Accelerating Higher Education’s Digital Transformation Journey

Susan Grajek
Vice President for Partnerships, Communities, and Research

Betsy Reinitz
Director of Enterprise IT Programs
Digital transformation (Dx) is the process of optimizing and transforming the institution’s operations, strategic directions, and value proposition through deep and coordinated shifts in culture, workforce, and technology.*

*EDUCAUSE definition, adapted from Getting Ready for Digital Transformation: Change Your Culture, Workforce, and Technology
The Dx Equation

Intentional change in institutional value proposition or direction
+ Shifts in culture, workforce, and technology
= Digital Transformation
It’s More Than an “IT Thing”

Digital transformation...

• Relies on institutional leadership to understand and champion the changes
• Builds on the core values of higher education and of the institution
• Involves a foundational shift such as changes to the underlying business model and approach
• Requires changes that are holistic in nature
• Enables an institution to differentiate itself
• Involves continuing effort—it’s not a “once and done” solution
Consider the 3 Ds When Talking About Digital Transformation

**Digitization**
- Changing from analog or physical to digital form.

**Digitization**
- Using digital technologies and information to transform individual institutional operations.

**Digitalization**
- Organize information
- Automate processes
- Streamline processes
- Transform the institution

**Digital transformation**
A series of deep and coordinated culture, workforce, and technology shifts that enable new educational and operating models and transform an institution's operations, strategic directions, and value proposition.
Most institutions will want to start with Simplification

Simplification paves the way for innovation

“This effort simplified the company’s systems and processes to reduce costs and risks. Without a powerful operational backbone, Philips’ leaders would be consumed with executing and maintaining core processes instead of imaging, developing, and commercialized digital offering that help people live healthier lives.”

Source: Five building blocks of digital transformation. Jeanne Ross, Martin Mocker, Cynthia Beath. MIT CSR, June 6, 2018
Level of Institutional Engagement in Dx

- 17%: No
- 38%: Not yet, but we are exploring it
- 32%: We are in the process of developing a digital transformation strategy
- 13%: Yes

Driving Digital Transformation in Higher Education
Dx Is Getting More Important

75% of higher education IT leaders who responded to our Dx survey believe that Dx will become more important in the next two years.
Grand Challenges for Higher Education

**Student Success**
- Persistence, retention, completion
- Engagement
- Outcomes

**Financial Health**
- Enrollment
- Costs
- Funding
- Natural disasters

**Reputation and Relevance**
- Affordability
- Political climate
- Teaching
- Academic programs
- Research

**External Competition**
- Alternative credentials
- Employer-based learning
- Talent
- Global higher education

**COVID-19**
- Crisis mitigation
- Health and safety
- Digital transformation
EDUCAUSE 2021 Top IT Issues

Three Paths for Higher Education’s Emergence from the Pandemic

1. Restore
2. Evolve
3. Transform
<table>
<thead>
<tr>
<th>RESTORE</th>
<th>EVOLVE</th>
<th>TRANSFORM</th>
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<tbody>
<tr>
<td><strong>#1. Cost Management</strong>&lt;br&gt;Reducing institutional costs and increasing workforce efficiency</td>
<td><strong>#1. Student Success</strong>&lt;br&gt;Advancing student support services to help students attain academic and career goals</td>
<td><strong>#1. Institutional Culture</strong>&lt;br&gt;Contributing to a culture of transformation</td>
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<td><strong>#2. Online Learning</strong>&lt;br&gt;Strengthening online and hybrid education</td>
<td><strong>#2. Equitable Access to Education</strong>&lt;br&gt;Providing technologies, support, and policies for diverse users</td>
<td><strong>#2. Technology Alignment</strong>&lt;br&gt;Identifying and applying sustainable digital strategies and innovations</td>
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<tr>
<td><strong>#3. Financial Health</strong>&lt;br&gt;Revising budget models and IT governance</td>
<td><strong>#3. Online Learning</strong>&lt;br&gt;Progressing from emergency remote teaching to online learning</td>
<td><strong>#3. Technology Strategy</strong>&lt;br&gt;Developing an enterprise architecture that keeps pace with strategic change</td>
</tr>
<tr>
<td><strong>#4. Affordability &amp; Digital Equity</strong>&lt;br&gt;Providing increased support for students' technology needs and enabling technology availability</td>
<td><strong>#4. Information Security</strong>&lt;br&gt;Developing a cybersecurity operations strategy</td>
<td><strong>#4. Enrollment &amp; Recruitment</strong>&lt;br&gt;Exploring and implementing creative holistic recruitment solutions</td>
</tr>
<tr>
<td><strong>#5. Information Security</strong>&lt;br&gt;Providing information security leadership</td>
<td><strong>#5. Financial Health</strong>&lt;br&gt;Partnering to develop new funding sources</td>
<td><strong>#5. Cost Management</strong>&lt;br&gt;Focusing on digital transformation</td>
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“There will never be a return to what we knew as normal”
The Pandemic and the Acceleration of Dx
Dx is a series of focused journeys
What kinds of digital transformation journeys might we expect to see?

• Transforming credentials
• Strategic enrollment management
• Programming for lifelong learners
• Curriculum reform
• Student outcomes
• The student experience
• Hybrid learning models
• Teaching and learning innovations

• Alignment with and impact on employers and the local region
• Institutional efficiency
• Addressing social justice issues like equity, the digital divide, racism, mental health, and social discord
The Dx Journey | A Roadmap

dx.educause.edu
Digital transformation is the future of higher education.

But the future doesn’t just happen. It’s the result of a process—one that requires strong leadership and a commitment to institutional change to be successful. We’re here to help you lead your team through the digital transformation (Dx) journey.
The Dx Journey roadmap at a glance
Three phases for your Dx Journey

Your path to Dx starts here.

We take you through the Dx journey in three phases. Using our resources, you'll be able to learn about Dx, create a plan for your institution, and put that plan into action.

**Phase 1: Learn**
Understand what digital transformation means for higher education and for your institution. We'll start with definitions and identify signs that Dx may already be happening at your institution.

- [New to Dx? Start Here.](#)

**Phase 2: Plan**
Prepare for Dx by assessing your institution's capabilities, setting goals, developing a roadmap, and getting colleagues across campus excited to be part of institutional change.

- [Preparing for Dx Initiatives? Start Here.](#)

**Phase 3: Do**
Put your plans into action by launching strategic initiatives that will make your institution more competitive, flexible, and responsive. Evaluate their impact and adjust course accordingly.

- [Ready to implement? Start Here.](#)
Start by Learning about Dx

Resources

- Dx definition
- Major Dx signals
  - How to foster a culture that embraces Dx
  - The effect of Dx on the workforce
  - How to use technology to transform the institution

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Then begin Planning your Dx journey

Resources

• Dx Maturity Assessment and advice
• Online Dx workshops

Plan

Prepare for Dx by assessing your institution’s capabilities, setting goals, developing a roadmap, and getting colleagues across campus excited to be part of institutional change.

Resources

Maturity Assessment

Use this resource to understand your institution’s Dx capabilities and identify areas to focus on. The assessment is designed for CIOs, IT leaders, or other campus leaders, such as your CAD or CBO, to fill out with input from stakeholders across campus.

Professional Development

Participate in our online workshops to learn and exchange ideas with colleagues from campuses around the country working on Dx. Sign up for our Dx newsletter to be notified of upcoming events.
Now, start your Dx journey

**Coming soon**

**Resources**
- Dx strategy implementation framework
- Dx case studies

**Do**
Put your plans into action by launching strategic initiatives that will make your institution more competitive, flexible, and responsive. Evaluate their impact and adjust course accordingly.

**Coming Soon**
We have great things planned! More materials are coming soon to keep your institution's digital transformation on track.

**Already on your Dx journey?**
Tell us your story. Share a case study or other resource with the higher ed community.

[dx.educause.edu](http://dx.educause.edu)
Preview:
Six Steps for Designing your Dx Strategy
Six Steps for Designing your Dx Strategy

**Step 1: Define the Purpose.** Why are you engaging in Dx? What institutional goal, challenge, or need are you addressing?

**Step 2: Identify the Context** that is fueling this need to change.

**Step 3: Describe the Impact** in terms of the anticipated change to the institutional value proposition. How does it address the Purpose?

**Step 4: Describe the Outcomes.** What will change in the next 6 months? In the next 1-3 years?

**Step 5: Describe the Outputs.** What will you implement, and what shifts will be needed in culture, workforce, and technology?

**Step 6: List the Inputs,** including resources needed and Dx Signals that you will rely on or build.
# Dx Strategy-on-a-Page, part 1

## Purpose

## Context

## Impact

| Change to Value Proposition | Connection to Mission/Goals |

## Outcomes

| Short Term | Long Term | Evidence |

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Evidence
### Outputs

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<td>Workforce Shifts</td>
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<td>Technology Shifts</td>
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### Inputs

- **Dx Signals** You Will Rely On
- **Dx Signals** to Be Improved

### Resources Needed
Dx Strategy Example: Aligning IT with Institutional Mission to Support Innovation, part 1

**Purpose:** As part of an institutional effort to align all departments with institutional strategy and goals, IT will create a multi-year IT transformation plan.

**Context:** Increasing pressure to attract and retain students | New focus on areas of institutional differentiation | Decreased revenue leading to need for more financial and operational efficiencies | Need for ability to make quicker adjustments based on changing situations

**Impact**

**Change to Value Proposition**
Having a clearer focus on shared goals will allow the institution to focus efforts on innovation in areas that differentiate it. This sharper focus on what differentiates the institution will also create a clearer choice for students looking for an education in our particular areas of expertise.

**Connection to Mission/Goals**
By directly aligning IT priorities with institutional goals, IT will be better positioned to support and adapt to changes brought about by this change to value proposition.

**Outcomes**

**Short Term**
- Better understanding within IT of institutional strategic goals and priorities and primary drivers and levers of change
- Review of existing IT projects and decision-making processes
- Review of IT governance structure analyzed

**Long Term**
- Overhaul of IT governance structure if necessary
- Development of stronger IT business liaison structure for better understanding of campus needs
- Development of more strategic relationships across the institution

**Evidence**
- Better stakeholder buy-in through better change management
- More transparency of decision-making
- Decrease in time spent on IT projects without a direct connection to an institutional goal
## Dx Strategy Example: Aligning IT with Institutional Mission to Support Innovation, part 1

### Project/Initiative Objective
Develop a multi-year IT transformation plan that highlights connections between IT projects and initiatives and specific institutional goals.

### Culture Shifts
- Cross institutional collaboration in planning IT work
- Overcoming fear that changes will lead to job loss
- Better transparency across the institution for how IT decisions are made, with more stakeholder contributions into the process

### Workforce Shifts
- May lead to shifts in the types of position needed if we determine that some work under way now does not need to continue
- Increase in business liaison competencies
- Increase in communication skills among IT staff
- Greater focus on vendor negotiation and management and less on technology management

### Technology Shifts
- Project management tools may be needed

### Dx Signals You Will Rely On
- Academic curriculum redefined to better serve student needs
- Leaders willing to adopt new strategic directions
- Adept at change management

### Dx Signals to Be Improved
- Focus toward institution-wide goals and away from siloed goals
- Focus on institutional differentiation
- IT investments and initiatives fully aligned with institutional priorities through governance
- Emergence of new levels of cross-organizational alignment and collaboration
- Investments and technology implementations specific to Dx projects informed by user experience

### Resources Needed
- Campus leadership time to engage in the project
- IT staff time to engage with new ideas and learn new skills
- New collaboration and knowledge management software
Summary

1. Digital transformation is a series of focused journeys, not a destination
2. Dx is about more than technology, and it must have an objective of transforming the institution itself
3. A lot of initial Dx work centers on preparing existing infrastructure and culture for transformation
4. We reviewed a framework to help institutional leaders plan a Dx initiative at their institutions
5. Dx is happening faster, and is more important, since the pandemic
6. EDUCAUSE has Dx resources at dx.educause.edu
Resources

The Dx Journey | A Roadmap

Articles:
• Getting Ready for Digital Transformation: Change Your Culture, Workforce, and Technology
• Digital Transformation Signals: Is Your Institution on the Journey
• Driving Digital Transformation in Higher Education
• How Colleges and Universities are Driving to Digital Transformation Today
• Consider the Three Ds When Talking about Digital Transformation
• Integrative Leadership: A Necessary Ingredient for Dx

Tools
• Dx Signals Checklist
• Dx Institutional Self-Assessment
• Dx Strategy Design Framework (coming soon as part of the Roadmap)
Contact us

dx@educause.edu