



Leading in an Era of Digital Transformation



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Presenters



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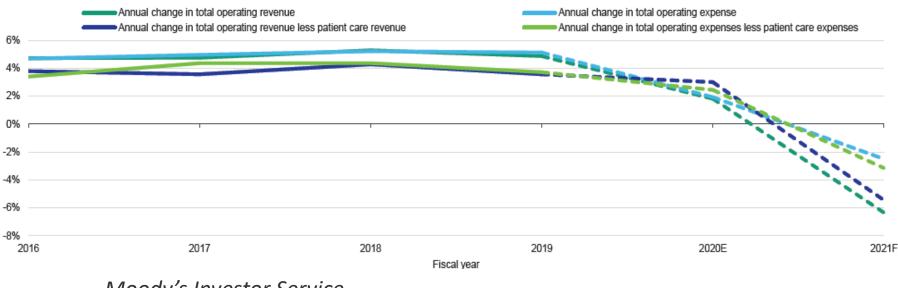
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Challenges for Higher Ed, Pre-COVID

Exhibit 1

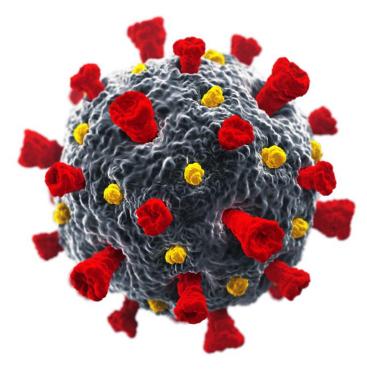
Revenue will decline in fiscal 2021 with potential for a recovery in the second half of the year Revenue and expense change with and without patient care



Moody's Investor Service



The Impact of COVID-19



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Accelerating the Shift to Digital

Eight in 10 surveyed college presidents said they would "reassess the long-term mix of in-person vs. virtual education" they offer.



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Almost 1 in 8 presidents said they did not expect to reverse remote work policies put in place during COVID; another 23% weren't sure when they would reverse those policies.



Pushing the Boundaries

Which of the following most closely reflects your view of how your institution will respond to the COVID-19 pandemic and economic recession?

Transform institution:

My institution should use this period to make difficult but transformative changes in its core structure and operations to better position itself for long-term sustainability.

Reset for growth:

My institution should use this period to focus more on what it does best so it can invest and grow in those areas once the recession ends.

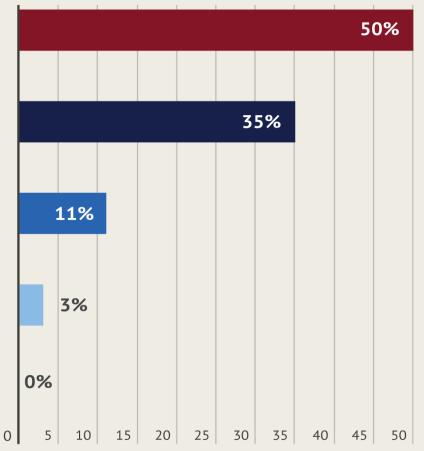
Return to normal:

My institution can ride out the current difficulties and return more or less to normal operations within 12-18 months.

Shrink institution:

My institution should use this period to tighten its focus to come out of the recession smaller but better.

> Don't know/ Does not apply





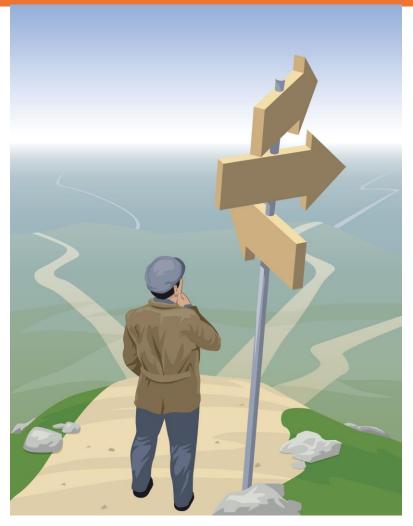
One Leader's Opinion

"If there is any leader in the country who thinks it is going to go back to where it was a year ago, they are lying to themselves."

--Terri E. Givens, chief executive officer of the Center for Higher Education Leadership



Options for the Future





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Need for New Competencies?





Prepared for a Digital World?

The job of college president has always been a mix of duties, and individual presidents have more preparation for some of those duties than others.

Please indicate how prepared you were for each of the following presidential duties when you first became a college president.

	All Institutions by Sector			Public			Private Nonprofit	
	All	Public	Private Nonprofit	Doctoral	Master's/ Bacc.	Assoc.	Doctoral/ Master's	Bacc.
Digital learning								
% Very well prepared	15	18	11	9	17	21	15	8
% Well prepared	30	34	28	39	30	36	24	31
% Somewhat prepared	35	35	36	28	41	35	34	36
% Not very prepared	17	13	20	24	11	8	20	19
% Not prepared at all	3	<1	5	0	1	0	7	6

2018 Survey of College and University Presidents, *Inside Higher Ed*



New Generation of Leaders



With Thanks ...

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