

# POST-PANDEMIC HIGHER ED: USHERING IN INNOVATION

An Interview Series

**SEPTEMBER 2020**

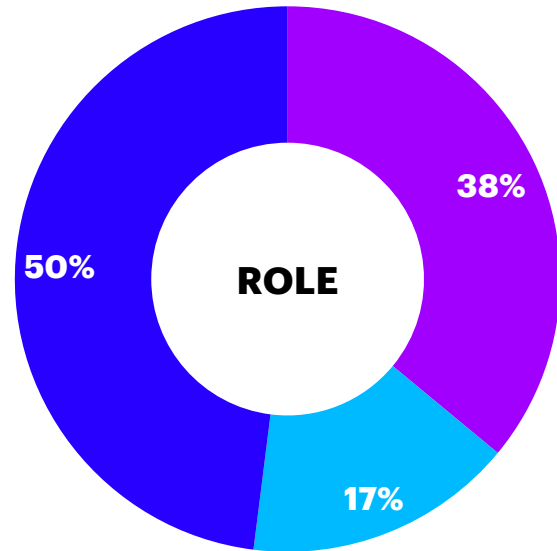


We have seen in the recent *Inside Higher Ed* surveys of college and university presidents and business officers that **nearly 50% anticipate making difficult but transformational changes** in their institutions in the next 12 months.

Changes might include things such as lasting shifts in the program portfolio or even the sharing of administrative services with other institutions.

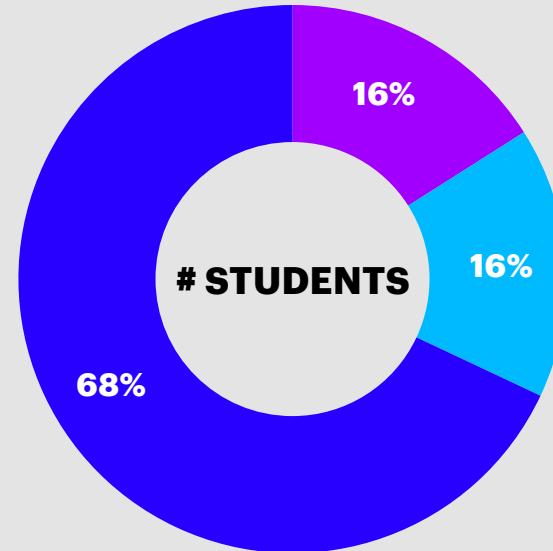
We embarked on an interview series with institutional leaders July – September 2020 to learn more about what lies behind these numbers.

# WE TALKED TO LEADERS...

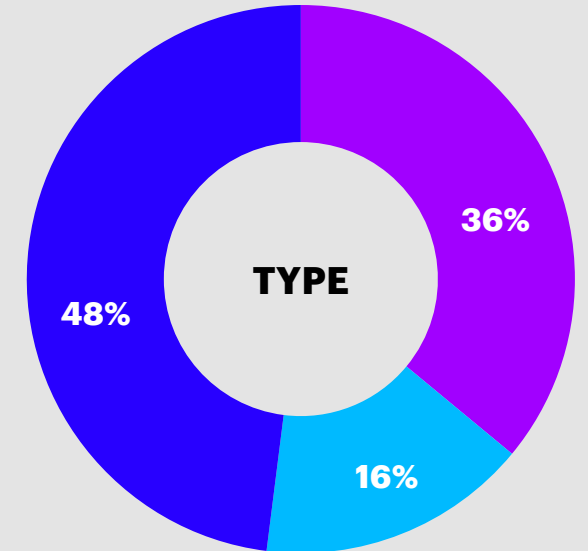


- VP of Enrollment, Innovation, Other
- President
- CFO/COO/VP Finance

# ...AT INSTITUTIONS OF DIVERSE SIZES AND TYPES ACROSS THE NATION



- <5k
- 5-15k
- >15k



- Public
- System Office
- Private

# WE SET OUT TO UNDERSTAND...



...permanent changes  
to education delivery



...evolving approaches  
to serving and  
engaging students



...the transformation of  
operating models

# ...IN A POST-PANDEMIC WORLD

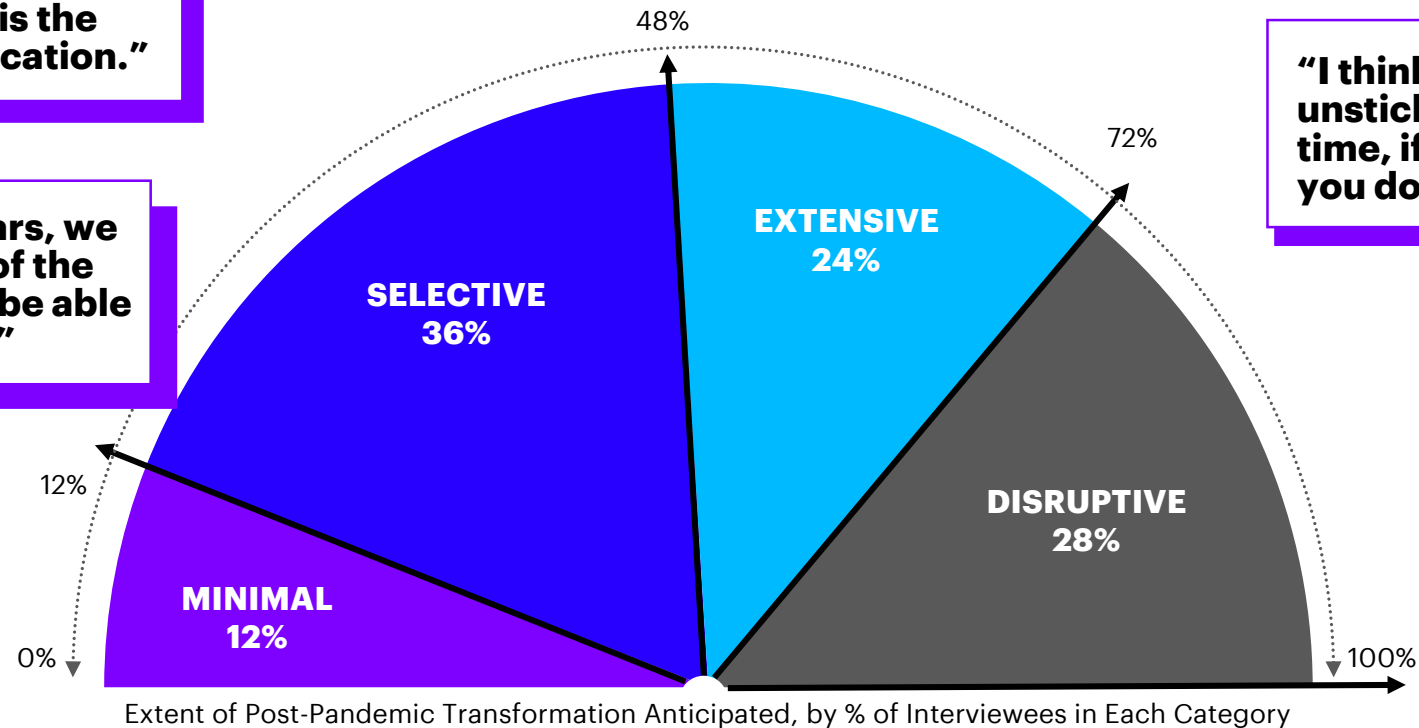
# INTERVIEWEES PREDICTED A WIDE SPECTRUM OF TRANSFORMATION

**"I don't know if COVID disruption is enough. If COVID doesn't create the disruption, I don't know what would."**

**"I don't think that COVID is the death of face-to-face education."**

**"Even in the next 10, 20 years, we don't think major portions of the residential experience will be able to be replicated [virtually]."**

**"I think now everything is unsticky. I think now is the time, if you are going to do it, you do it."**



**"The institutions that refuse to change will die."**

**"No one will be untouched. No college or university will be the same. Some of us will change dramatically."**

# ENRICHED EDUCATION DELIVERY

Quality of education will be enriched for both traditional and non-traditional students as necessity spurs innovation in education delivery.

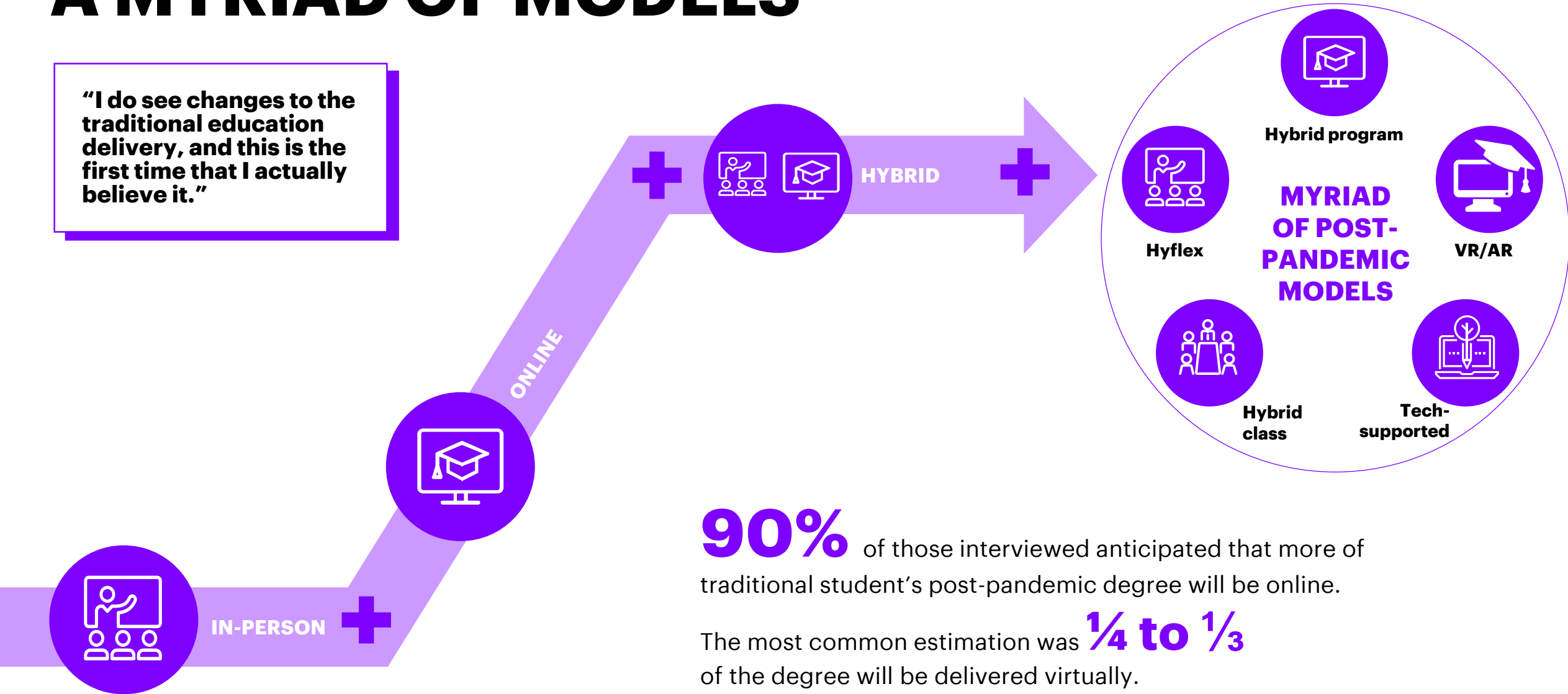
The result will be more varied, tech-enabled and tailored education to meet the needs of different student segments across their lifetimes.



**“HOW YOU RECEIVE YOUR  
EDUCATION HAS BEEN  
IMPACTED BY COVID  
FOR GENERATIONS.”**

# EDUCATION DELIVERY WILL EXPLODE INTO A MYRIAD OF MODELS

"I do see changes to the traditional education delivery, and this is the first time that I actually believe it."



**90%** of those interviewed anticipated that more of traditional student's post-pandemic degree will be online.

The most common estimation was **1/4 to 1/3** of the degree will be delivered virtually.

# TECH-ENABLED FACULTY ARE CHAMPIONING THIS INNOVATION EXPLOSION

Teaching & learning centers internal to institutions have taken on the enormous task of upskilling faculty through the pandemic.



**95%** of interviewees said that **faculty are now more open / more innovative** in approaches to leveraging technology.

**“Maybe 20% of the faculty...had interacted with the [teaching and learning] Center before COVID. And now it's 100%. That has changed our DNA.”**

**“It’s taking down the walls of fear of being able to deliver it for the first time.”**

**“Now [technology has] become more than a tool. It’s become a fundamental change in the delivery of pedagogy.”**



# EDUCATION WILL BE ENRICHED FOR BOTH TRADITIONAL AND NON-TRADITIONAL STUDENTS IN DIFFERENT WAYS

**NON-TRADITIONAL STUDENTS**  
will get better **LIFELONG ACCESS**

**TRADITIONAL STUDENT**  
delivery will be **MORE TAILORED**

Interviewees believe that post-pandemic education will...

- Meet life-long education needs from high school to retirement (40%)
- Provide greater variety of degree and certification options (36%)

- Provide a crisper value prop for purposeful, in-person learning (38%)
- Accelerate time-to-degree (36%)
- Increase of % degree done online (90%)

## **FOR BOTH**

- Provide more flexibility (90%)
- Include technology enrichments (75%)
- Offer a wider variety of content and courses (52%)

# SUPPORTING AND ENGAGING STUDENTS

Post-pandemic student support will be more purposeful, as COVID has illuminated where exactly the immense value of in-person student experiences lies – and where it is preferable for student support services to be delivered virtually.

**“OUR STUDENTS WANT TO BE HERE...THEY STILL WANT TO BE IN PERSON OR ON CAMPUS.”**

**“STUDENTS SEE IN-PERSON [ADMINISTRATION] AS ANNOYING RATHER THAN A CONCEPT OF HIGH QUALITY [SERVICE].”**

# COVID HAS ILLUMINATED WHERE IN-PERSON STUDENT INTERACTIONS ARE NEEDED – AND WHERE THEY ARE NOT



CLUBS & AFFINITY GROUPS



GREEK LIFE / RESIDENCE LIFE



GRADUATION



SPORTS

## SOCIALIZE AND BUILD COMMUNITY IN-PERSON

In-person is preferred for social activities involving groups and/or un-curated interactions among peers.



ACADEMIC ADVISING/TUTORING



MENTAL HEALTH/ TELE-HEALTH



STUDENT ADMINISTRATION SERVICES



CAREER SERVICES

## PROVIDE 1:1 SUPPORT REMOTELY

Where convenience and privacy are prioritized, such as personal or administrative support interactions with institutional employees, virtual delivery is preferred

# COVID HAS CLARIFIED THE VALUE FOR IN-PERSON DELIVERY OF STUDENT ACTIVITIES...



CLUBS & AFFINITY GROUPS



GREEK LIFE / RESIDENCE LIFE



GRADUATION



SPORTS



**"It's really hard to do student organizations virtually."**

**"There is a real thirst for in-person interaction."**

**"The biggest complaint I'm hearing now is - 'great my student's there... but there's zero for her to do. And how does she get engaged?'"**

# ...AND ILLUMINATED HOW STUDENT SUPPORT CAN BE IMPROVED THROUGH VIRTUAL DELIVERY



ACADEMIC ADVISING/TUTORING



MENTAL HEALTH/ TELE-HEALTH



STUDENT ADMINISTRATION SERVICES



CAREER SERVICES

**“Career services can be done online. And there are some students who don't want to come in to do it and would prefer to do it through their computer.”**

**“We're using the technology and seeing a growth in participation. That's amazing.”**

**“Students are actually working at their records between 11p and 2am....its an opportunity for us to have 24-hr very flexible time.”**



# TRANSFORMED WAYS OF OPERATING

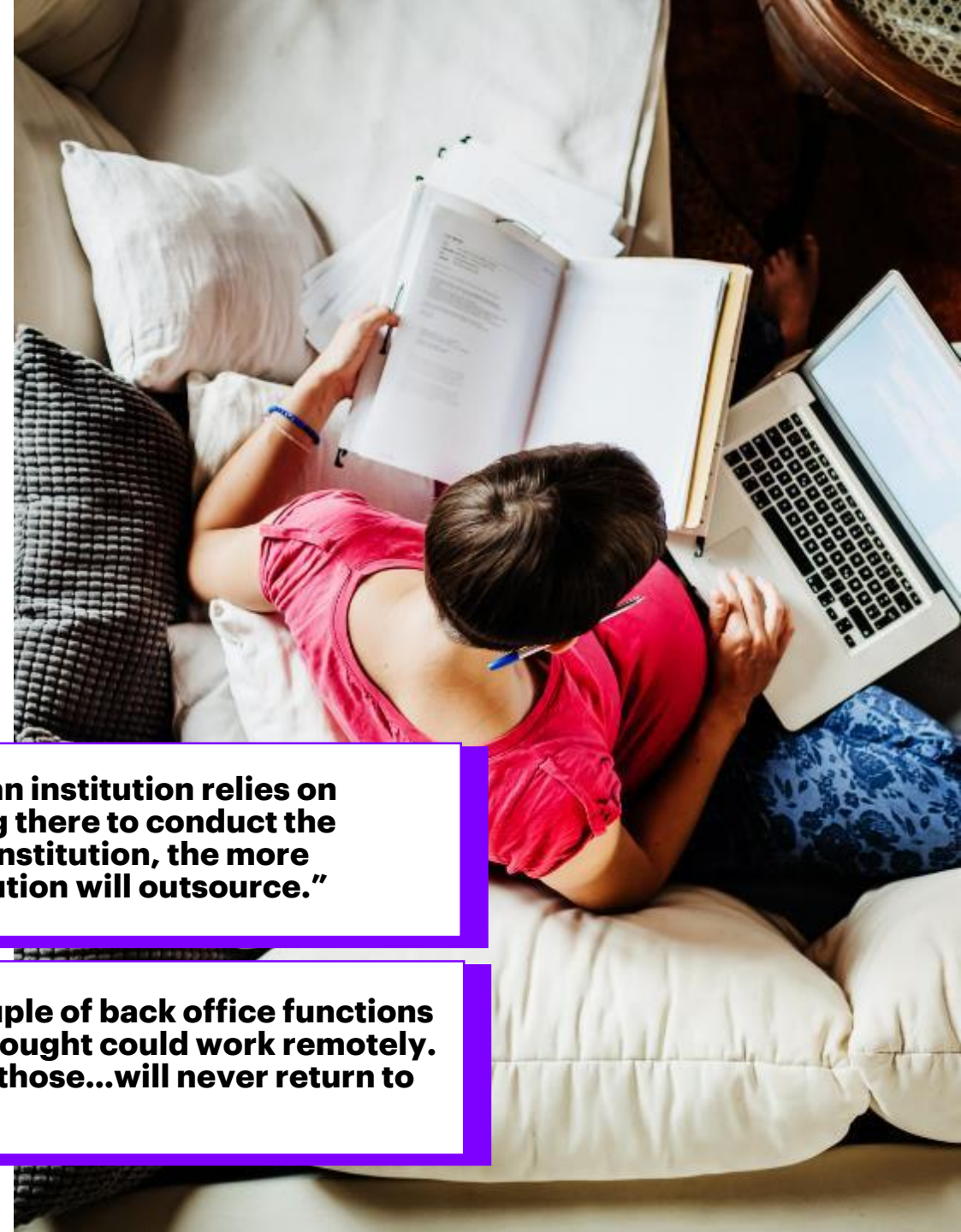
Institutions have been spurred into exploring new ways of operating, from automation to shared services and outsourcing.

A more permanently remote administrative workforce and IT modernization are removing barriers to change.

**“WE TOOK SOME VERY ‘AGGRESSIVE’ ACTIONS THAT WE WOULD HAVE NEVER TAKEN WITHOUT THE PANDEMIC.”**

# REMOTE WORK IS HERE TO STAY, HELPING TO EVAPORATE ONE HURDLE TO ADMINISTRATIVE TRANSFORMATION

All interviewees expected more staff to be more remote more often, with the most frequent response being that **20% of staff may not come back in person.**



**“We are kind of amazed at how well [the back office] is working virtually...We really don’t need to be there physically.”**

**“The more that an institution relies on people not being there to conduct the business of the institution, the more likely that institution will outsource.”**

**“We hear the ‘I walk down the hall and I sit with so-and-so’ [as an objection to shared services]. Now they definitely don’t walk down the hall.”**

**“There are a couple of back office functions that we never thought could work remotely. And a couple of those...will never return to campus”**

# PROCESS AUTOMATION AND STANDARDIZATION IS THE FIRST STEP

All interviewees who discussed the topic thought automation was critical to their future transformation plans. Of those, **60% cited modern technology as a driver of the automation potential.**

**“My goal is to be highly standardized so it doesn’t matter who is doing the function or where they reside.”**

**“Let’s get rid of work and standardize what you can’t get rid of.”**

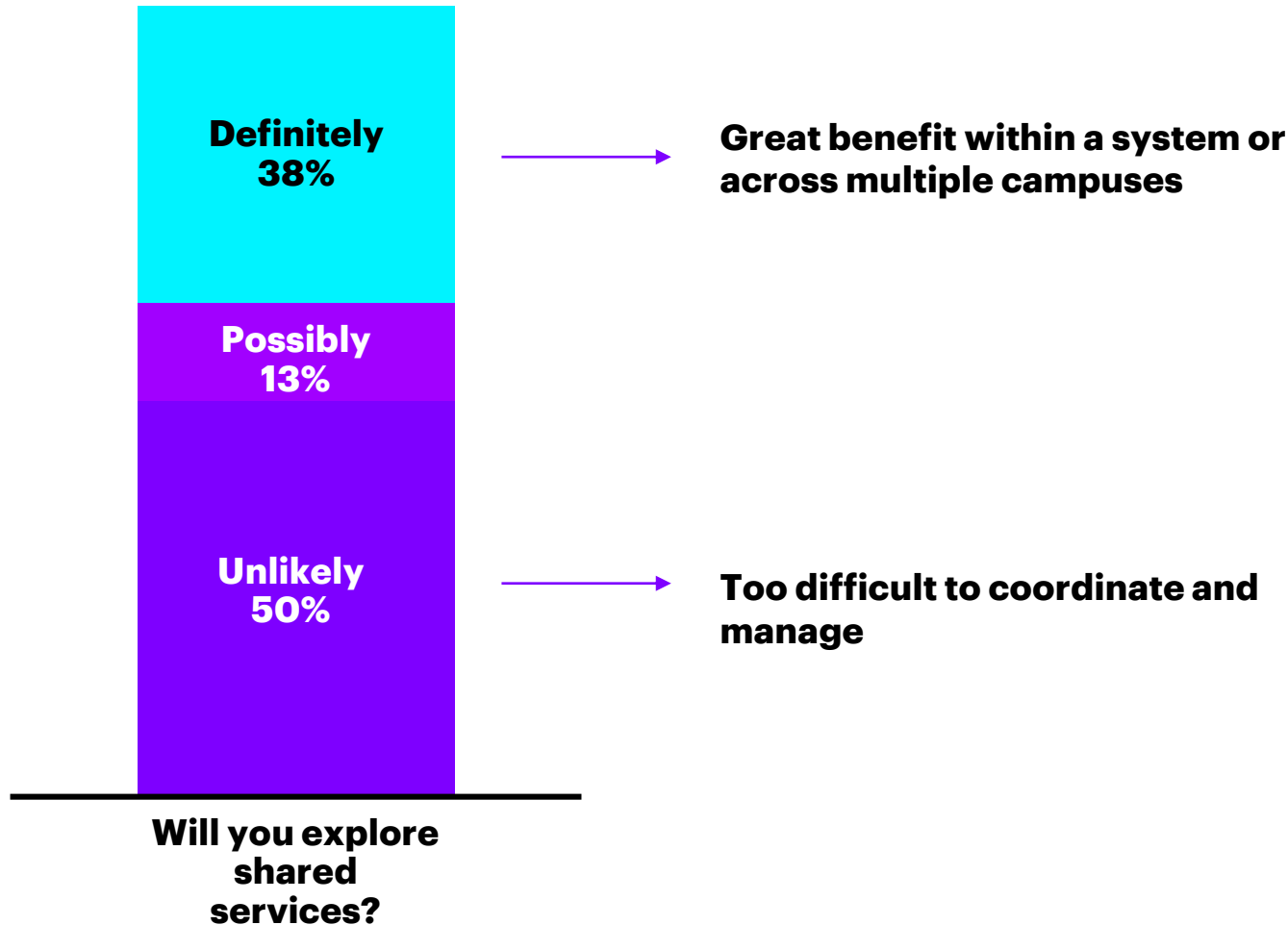
**“If it can be automated, most people don’t feel very engaged in that kind of [work].”**

**“There will be tremendous workload reduction through automation.”**





# ATTITUDES TOWARD SHARED SERVICES ARE POLARIZED, WITH TRACTION CENTERED AT THE SYSTEM OR MULTI-CAMPUS LEVEL

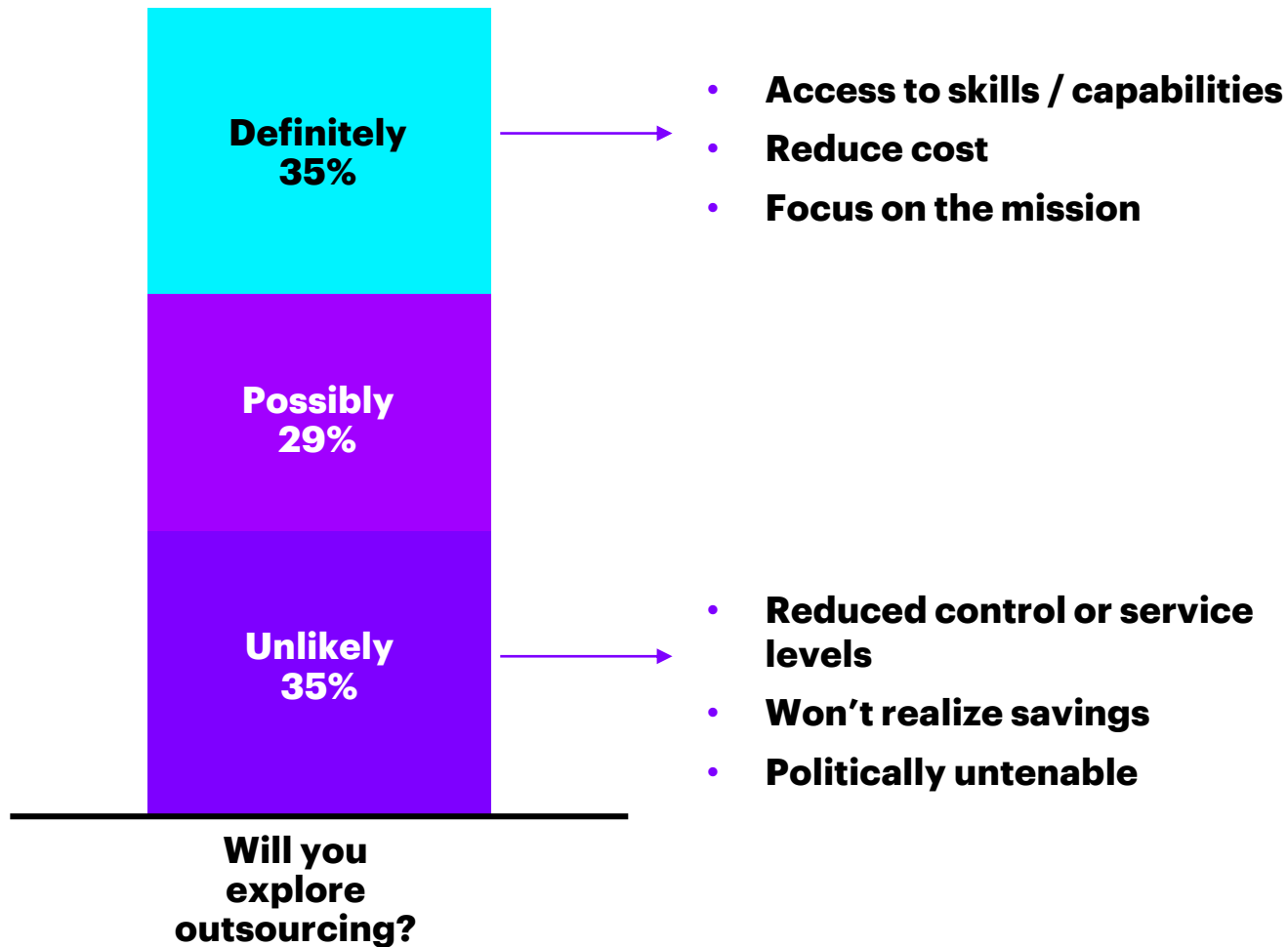


**"If you are trying to convince people to leverage a shared service for anything, you better be able to deliver at a high level of quality."**

**"Outsourcing will be more common than shared services."**

**"Our focus has got to be on getting the work out of the system, not on trying to force a shared services model."**

# THERE IS A MIXED ATTITUDE TOWARD OUTSOURCING'S ABILITY TO PROVIDE SERVICE, QUALITY, AND VALUE



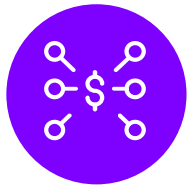
**"I'm going to find a vendor to outsource that to or a technology I can automate it with. And we're just going to keep our attention on what's really our mission and core."**

**"In a heavily unionized organization, the term outsourcing is sort of the third rail."**

# HOW CAN INSTITUTIONS NAVIGATE THROUGH THIS TRANSFORMATION TO THRIVE IN A POST- PANDEMIC ERA?

# ACCENTURE'S EDUCATION OFFERINGS LOOK BEYOND FALL AND EQUIP COLLEGES AND UNIVERSITIES TO THRIVE IN A POST-PANDEMIC WORLD

## FINANCIAL SUSTAINABILITY & OPERATING MODEL



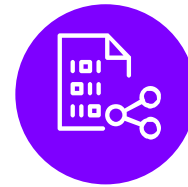
### Zero Based Reboot of Financial Structure

- Large private research institution

### Shared Services

- Public university system

## SAFETY & SECURITY



### Contact Tracing, Monitoring, Tracking and Managing

- Various states and counties

### Capacity / Density Management

- Large private research institution

### Cybersecurity

- Large private research institution

## INSTITUTION TRUST



### Branding and Institutional Marketing

- Exclusively online institution

### Social Media Sentiment

- Accenture's Student Sentiment Study

## ACADEMIC PROGRAMS & STUDENT EXPERIENCE



### Program Portfolio Reboot

- Large private institution

### Enrolment Analytics & Recruitment Website Assessment

- Private special-focus institution

### Digital Student Engagement Platform

- Large private research institution

# CONTACTS



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