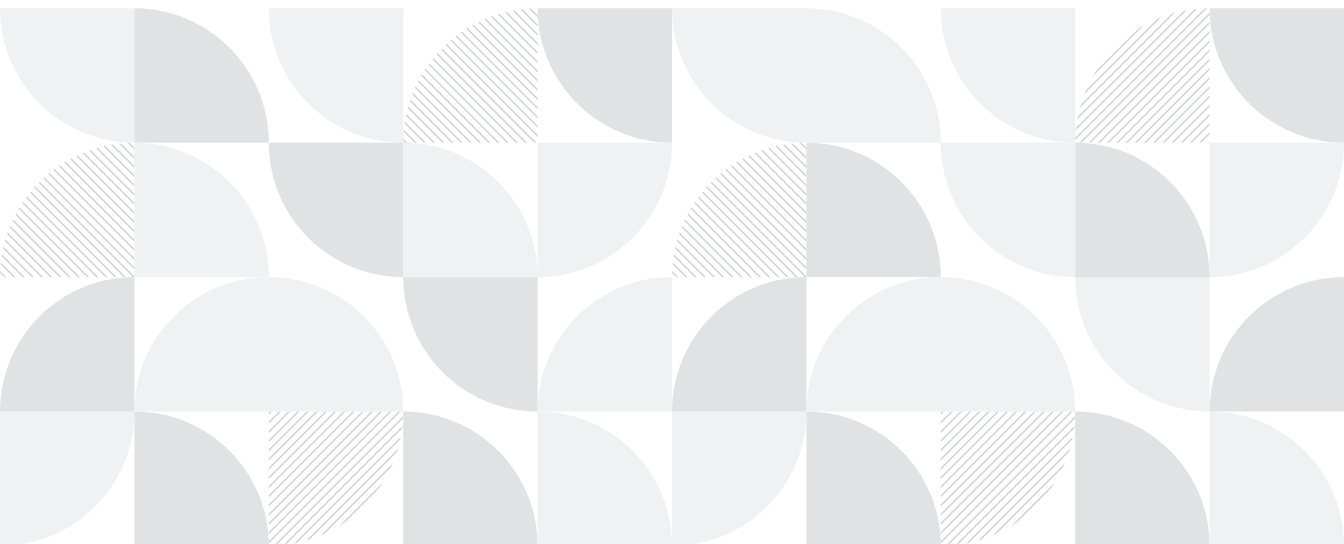





Planning for Higher Ed's **Digital-First,** **Hybrid Future**

A call to action for college and
university cabinet leaders






For higher education leaders, the past 19 months have focused on the short term. The COVID-19 pandemic has demanded that leadership teams devote outside attention to temporary, emergency policy decisions: first, emergency closures and refunds; later, campus repopulation and social distancing; and now, vaccine and mask mandates. The urgent has crowded out the important, diverting leaders' attention from long-term strategic threats and priorities.


But cabinets can't afford to defer decisions on long-term financial and mission threats and priorities any longer.

It's now clear that we'll be living with COVID-19 for the foreseeable future. At the same time, other existential threats to the higher education industry are intensifying—changing student preferences, demographic shifts, and cost pressures, to name a few. We need to resume our response to these threats alongside our dogged efforts to contain the virus.



This briefing is intended to serve as a call to action for cabinets to start responding to these threats by **adopting digital-first and multimodal strategies.**

Today's students, faculty, and staff are increasingly seeking campus environments where they can move seamlessly across in-person, virtual, and blended mediums, and the pandemic experience has accelerated interest in new ways of engaging with colleges and universities. **In a hypercompetitive market environment, the decisions cabinets make—or don't make—today to respond to these changing preferences will influence their enrollment competitiveness and financial health across the next decade.**





“The race to the top is now about who can provide the experience [that people want]—whether it’s the student experience, research experience, or faculty experience.”

Director

Campus Design and Planning Firm

To that end, we've designed this briefing to spark honest dialogue about higher ed's multimodal future, including these issues:

- ▶ **What forces are driving students, faculty, and staff to demand different experiences,** and how do those forces manifest differently across stakeholder populations?
- ▶ **What is the mismatch between our current campus experience** and what students, faculty, and staff want and need to be successful?
- ▶ **How have the table stakes for technology and digital tools already changed?** Where are we at risk for falling behind, and what are the consequences of maintaining the status quo?
- ▶ **How can responding to changing student, faculty, and staff demands satisfy stakeholders** while advancing other institutional goals such as access, retention, and engagement?
- ▶ **What's stopping us from making the changes that our stakeholders want?**

How to use this briefing

Higher education executives and their teams should commit to discussing this briefing as a team in cabinet retreats or other strategic planning sessions. While individuals can independently read the briefing itself, we recommend discussing the featured “**Essential questions to guide future campus strategy**” (included at the end of the briefing) as a team. Your responses to the discussion questions will help you identify areas where you’re already making critical strategic investments in multimodality and digital solutions, and (more importantly) illuminate unforeseen areas of weakness or areas demanding greater attention.

Beyond use by the cabinet, the ideas and questions within this briefing can be applied at the unit level (e.g., the College of Science). Leaders should share this briefing and its discussion questions with any unit leaders, task forces, or teams focused on the student, faculty, or staff experience in a specific area.



To invite an EAB expert to facilitate a conversation and share feedback and insights on your institution’s specific risks and opportunities, please **contact your EAB Strategic Leader.**

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1

Five converging catalysts for reimagining traditional higher education operating models

Key trends that are influencing higher ed
operations and service delivery

CATALYST 1

Experience liquidity

The pandemic put a spotlight on higher ed's digital infrastructure and virtual offerings, but of course, stakeholder preferences for learning, work, and service models were changing long before 2020, largely driven by **accelerating digital transformation in other industries**.

Across the past decade, students and their families have been asking colleges and universities to provide more seamless, customer-friendly processes and services, comparable to the experiences they receive when they interact with companies like Zappos and Disney. There's actually a name for this concept—**experience liquidity**, the concept that consumers increasingly compare similar service interactions across industries, facilitated by the adoption of the same technology across different sectors. For higher ed, this means that today's students expect high-tech, self-service, mobile-friendly processes across academic affairs and student services.



“The experience that students are having other places—like at Panera—does push back to campus. We look antiquated when we don't provide services at the level...and students are upset when they don't have that experience.”

President

Regional Private Residential University

Students' expectations for digital experiences were already high before the pandemic. Gen Z was born into an accessible, participatory, and directive internet era. Their daily lives are shaped by an advanced digital landscape, and the digital ecosystem impacts college campuses.

Characteristics of today's digital landscape

- ▶ One-stop shop information access via search engines, whenever and wherever
- ▶ Information filtered through algorithms
- ▶ Online experience personalized through ad tracking
- ▶ Media has always been social, and platforms have distinct purposes
- ▶ Content has eight seconds to capture attention

How the digital ecosystem affects campuses

- ▶ Students want more directive and personalized ways to navigate campus resources
- ▶ Students increasingly expect 24/7 service and centralized information hubs
- ▶ Growing need for students to undergo online conduct and media literacy training
- ▶ Online polarization is intensifying conduct issues and magnifying visibility and range of flashpoints

But this doesn't mean that students want their whole educational experience delivered by AI-enhanced TAs and chatbots. Today's students also want to interact with human staff for instruction and assistance, when warranted. And they have high expectations for the level of services they receive. They seek real-time, personalized support, just as they would expect to receive from Zappos or Marriott staff.

Now that students (and their parents), not to mention faculty and staff, have been conditioned by other industries to expect to obtain services and receive support on their own terms, the challenge for higher ed leaders is twofold:

- 1 First, determining how, when, and where different types of stakeholders **prefer to receive services**
- 2 Second, **prioritizing delivery models** that meet their demands *and* bolster institutional outcomes (and conversely, making principled decisions about which new delivery models or services to *deprioritize*, since not all emerging demands warrant new resource investments)

CATALYST 2

Return-on-experience mindset

Perhaps cabinets could deprioritize demands for real-time, virtual information and services if students viewed higher ed as different from other industries, such as consumer products and hospitality. Of course, higher ed is different—when students enroll in a degree program, they're making a major investment with significant, positive, long-term returns for most¹. Yet increasingly, prospective and current students and their families are approaching enrollment decisions with a consumer mindset, asking, "What will I get from this now?"—not all that differently from how they approach investments in a Disney vacation or Apple watch. In other words, they're **prioritizing the return on their experience (ROE) over return on their investment (ROI)**.

This trend of students shifting from an ROI to an ROE mindset was already in motion before the pandemic, as rising tuition prices empowered students and parents to demand more from their campus experiences. And the pandemic has pushed students even further in this direction. Dissatisfied with the college experience amid emergency measures such as online teaching and social distancing, many students concluded that "this isn't what they paid for"—weighting the short-term experience more heavily in their decision-making than they once did.

The graphic below illustrates a few examples of ways the ROE mindset manifested on campuses prior to and during the pandemic. These actions are driving campus leaders to prioritize investments in services and policy changes that satisfy students' growing expectations of their colleges and universities—both to attract and retain students and also to avoid negative publicity and damage to their reputations.

Three trends in student attitudes and preferences exacerbated by the pandemic

1 College, à la carte

Students seek to construct an experience that meets their needs, rather than treating the college experience as a package deal

Example

On-campus students seek exemptions from in-person classes, without "compelling reasons"

2 Everything is negotiable

Tuition changes, fees, and financial aid offers are increasingly viewed as negotiable

Example

Twice as many posts on /r/ApplyingtoCollege subreddit about financial aid negotiation during 2021 cycle than in 2020

3 I'd like to speak to the manager

Dissatisfaction with current policies or practices is targeted directly at senior leaders

Example

Students demonstrate dissatisfaction with campus policies outside of college presidents' homes

CATALYST 3

Emerging preferences for virtual socialization and community-building

Beyond students' satisfaction with their higher ed experiences, institutions must also consider how digital enhancements can influence student outcomes in and out of the classroom. Take social integration, for example. At residential institutions, social integration is the biggest driver of student retention. Higher education leaders have known this for a while; it partially explains some of the significant investments institutions have made in residence life and student activities. But today, social integration can be achieved online—and not just on Facebook and other giant social media platforms.

Gen Z (students roughly between the ages of 9 and 24 today) are increasingly gravitating more toward “digital campfires²,” virtual social platforms that are smaller and more intimate than traditional social media servers. These platforms (which include Twitch³, a video game livestreaming site, and Discord⁴, a network of interest-based virtual discussion channels) typically engage users around shared interests, such as video games, music, or makeup—interests that students don't always see represented at campus activities fairs.

Arguably, students may flock to digital campfires for privacy from administrators and faculty (and their parents and other adults who frequent sites like Facebook today). But given the popularity of digital campfires among Gen Z (examples below), higher education leaders may miss opportunities to socially integrate—and retain—students if they fail to account for those who gravitate toward digital engagement platforms.



50%

of Twitch's 30 million daily visitors are between 18 and 34 years old⁵



21%

of Twitch's 30 million daily visitors are between 13 and 17 years old



34%

of high school students are on Discord⁶

CATALYST 4

Higher ed's growth imperative and increasing competition for online students

While meeting the expectations and needs of undergraduate students is crucial, most leaders realize they cannot sustain their business models through undergraduate enrollments alone. Amid increasing competition for enrollments and constraints on undergraduate tuition growth, many cabinets are looking to grow into new adult and graduate markets to cultivate new revenue streams and achieve financial sustainability. Specifically, many institutions have announced plans to grow online graduate enrollments—recognizing that even prior to the pandemic, graduate enrollment growth was heavily concentrated in online programs.



+258K

Total increase in online graduate students 2013–2018



-179K

Total decrease in face-to-face graduate students 2013–2018

As competition for online enrollments has increased, leaders have been forced to identify new ways to attract online students and improve their outcomes and experiences. Counterintuitively, some leaders are increasingly focusing on the role of physical spaces and experiences in serving online students—building truly multimodal experiences to better serve student needs. Some of this experimentation involves multimodal courses, in which students may visit campus a few days per semester for in-person classes, with the majority of coursework completed online.

But more interestingly, some institutions are thinking about the total student experience and intentionally creating opportunities for online learners to engage in person with their institutions. For example, a few universities have created or leased co-working spaces in metropolitan areas where online students can study, log in to courses, and socialize.

In an increasingly competitive market, leaders looking to grow enrollments outside of undergraduate programs must similarly consider not only their program mix but also how combining physical and online courses and services can better meet prospective students' needs—driving greater enrollments and improving outcomes.

CATALYST 5

Intensifying talent wars and the evolution of work

Students are not our only stakeholders whose needs and preferences are changing. Faculty and staff preferences, too, have been affected by outside forces and need to be considered when planning for a more multimodal future. Most notably, of course, the COVID-19 pandemic gave faculty and staff a taste for what a fully virtual work arrangement might look like. Surprisingly, many enjoyed it.



83%

of employees prefer 1+ day
of remote work per week

Employees across industries are now demanding more permanent flexible work arrangements from their employers, and higher ed institutions are not immune to this workforce revolution. In fact, higher education institutions face greater urgency than some outside industries to meet staff demands, since many universities can't compete for talent with other industries on wages. This pressure is particularly acute in several areas, including IT, advancement, and finance.

Without the ability to compete on pay, higher ed leaders must leverage other benefits to attract and retain talent. To that end, recent surveys suggest that flexible work arrangements may be the new must-have non-compensation benefit—to the point that 65% of surveyed staff⁷ across industries have stated that they would be willing to take a pay cut in exchange for more remote work.



4x

rate of work at home post-versus pre-pandemic



61%

of employers expect to reduce business district space

At the very least, this means that higher ed institutions must reconsider their remote work policies, but sustainable and productive remote work arrangements must go beyond simply allowing staff to join meetings on Zoom. To create attractive and effective work arrangements, leaders must also consider new investments in technology to facilitate remote team connectedness, space arrangements to maximize collaboration and flexibility when staff are on campus, and training and support for managers of remote or hybrid staff.

Most higher education institutions have already established their return-to-office plans for fall 2021, but leaders should continue to monitor staff preferences for remote work alongside competitor organizations' plans. At a macro labor market level, the remote work question has yet to be resolved: many companies and organizations are still under emergency work-from-home orders, and many staff are still weighing short-term pandemic needs (for childcare, stability, health protections, etc.) when making employment decisions.

Once the labor market stabilizes and organizations across industries announce more permanent work policies, higher education institutions may experience knock-on recruitment and retention challenges if they do not provide the workplace benefits and experiences that professional staff desire.

2

The risks of **reverting back to pre-pandemic “normalcy”**

Unpacking the potential consequences
of not embracing multi-modality

The Change Imperative

Of course, stakeholder demands alone should not drive cabinets to change their offerings and operations. Ultimately, any changes must align with institutional mission. **But in today's market environment, higher ed institutions risk financial, reputational, or mission damages if they fail to provide the experiences that stakeholders expect for their investment.** Consider a few hypothetical (but plausible) scenarios:

Multimodality and digital investments become the new “amenities arms race” in undergraduate recruitment

While these investments are less visible on campus tours, they're increasingly top of mind for high school students—particularly in an era when prospective students use digital tools such as discussion boards and social media to engage with institutions during their college searches⁸. What if institutions needed to demonstrate that they provide a seamless digital experience during the recruitment and admission process or risk students enrolling elsewhere?

Virtual platforms and services become the new table stakes for building community and connections on campus

What if institutions that continue to invest only in physical amenities, clubs, and support services are missing portions of the student population who primarily form connections behind their screens—increasing the risk that these students disengage (and hindering institutions from advancing their inclusivity and access goals)?

Underinvestment in digital infrastructure exposes institutions to legal and reputational risk

As affordability concerns are amplified, what if students and their parents start to demand refunds, file public petitions, or smear institutional brands on social media when services or technology fails to meet their expectations?

Online “mega-universities” with robust multimodal offerings and digital services monopolize adult enrollments

Prior to the pandemic, 20% of online graduate students attended one of seven mega-universities⁹, including Western Governors University, Southern New Hampshire University, and University of Phoenix. These institutions have been rapidly growing enrollments by meeting student demands for convenience and digital accessibility, and adult interest in accessible online programs shows no signs of slowing. Institutions seeking to grow online enrollments are competing with these institutions (and their marketing and recruiting capabilities), like it or not. What if mega-universities figure out how to scale not just online instruction but also customized, in-person experiences for their online students?

Administrative staff attrition diminishes quality and service levels

What if, where institutions once relied on the on-campus experience as a competitive advantage in staff recruitment, they now struggle to recruit and retain talent if their remote work policies don't compare to their corporate sector peers' policies? In particular, institutions in urban areas with high costs of living and budget-constrained institutions that can't pay market wages plausibly risk losing talent if they don't provide remote work flexibility and the digital infrastructure to support it, ultimately leading to diminished quality and service levels and higher administrative costs.

Benefits of multimodality on campus

Importantly, embracing multimodality and digital enhancements on our campuses is not just about avoiding negative outcomes—it can improve mission outcomes too. Consider the possibilities:



Saving students and faculty time on administrative processes—and creating more time for teaching, learning, and research



Improving student engagement with academic courses and enhancing learning outcomes



Enhancing student sense of belonging



Expanding access to courses and programs to working students



Creating needed flexibility for students, faculty, and staff to balance academic or professional responsibilities with caretaking obligations

The challenge for cabinets is that of identifying changes that stakeholders want *and which also* improve outcomes and drive mission goals.

3

Cognitive **barriers** to **action**

Understanding—and overcoming—the biggest impediments to driving campus progress

BARRIER 1

For many, the ongoing impact of the COVID-19 pandemic is the greatest barrier to change right now.

This manifests on two levels. On the one hand, leaders across levels and units are still dealing with **management creep**: a high volume of urgent, crisis-related tasks and meetings continue to crowd out longer-term strategic planning. It's difficult to make time for conversations about what our student body will look like in five years while trying to keep today's campus community healthy, safe, and enrolled!

At the same time, many campus leaders, faculty, and staff are suffering from **pandemic fatigue**. Nearly two years into the pandemic, we're tired of constant change and craving the comforts of pre-COVID-19 lives.

BARRIER 2

The outlook demonstrated by some cabinet leaders who fear that adopting digital services or modalities will distort their residential value propositions or missions.

These leaders often cite a false dichotomy between residential and online experiences. In reality, most institutions already offer more multimodal experiences than meet the eye. Many institutions offer at least some online programs for graduate or professional students, engage residential students in online discussion boards, and offer virtual tours or information sessions for prospective students. None of these offerings signals that an institution is no longer committed to residential education; in contrast, they help the institution advance mission goals by expanding access to their courses, services, and experts.

Higher ed's **residential value proposition remains strong**: many students still want to live on campus and participate in formative experiences such as athletics and theater, and many faculty and staff still want to work on campus to feel more connected to the student body.

The challenge for cabinets is to identify how student, faculty, and staff preferences are changing and how responding to those changing demands (where warranted) can **help strengthen their mission—not transform it altogether**.

BARRIER 3

The “here and now fallacy.”

The “here and now fallacy”¹⁰ occurs when leaders overweight the extent to which the future will resemble the present (or past) when making decisions. These leaders are projecting themselves—their preferences and experiences—onto the “imagined student” (or faculty or staff member). Perhaps they personally found the pandemic-induced work-from-home period miserable and can’t imagine how others could have benefited from it. Perhaps they have fond memories of congregating with friends outside a faculty member’s door during office hours and would not want to deprive today’s undergraduates of similar face-to-face experiences. In turn, they dismiss ideas about doing things differently.



“All our assumptions need to be tested. We need to stop thinking that we know what will work and be effective in a virtual format and what has to be delivered in person. And to stop thinking we know in which environment students will be more engaged and satisfied.”

Vice President for Student Affairs

Public Research University

4

A vision for a **multimodal, technology- enhanced future**

Early indicators of how multi-modality
might transform stakeholder experiences

Signals of the future

What might a multimodal, digitally enhanced future look like? Rather than trying to make concrete predictions about what types of investments your institution will need in five, 10, or 15 years, we recommend focusing on signals of the future to help envision how the future might take shape. A signal could be anything from a new technology to an emerging behavior to a new business model or venture.



Signal of the future

A specific example of the future happening in the present—a clue about what the future might be like.

Institute for the Future¹¹

We're already observing indications of what a multimodal, digitally enhanced future may look like in higher ed:



AI-enabled student assistants become standard amenities

All students at **Deakin University** in Australia can access Genie¹², an artificial intelligence-enabled personal assistant, from their cell phone or other devices.

Genie helps students navigate all facets of student life, from reminding them when assignments are due to connecting them with support staff to suggesting campus events and extracurriculars that might interest them.



In-person, large lectures become obsolete

The **University of California, Berkeley**, has announced it is abandoning its plans to build a large new lecture hall¹³ on campus following the pandemic. Explaining their logic, Chancellor Carol Christ noted that “[large lectures] are working better online... big, in-person lectures are going to be a thing of the past.”



Students gain the power to define when, where, and how they complete their degrees

Unity College, a private college in Maine, announced plans to abandon its traditional two-semester residential model in favor of a hybrid learning model¹⁴ in August 2020. In their new model, students can move fluidly between online and in-person learning across their degree programs, choosing which type of coursework best meets their needs at any given time.

In the year since announcing their new model, Unity has doubled enrollment¹⁵, from 868 undergraduates in 2019–20 to 1,800 in 2020–21.



Less selective institutions offer hybrid programs to lower tuition cost while maintaining the benefits of residential learning

Southern New Hampshire University launched six undergraduate degree programs priced at \$10,000 per year¹⁶ in fall 2021. In these programs, students will take most of their classes online while living on campus and interacting with faculty members, advisors, and group project teams in person.



Physical hubs for in-person meet-ups and engagement become a standard amenity of fully online programs

Georgia Tech is building co-working spaces¹⁷ in 10 major population centers to give online students a physical space in which to work and meet one another. Those spaces are also equipped with in-person career and advising services.

They generated this idea after analyzing student enrollment data and realizing that 80% of students in their online master's in computer science program live within a two-hour drive of these population centers.



Being a "Digital RA" becomes a standard campus job

Saint Leo University is experimenting with embedding student affairs staff and RAs into the esports Discord server to provide mentoring and to connect students with campus resources and events.

They generated this idea after a few residence hall RAs who were active on the Discord server proactively connected students in distress whom they observed on the platform to student affairs professionals.



Most staff split their time between campus, home, and other work environments as needed to improve work-life balance and performance

University of Leicester is investing in campus space redesign to accommodate a hybrid workforce that moves constantly across campus, home, and other work environments.

5

Where do we go from here?

Next steps for college and
university cabinet leaders

EAB's research team is continuing to think deeply about what a multimodal or digitally enhanced campus might look like and how that vision varies across institutional market segments and student mixes. These are complex and evolving research questions that we are tackling in stages, thinking about the multimodal futures of the **student experience, the faculty and staff experiences, and teaching and learning**, in turn. Our goal is to share data and insights to help inform your investment strategy across each of these domains.

Of course, institution-specific data and priorities should inform your investments in digital or multimodal services, programs, or experiences. To help leaders start to identify the data and market intelligence necessary to drive investment decisions on their campuses, we've prepared the following **conversation starter** for cabinets, boards, and other executive leaders. We recommend cabinets discuss these questions as a team in upcoming retreats or strategic planning sessions—particularly sessions focused on enrollment growth strategy, digital investment strategy, or the student, faculty, and staff experience.

We also recommend sharing these questions with unit-level leaders who are leading efforts to improve the student, faculty, and staff experience in their respective areas.

Essential questions to guide future campus strategy

Students, faculty, and staff and how they're changing

- ▶ How are today's students' needs and preferences for multimodal, digital, or technology-enhanced experiences changing?
- ▶ How do we expect our student demographics to change in the next 10 years? Where are we investing in growth?
- ▶ What data can we use to analyze changing behavior patterns over time (e.g., course registration, satisfaction surveys, etc.)?
- ▶ What types of investments in multimodal instruction or service delivery are our peer or competitor institutions making?
- ▶ Why do different types of prospective students enroll at our institution, select other institutions, transfer, or drop out? Can we use enrollment or registrar data to identify areas where we may be losing students to competitors because of a lack of investment in multimodal instruction or digitally enhanced service delivery?
- ▶ How does our technology infrastructure within and beyond the classroom compare to that in place at our top K-12 feeder schools?
- ▶ What about faculty and staff? How are they different from our faculty and staff of 10 years ago?
- ▶ Where do we risk losing faculty and staff if we don't embrace more flexible and technology-enhanced work models?

How shifting demographics and preferences should affect your budget and campus master plan

- ▶ How will our physical space needs change as we adopt more virtual or hybrid services, course modalities, and work models?
- ▶ How will our IT operating budget and staffing model need to grow or change to accommodate more virtual and hybrid services, course modalities, and work models?
- ▶ How will our academic support staffing investments need to change? How might our faculty and support staff profiles need to change to support a more multimodal future?
- ▶ How will our student services investments need to change? What types of services will students want to self-service, experience virtually, or eliminate altogether? What new roles, staff profiles, or technology investments might we need to make to support residential students who want to engage with the campus community through virtual means?
- ▶ Have recent investments in academic and student support services (e.g., new learning technologies, one-stop-shop models) positively inflected outcomes? Why or why not?
- ▶ What changes may we need to make to our ERP and course registration systems to support experimentation with course start dates and end dates and modalities?

Multimodal experimentation and what's worth scaling

- ▶ Have recent changes to our service or operating models seen the intended results regarding enrollment growth, service quality improvement, or stakeholder satisfaction gains?
- ▶ What can we learn from our Professional and Adult Education unit in regard to incentivizing, evaluating, scaling, and sustaining innovations?
- ▶ Which faculty members or departments have taken the lead on pioneering new multimodal teaching or service models? Can we scale those innovations across campus or engage those faculty in championing other digital or multimodal innovations?

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Endnotes

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