2022

# THE STATE OF HIGHER EDUCATION STRATEGIC TECHNOLOGY PLANNING REPORT

## Insights into institutional initiatives and the role of technology

# APOGEE

# Executive Summary

With the ongoing pandemic, higher education is still working to adapt to a new normal. The events of 2020 and 2021 cast a bright light on the difficulties of making quality higher education accessible to the underserved as well as preparing students for modern, well-paying jobs that lead to satisfying careers and lives. This intense disruption to academics-as-usual, and the profound need for higher education to be a beacon of hope and opportunity, have revealed fascinating differences in strategic planning among universities.

In September 2021, Apogee analyzed 611 publicly available strategic plans created by a variety of higher education institutions to understand the state of strategic planning pre-2020 and after. Our goal is to empower our customers to make data-driven planning decisions, help them tie their initiatives to technology strategies, and support higher ed institutions as they emerge from this crisis stronger than before.

The 611 strategic plans were coded based on elements in different planning areas without double-counting action items in the same area. Many plans that expired in 2020 were not explicitly renewed in publicly available databases. This could be due to the pandemic preventing institutions from moving forward with planning. Strategic plans were downloaded or copied where possible and are available upon request. The interactive report, containing data visualizations by school size and locale (city, suburb, town, and rural), was updated in October 2021.

Though larger institutions have the innate advantages of more personnel and funding, we believe all institutions – especially smaller ones – need to double-down on strategic planning to not only push through these uncertain times, but to come out stronger on the other side. According to our research, smaller institutions in this study are two times more apt to not have a strategic plan. It is unclear whether this is due to a lack of resources or hesitation on how to plan for a post-pandemic world. Goal setting and strategic planning must include aggressive technology planning. This is necessary to support the nation's demand for educational ROI that will drive equality and prosperity now and in the future.

Our analysis of the data suggests that there is a bigger focus on return on educational investment (ROEI).

Student debt is currently at $1.7 trillion, and as it continues to rise, it will be critical for institutions of all sizes to provide access to affordable, quality education. Intentional strategic planning, with technology planning that keeps pace with and stays ahead of the altered environment, is fundamental to realizing this goal.

# INSTITUTIONAL STATISTICS

We focused primarily on campuses with less than 5,000 students, but we included a healthy representation of larger institutions to reference and compare strategic vision, for a 2:1 ratio **(FIG. A)**.

We used data from institutions based in a wide variety of locales, but a strong plurality (45.1 percent) were located in towns and rural areas per IPEDS classification **(FIG. B)**.

As might be expected, we found that 77 percent of larger institutions (those with more than 5,000 students) are located in areas with higher density populations like cities and suburbs. 57 percent of smaller institutions (which we define as having between 1,000-4,999 students) are generally located in towns and rural areas that are further from population centers **(FIG. C)**.
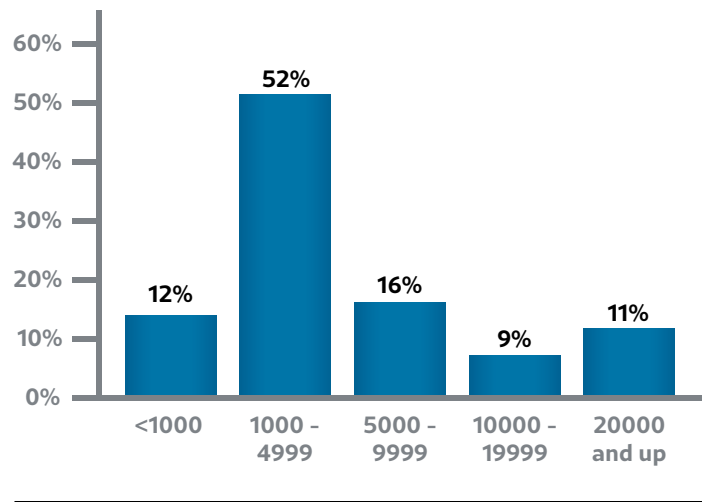
**Fig. A – Institution Size**

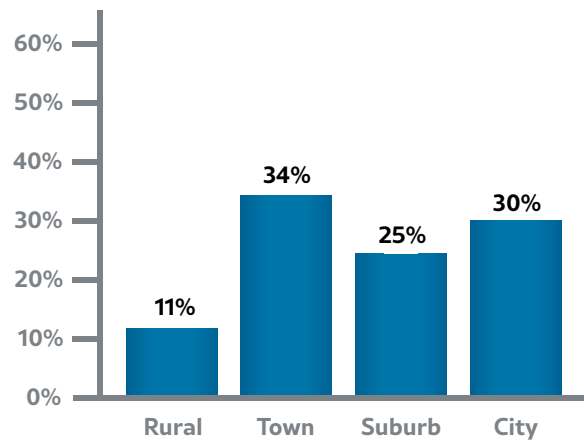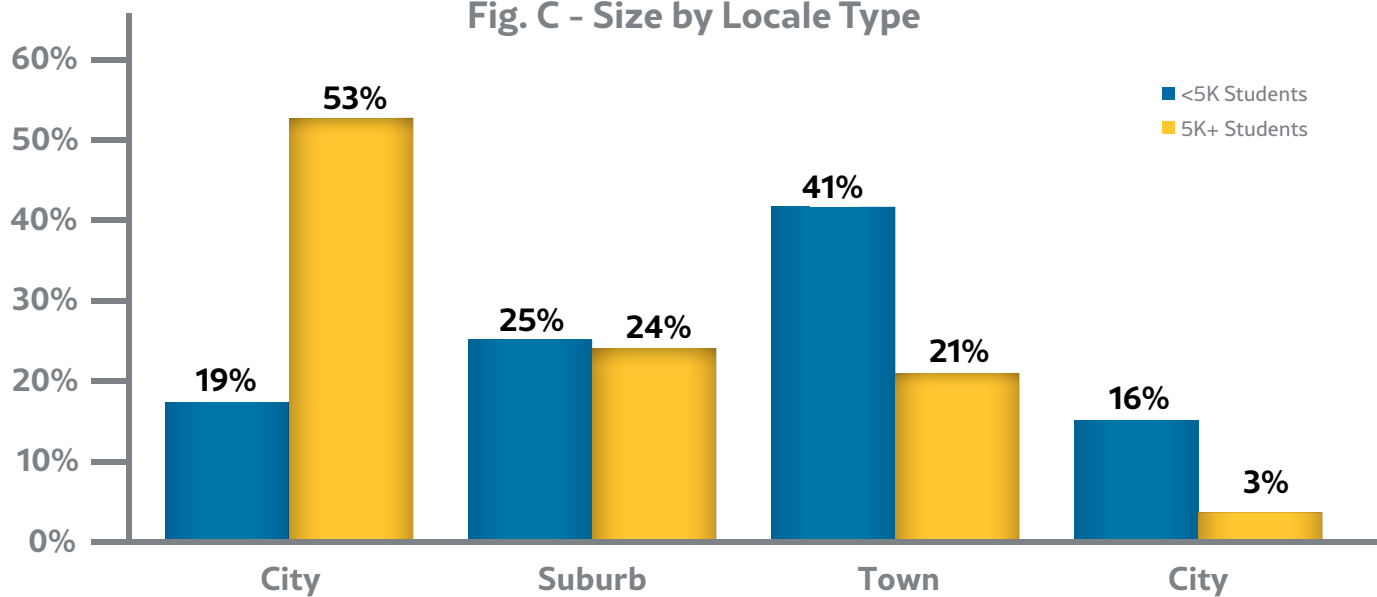Institution Size distribution:
- <1000: 12%
- 1000 – 4999: 52%
- 5000 – 9999: 16%
- 10000 – 19999: 9%
- 20000 and up: 11%

**Fig. B – Locale**

Locale distribution:
- Rural: 11%
- Town: 34%
- Suburb: 25%
- City: 30%

**Fig. C – Size by Locale Type**

Legend: ■ <5K Students   ■ 5K+ Students

| Locale | <5K Students | 5K+ Students |
|--------|--------------|--------------|
| City | 19% | 53% |
| Suburb | 25% | 24% |
| Town | 41% | 21% |
| City | 16% | 3% |

# THE ROLE OF TECHNOLOGY

Technology preparedness is essential and a critical component of several of the initiatives that inform an institution's strategic plan. Student Outcomes, Pedagogy, Student Life, and Planning and Governance initiatives all rely on an underpinning of technology to drive or enable them. While campuses actively invest time, energy, and money into these initiatives, our study found that many fail to supply the explicit focus on technology that would drive these initiatives forward at a rate commensurate with their importance to future success, stability, and resilience.

As **FIG. D** makes clear, technology initiatives are a lower priority than Student Life, Funding, Planning and Governance, Population, and Pedagogy initiatives for the institutions in this study.

## Fig. D – Initiative Areas
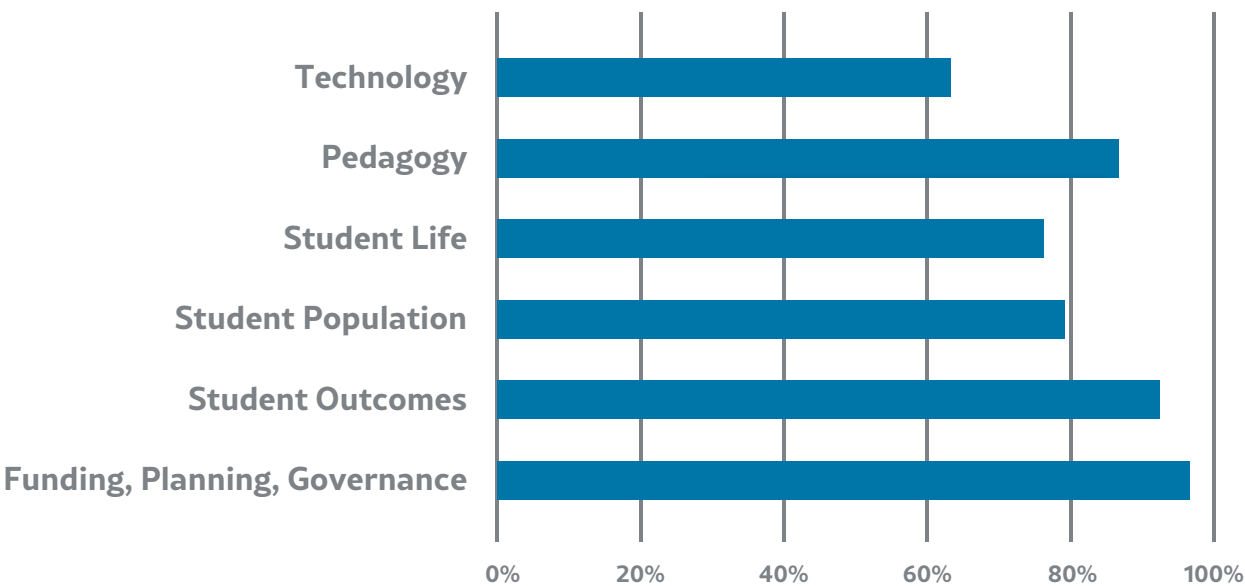


Our 2020 study showed that 66 percent of institutions explicitly called out Technology initiatives in their strategic plans. Given the transition to remote learning, it would be expected for schools to enhance technology resources. However, only 62 percent of active plans in this year's study included Technology initiatives.

The impact of COVID-19 has revealed our dependence upon a reliable technology infrastructure. The internal conversation around technology has likely changed, but our study does reveal why so many campuses were ill-prepared for the move to remote learning, work, teaching, and research.

Forced to move the bulk of their classes online in response to the global pandemic, a majority of institutions were not well-equipped to do so in a way that could yield a meaningful outcome. The fact that few metrics exist for evaluating student attendance, participation, or engagement only exacerbates the problem. Over the longer term, this approach is unsustainable as student educational experience demands rapidly return to their pre-pandemic state.

In a potentially interesting development, this study found that Wi-Fi initiatives decreased in plans created after 2020 despite there being a clear need for accessible Wi-Fi.

In plans created in 2019 and earlier, 5.7 percent of schools had Wi-Fi initiatives incorporated in their strategic plans. Given that many schools anticipated students returning to on-campus activities, Wi-Fi initiatives should have risen. However, only 1.6 percent of 2020-2021 plans emphasized actions to improve the Wi-Fi experience they deliver.

With more schools reopening, strategic plan initiatives may best be focused around technology initiatives that will enhance the student experience. With the release of Wi-Fi 6, institutions should take the time to see this as an opportunity to get ahead and convert their campus to a new generation of Wi-Fi.

As new technologies emerge to address the gap in synchronous learning platforms, colleges and universities must also work to make blended learning a focal point of their strategic plans.

To learn more about how blended learning can help you differentiate in a hyper-competitive future, read our e-book Transform the Educational Experience through Blended Learning.

## THE TECHNOLOGY TIMESCALE

73 percent of the strategic plans we used in this study (see our sources for more information) began before 2020, while 27 percent began in 2020 or after **(FIG. E)**.

**FIG. F (on next page)** shows that strategic plans created before 2020 (59 percent) focused less on technology than those created in 2020 or after (65 percent).

Fig. E – Plan Start



**27%**
BEGAN IN 2020 OR AFTER

**73%**
BEGAN BEFORE 2020
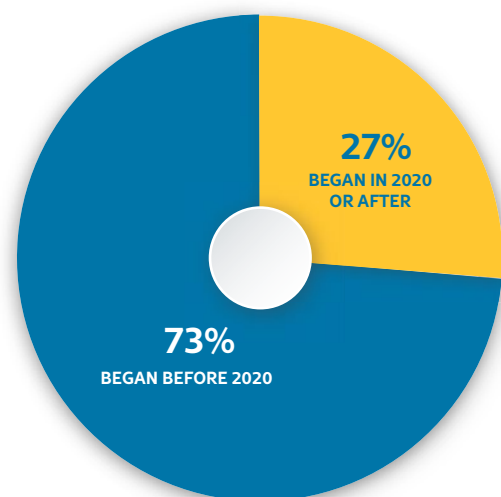
When pre-2020 plans are broken down by school size, the disparity comes into sharp focus. Even when strategic plans embraced technology in the past, it was usually larger schools that budgeted for technological growth and infrastructure.

### Fig. F – Initiative Areas By Plan Creation Time Frame
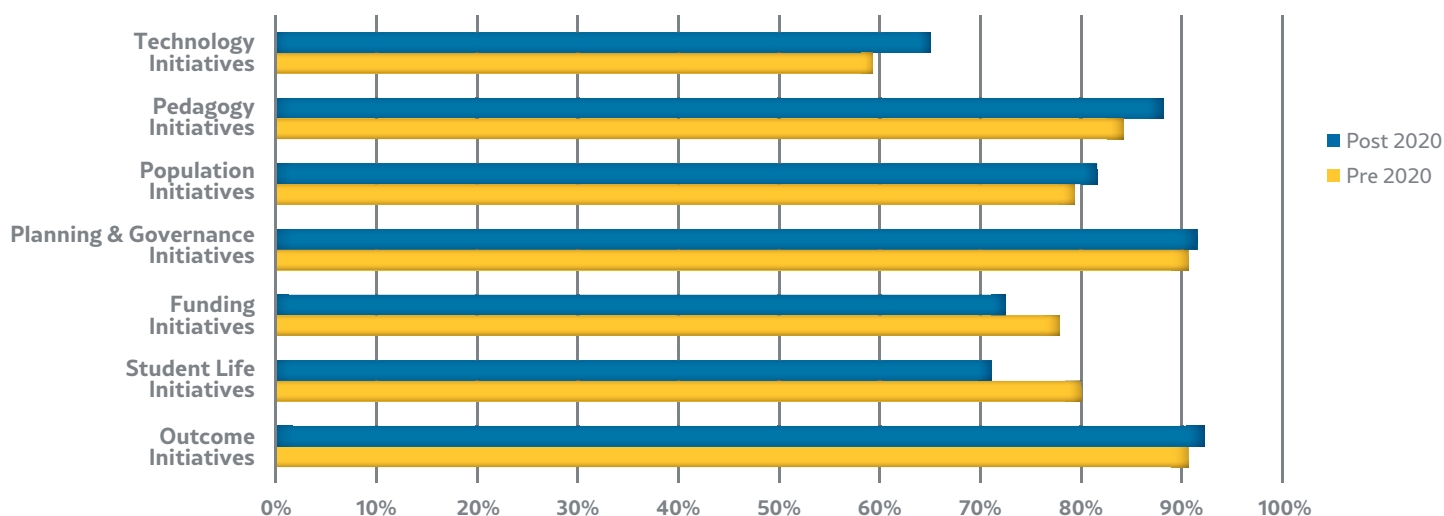


Pedagogy initiatives increased alongside Technology initiatives from 84 percent prior to 2020 to 88 percent afterward. While the increased focus on pedagogy planning since 2020 aligns with the increase in remote learning adoption, the inverse technology investment relationship suggests schools may either be unprepared for a future of blended, multimodal learning or expect a return to normalcy soon.

## THE IMPORTANCE OF DIFFERENTIATION

Under difficult economic conditions, many schools will downsize their way to survival. This is a useful way to avoid closing but a poor way to compete and differentiate. Rightsizing — the process of disinvesting in traditions or initiatives that no longer serve the needs of a modernized education and reinvesting those dollars in innovative ideas and technologies — offers a way forward. As a key aspect of multimodal learning, synchronous learning can help schools differentiate far beyond the current public health crisis by thinking about it as an enhancement to traditional learning rather than a replacement for it. With synchronous learning delivered to those physically in the classroom, students have far greater control over their capacity to learn and absorb. The ability to pause, rewind, or play again allows students to interact more deeply with challenging content. Similarly, new content delivery platforms can use sentiment analysis to comprehend areas of the lecture that prove challenging, enabling the professor to make adjustments in real time or for future lectures.

While small schools (those with less than 5,000 students enrolled) have outpaced their larger counterparts in pedagogy in recent years, they trail the same schools in technology investment – an area where both large and small universities already appear underinvested.

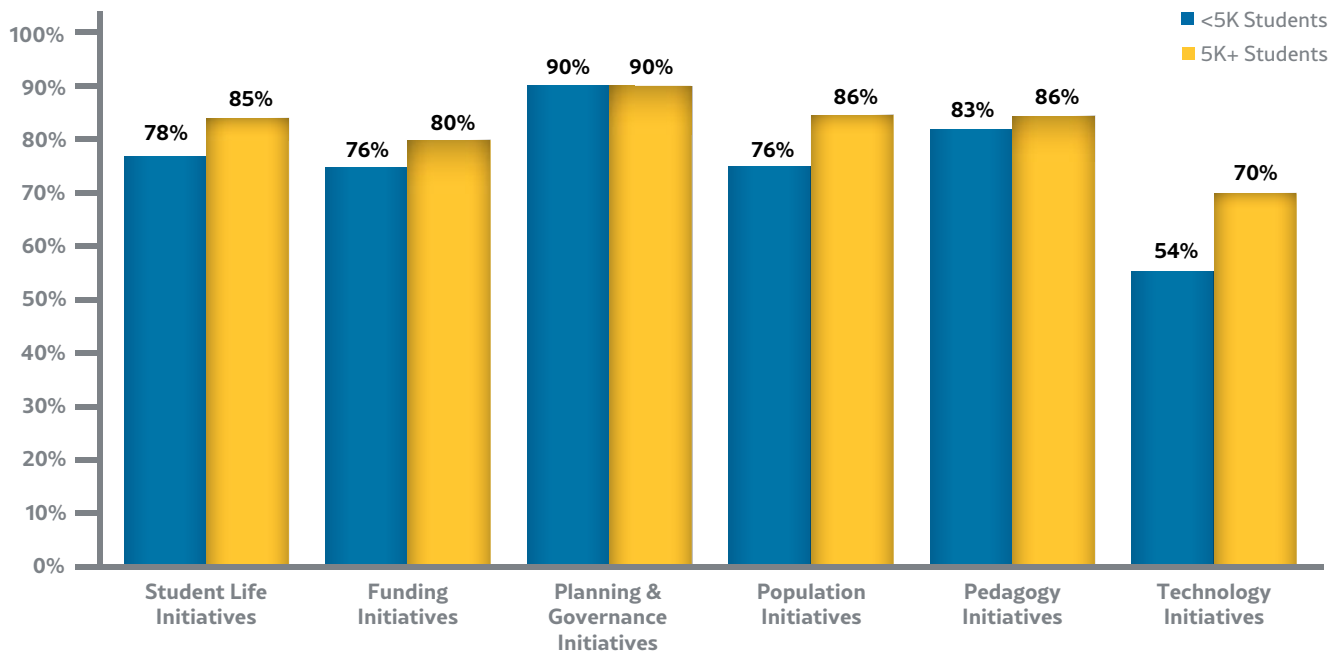Fig. G – Initiative Areas By Institution Size Pre-2020

**FIG. G** above reflects initiative area focus by institution size prior to 2020. Here, Pedagogy initiatives feature well for both large and small schools, with an 86.1 percent and 82.5 percent strategic plan emphasis, respectively. Technology initiatives fall well below pedagogy for the same time period, however, with large and small school strategic plans emphasizing Technology initiatives just 69.4 percent and 53.8 percent of the time, respectively.

Specific initiative areas that drive Pedagogy initiatives, such as New Program Development and Curriculum Revision, increased by 18 percent and 15 percent respectively. In addition, the study found a greater emphasis on Career Placement in plans created after 2020 (52 percent), suggesting that institutions are investing time and resources to ensure students are well-prepared for a successful career, potentially to deliver ROEI.
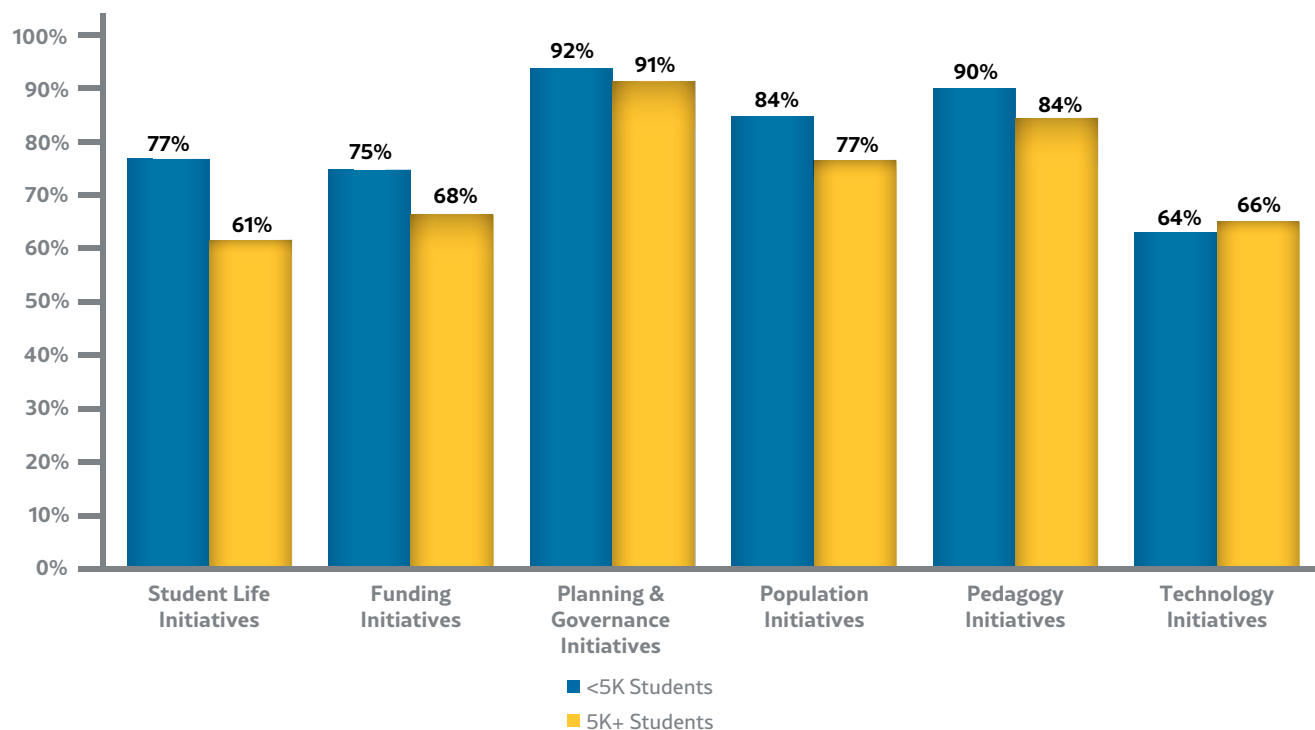
We would expect Technology initiatives to have risen substantially post-2020. Instead, investment across both large and small schools only increased slightly. It's important to note that Residential Life initiatives went down for plans created after 2020.

For plans created before 2020, institutions showed a focus on improving residential living (38 percent). However, we saw that only 25.6 percent of plans created after 2020 emphasized Residential Life initiatives.

This suggests that institutions do not expect students to invest heavily in on-campus housing. From a competitive standpoint, this could pose a serious issue for schools in the future if they continue to neglect improving student life on campus.

**FIG. H** indicates a continued emphasis in pedagogy, with large schools at 84.1 percent and small schools at 89.6 percent. Emphasis on Technology initiatives increased in the same period post-2020 to 65.9 percent for large schools and 63.6 percent for small schools.

## Fig. H – Initiative Areas By Institution Size 2020 and After



Legend:
- ■ <5K Students
- ■ 5K+ Students

Data values:
- Student Life Initiatives: 77% (<5K), 61% (5K+)
- Funding Initiatives: 75% (<5K), 68% (5K+)
- Planning & Governance Initiatives: 92% (<5K), 91% (5K+)
- Population Initiatives: 84% (<5K), 77% (5K+)
- Pedagogy Initiatives: 90% (<5K), 84% (5K+)
- Technology Initiatives: 64% (<5K), 66% (5K+)

For smaller schools in particular, competing with large or state-funded universities means thinking critically about ways to differentiate. Disinvesting in those activities that no longer serve their vision and reinvesting in the technologies that support blended learning and enhance the educational experience are critical.

Effective strategic planning – getting to how your vision can be achieved – starts with asking the right questions. Which services should be outsourced to help us effectively accomplish our goals? What new technologies should be adopted to deliver a better educational experience that prepares students for their future careers through blended learning? Consider, for example, the implications of a lost Wi-Fi connection to synchronous learning. While this might be a tolerable experience during asynchronous playback, losing connectivity during a live-streamed lesson is not.

# RETHINK YOUR STRATEGIC PLAN

As blended learning moves to the forefront and improving enrollment takes center stage, the role of IT is rapidly evolving from cost center to key contributor in the pursuit of enrollment, retention, persistence, and outcomes. Your capacity to put mission over operations — to disinvest in time- and resource-hogging operational headaches and partner to deliver the infrastructure and technologies that enable student success — is core to achieving your strategic vision and goals. The topic of moving IT operations in-house to a managed technology services model is covered extensively in our e-book How to Move from In-House IT Operations to Managed Technology Services.

Network infrastructure operations and funding models are key targets for managed technology services. It's imperative that institutions lower network operational costs and gain budget stability and predictability to improve the on- and off-campus educational experience.

From learning management systems (LMS) and live video to on-demand video and content platforms, a network infrastructure that's a decade or even five years old won't be enough to get the job done. IT must modernize ahead of the curve, with built-in refreshes and futureproofing, and CFOs must demand a financial model that is predictable and sustainable.

Partnering with a managed technology services partner (MSP) is a powerful way to place your mission over your operations. A knowledgeable MSP eliminates in-the-weeds technology decision-making, provides continuity over the long term, and takes on risk. A strong partner also provides account stewardship, with dedicated client service managers, monthly conference calls and reports, and onboarding for campus users.

# SUMMARY

It's clear from the data that higher education as an industry remains focused on improving the educational experience. For the better part of the last decade, colleges and universities of every size have sought to shift the pedagogical experience toward remote or online modalities. The data also suggests that the industry may not be technologically prepared for a rapid and dramatic shift to blended learning and still has work to do before it can effectively deliver a multimodal on-campus educational experience that produces results for students beyond graduation.

A focus on ROEI indicates that institutions may want to combat rising student debt levels by focusing on helping students find the best jobs and careers possible. With budgets and staffing remaining flat or declining year over year, partnering for IT services offers colleges and universities their best chance to uncover their differentiating value and attract and retain new students. Outsourcing time- and resource-consuming infrastructure challenges is a compelling way to allow for a renewed focus on differentiating programs and coursework that will drive the student experience during their time studying on campus and after graduation.

To see how your campus compares or to schedule a 1:1 strategic IT planning session with Apogee, please visit strategicplanning.apogee.us.

# Sources

1.  U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2019, Directory Information-HD2018. Retrieved from https://nces.ed.gov/ipeds/datacenter/DataFiles.aspx?goToReportId=7 on March 2021.

2.  U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2019, Education oering, organization, services and athletic organizations-IC2018. Retrieved from https://nces.ed.gov/ipeds/datacenter/DataFiles.aspx?goToReportId=7 on March 2021.

3.  U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2019, Public institutions - GASB 34/35: Fiscal year 2018-F1718_F1A. Retrieved from https://nces.ed.gov/ipeds/datacenter/DataFiles.aspx?goToReportId=7 on March 2021.

4.  U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2019, Private not-for-profit institutions or Public institutions using FASB: Fiscal year 2018-F1718_F2. Retrieved from https://nces.ed.gov/ipeds/datacenter/DataFiles.aspx?goToReportId=7 on March 2021.

# ABOUT

For more than 20 years, Apogee has been redefining the student campus life experience. As the only managed technology services provider with a sole focus on higher education, Apogee has become the trusted partner to more than 400 schools and 1 million students and administrators who rely on the company's innate understanding of how superior Wi-Fi powers student vitality. Apogee's comprehensive portfolio includes unmatched residential networks (ResNet) and Managed Campus networks that drive student and administrator success; video services that provide "like home" rich media experiences; and digital campus engagement services that act as an extension of the university's stat. Partnering with Apogee enables schools to derive greater return on their IT investments and increase student satisfaction while achieving budget stability and predictability.

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