Leveraging Digital Transformation Principles to Effect Institutional Change

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Agenda

- What is digital transformation?
- EDUCAUSE tools
- Examples of digital transformation
- Polls and Q&A
What is digital transformation?

Digital Transformation in Higher Education

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
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

Understanding Dx – the 3 Ds

DIGITIZATION
Changing from analog or physical to digital form.

1. Digitize information

DIGITALIZATION
Using digital technologies and information to transform individual institutional operations.

2. Organize information

3. Automate processes

4. Streamline processes

5. 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.

SOURCE: Consider the 3 Ds When Talking About Digital Transformation
The Dx Equation

Intentional change in institutional value proposition or direction + Shifts in culture, workforce, and technology = Digital Transformation

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 has pushed us all to become more agile, more strategic, more collaborative, and more focused. It has asked us to look at what we do in new ways and to prioritize outcomes in support of our mission more quickly and more directly than we ever have before. What it has done, in essence, is move colleges and universities into digital transformation faster and more directly than we could have ever imagined.

As we look toward a very uncertain future, we are already seeing evidence that institutions are prioritizing efforts that bring the greatest value and most tangible results, in a deep and coordinated fashion. They are, in effect, embracing digital transformation, intentionally or not, as a matter of survival.”

SOURCE: Driving Digital Transformation in Higher Education
The Pandemic has Accelerated Dx

Would you say your institution is engaging in Dx today?

Tools for developing a Dx strategy
Digital Transformation Journey Roadmap

dx.educause.edu

Digital Transformation Signals
ARE YOU ON YOUR JOURNEY?

Digital transformation (Dx) is a series of deep and coordinated culture, workforce, and technology shifts that enable new educational and operating models and transform an institution's business model, strategic directions, and value proposition. Dx can make institutions more resilient, flexible, and relevant as they face an array of increasingly difficult challenges.

But what does that look like in practice? How do you know where your institution stands? This list is intended as a way for you to get a sense of your institution's progress on that journey and to learn about how you can move forward.

Are you working toward transformation related to...

☐ One of your institution's major challenges, such as student success, financial health, reputation and relevant, or external competition
☐ Institutional value proposition
☐ Change in business model
☐ Institutional or departmental strategic direction

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Assessing your institution's readiness
Digital Transformation (Dx) Institutional Self-Assessment

This self-assessment is designed to help you understand your institution's capabilities for Dx by walking you through six capability categories. Each category contains several questions, each with three possible responses. Please read each question carefully, then select an option that best represents your institution's capabilities today (do not select an option that reflects a goal that you and your colleagues are aiming to achieve, or how capable you'd like your institution to be).

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Assessing your institution's readiness

<table>
<thead>
<tr>
<th>Section</th>
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<tbody>
<tr>
<td>Strategic Innovation (8 items)</td>
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<tr>
<td>Data and Analytics (7 items)</td>
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<tr>
<td>Institutional Alignment (7 items)</td>
</tr>
<tr>
<td>Flexibility and Agility (6 items)</td>
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<tr>
<td>Diversity, Equity and Inclusion (7 items)</td>
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<tr>
<td>Transformation of Work and Skills (6 items)</td>
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Slides: Introduction to Dx
dx.educause.edu

Leading a campus conversation

Leading a campus conversation about digital transformation is an important step in the Dx journey. This set of slides provides an introduction and overview about Dx. Download and adapt them for use in your own campus conversations.

VIEW AND DOWNLOAD THE SLIDES
Design Your Dx Strategy

Step 1: Purpose

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

Step 2: Context

Identify the Context that is fueling this need to change.

Step 3: Impact

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

Step 4: Outcomes

Describe the Outcomes. What will change in the next 6 months? In the next 1–3 years?

Step 5: Outputs

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

Step 6: Inputs

List the Inputs, including resources needed and Dx Signals that you will rely on or build.

PART 1

Dx Strategy-on-a-Page

Purpose

Context

Impact

Change to Value Proposition

Connection to Mission/Goals

Outcomes

Short Term

Long Term

Evidence
### PART 2  Dx Strategy-on-a-Page

#### Outputs
- Project/Initiative Objective
- Culture Shifts
- Workforce Shifts
- Technology Shifts

#### Inputs
- Dx Signals You Will Rely On
- Dx Signals To Be Improved
- Resources Needed

[dx.educause.edu](http://dx.educause.edu)
What does Dx look like?

UMBC - Rethinking the Student Experience

Reimagine Undergraduate and Graduate Admissions AY 20-21
- Developed digital first institutional branding & messaging strategy using same platform and tools for undergrad/graduate groups.
- IT chairs steering group, ran procurement, managed project, & supports platform.

Reimagine Student Communications AY’s 21-23
- Building off our current in-house platform. Establish a collective vision for personalized communication informed by data, student needs, and personal choice.
- Move all communication to this new platform.

Reimagine our Support Services AY’s 22-24
- Reimagine support in a digital first world to rethink the meaning of great support.
- Building off our common ticketing platform. Implement a modern service management platform.
Rethinking Teaching, Learning & Student Success

Modernize LMS to further our core values of Academic Excellence and Innovation

**AY’s 20-22**

<table>
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<tr>
<th>CULTURE</th>
<th>Examples: Developed new faculty/staff/student partnerships, established new governance groups. Undertook extensive work to rethink how faculty utilize the LMS to promote Inclusive, Diverse, Equitable, and Accessible Learning (IDEAL).</th>
</tr>
</thead>
<tbody>
<tr>
<td>WORKFORCE</td>
<td>Examples: Reimagined staffing in IT &amp; Center for Faculty Excellence. Provided extensive trainings for faculty &amp; staff, revised job descriptions and skill sets.</td>
</tr>
<tr>
<td>TECHNOLOGY</td>
<td>Selected and implemented new LMS in 10 months.</td>
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Leverage Data to Improve Student Success, Retention & Outcomes

**AY’s 22-24**

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<tr>
<th>CULTURE</th>
<th>Examples: Reimagining how we are doing student advising, including roles of faculty, Dean’s offices, and other groups. Establishing data governance and data privacy policies, practices and processes.</th>
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<td>WORKFORCE</td>
<td>Examples: Evolving skill sets and org structures. Continue to revise job descriptions and positions to focus on student outcome and experience.</td>
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<tr>
<td>TECHNOLOGY</td>
<td>Implementing new student CRM and dashboards. Developing more robust data lake. Leverage new LMS and recent tool investments.</td>
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Ithaca College: 5,000 undergraduate & 400 graduate students, private, residential college, located in upstate NY.

NextGen Overview | The Case for Change

If the current ERP is the **push** to change to a new system, the **pull** to change to a new system is that a new technology landscape is even more important to the success of students, faculty, staff, and communities across Minnesota. NextGen will provide the tools to help faculty and staff make students be more successful through the implementation of Workday HCM, Finance, and Student.
Polls and Q&A

Poll [select one]

Communicating about digital transformation

Is the term “digital transformation” positive or negative at your institution?

- Positive
- Negative
- We don’t use “digital transformation” to refer to our transformation efforts
Poll [select one]

The EDUCAUSE Dx self-assessment

Have you taken the Dx self-assessment

- Yes
- No

Poll [select one]

Dx institutional competencies

Which category is most challenging for your institution (select only one)
- Strategic innovation
- Data and analytics
- Flexibility and agility
- Diversity, equity, and inclusion
- Transformation of work and skills
For more information

On the [Dx Journey Roadmap](http://dx.educause.edu) at [dx.educause.edu](http://dx.educause.edu), you’ll find

- Dx Signals Checklist
- Dx Institutional Self-Assessment
- Introduction to Dx
- Design your Dx Strategy framework
- And more...

Contact us

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