within Next 12 Months)
Figure 9. Projected IT Priorities
Figure 10. Top Business Issues Facing Healthcare (Within Next Two Years)

5. IT Barriers

Lack of financial support continues to be the most significant barrier to IT implementation.

For the fifth consecutive year, survey respondents identify lack of adequate financial support for IT as the most significant barrier to a successful implementation of IT at their organization. This response was chosen by 20 percent of respondents. Respondents also indicated that vendors' inability to satisfactorily deliver products and services was a barrier; this was identified by nearly 18 percent of respondents. Lack of staffing resources rounds out the top three responses, identified by 13 percent of IT executives participating in this survey. Difficulty proving ROI and a lack of clinical leadership were each selected by ten percent of respondents.

For the first time in the 2005 survey, respondents were asked to identify to what extent laws and regulations that prohibit technology sharing with ambulatory clinics (such as the Stark Law) posed

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a barrier to the successful implementation of IT. This response was selected by less than one percent of respondents.

Overall, the responses identified by healthcare IT executives responding to the 2004 survey were not remarkably different from those who took the survey in 2003.

Figures:

Figure 11. Most Significant Barriers to Implementing IT

6. IT Applications

Electronic medical records continue to be a future focus of healthcare organizations; only 17 percent of organizations do not presently have a plan to implement an EMR.

Nearly two-thirds of respondents indicate that electronic medical records (EMRs) was the IT application that was cited most frequently by survey respondents as being the healthcare application area they considered to be important to their organization in the next two years. The number of respondents selecting this item as important has steadily increased over the course of the past several years. The 62 percent of respondents who selected this option in 2005 can be compared to 52 percent in 2004 and 41 percent in 2003.

Bar coded medication management (55 percent), clinical information systems (52 percent) and computerized provider order entry (CPOE) (50 percent) were also frequently selected by respondents. The number of respondents identifying each of these options increased slightly compared to 2004 survey results.

The number of survey respondents identifying Web-based applications as important to their facility in the next two years continues to decline in importance, though at a slower pace than it has in the past. Identified as a top application by 17 percent of survey respondents in 2005, this was identified by 70 percent of those individuals responding to the 2000 survey.

In 2005, approximately 18 percent of respondents indicated that their organization has a fully operational EMR system in place; this is compared to approximately 19 percent of the healthcare IT executives responding to the 2004 survey. By survey definition, this means that healthcare facilities are electronically maintaining information about an individual's lifetime health status in a completely paperless fashion. An additional 42 percent of respondents indicate that their organization is presently installing EMR hardware and software, while 22 percent have developed a plan to implement an EMR. Only 17 percent of respondents report that they have not yet begun to plan for the implementation of an EMR.

Figures:

Figure 12. Most Important Applications (Next Two Years)
Figure 13. Status of Electronic Medical Record Implementation

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7. IT Security

Healthcare IT executives continue to identify internal breaches of security as their primary concern regarding data security. The majority of healthcare organizations continue to secure data with multiple technologies.

Survey respondents continue to express concern that internal breaches may compromise the security of electronic medical information. This was identified as a top concern by 56 percent of respondents, representing a decrease from the 65 percent of respondents who identified this as a concern in 2004. Compliance with HIPAA's security regulations (35 percent) and limitations of existing technology (31 percent) round out the top three for the third consecutive year.

Healthcare organizations continue to place an emphasis on data security. All healthcare organizations represented in this survey use at least one security application, and 99 percent use more than one application. In fact, 75 percent use at least six of the security tools identified in the survey; last year approximately 70 percent reported using six or more technologies.

Firewalls (99 percent), user access controls (80 percent), off-site storage (79 percent) and multi-level passcodes (79 percent) are the top security tools in place at this time. These were also among the top four in both the 2004 and 2003 surveys.

Survey respondents were most likely to identify single-sign on as the security tool they would use at their organization in the next two years. This was identified by 70 percent of respondents. Presently, this technology is used by 21 percent of respondents. Fifty-eight percent of survey respondents report that their organization will use biometric technologies for data security in two years; present use is 14 percent. Electronic signature rounds out the top three, identified by 57 percent of respondents.

Growth in use of public key infrastructure technology, which is presently used by 25 percent of respondents, is not projected to be strong. Only 32 percent of respondents indicate that they plan to use this technology in their organization in the next two years; this was the security tool that was least frequently selected for future use.

Figures:

Figure 14. Top Concerns—Security of Computerized Medical Information
Figure 15. Security Tools

8. Technology Adoption

PDAs, bar-coding and speech recognition are the top technologies that survey respondents intend to implement in the next two years.

For the fourth consecutive year, survey respondents identified high-speed networks and Intranet technology as the top technologies that are currently in use at their organization. High-speed networks were selected by 95 percent of 2005 respondents; this option has been selected by at least 90 percent of respondents since 2002. Intranet technology was selected by 86 percent of respondents in 2005, and it has been identified by at least 82 percent of respondents since 2002.

Wireless information systems (79 percent) and client server systems (78 percent) round out the top four. Both of these technologies were in the top four of the 2004 survey.

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The top technologies that respondents plan to implement in the next two years are PDAs (59 percent), bar coding technology (59 percent) and speech recognition (59 percent). These are the same technologies that were identified as top technologies in the 2004 survey. Automated alerts to clinicians were also identified as a technology that at least half of respondents would like to implement in the next two years (57 percent).

Figures:

Figure 16. Current Use of Information Technology
Figure 17. Technology Adoption (Next Two Years)

9. Web Site/Intranet Use

Web site functionality for patients, including scheduling, health assessment tools and providing consumer health information is expected to increase in the next two years. The use of Intranets is also projected to increase in the next two years; staff communication is the most frequent use of Intranets.

Nearly all survey respondents reported that their organization has a Web site. Marketing/promotion of the organization continues to be the function for which Web sites are most frequently used (95 percent). Employee recruitment and use of online physician and provider directories round out the top three, offered by 94 and 81 percent of respondents, respectively. Seventy percent of respondents also say their organizations provide consumers with health information on their Web sites.

Respondents continue to identify that they are pursuing new avenues of patient-centered functionality for their Web sites. Patient scheduling (76 percent), patient health assessment tools (62 percent), and providing consumer health information (55 percent) are the top three areas in which organizations plan to use their Web site in the next two years. Fifty-five percent of respondents also identified that they would like to provide additional functionality in the area of employee recruitment.

Eighty-three percent of respondents who report that they currently do not offer patients secure and authenticated online access to their medical records anticipate that they will do so in the future. Other areas with similarly high increases include:

- Patient scheduling—74 percent
- Patient health assessment tools—58 percent
- Provide consumer health information—47 percent

Use of Intranets in healthcare organizations continues to increase. Nearly 96 percent of respondents indicated that their organization has an Intranet, compared to 94 percent in 2004 and 91 percent in 2003. For the second year in a row, staff communication was most frequently identified as a function of the Intranet; 93 percent of respondents report that this functionality is offered at their facility. Rounding out the top three are posting policies and procedures (88 percent) and the availability of resource tools (79 percent).

Future use of Intranets is projected to reach near market saturation. Presently, 96 percent of healthcare IT executives report that they use an Intranet; 99 percent report they will use an Intranet in two years. The top projected uses of the Intranet will be posting policies and procedures (67 percent), staff communication (64 percent) and access to resource tools (59 percent).

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Figures:

Figure 18. Current Web Site Functions
Figure 19. Additional Web Site Functions
Figure 20. Intranet Functions

10. IT Outsourcing/Satisfaction with Vendor Performance

Nearly three-quarters of respondents' facilities currently outsource one or more IT functions. The use of outsourcing over the next two years is not expected to decrease.

Nearly three-quarters of respondents (70 percent) reported their organization outsources at least one IT function; this compares to 71 percent in 2004 and 70 percent in 2003. Web site maintenance and development (43 percent), applications development (22 percent) and ASP services (21 percent) were the most frequently outsourced areas.

Among those respondents that reported their organization uses outsourcing services, just over one-third (36 percent) report that their organization outsources only one function. Another 48 percent report that their organization outsources between two and four functions. The remaining 16 percent of respondents indicate that they outsource at least five of their organization's IT functions.

Approximately 71 percent of respondents reported that they will outsource one or more IT functions in the next two years; this is up slightly from the 70 percent of respondents who indicated that they would outsource in 2004. Web site maintenance and development (20 percent) and applications development (20 percent) are the top two functions that will be outsourced in the next two years. The help desk and ASP services were each identified by 16 percent of respondents.

Nearly two-thirds of respondents (69 percent) report that they are satisfied or very satisfied with the products and/or services they receive from suppliers, applications vendors and consulting firms. This is down from 70 percent in 2004. Only seven percent of respondents indicate that they are either dissatisfied or very dissatisfied with the products and/or services that they receive.

Figures:

Figure 21. IT Functions Currently Outsourced
Figure 22. Current and Future Plans for Outsourcing
Figure 23. Satisfaction with Vendor Performance

11. IT Budget and Staff

Healthcare IT executives predict that both IT staff and budgets will increase.

Nearly two-thirds of healthcare IT executives in this survey predicted that the number of FTEs in their IT departments will increase in the next twelve months, compared with 60 percent in the 2004 survey. However, the changes will be relatively small—62 percent of those respondents indicating that their staff would increase projected an increase of less than 10 percent. Only five percent of respondents projected that the size of their staff is going to decrease.

Network and architecture support continues to be the area in which respondents are most likely to report staffing needs; this was selected by 36 percent of respondents, compared to 31 percent in 2004. Respondents also identify clinical informatics as a key staffing need at their organizations, selected by 35 percent of respondents (compared to 24 percent in 2004). Rounding out the top

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three is applications support/development, which was identified by 28 percent of respondents; this response was chosen by only 19 percent of respondents in 2004.

Process/workflow design also saw an increase in respondents in the past year. In 2005 this was selected by 26 percent of respondents, compared to 19 percent in 2004.

Respondents were also somewhat less likely to identify staffing needs in the areas of clinical transformation and clinical champions, which were ranked second and third last year.

- Clinical transformation (21 percent, compared to 25 percent in 2004)
- Clinical champions (22 percent, compared to 24 percent in 2004)

IT executives responding to the 2005 survey were more likely to report their budget would increase (76 percent), compared to 72 percent of those individuals responding to the 2004 survey. Among those predicting an increase, 34 percent reported a probable increase, and 42 percent reported a definite increase. Only six percent of respondents indicated their budget would decrease in 2005, compared to ten percent in 2004.

Respondents continue to be optimistic about the amount in which their budget will increase. Fifty-six percent of respondents indicated that their IT budget would increase by at least six percent in 2005. This is compared to nearly 60 percent of respondents who reported this level of increase in 2004.

The top three reasons for a budget increase are overall growth in the number of systems and technologies (77 percent), the need to upgrade IT infrastructure (41 percent) and an increase in the long-term IT or organizational strategic plan (39 percent).

Only six percent of respondents projected a decline in their IT budget. Among those respondents, 62 percent expected the decrease to be five percent or less. Most respondents are attributing this decrease to either an overall budget decrease (62 percent) or to deteriorating financial conditions related to cutbacks in Medicare/Medicaid (54 percent).

Only 21 percent of healthcare IT executives report that all of the IT spending is controlled within the department, with another 41 percent reporting that between one and ten percent is controlled outside of the department. Conversely, 21 percent of executives report that more than 20 percent of IT spending is controlled outside the department. These numbers are similar to those reported by individuals responding to the 2004 survey.

Figures:

Figure 24. Projected Change in 2005 IT Operating Budget
Figure 25. Reason for Increase in 2005 Budget
Figure 26. Percent of Projected Increase in 2005
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Figure 29. Percent of IT Spending Controlled Outside IT Department
Figure 30. Expected Change in IT Staff in Next Twelve Months
Figure 31. 2005 IT Staffing Needs

12. Survey Sponsors

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About Superior Consultant Company/ACS Healthcare Solutions

Superior Consultant Company/ACS Healthcare Solutions comprises 2,200 experienced professionals providing healthcare information technology services and solutions to its array of consulting, outsourcing, and provider clients. The company's IT outsourcing, consulting, revenue solution and analytic systems clients include hospitals and health systems, integrated delivery networks, and other providers of care, technology firms, and state and federal government agencies. Affiliated Computer Services (ACS), a Fortune 500 company with more than 43,000 people supporting client operations in nearly 100 countries, provides business process and IT outsourcing solutions to world-class commercial and government clients. Visit Superior Consultant Company/ACS Healthcare Solutions' Web site at http://www.superiorconsultant.com.

About HIMSS

HIMSS (Healthcare Information and Management Systems Society) is the healthcare industry's membership organization exclusively focused on providing leadership for the optimal use of healthcare information technology and management systems for the betterment of human health. Founded in 1961 with offices in Chicago, Washington D.C., and other locations across the country, HIMSS represents more than 14,000 individual members and some 220 member corporations that employ more than 1 million people. HIMSS frames and leads healthcare public policy and industry practices through its advocacy, educational and professional development initiatives to promote information and management systems' contributions to ensuring quality patient care. Visit www.himss.org for more information.

13. How to Cite This Study

Individuals are encouraged to cite this report and any accompanying graphics in printed matter, publications, or any other medium, as long as the information is attributed to the 16th Annual HIMSS Leadership Survey sponsored by Superior Consultant Company.

14. For more information, contact:

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Participant Profile

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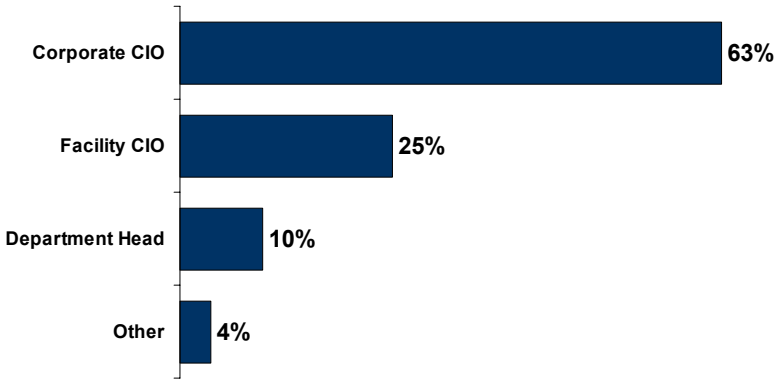
Participant Profile—Titles

Figure 1



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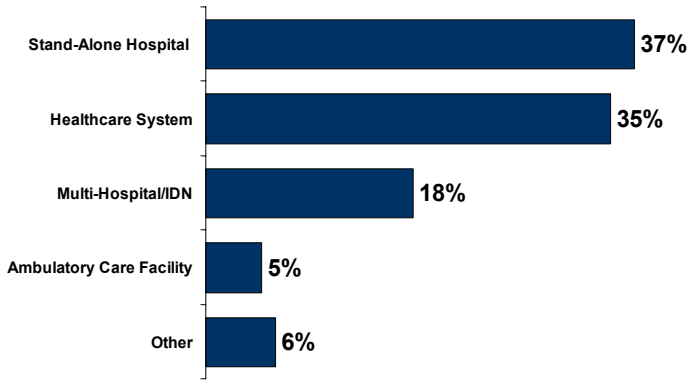
Participant Profile—Facility Type

Figure 2



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Participant Profile (continued)

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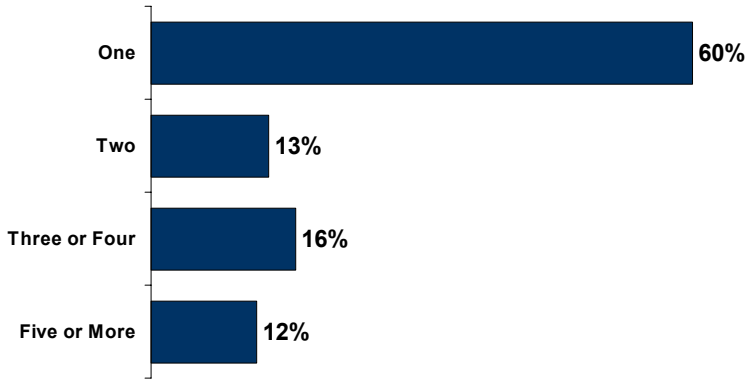
Participant Profile—Number of Hospitals

Figure 3



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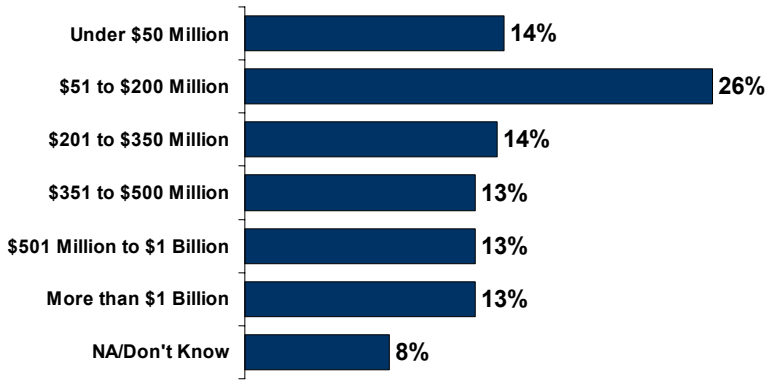
Participant Profile—Facility Revenue

Figure 4



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Participant Profile (continued)

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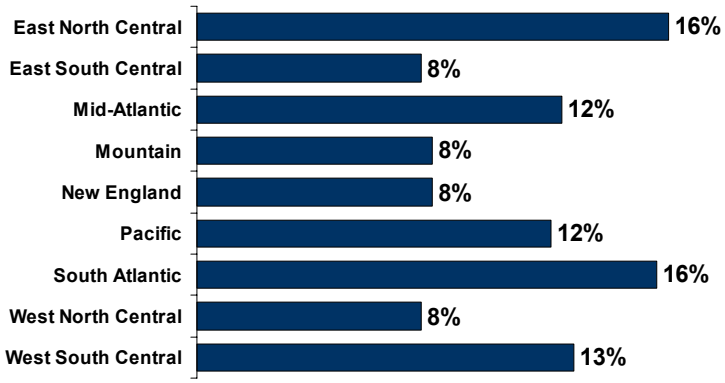
Participant Profile—Region

Figure 5



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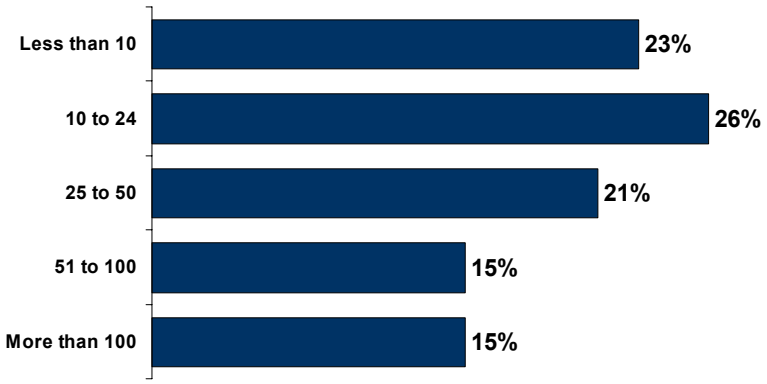
Participant Profile—Number of IT FTEs

Figure 6



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Participant Profile (continued)

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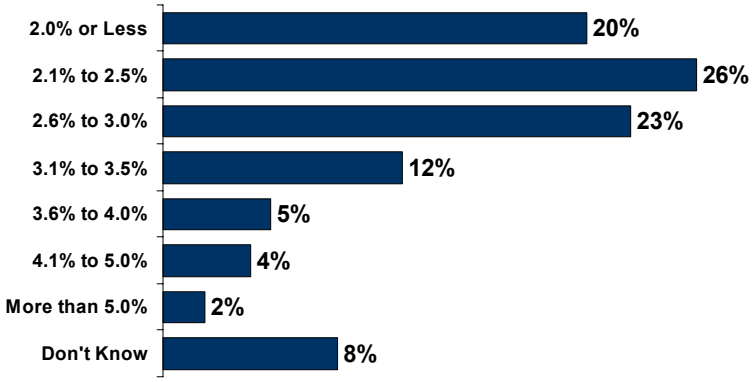
Participant Profile—IT Budget as % of Operating Budget

Figure 7



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IT Priorities

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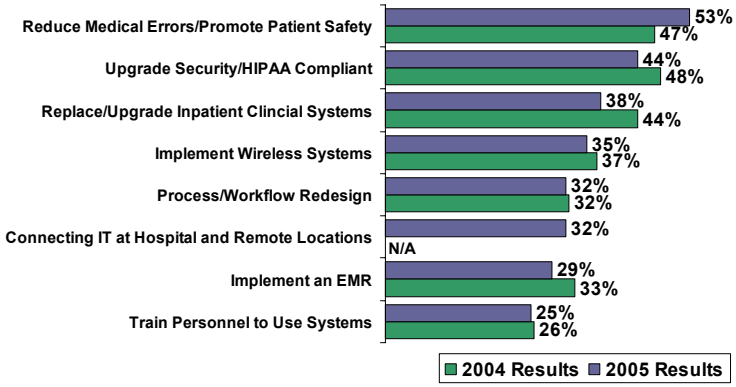
Current IT Priorities (Within Next 12 Months)

(2005 vs. 2004 Results)

Figure 8



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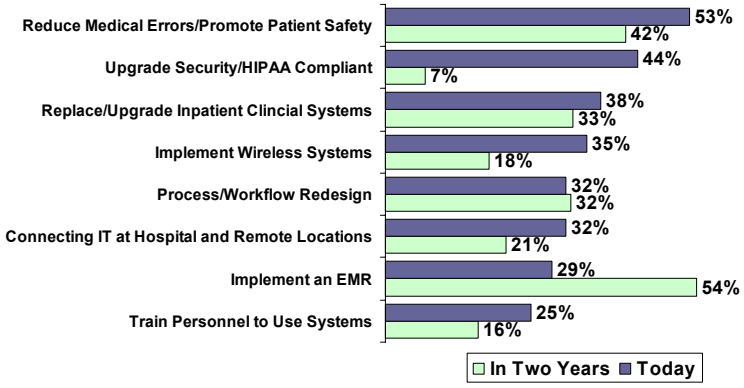
Projected IT Priorities

(Today vs. Next Two Years)

Figure 9



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IT Priorities (continued)

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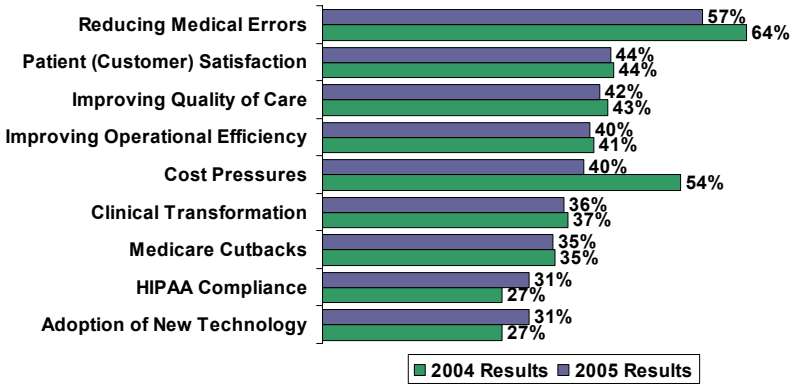
Top Business Issues Facing Healthcare

(2005 vs. 2004 Results)

Figure 10



IT Barriers

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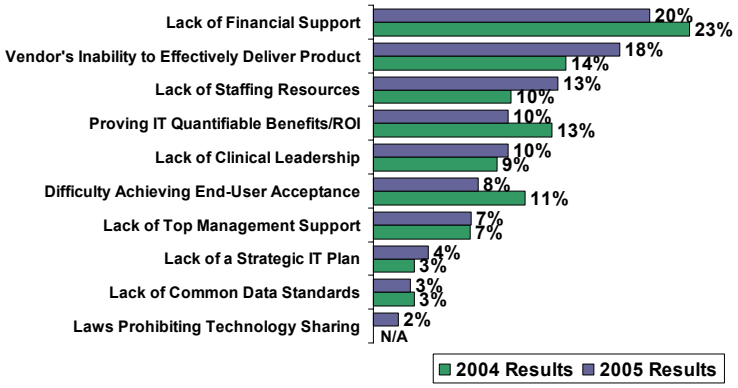
Most Significant Barriers to Implementing IT

(2005 vs. 2004 Results)

Figure 11



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IT Applications

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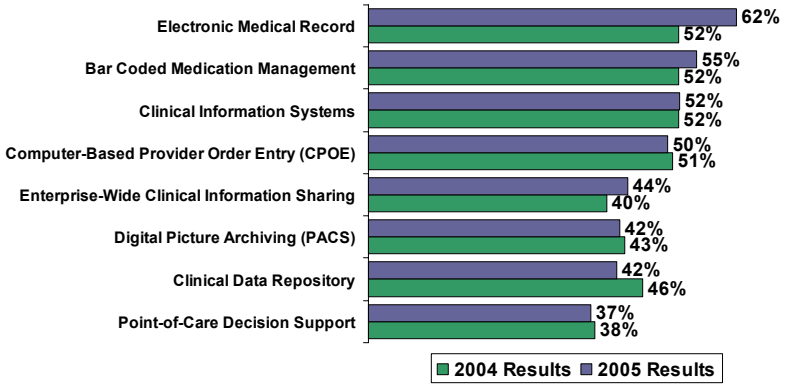
Most Important Applications (Next 2 Years)

(2005 vs. 2004 Results)

Figure 12



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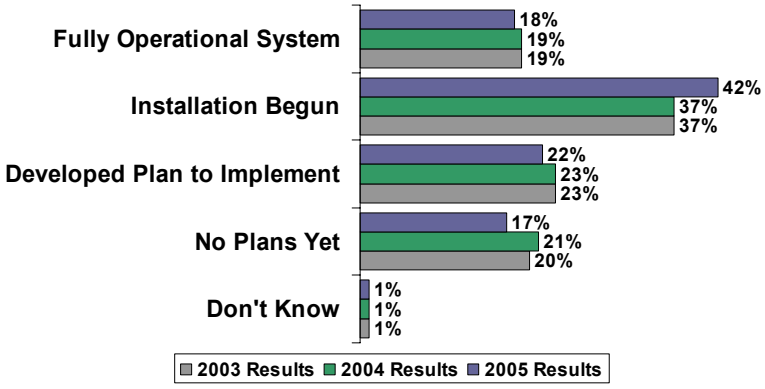
Status of Electronic Medical Record Implementation

(Comparison of 2005, 2004, and 2003 Results)

Figure 13



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IT Security

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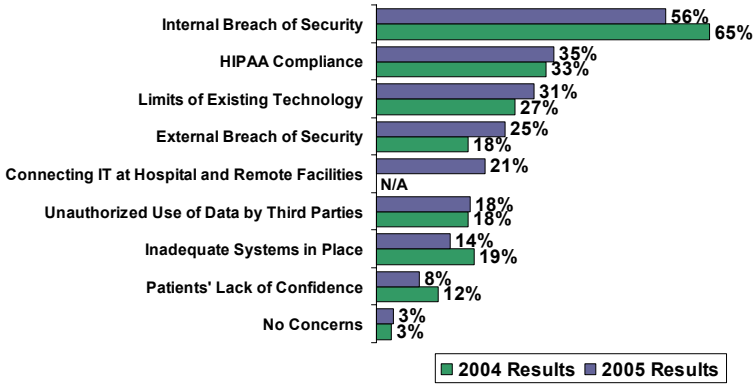
Top Concerns—Security of Computerized Medical Information

(2005 vs. 2004 Results)

Figure 14



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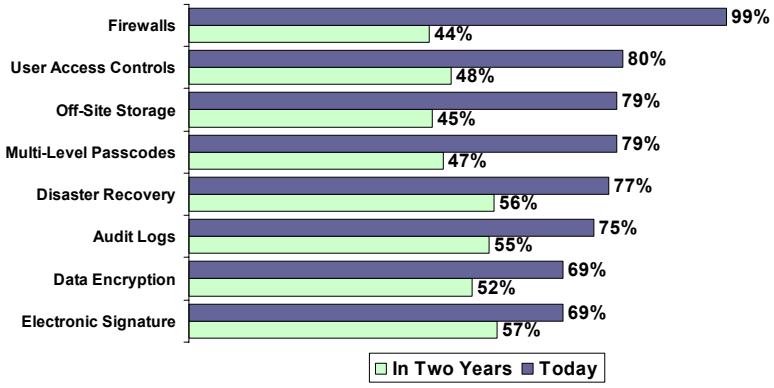
Security Tools

(Today vs. Next Two Years)

Figure 15



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Technology Adoption

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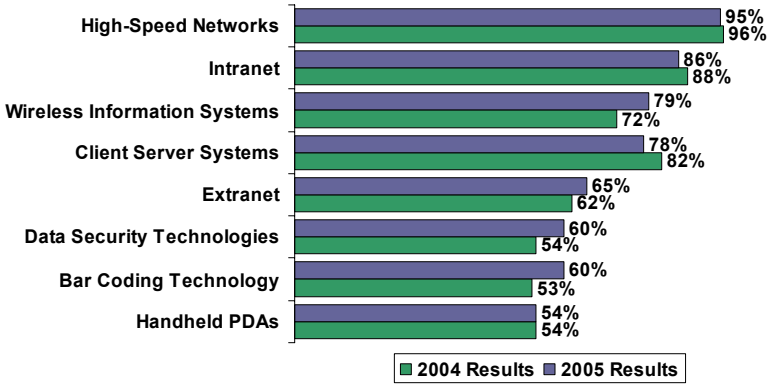
Current Use of Information Technology

(2005 vs. 2004 Results)

Figure 16



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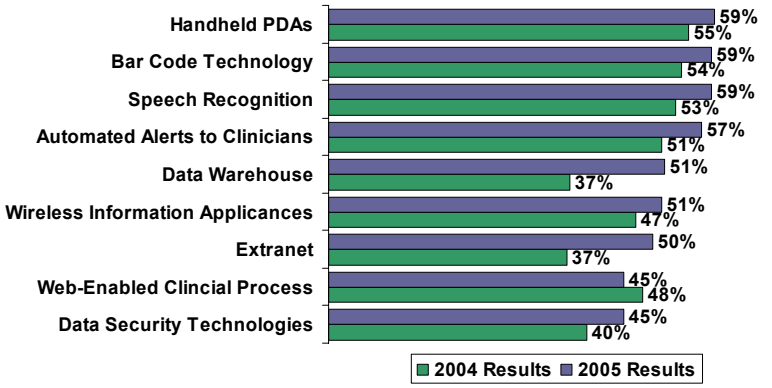
Technology Adoption (Next Two Years)

(2005 vs. 2004 Results)

Figure 17



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Web Site Use

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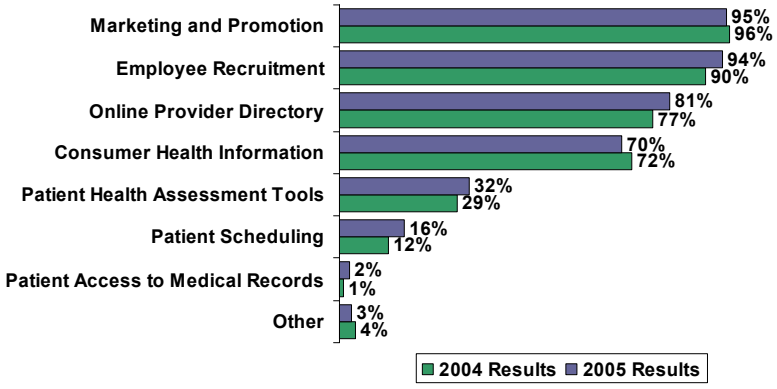
Current Web Site Functions

(2005 vs. 2004 Results)

Figure 18



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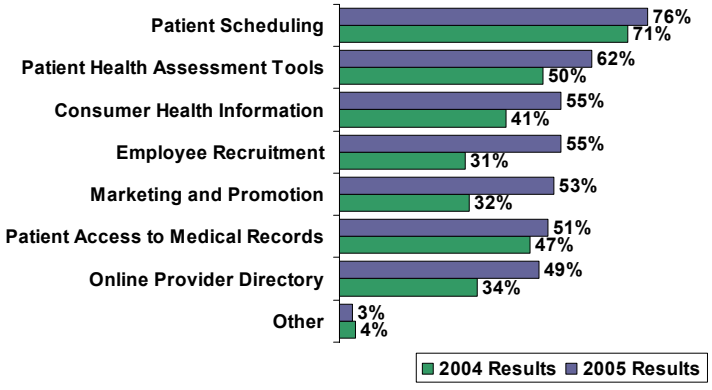
Additional Web Site Functions

(2005 vs. 2004 Results)

Figure 19



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Intranet Use

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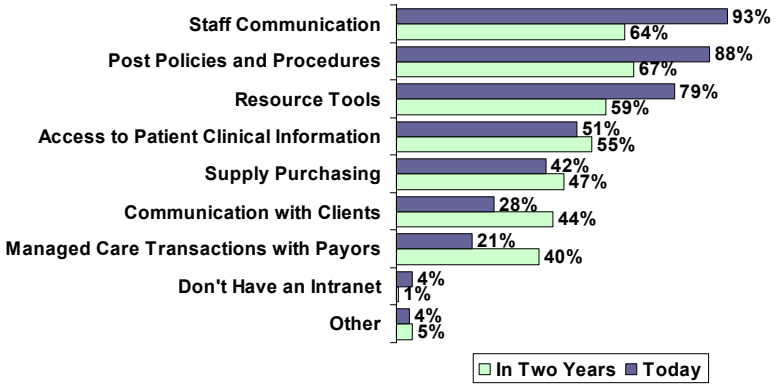
Intranet Functions

(Today vs. Next Two Years)

Figure 20



IT Outsourcing

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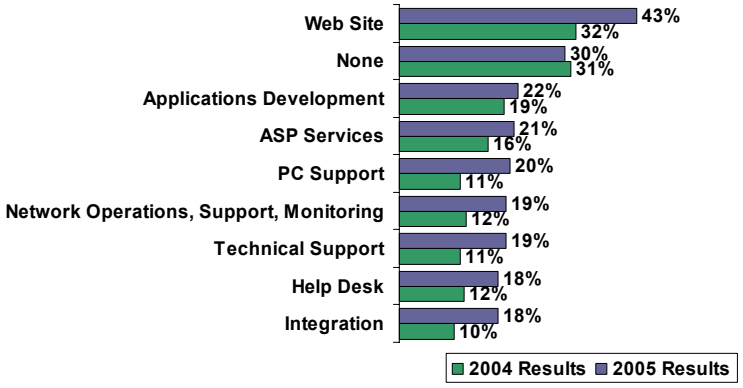
IT Functions Currently Outsourced

(2005 vs. 2004 Results)

Figure 21



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IT Outsourcing (continued)

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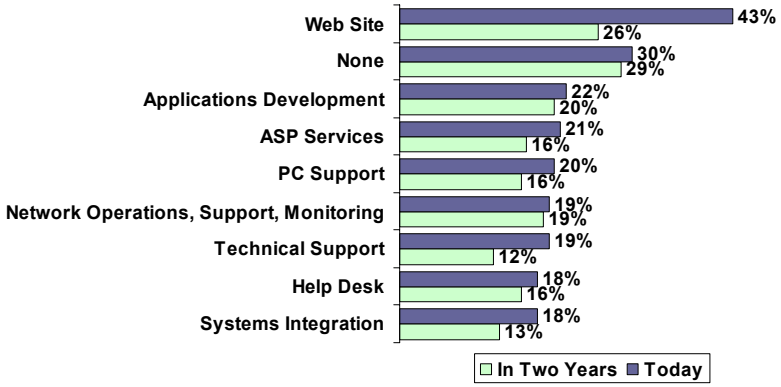
Current and Future Plans for Outsourcing

(Today vs. Next Two Years)

Figure 22



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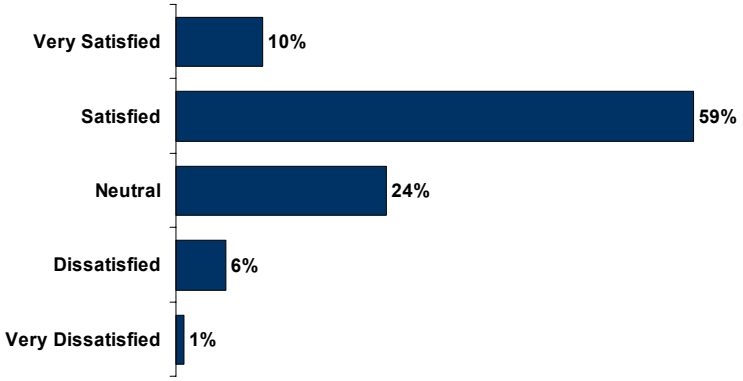
Satisfaction with Vendor Performance

Figure 23



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IT Budget and Staff

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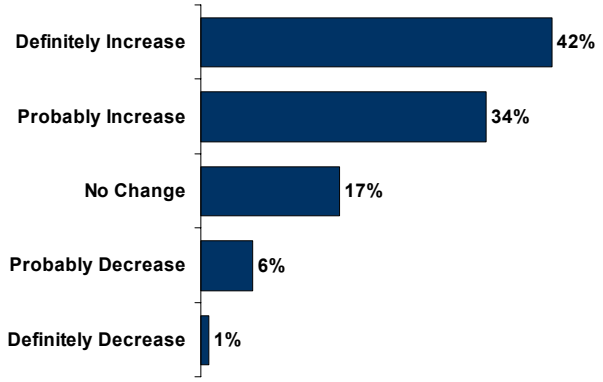
Projected Change in 2005 IT Operating Budget

Figure 24



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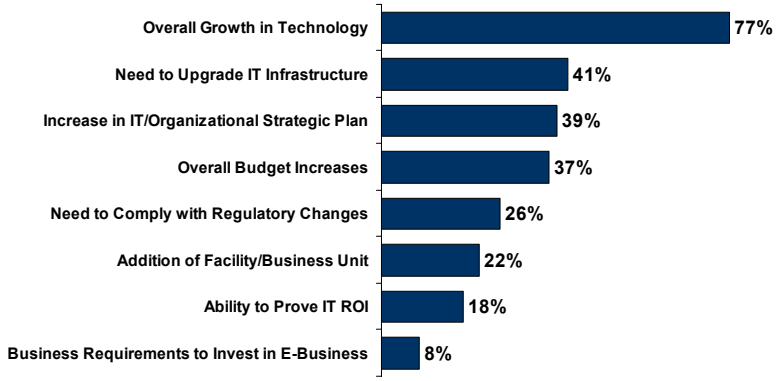
Reason for Increase in 2005 Budget

Figure 25



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IT Budget and Staff (continued)

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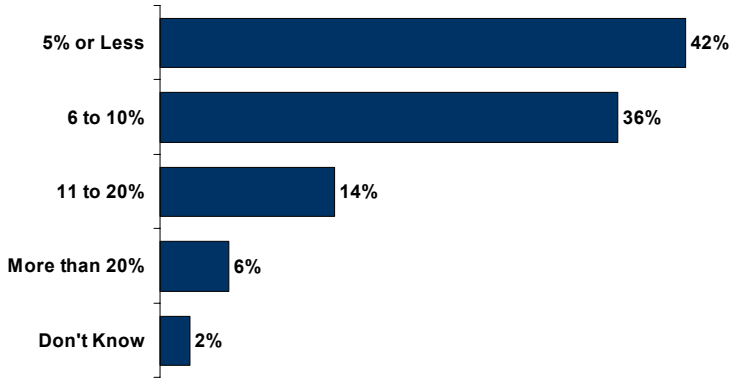
Percent of Projected Budget Increase in 2005

Figure 26



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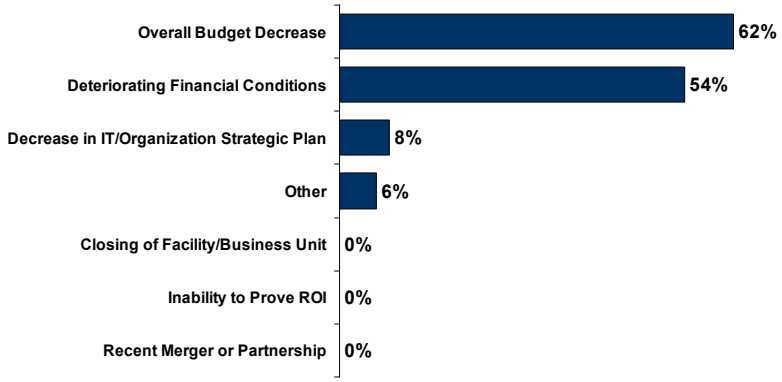
Reason for Decrease in 2005 Budget

Figure 27



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IT Budget and Staff (continued)

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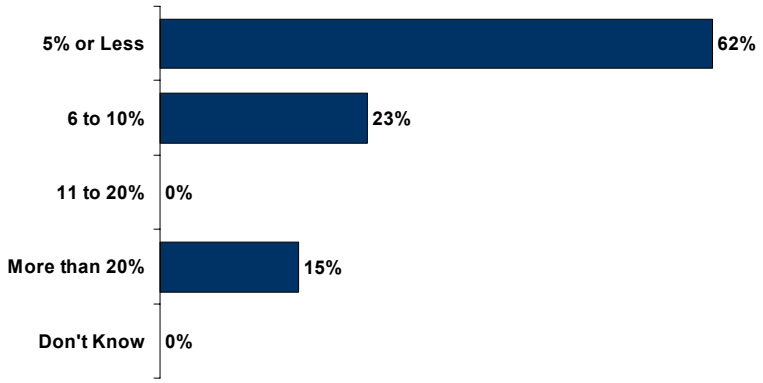
Percent of Projected Budget Decrease in 2005

Figure 28



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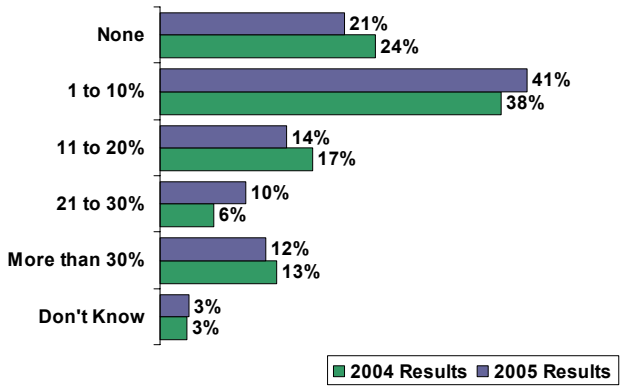
Percent of IT Spending Controlled Outside IT Department

(2005 vs. 2004 Results)

Figure 29



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IT Budget and Staff (continued)

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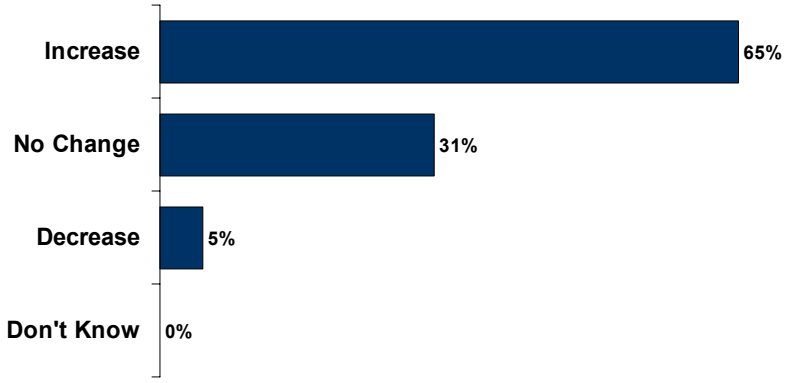
Expected Change in IT Staff in Next 12 Months

Figure 30



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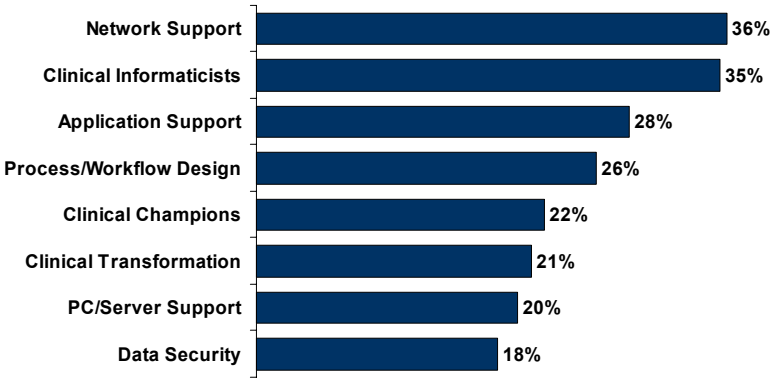
2005 IT Staffing Needs

Figure 31



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