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Higher education budgeting and purchasing.

What technology leaders can do to plan better purchases and build trusted partnerships.

Based on Understanding Higher Education Budgeting and Purchasing: A Guide for Trusted Partnerships (EDUCAUSE, 2026).

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WHY THIS MATTERS

Institutions buy technology on their own rhythm: fiscal years, restricted funds, and shared governance. A new EDUCAUSE guide shows that the strongest outcomes come when leaders share their budget calendar, confirm funding early, and expect transparency from every partner.

The higher education fiscal year.



Typical public institution calendar (July 1 – June 30). Some institutions and state systems differ.

Key insights.

01

Timing drives success.

Most public institutions begin budget planning in January for a fiscal year that starts July 1. Proposals that arrive after spring planning usually wait for the next cycle, regardless of need.

WHAT LEADERS CAN DO

- Share your fiscal calendar and lockdown dates with partners.
- Invite exploratory conversations in late fall.
- Ask for multiyear pricing projections.

02

Know who holds the budget.

Operating, capital, grant, and endowment funds each carry their own rules and approval paths. The unit that needs a solution and the unit that funds it are often different.

WHAT LEADERS CAN DO

- Confirm funding source and budget authority before talks get serious.
- Know your thresholds for informal and formal procurement.
- Bring IT, finance, legal, and procurement in early.

03

Enrollment shapes purchasing power.

Tuition is the largest revenue source at most institutions, so enrollment swings move budgets. Contracts locked to a fixed FTE count become a burden when enrollment declines.

WHAT LEADERS CAN DO

- Negotiate true-up and true-down clauses.
- Ask for a documented FTE counting method.
- Favor pricing that flexes with actual usage.

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04

Transparency builds trust.

Rapid, unexpected price increases are among the most cited frustrations in vendor relationships. Stepped, predictable increases written into the contract are far easier to plan for.

WHAT LEADERS CAN DO

- Require explicit annual escalation terms in multiyear agreements.
- Evaluate total cost of ownership, including implementation, training, integration, and exit.
- Treat an inflated opening price as a warning sign.

05

Reputation travels.

Higher education is a networked community. Leaders talk to peers, and vendor behavior is remembered long after the contract is signed.

WHAT LEADERS CAN DO

- Build peer networks for insight on vendor pricing and behavior.
- Hold performance reviews outside the renewal cycle.
- Consider a vendor code of conduct: transparency, context, shared risk, and long-term alignment.

What to expect from a partner

- Honest, defensible pricing from the first conversation.
- Respect for your budget calendar, with no quarter-end pressure.
- Flexible terms, such as true-down provisions and stepped pricing.
- Continuity from sales to implementation to support.
- Engagement between sales cycles, not only at renewal.

Strategic guidance for leaders

Partnership quality is shaped by both sides. Institutions that share their budget timelines, align IT, finance, legal, and procurement early, and describe a multiyear technology vision, even without full multiyear funding, negotiate better terms and get more from their partners.

BOTTOM LINE

Buy on your timeline, not the vendor's. Expect transparent pricing, flexible terms, and a partner who shows up between sales cycles. Trust, built over time, is what turns a vendor into a partner.

How AMSYS puts this into practice.

On your calendar
Free or fixed-fee assessments timed to inform January budget planning.

Priced up front
Fixed-fee assessments and clear scopes before any commitment.

Built to flex
Device-as-a-Service and managed retainers that adjust with your budget.

Funding mapped early
Title III, NSF, USDA NIFA, and E-Rate pathways identified at the start.

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