APOGEE

2020 HIGHER EDUCATION STRATEGIC IT PLANNING REPORT

Understand the state of strategic technology planning

GET YOUR REPORT

Executive Summary

In the wake of the current pandemic and protests over systemic racism, higher education is experiencing an existential threat. Both events cast a bright light on the difficulties of making quality education accessible to the underserved, from the black community to first-generation immigrants, to ESL students, and those in rural or poverty-stricken parts of the country. The 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 May 2020, Apogee analyzed 491 publicly available strategic plans for a variety of higher education institutions, with starts and projected ends recorded, to understand the state of strategic planning in the pre-COVID-19 world. Our goal is to help our customers make data-driven planning decisions, help them tie their initiatives to technology strategies, and help ensure higher education emerges from the crises of 2020 stronger than before.

The 491 strategic plans were coded based on elements in different planning areas, without double-counting action items in the same area. Strategic plans were downloaded or copied where possible and are available upon request. An interactive microsite with data visualizations and downloadable reports will be available in Fall 2020.

In addition, Apogee will add more data to the study in Summer 2021 by taking a “post-COVID-19” look at the same schools studied with an additional 500 schools included in the research.

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 the current crisis, but to come out stronger on the other side. 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 a disconnect between emphasis on pedagogy initiatives and technology initiatives in colleges and universities with under 5000 students enrolled.

Now more than ever, higher ed must play a role in combatting racial and economic inequality by providing 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 included a healthy representation of larger institutions to reference and compare strategic vision, for a 70/30 split **(FIG. A)**.

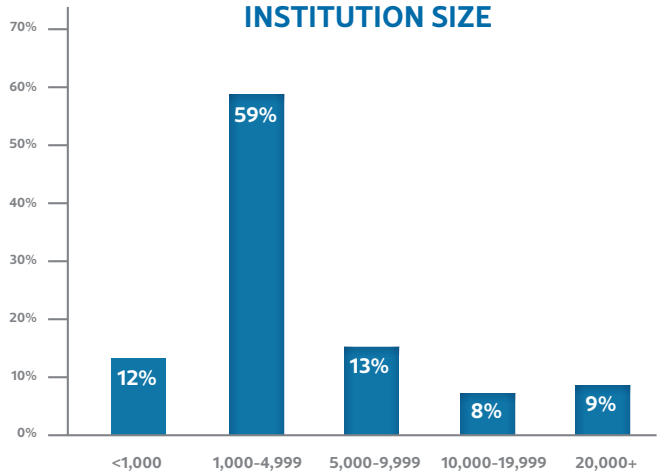

FIG. A: Institution Size.

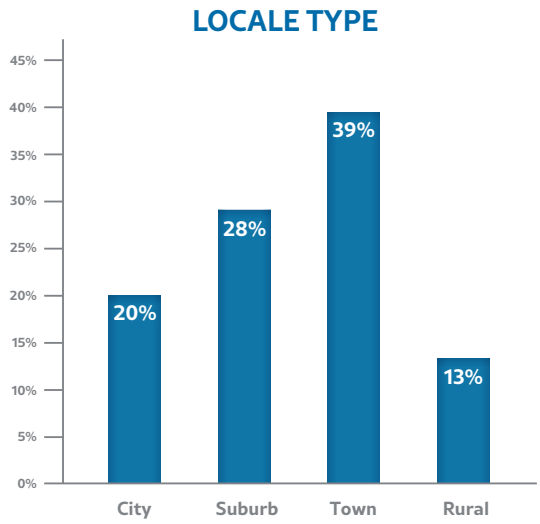

FIG. B: Locale Type.

We used data from institutions based in a wide variety of locales, but a strong plurality – 52% – were located in towns and rural areas **(FIG. B)**.

When size and locale are compared, we found that 80% of larger institutions (those with more than 5,000 students) are located in areas with higher density populations like cities and suburbs. 66% 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)**.

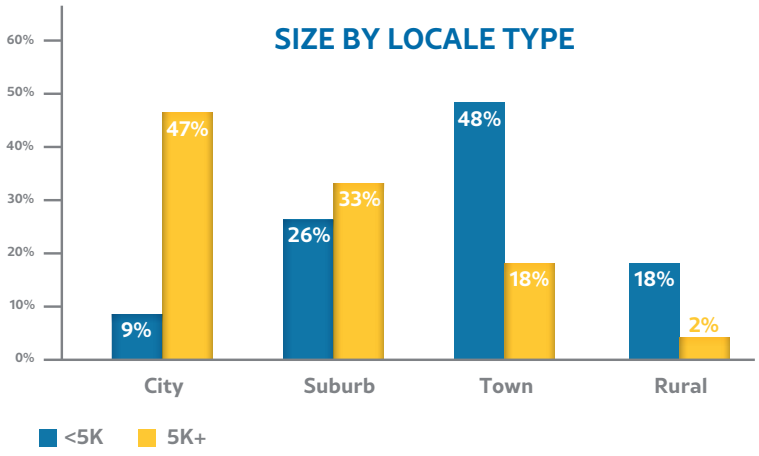

FIG. C: Size by Locale Type.

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 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 lower priority than student life, funding, planning and governance, population, and pedagogy initiatives for the institutions in this study. Only 66% of campuses explicitly called out technology initiatives in their strategic plans.

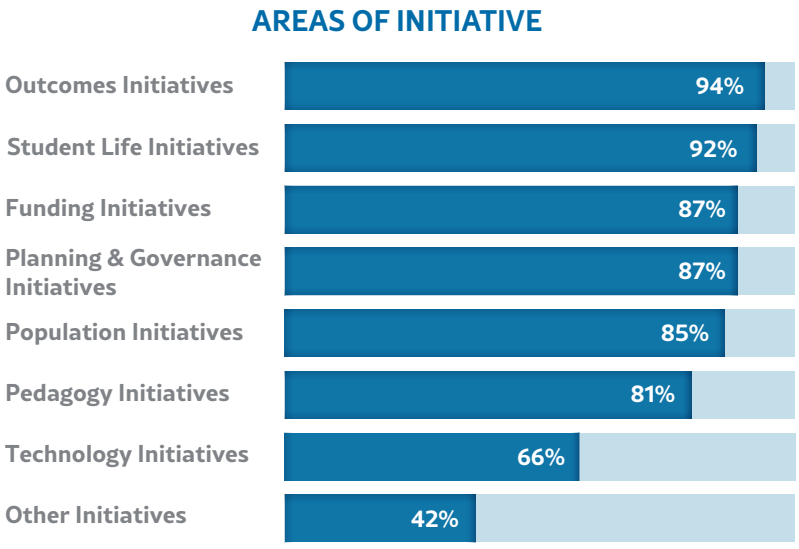

FIG. D: Areas of Initiative.

Since the strategic plans assessed were prior to 2020, they do not reflect our current and rapidly changing reality. The impact of COVID-19 has revealed our dependence upon reliable technology infrastructure. The internal conversation around technology has likely changed, and a future study in 2021 of strategic plans may help us to understand the effects of the COVID-19 pandemic on the institutional perception of technology initiatives. But our study does reveal why so many campuses were ill-prepared for the move to remote learning, work, teaching, and research.

At the time this report is being published, many schools are facing Fall 2020 reopening challenges due to the lack of investment in blended learning technologies and enabling infrastructure. Forced to move the bulk of their classes online (almost overnight) in response to the current public health crisis, a majority were ill-equipped to do so in a way that could yield a meaningful outcome. The problem is exacerbated by the fact that few metrics exist for evaluating student attendance, participation or engagement. Over the longer term, this approach is unsustainable as student educational experience demands rapidly return to their pre-COVID state.

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 white paper Transform the Educational Experience through Blended Learning.

The Technology Timescale

71% of the strategic plans we used in this study (see our Sources for more information) began after 2015. 81% have planned end dates in 2020 or after **(FIG. E)**.

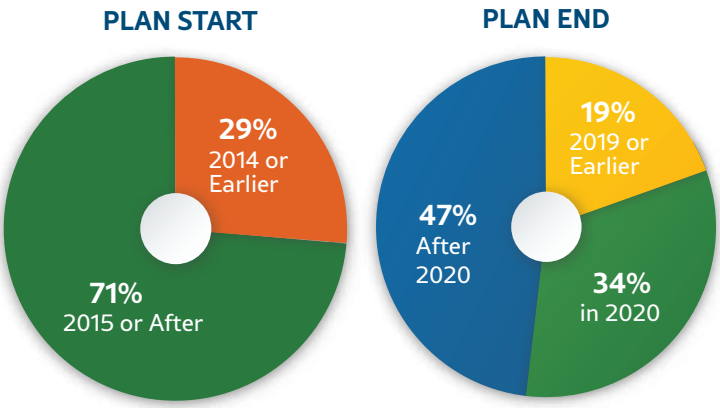

FIG. E: Plan Start and End Dates.

FIG. F shows that strategic plans created in 2014 or before focused more on technology than those created after 2014, with 71% of plans created prior to 2014 having technology initiatives and the number dropping to 64% for those plans created after 2014.

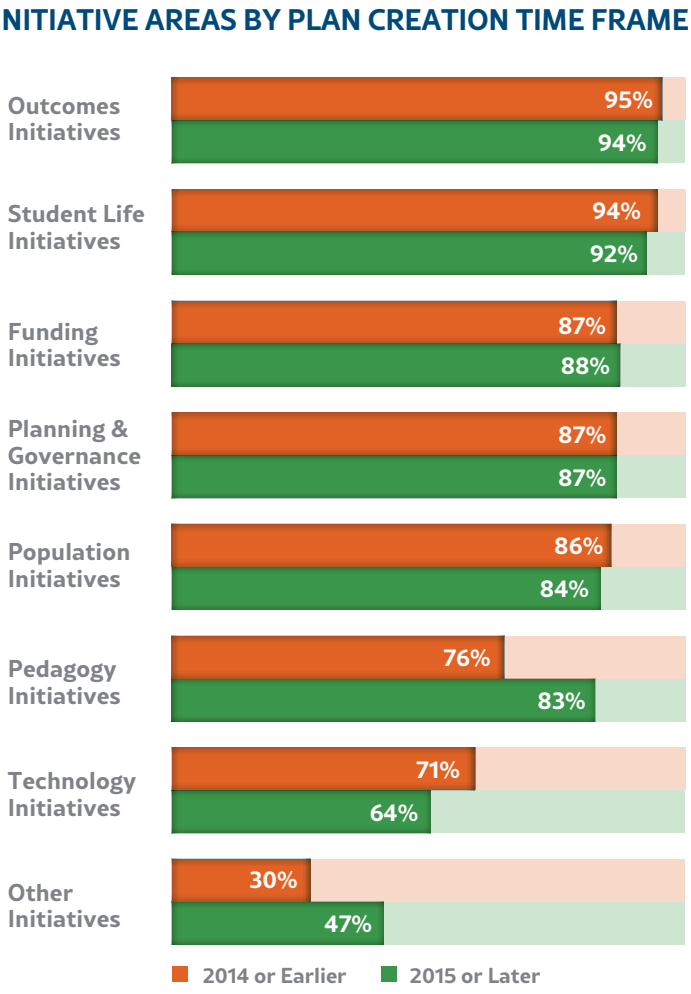

FIG. F: Initiative Areas by Plan Creation Time Frame

When pre-2015 plans are broken down by school size, the disparity comes into sharp focus. Even when strategy embraced technology during those years, it was usually larger schools that budgeted for technological growth and infrastructure.

As **FIG. F** above shows, pedagogical initiatives increased from 76% prior to 2015 to 83% afterward. Notably, technology initiatives declined over the same period, dropping from 71% before 2015 to 64% afterward. While the increase in pedagogy since 2015 aligns with the increase in remote learning adoption, the inverse technology investment relationship suggests schools are unprepared for a future of blended, multimodal learning.

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. But it means 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.

INITIATIVE AREAS BY INSTITUTION SIZE PRE-2015

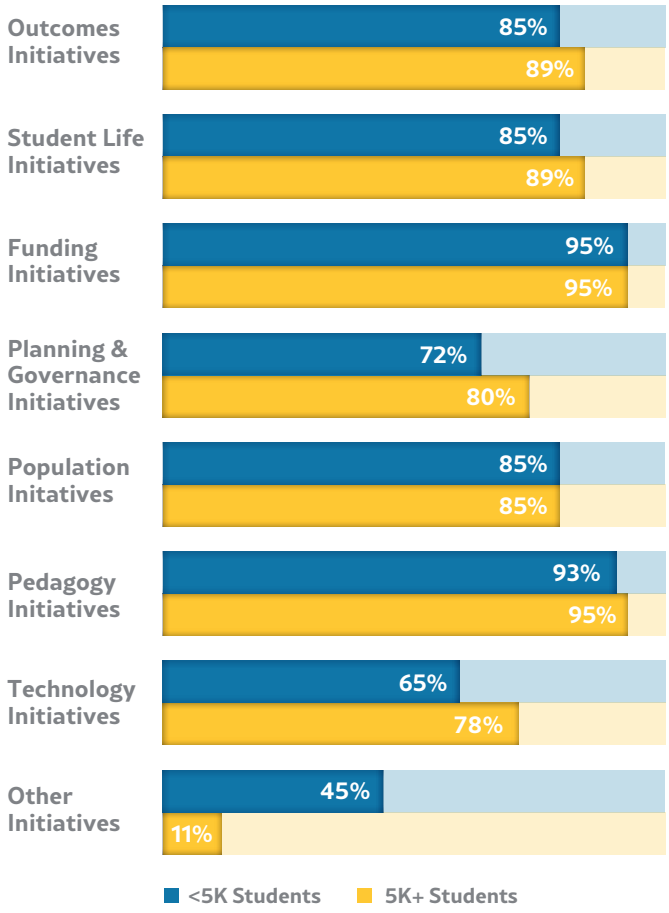

FIG. G: Initiative Areas by Institution Size, Pre-2015

While small schools (those with less than 5000 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 above reflects initiative area focus by institution size prior to 2015. Here, pedagogical initiatives feature well for both large and small schools, with 95% and 93% 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 78% and 65% of the time, respectively.

We would expect technology initiatives to have risen post-2015. Instead, investment across both large and small schools declined slightly. **FIG. H** indicates a continued emphasis in pedagogy, with large schools at 97% and small schools at 90%. Emphasis of technology initiatives fell in the same period post-2015 to 68% for large schools and 63% for small schools.

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 your vision and reinvesting in the technologies that support blended learning are critical.

Effective strategic planning – getting to how your vision can be achieved – starts with asking the right questions. What are the services we need to outsource to help us effectively accomplish our goals? What technologies will we need to adopt to deliver a better educational experience 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 can't be.

Is your network ready?

INITIATIVE AREAS BY INSTITUTION SIZE 2015 AND AFTER

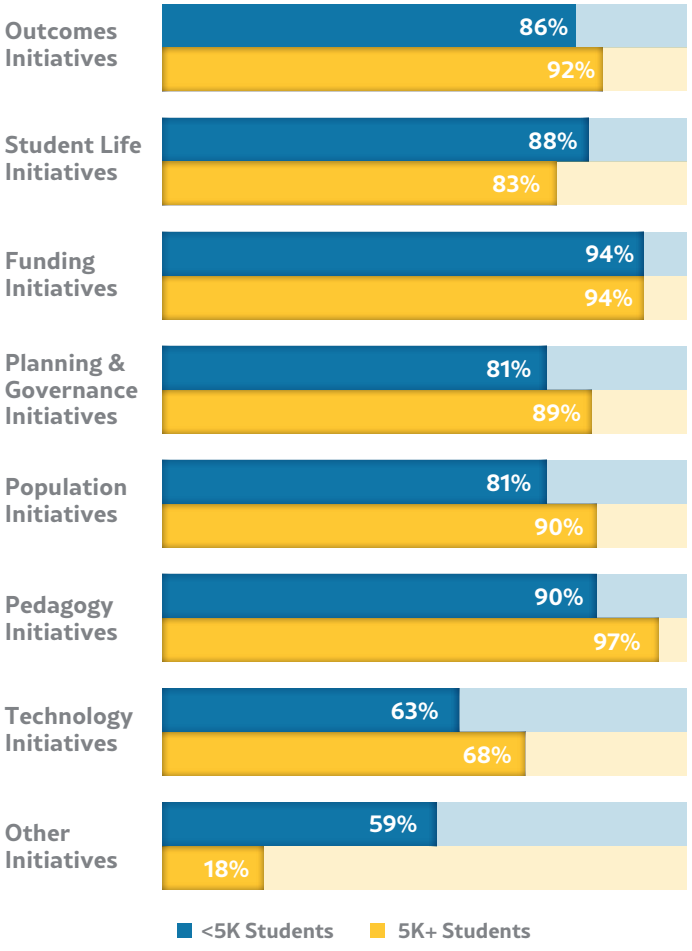

FIG. H: Initiative Areas by Institution Size, 2015 and After

Rethink your strategic plan

As blended learning moves to the forefront, 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 rightsize — to disinvest in time and resource-hogging operational headaches and reinvest in the infrastructure and technologies that enable blended learning — is core to achieving your strategic vision and goals. The topic of rightsizing is covered extensively in our white paper What Will You Do To Win?

Network infrastructure operations and funding models are key targets for rightsizing the ship. 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), to live video, to on-demand video and content platforms, a network infrastructure 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.

Outsourcing your network to a managed services partner (MSP) is one way to rightsize. 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 is not technologically prepared for a rapid and dramatic shift to blended learning and has much work to do before it can deliver a multimodal on-campus educational experience.

With budgets and staffing remaining flat or declining year over year, rightsizing 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 rightsize IT investment and enable renewed focus on differentiating programs and coursework enabled by blended learning.

To see how your campus compares or 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), 2018, Directory Information-HD2018. Retrieved from https://nces.ed.gov/ipeds/datacenter/DataFiles.aspx?goToReportId=7 on 2019-Oct-17.

2. U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2018, Education offering, organization, services and athletic organizations-IC2018. Retrieved from https://nces.ed.gov/ipeds/datacenter/DataFiles.aspx?goToReportId=7 on 2019-Oct-17.

3. U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2018, Public institutions - GASB 34/35: Fiscal year 2018-F1718_F1A. Retrieved from https://nces.ed.gov/ipeds/datacenter/DataFiles.aspx?goToReportId=7 on 2019-Oct-17.

4. U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS), 2018, 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 2019-Oct-17.

ABOUT APOGEE

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 staff. Partnering with Apogee enables schools to derive greater return on their IT investments and increase student satisfaction while achieving budget stability and predictability.

Visit Apogee at apogee.us.

APOGEE

sales@apogee.us
512.478.8858
1905A Kramer Ln. Austin, TX 78758