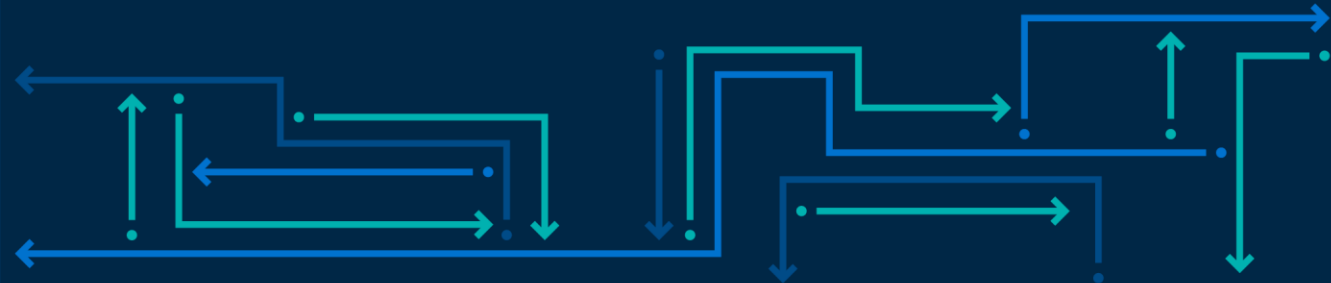




# Planning for a Multi-Modal Future Campus

A Call to Action for Cabinet Leaders



# Joining Us Today...

## Meet Your Presenters



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### EAB's Business Model Transformation Team

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**Megan Adams, PhD**  
*Managing Director*



**Jackson Nell**  
*Associate Director*



**Elizabeth Denny**  
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**Teresa Liu**  
*Analyst*

# In Search of Our New Normal

Pandemic Experience Elevated Importance of Physical and Virtual Operations

## Renewed Significance of Place



*A year of forced social distancing and online interaction highlights the value of place*

- Fresh appreciation of the value of the in-person experience
- Strengthened sense of campus community and belongingness
- Affirmed market demand for residential experience

## Institutionalized Virtuality



*Successful virtual operations and benefits of working at home point toward a multi-modal campus*

- Increased productivity, satisfaction, and morale from remote work for some staff
- Remote learning expanded access and flexibility for some students
- Online pedagogical innovations show potential to enhance student learning experience

# Bigger Than the Pandemic



## Multi-Modal Strategy Is About Future Mission Outcomes—Not Public Health

### Pandemic-Era Remote Experiment

- Reactionary
- Public health-focused
- Little to no training
- Almost entirely virtual operations



### Future Multi-Modality (~2025)

- Strategic
- Purposeful blend of physical and virtual
- Goals-focused
- Intentionally designed and staffed

#### Examples



Forced virtual commencement



Attendance caps for social distancing



Reactionary shift to online operations



Fully virtual student services

#### Examples



Students have option to access services in modality that best suits needs



Programs blending online courses and campus amenities improve affordability and access



Digital tools help students navigate physical campus



Flexible work policies let staff work from best location for task

# Barriers to Building on Pre-2020 Momentum

## Widespread Adoption of Select Multi-Modal Experiences Pre-2020

### Adult and Graduate Education

- ✓ Flexible modalities
- ✓ Virtual support services

### Undergraduate Education

- ✓ Online discussion groups
- ✓ Multi-modal “one-stop-shops” for student services

### Faculty Affairs

- ✓ Autonomy to conduct parts of job (e.g., research) off-campus

### Administration

- ✓ Remote work allowed in exceptional circumstances or for hard-to-fill roles

## Barriers to Increased Multi-Modal Adoption in Post-Vaccine Period



**Crisis management creep**



**Pandemic change fatigue**



**Fear of distorting value proposition**



**Lack of data and insights to inform strategy**

# Roadmap for Today's Discussion



## **Forces Elevating Stakeholders' Digital Expectations**

Catalysts for adopting digital and multi-modal services and programming on and off campus



## **On the Leading Edge of Multi-Modality**

Innovative examples of higher ed institutions using multi-modal experiments to improve stakeholder experiences



## **Forward Action Planning**

EAB's research, services, and tools to help your campus define and implement multi-modal strategies



# Forces Elevating Stakeholders' Digital Expectations

Catalysts for Adopting Digital and Multi-Modal Services and Programming On and Off Campus

- 
- Total Student Experience
  - Experience Liquidity
  - Return on Experience Mindset

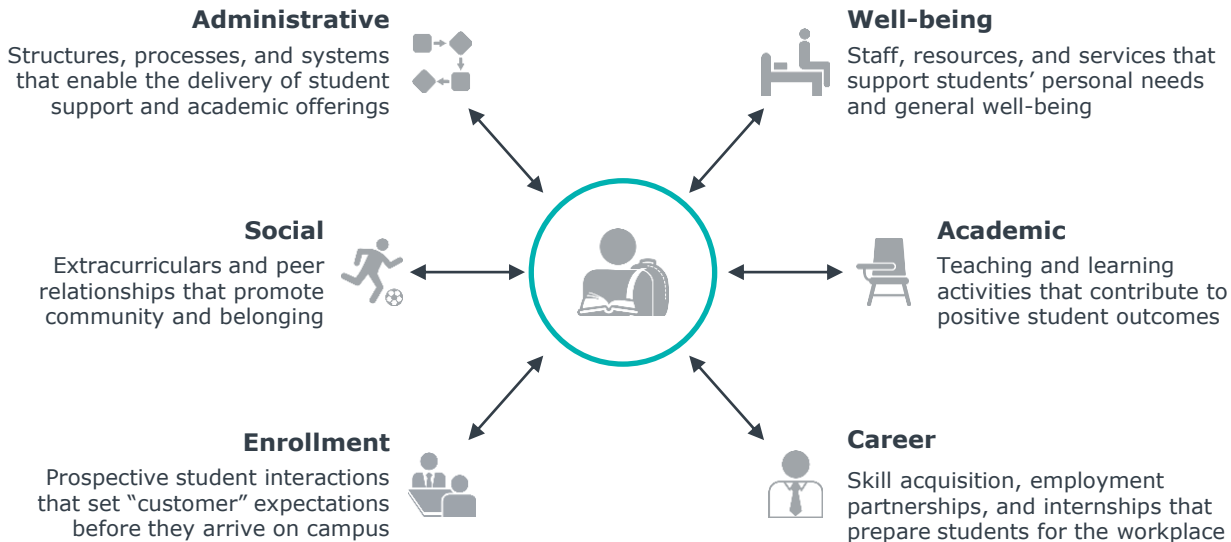
SECTION

1



# Transforming the Total Student Experience

## Six Elements of "Total" Student Experience



## Across the Full Range of Modalities





# Higher Ed Not Immune from Consumer Forces



“Experience Liquidity” Raising Student Expectations for Multi-Modal Services

## Defining Experience Liquidity

Consumers increasingly **compare similar service interactions across industries** as companies in different sectors adopt the same technology (e.g., apps, touchscreen kiosks, chatbots)



## A Healthcare Comparator

one medical

- Offers **personalized care** from providers at **85+ offices** that share health records, creating a seamless experience for patients
- Patients have access to **24/7, on-demand support via video** consultations
- **App provides customized reminders** (e.g., flu shot), simplifies administrative tasks (e.g., refill prescriptions, make appointment) via **self-service**

## Student Service Expectations



### Hyper-Personalized

Individualized content and services tailored to location, situation, needs



### Digital First

Online self-service is the default option, available on-demand



### Omni-Present

Seamless, asynchronous experience available across multiple devices



### Frictionless

Administrative processes fade into the background with fully integrated digital experience

# Pandemic Experience Shifts Student Mindset



## “Resource Scarcity” Leads Students to Prioritize Short-Term Experiences



*Some Consequences of Having Too Little (2012, Science)*

*Resource scarcity shifts focus:*

**From Long-Term Goals**



**To Immediate Concerns**

*Examples of student scarcity during COVID:*



Loss of in-person **classroom experience**



Loss of **residential campus community**



**Cancellation of events and extracurricular** experiences (e.g., study abroad, athletics)

## On-Campus Manifestations of Students’ “Return-on-Experience” Mindset

### 1 College, A La Carte

Seek to construct college experience that meets their needs, rather than treating it as a pre-packaged deal

### 2 Everything is Negotiable

Increasingly view tuition charges, fees, and financial aid offers as negotiable

### 3 I’d Like to Speak with the Manager

Voice dissatisfaction with policies or practices, targeting senior leaders directly



# Online Learning: Not as Unpopular as Media Suggests <sup>11</sup>

## Students' Preferences Shaped More by Quality Than Modality

### Quality Concerns Fueled Student Pushback to COVID Online Learning

*Analysis Methodology:*  
**130+** Student newspapers reviewed from across US

**84%** of articles referenced **negative student feelings** toward online learning experience during pandemic

**2x** Likelihood of students referencing **poor quality of online instruction** as a negative, **rather than online medium** itself

### Recent Surveys Show Many Students Want Online Options Post-COVID

**46%** of students want to **retain some elements of online learning** (e.g., viewing recorded lectures, virtual faculty office hours)

**84%** of students want to retain easy, online access to **lecture presentations, learning materials, and assignments**

**59%** of students want the **flexibility to choose** whether to attend classes in person or virtually

Source: Best College, [Despite COVID-19's Impact on Mental Health, Students Want Colleges to Stay Closed](#); Cengage, [Survey: College Students More Likely Than Instructors to Give Pandemic Learning an "A" Grade and Prefer Some Courses Be Fully Online Post-Pandemic](#); Top Hat, [Instruction and Educational Value in the Fall 2021 Academic Term](#); EAB interviews and analysis.

# Takeaways for Campus Leaders

## Sample Guiding Questions

1 Invest in understanding how campus stakeholders' demographics, needs, and preferences are changing

- What will our student demographics look like in 10 years and where are we investing to grow?
- What mechanisms can we put in place to monitor and track shifting student expectations?

2 Pinpoint and target improvements in areas where stakeholder expectations are not currently being met

- Where is there a mismatch between what students want and our current offerings?
- What data can we analyze to inform our investment strategy (e.g., satisfaction surveys)?

Download EAB's full list of essential questions to guide future campus strategy [here](#).



# On the Leading Edge of Multi-Modality

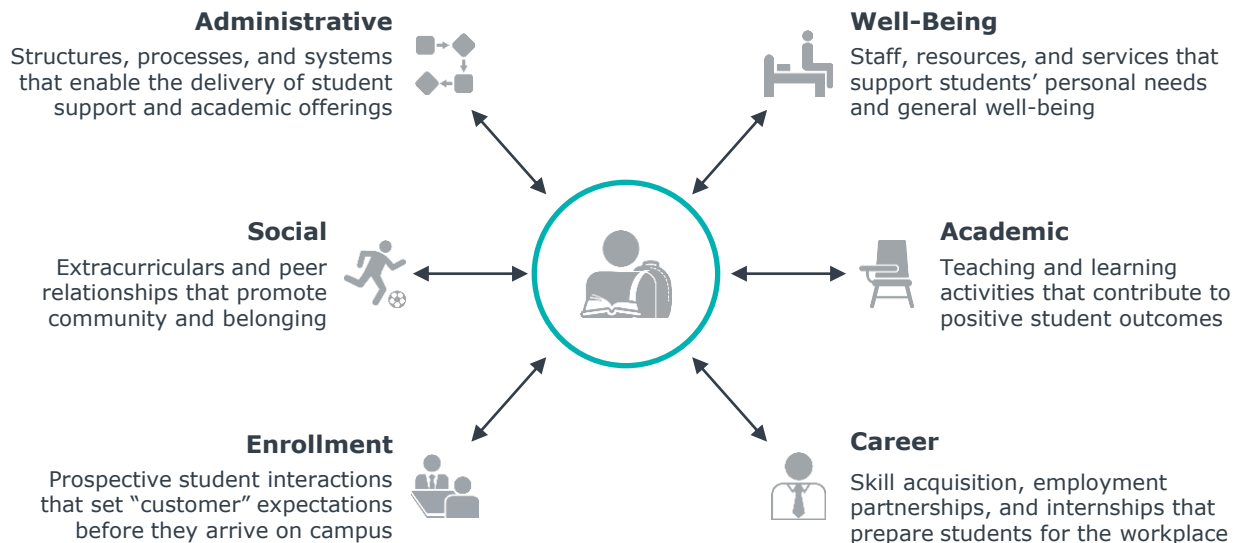
Innovative Examples of Higher Ed Institutions Using Multi-Modal Experiments to Improve Student Experiences

- 
- Administrative Experience
  - Social Experience
  - Well-Being Experience
  - Academic Experience

SECTION

2

# Six Elements of “Total” Student Experience



## Across the Full Range of Modalities



# Putting Campus Services at Students' Fingertips

Deakin's AI-Powered Student Apps Provide Instant, Customized Resources



## Introducing Genie, Deakin University's Virtual Assistant



**12K conversations** facilitated daily by Genie



**25K unique student users** and app downloads in first five years

## Portfolio of Smart Apps Create Seamless, Personalized Experience

- Genie interfaces with Scout, a personalized smart **campus navigation** and wayfinding app, to provide **location-based support**
- DeakinSync, a cloud-based study and **student services hub**, integrates registration, student accounts, email, student chat function



# Video Games: Better for Students Than You'd Expect

## The Link Between Esports and Positive Student Outcomes

### Virtual Components

- Students play games using Internet-based servers
- During games, students chat on digital platforms like Discord
- Spectators tune into livestreamed competitions on platforms like Twitch



### In-Person Dimensions

- Students convene in same physical space (e.g., computer lab) to practice and compete
- Spectators purchase tickets to attend in-person competitions in esports stadiums

## Three Ways Esports Enhances Student Experiences



Promotes **inclusivity**, **accessibility** (e.g., gender neutral, open to students with disabilities) more than other collegiate sports



Creates **community**, especially for students less likely to engage in other campus activities (e.g., male students, introverts)



Fosters **sense of belonging**, which positively influences **student well-being** and **retention**



# The Rise of “Digital Campfires”

## Saint Leo Uncovers New Opportunity to Support Students Via Discord

### Digital Campfires Satisfy Gen Z Preferences



“**Digital campfires**” - Small online communities, typically oriented around a niche topic (e.g., esports, makeup, rock music)



Meet Gen Z preferences for **smaller and more intimate** social media platforms (in contrast to Facebook and Instagram)



Began as gathering spaces for gamers but have since **attracted a broader population**

**150M**

Monthly active  
Discord users as  
of July 2021

**33.8%**

of college students  
reported using  
Discord in 2021



### Saint Leo University's Approach to Discord

- Student affairs staff created Discord server for **esports players to connect** during and outside of games
- In Spring '21, RAs active on the server identified and referred team members in distress to student affairs staff
- Campus leaders realized they could use Discord to **proactively surface mental health concerns** and target student well-being support
- Incoming, full-time esports coach explicitly tasked with managing, growing Discord community going forward

# In-Person Support Services for Online Students



UCF, Georgia Tech Use Satellite Locations to Meet Students Where They're At



**University of Central Florida's "Connect Centers"**



**Georgia Tech's "GTatrium" Sites**

## Locations

11 locations across Central Florida (all within 80 miles of UCF main campus in Orlando)



Planning to open small sites in major population hubs where large clusters of online students reside



## Services

- ✓ Provides services like advising, tutoring, health and wellness support
- ✓ Multi-use space supports academic programming, workshops, seminars

- ✓ Will provide services like counseling, career services, academic advising
- ✓ Multi-use space will support events, student meetups for online courses

## Staffing

Includes 6-8 success coaches who provide hands-on, in-person support

Will include in-person, professional staff with broad subject matter expertise in student support and services

# Creating Truly Multi-Modal Academic Programs

## Minerva, SNHU Combining Online Classes with In-Person Experiences

### Minerva University

Courses are delivered fully online, but students live together in residence halls located in seven cities around the world



- ✓ Provides an **immersive, global learning** experience
- ✓ Enables in-person relationships, **sense of community** outside of the online classroom

### Online Course Delivery

### Southern New Hampshire University<sup>1</sup>

Students take a mix of online and F2F<sup>2</sup> classes while living in one of six residence halls on main campus



- ✓ Improves affordability of **residential experience** by lowering delivery costs
- ✓ Enables **flexibility** for career-focused experiential learning opportunities (e.g., internships)

1) SNHU currently offers six multi-modal Bachelor's programs that are career-focused and priced the same as fully online degree programs.  
2) Face-to-face.

# Has COVID Killed the Big Lecture Hall?

## UC Berkeley Rethinking the Value of In-Person Lectures Post-Pandemic

“

“Berkeley has a lot of **very big lecture courses**, with more than 1,000 students. Those are **working better online**. Flipping the classroom, creating breakout experiences for students is working better online.”

Carol Christ, Chancellor  
*University of California, Berkeley*

”

## Lectures Weren't Ideal for Student Outcomes Anyway



Lecture halls and auditorium-style, fixed seating **prioritize content delivery over active learning**

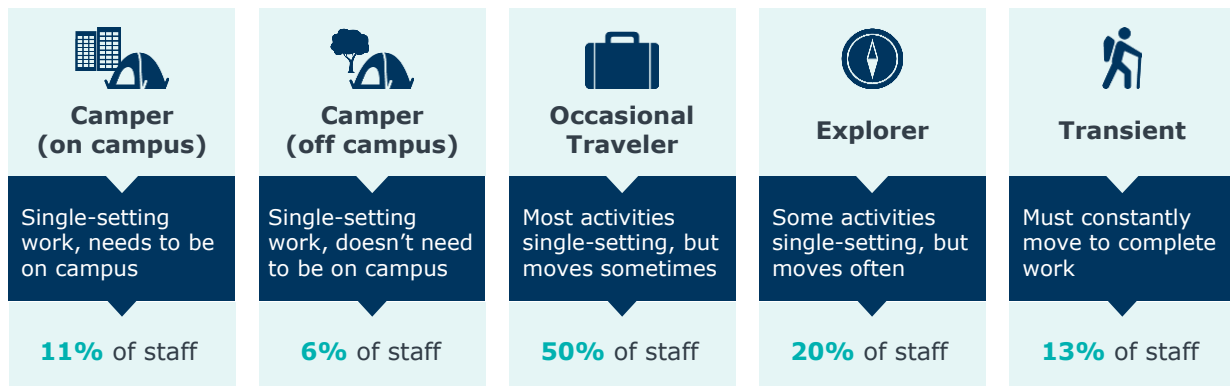


Large classes **increase student feelings of anonymity and isolation**, leading to reduced cognitive skill development, learning motivation, and attendance

# Helping Staff “WorkSmart,” In-Person or Remote

Leicester Reimagines Workplace with Agile Work, Space Transformation

## UNIVERSITY OF LEICESTER Range of Workstyles, Space Needs for Central Professional Services Staff



## Adapting Office Space to Support Agile Workforce

**£7.5M**

Anticipated returns from sale of four vacated properties no longer needed

**£2.7M**

Investment in three dedicated WorkSmart spaces for agile staff to use when on campus

**2:1**

Employee-to-desk ratio used for redesigned agile workspaces

# Takeaways for Campus Leaders

## Sample Guiding Questions

1 Determine multi-modal priorities based on institutional goals and market position

- How can we leverage multi-modality to advance goals in our strategic plan?
- What multi-modal investments are our peer or competitor institutions making?

2 Plan for the financial and infrastructural implications of a multi-modal future campus

- How must our investments in space, technology, and staffing evolve?
- Have recent investments in digital or multi-modal experiences achieved their intended outcomes? Why or why not?

3 Pilot, evaluate, and scale multi-modal innovations

- How can we incentivize stakeholders to experiment with multi-modality?
- What new approaches are faculty trying, and how can we scale their innovation across campus?

Download EAB's full list of essential questions to guide future campus strategy [here](#).



# Forward Action Planning

Multi-Modal Campus Research Agenda and  
Upcoming EAB Events and Services

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# 3

# Planning for Higher Ed's Digital-First, Hybrid Future

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EAB Resource to Help Cabinets Determine Multi-Modal Strategies, Priorities



Download EAB's executive briefing [here](#).

## Planning for Higher Ed's Digital-First, Hybrid Future

- ✓ Designed to help leadership teams envision, discuss higher ed's multi-modal future
- ✓ Outlines trends shaping higher ed operating models, demand for multi-modal approaches
- ✓ Profiles examples of innovative institutions experimenting with digital-first, hybrid strategies
- ✓ Includes list of 15+ essential questions to guide cabinet conversations, campus strategy



# Advancing Your Multi-Modal Strategy Across the Fall

## Upcoming EAB Events and Services



### Multi-Modal Visioning and Strategy Support for Cabinets

- [Download](#) EAB's **executive briefing** on the multi-modal campus and accompanying conversation starter
- Request a **1:1 expert consultation** to discuss your institution's unique circumstances and strategy
- Schedule a **virtual presentation** of this research for your team



### Executive Working Sessions on Hybrid Workplaces

- [Register](#) for an **upcoming working session**:
  - Thursday, October 21 at 12pm ET (CBOs)
  - Thursday, October 28 at 11am ET (SFOs)
  - Friday, November 12 at 9am (International/Make-Up Session)
- Request a **1:1 space strategy consult** with an EAB expert



### Research Interviews on Academic Strategy and Investments

- Participate in a 1:1 **research interview** with EAB's team to provide input on research questions and priorities
- Share ideas and **input asynchronously** via email ([BThayer@eab.com](mailto:BThayer@eab.com))

Contact your **EAB Strategic Leader** for more information or scheduling.

## ▶ **Grow Your Institution's Digital Capabilities and Infrastructure**

- [Digital Transformation Capabilities Assessment for Campus Leaders](#) (tool)
- [Digital Transformation in Higher Education Resource Center](#) (toolkit)
- [Roadmap for Developing and Sustaining Student-Centric Innovations](#) (white paper)

## ▶ **Use Multi-Modal Tactics to Attract and Engage Prospective Students**

- [Enroll360 Recruitment Ecosystem](#) (service)
  - [YouVisit](#) virtual tours
  - [Wisr](#) peer virtual engagement platform
  - [Cappex](#) online college discovery and exploration platform
  - [Intersect](#) student recruitment platform

## ▶ **Pinpoint Opportunities to Enhance Multi-Modal Student Services**

- [Student Services Virtual User Experience Audit](#) (service)
- [Total Student Experience Self-Audit](#) (tool)
- [6 "What Ifs" to Inspire Innovation and Reimagine the Student Experience](#) (infographic)

## ▶ **Scale Multi-Modal Teaching and Learning Strategies Across Campus**

- [Tactics to Identify, Scale, and Sustain Learning Innovations](#) (study)
- [Online and Hybrid Course Prioritization Guide](#) (study)

## ▶ **EAB-Facilitated Cabinet Workshops**

Email your Strategic Leader for the full menu of available workshops, including **Future Visioning and Strategic Foresight**, **Resilient Leadership**, and **Change Management**.



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