Post-pandemic higher ed: ushering in innovation

An interview series
February 2021
Nearly 50% of college and university presidents anticipate making difficult, but transformational, changes in their institutions in the next 12 months. According to recent Inside Higher Ed surveys.

Changes might include lasting shifts in the program portfolio or even sharing 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 also conducted a survey of higher education employees that included insights into their perspectives on the post-pandemic workplace.
We talked to leaders...

...at institutions of diverse sizes and types across the nation

Note: Information on the workforce survey methodology can be found at our full publication, "Public service as a career of choice." Results in this document pertain to the US higher education subsegment of that survey.
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 think that COVID-19 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 don’t know if COVID-19 disruption is enough. If COVID-19 doesn’t create the disruption, I don’t know what would.”

“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.”

Extent of Post-Pandemic Transformation Anticipated, by % of Interviewees in Each Category

Disruptive 28%
Extensive 24%
Selective 36%
Minimal 12%
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-19 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

90% 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-19. 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.”

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

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<th>Internal resources</th>
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<td>75%</td>
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Education will be enriched for both traditional and non-traditional students in different ways

Non-traditional students will get **better lifelong access**

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

Traditional student delivery will be **more tailored**

- 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%)

Interviewees believe that post-pandemic education will...
Supporting and engaging students

Post-pandemic student support will be more purposeful, as COVID-19 has illuminated where exactly the immense value of in-person student experiences lie – 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-19 has illuminated where in-person student interactions are needed – and where they are not.

Socialize and build community **in-person**
In-person is preferred for social activities involving groups and/or un-curated interactions among peers.

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.

- Clubs & affinity groups
- Greek life / residence life
- Graduation
- Sports
- Academic advising / tutoring
- Mental health / tele-health
- Student administration services
- Career services
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COVID-19 has clarified the value for in-person delivery of student activities...

"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?'"

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

"It’s really hard to do student organizations virtually."
…and illuminated how student support can be improved through virtual delivery

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Academic advising / tutoring
Mental health / tele-health
Student administration services
Career services
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.”

“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.”

“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.”

“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.”
Most higher ed employees want to work in a hybrid or remote capacity and believe they can be effective doing so.

Believe their job can be completed just as effectively remotely.

- 59% of higher ed employees want to increase how much they work remotely.
- This rises to 68% for those younger than 35.

According to the survey results, the #1 thing higher ed institutions can do to create an attractive career option is to offer flexible/part-time working arrangements.

23% do not expect their role to revert back to being office based.
Institutions are therefore encouraging this remote work trend. 78% say their institution encourages and supports remote work, and 72% say their institution is making investments for remote work. This is especially true for institutions with 1k-10k employees.
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.”
Automation is taking hold, and employees, particularly those mid-career or younger, are becoming more comfortable with machines doing routine tasks (by age group). 

- 65% of those surveyed <35 years say they are more comfortable with machines doing routine tasks.
- 68% of those surveyed 35-44 years say they are more comfortable with machines doing routine tasks.
- 56% of those surveyed 45-54 years say they are more comfortable with machines doing routine tasks.
- 29% of those surveyed 55+ years say they are more comfortable with machines doing routine tasks.

83% of mid-sized institutions say the use of automation at their institution has increased.

65% of those surveyed say automation of routine tasks has freed up time to focus on more important work.

63% say their institution has announced an increase in investment for automation.

Note: Mid-sized refers to institutions with 5k-10k employees.
Attitudes toward shared services are polarized, with traction centered at the system or multi-campus level.

- **Definitely 38%**
  - Great benefit within a system or across multiple campuses
  - "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."

- **Possibly 13%**
  - Too difficult to coordinate and manage
  - "Outsourcing will be more common than shared services."

- **Unlikely 50%**
  - "Our focus has got to be on getting the work out of the system, not on trying to force a shared services model."

Will you explore shared services?

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There is a mixed attitude toward outsourcing’s ability to provide service, quality, and value.

Will you explore outsourcing?

- **Definitely** 35%
  - Access to skills / capabilities
  - Reduce cost
  - Focus on the mission
- **Possibly** 29%
- **Unlikely** 35%
  - Reduced control or service levels
  - Won’t realize savings
  - Politically untenable

“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**
- Workforce of the Future
  - Health organization
- Zero Based Reboot of Financial Structure
  - Large private research institution
- Shared Services
  - Public university system

**Institution trust**
- Branding and Institutional Marketing
  - Exclusively online institution
- Social Media Sentiment
  - Accenture’s Student Sentiment Study

**Safety & security**
- Contact Tracing, Monitoring, Tracking and Managing and Vaccine Management
  - Various states and counties
- Capacity / Density Management
  - Large private research institution
- Cybersecurity
  - Large private research institution

**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