IAUP

**International Association of
University Presidents**

GLOBAL PERSPECTIVES OF COLLEGE & UNIVERSITY LEADERS IN THE POST PANDEMIC ERA

Santander

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FOREWORD

Dear IAUP members:

I hope you enjoy this most recent report from IAUP, which is the culmination of an In-Depth Research project exploring the leadership priorities of IAUP members in the post-pandemic era. It uses a combination of survey and interview data to shed light on what has happened since the COVID-19 pandemic, the status of the changes that leaders reported they were going to make as they moved into the post-pandemic era, and new priorities and challenges that are on the horizon now and for the next 3 to 5 years.

The report is based on a survey open to all IAUP members from June until December 2023, as well as follow up interviews from January through April of 2024 with 30 institutional leaders from August 2023 until April 2024 to better understand emerging themes from the survey results. It draws heavily on and is intended to follow up on the study conducted by IAUP and published in 2021: Leadership Responses to COVID-19 - A Global Survey of College and University Leadership.

We are most thankful to Dr. Rachael Merola, who conducted this survey as well as the interviews. We are appreciative as well to the support provided by Santander Universidades, to all leaders who took the time to respond to the survey, and to those who made time for the interview. We hope that you find the report informative and useful.

Very appreciatively,

Dr. Fernando León García
President, IAUP 2021-2024
President, CETYS University

"The higher education landscape is poised for significant transformation. IAUP leaders at the helm are keenly aware of the dynamic interplay between educational innovation and societal needs."

Dr. Fernando León García

President, IAUP 2021-2024 | President, CETYS University

INTRODUCTION

The IAUP report on Global Perspectives of College & University Leaders in the Post Pandemic Era delves into the post-pandemic perspectives of higher education leaders, focusing on leadership priorities, institutional responses, and future outlooks. Section one of the report investigates the impact of COVID-19 on financial models, operations, and lasting changes highlighting adaptations and resilience. The next sections explore leaders' strategic and operational shifts, internationalization efforts, and the evolving student and academic experience. The report concludes with a glance into emerging priorities and regional variations, offering a comprehensive overview of the transformative shifts within higher education institutions post-pandemic.

Some of the top findings include:

- Faculty development and support are highlighted as crucial for institutional success, with investments in professional development centers and resources fostering an environment of continuous learning and growth.

- The prioritization of student mobility, as reflected by the institutions, underscores a commitment to providing students with international exposure and cross-cultural competencies essential for a globalized workforce.

- International partnerships are identified as a high priority, highlighting a trend towards collaborative research, joint academic programs, and faculty exchanges that bolster the global standing and academic prestige of institutions.

- The embrace of digital technologies, such as smart campus initiatives and the incorporation of AI-driven platforms like ChatGPT, signifies an evolution in teaching methods and a push towards creating a new educational ecology that is adaptive, innovative, and student-centered.

In navigating these strategic changes, IAUP institutions also emphasize the importance of sustainability, research impact, interdisciplinarity, and community

well-being, aligning with the Sustainable Development Goals (SDGs) and adopting a student-centered approach to today's challenges and advancements.

As IAUP members look to the future, the report suggests that many are on a path defined by agility, foresight, and a deep-seated drive to enrich academic experiences while contributing meaningfully to the global community. We hope you will gain many insights and inspiration from this document. Thank you for being an important part of this IAUP community.

Dr. Fernando León García

President, IAUP 2021-2024

President, CETYS University

Dr. Arturo Cherbowski Lask

Executive Director, Santander Universidades Mexico

General Director, Universia Mexico

INFORMATION ON RESPONDENTS

Overall, the 60 respondents to the survey depict a leadership group in higher education that is predominantly male, middle-aged, or older, highly educated with advanced degrees, and with a strong background in academia or education-related fields. The dates of their appointments as leaders of their institutions varies greatly, with the longest appointed leader beginning in 1978 and the newest ones in 2023. The average number of years in office for respondents was 13.8.

The majority of respondents are male (77%), with a smaller representation of female leaders (22%). One participant preferred not to disclose their gender. The age distribution shows a concentration in the middle to senior age groups, with 20 respondents aged 55-64, and 16 each in the 45-54 and 65-74 age brackets. There are fewer respondents in the younger (35-44) and older (74+) age groups, with 4 and 3 respondents, respectively. One participant preferred not to answer. A significant majority of the leaders hold Doctoral degrees (90%), indicating a high level of academic achievement, while 10% have master's degrees.

Prior to becoming HEI leaders, most respondents were involved in academia or education (45%), followed by academic administration (27%). A notable number were in corporate or business sectors (17%), with smaller numbers in government or public service (5%), healthcare or medicine (3%), and non-profit or NGO (2%).

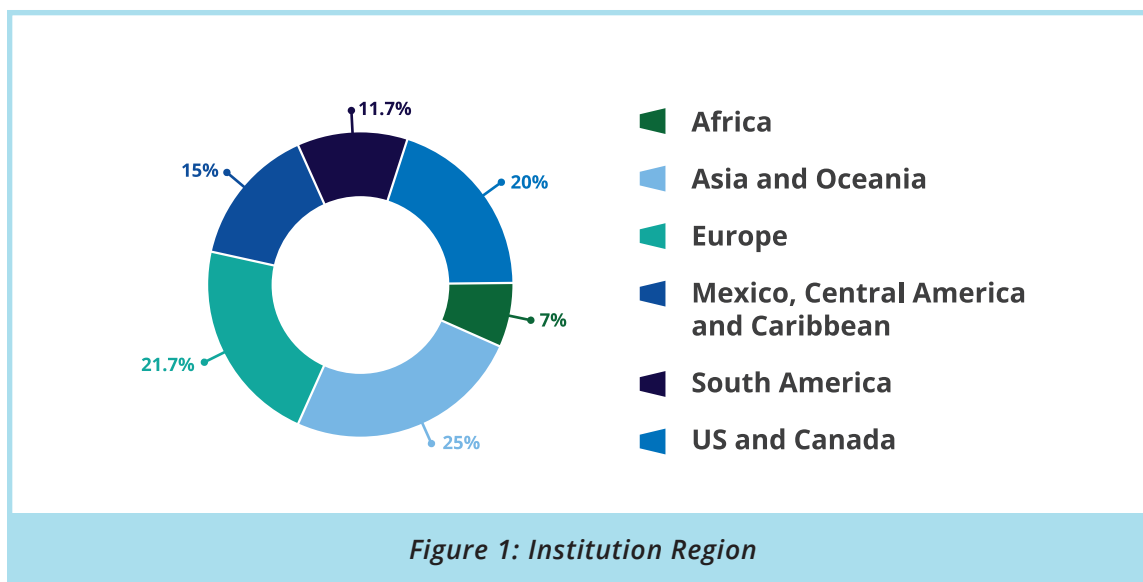When asked to rate their leadership experience on a scale of 1 to 4, the majority of respondents rated their leadership experience as a 4, indicating a high level of confidence or experience in leadership. This high rating was selected by 72% of leaders, compared to 28% who chose a rating of 3, suggesting overall strong leadership capabilities among the participants. Accordingly, the overall average was 3.7.

INSTITUTIONAL CHARACTERISTICS

Sixty higher education institutions (HEIs) were represented in the survey responses. Responses represent a mix of private and public institutions of varying sizes, ages, and educational offerings.

The geographical distribution of the institutions is varied, with the highest representation from Asia and Oceania (25%), followed closely by Europe (22%) and US and Canada (20%). Institutions from Mexico, Central America, and the Caribbean (15%), South America (12%), and Africa (7%) are also represented, indicating diverse international participation.

The institutions are spread across various countries, with the United States and Spain each housing 5 (8%) of the participating institutions. Other notable representations include Mexico, Colombia, and a range of other countries, each contributing between 1 to 4 institutions, highlighting the global nature of the survey.

11.7%
15%
20%
21.7%
7%
25%

- **Africa**
- **Asia and Oceania**
- **Europe**
- **Mexico, Central America and Caribbean**
- **South America**
- **US and Canada**

Figure 1: Institution Region

There is a notable split between private (60%) and public (40%) classifications, with a greater number of private institutions represented in the survey. This distinction may reflect different operational and governance models in the participating institutions.

Enrollment sizes vary, with the largest group being institutions with more than 20,000 students (37%). This is followed by those with 5,000 to 10,000 students (32%), indicating a strong presence of larger institutions in the survey. There are also institutions with 10,000 to 20,000 and less than 5,000 students, reflecting a broad range of institution sizes.

36.7%

16.7%

15%

31.7%

- Less than 5,000 enrolled students
- Between 5,000 and 10,000 enrolled students
- Between 10,000 and 20,000 enrolled students
- More than 20,000 enrolled students

Figure 2: Enrollment Size
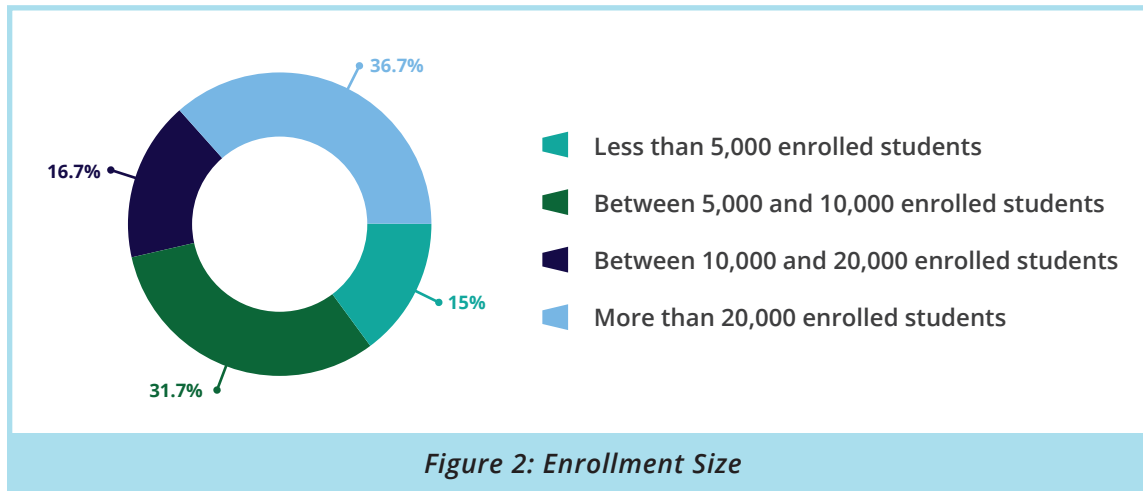
Nearly half of the institutions (47%) have been in existence for over 50 years, suggesting a well-established higher education landscape among the participants. Institutions aged between 25 and 50 years (30%) and less than 25 years (23%) are also represented, showing a mix of established and relatively newer institutions.

The majority of institutions (77%) award Doctoral or M.D. degrees, indicating a focus on advanced and professional education. There are also institutions that offer up to Master's degrees (18%), along with a few that award only Bachelor's degrees. This shows a predominance of institutions engaged in higher-level academic and research-oriented programs.

COVID-19 PANDEMIC IMPACT ON INSTITUTIONS

IMPACT ON FINANCIAL MODELS AND OPERATIONS[1]

During the COVID-19 pandemic, university leadership faced unprecedented challenges, leading to significant changes in their roles and approaches. Academic leaders, particularly at the middle level, had to navigate complex crises, adapt teaching methodologies, and transform digital infrastructures. The pandemic underscored the necessity for agile leadership capable of rapid adaptation and innovative problem-solving. Leaders had to balance immediate crisis management with long-term strategic planning, emphasizing flexibility, communication, and community engagement.

Most institutions were greatly impacted—at least temporarily—by the COVID-19 pandemic. When asked in the survey to what extent the pandemic had affected their institution's financial models, 25 percent said their financial model adjusted permanently in response to COVID pandemic; 62 percent said that their financial model adjusted temporarily in response to COVID pandemic, and now returned to pre-pandemic situation; and 13 percent said that their financial model did not adjust in response to COVID pandemic.

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[1]Crisis Leadership: Reflecting on the Complex Role of Academic (Middle) Leaders During the COVID-19 Pandemic. (2023). *Perspectives in Education.* https://doi.org/10.38140/pie.v41i2.6265

"It was building a plane as we were flying it!" Adapting Teaching Through a Crisis: Lessons from Educational Leadership Staff in Higher Education. (2023). Posted Content. https://doi.org/10.35542/osf.io/qkg87

Landscape Architecture Chairs' Retrospect and Prospect of Academic Leadership Disrupted by COVID-19. (2023). *Landscape Journal.* https://doi.org/10.3368/lj.42.1.131

Leading Change in the Time of the COVID-19 Pandemic. (2022). *Advances in Educational Technologies and Instructional Design Book Series.* https://doi.org/10.4018/978-1-6684-5914-0.ch003

The COVID-19 Crises and the Future of Academic Leadership in Transnational Higher Education: The Case of Ghana. (2023). *International Perspectives on Education and Society.* https://doi.org/10.1108/s1479-367920230000044003

Figure 3: Responses to the Question "How did your institution's financial model adjust in response to the COVID pandemic?"
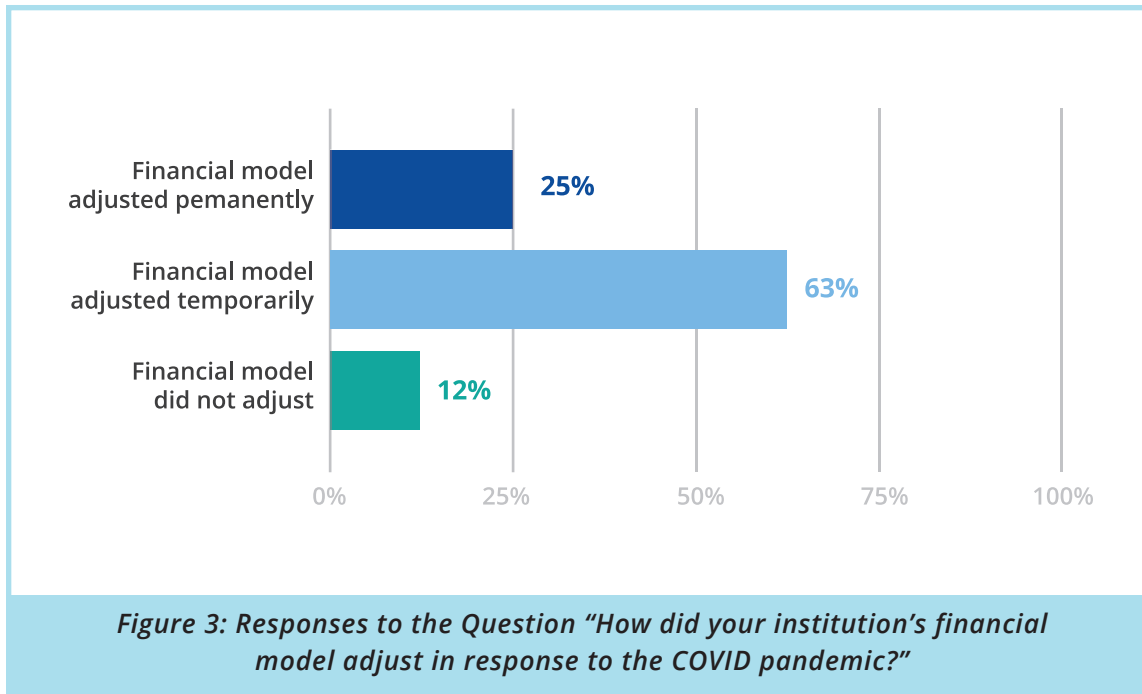
Interviews with leaders of IAUP member institutions shed light on the specific ways in which the COVID-19 pandemic affected universities' financial models. Below is an overview of common themes:

- **Diversification of Revenue Streams:** Many universities explored new revenue streams, such as online certificate programs, short courses, and partnerships with corporations, to compensate for the loss of income from traditional sources. For example, Dr. Inga Žalėnienė, Rector of Mykolas Romeris University in Lithuania, says the university strategically pivoted towards collaboration with external institutions, noting that the crisis led them to "deal more with the public and private sector institutions on contractual research and various teaching and learning activities. As a result, I can say that our financial model is diversified and it's also more sustainable for the future."

Likewise, IESB University, a private university in Brazil, was in a good financial situation due to investments in real estate, reported the Founder and Rector of 21 years, Dr. Eda Coutinho Machado. She notes "We invested lots of money [in land] hoping that it would be a good

strategy and it was. We already sold the first land and we are selling two other ones. During the pandemic IESB did not fire any teachers and gave 4,500 scholarships to students who lost their jobs."

Dr. Juan Camilo Montoya Bozzi, Rector of Universidad Autónoma de Bucaramanga (UNAB), noted that "The truth is that when the pandemic began, the university was doing well financially well but we did not have large cash reserves. The creation of an endowment for the university was a mechanism to save resources from the annual operation of the university and start having a savings fund to reinvest in the university and have reserves at the time of a crisis."

- **Reduction in On-Campus Services and Facilities:** With fewer students on campus, some institutions reported a decrease in the usage and, consequently, the cost of maintaining campus facilities. Savings in these areas allowed other areas of greater importance to be spared. Vice Chancellor Edward Peck of Nottingham Trent University (NTU) explained that they endeavored that "the core business, which is academic research, teaching, and learning, should not be affected, so we moved money from other things, like travel, catering and entertainment. We reassigned the budget to meet our other demands and needs."

Dr. Devorah Lieberman, former President of University of La Verne, a private university in California, explains "I wanted to focus on safety first, then quality of life, and then financial sustainability." Following these priorities required reassessing budget allocations: "The board was supportive of anything that we did that would not compromise quality of delivery, quality of education, or quality of experience, yet reduced expenses."

- **Adjustment in Staffing and Employment:** Financial pressures led to furloughs, layoffs, or hiring freezes at some institutions, impacting faculty and administrative staff. San Diego State University (SDSU) President Adela de la Torre noted that "We offered what was called an 'early exit', which a lot of campuses offered, in which you incentivize individuals to retire with a one-time bonus. The vacancies created by

this incentive basically allowed us to have higher base funds." Other universities responded by adjusting salaries in order to shift funds to students. For example, Dr. Gonzalo Mendieta, Rector of Universidad de Las Américas Ecuador, noted that "Regulations in Ecuador changed [during the pandemic] to allow for a reduction to 75 percent or 80 percent of the salary of faculty. While we did not cut the salaries of our teaching staff, we did for our non-teaching personnel, including management (myself included) and administrative personnel. No staff below a certain salary level had their salary reduced."

- **Shift in Funding Priorities:** Some institutions redirected funding towards pandemic-related activities, impacting other operations. Dr. Fernando León García, President of CETYS University—a private university in Baja California, noted that "We needed to make sure that in terms of adjusting the financial model we could accommodate new investment in technology, because during COVID we had to go to alternative modes of delivery, which required more technology as well as the accompanying faculty training. We were already offering some hybrid and online courses before the pandemic, but now it was not a matter of using those formats in some classres, but in all the classes. We needed to make sure we were responsive to the new needs, but yet were not generating a major deficit for the institution." This investment in technology was in addition to emergency financial support for students. Dr. Ignacio Sánchez, the President of Pontificia Universidad Católica de Chile—a private university in Santiago, Chile, explains that the university "decided to save money in different areas of expenditures and general costs, and we postponed some of our investments to grow."

- **Government and Institutional Support:** Many universities sought or were given additional funding from government relief programs or tapped into endowments and reserves to manage financial challenges. From a public institution leader's perspective, the University of California Riverside's Chancellor Kim Wilcox noted that "During the pandemic, [government support] was crucial. Our initial projection when the pandemic just started was that we were going to have to make massive

cuts in programming just to keep our budget safe. Then, the federal government had a huge recovery program for many sectors, including higher education, which was crucial for us to stay whole, keep people employed, and maintain activities."

- **Complete Reliance on Online Education:** Many universities shifted almost exclusively to online learning platforms, reducing the need for physical infrastructure, and potentially lowering long term operational costs. For example, Dr. Tomás Morales, President of California State University, San Bernardino (CSUSB), described the situation that many institutions around the world faced: "We literally had to adopt and change radically overnight during the pandemic, and we moved our entire portfolio of instruction to online." To do this successfully, they "used some of the federal funding that we received to provide professional development to faculty who had never taught online."

- **Investment in Technology and Infrastructure:** Investments in digital infrastructure for remote learning and administration became essential, sometimes impacting budget allocations. For example, Dr. Tomás Morales, described that at CSUSB they used funds to provide "hotspots, devices, laptops—hundreds and hundreds of laptops—to students who needed them. Our service area is 27,000 square miles containing 4.6 million people, and there are places in our region where connectivity is very poor. In order for students to be in a position to learn, we provided them with hotspots so that they can access the internet. The other challenge for us is that some of our students are very poor, and so there may be one device shared between four siblings. So, we were very generous. We had laptop loan program where students were able to take home the laptops and or hotspots."

"The pandemic has proved higher education institutions to be technology-driven, flexible, and adaptive organizations that can stand up to the challenges of complex moments in history."

CASE STUDY: Institutions Immune to COVID-19 Impact

While most institutions reported that their financial models were disrupted by the COVID-19 pandemic, at least temporarily, a minority reported that their finances were largely unaffected. Survey and interview data shows that these institutions had a combination of the following characteristics:

Prior Investment in Learning Management Systems and Technological Preparedness: Institutions that had already invested heavily in learning management systems were able to quickly transition to virtual teaching and learning, minimizing the impact on their core academic activities For example, Michele Nealon, President of The Chicago School—a private non-profit university in the US—explained that "because we'd already built out the infrastructure and the expertise that was necessary to help our fully online students thrive in an online platform, we were able to very quickly extend those technology services to all of our students during the pandemic." Likewise, Dr. Laura Alba-Juez, Vice-Rector for Internationalization and Multilingualism at the Universidad Nacional de Educación a Distancia (UNED), summed up their preparedness: "In our case we were less impacted than other universities, because [online learning] was already our methodology. We're a distance hybrid university with face-to-face classes with tutors in 61 centers in Spain and 23 abroad. We already had all the tools and machinery to work."

Stable Enrollment Growth and/or Limited Impact on Student Numbers: Some universities experienced stable or even increased enrollment during the pandemic, which helped maintain their financial stability. Dr. Alba-Juez, acknowledged that UNED's enrollments rose significantly during the pandemic: "We had an increase (15%) in the enrollment of students, which constituted a considerable amount, taking into account that we already had around 200,000 students. Even now after the pandemic we haven't gone back to the old numbers." A few universities noted that there was not a drastic departure of students during the pandemic, that they observed an increase in enrollments in subsequent years. For example, SDSU's President Adela de la Torre noted "Our enrollment growth didn't change, and we've been booming post pandemic. Since 2021 enrollment has just gone through the roof, and we were in the top 10 most applied-to public institutions in the country."

Strong Financial Position and Adequate Budget to Handle Changes: Some universities did not require substantial additional funding to adapt to the pandemic, managing with their regular budget and minimal extra funds for specific needs. For example, Osaka University of Commerce President Dr. Ichiro Tanioka noted that they were able to cover the costs of vaccinating all students and staff, as well as assume the cost of routinely disinfecting the entire campus, using funds normally allocated to research-related travel and funding. Dr. Gerald Reisinger, President of University of Applied Sciences Upper Austria—a public university in the north of the country—explained that "we have a very special model in Austria in which we run the university more or less like a private university, but financially, we are totally paid for by government. Approximately half of the money comes from the federal government and half of the money comes from the local government, so [during the pandemic] we didn't have any need to change anything. We needed a technology upgrade in the IT systems, but we could handle it through our regular budget. There was no additional money needed."

Swift Recovery to Pre-Pandemic Operations: Certain institutions were able to return to mostly face-to-face classes shortly after the pandemic, with minimal lasting impact on their operations. Nottingham Trent University´s VC Edward Peck noted, for example "We have the same overall institutional strategy, the same mission, and the same financial strategy. We see those two and a half years as just being a blip rather than the fundamental shift in the organization's orientation or approach." SDSU's President de la Torre noted that "even during the pandemic about 8 percent of our courses were still face-to-face because of the nature of the courses," and that teaching returned to in person as soon as restrictions were lifted.

VARIATIONS BY REGION AND INSTITUTIONAL CHARACTERISTICS

Survey responses show a diverse range of financial adjustments across different regions and institutional characteristics in response to the COVID pandemic. The below tables depict differences by institution classification (public/private), region, size, age, and highest degree awarded.

Figure 4: Differences by Institution Classification in Response to the Question "How did your institution's financial model adjust in response to the COVID pandemic?"
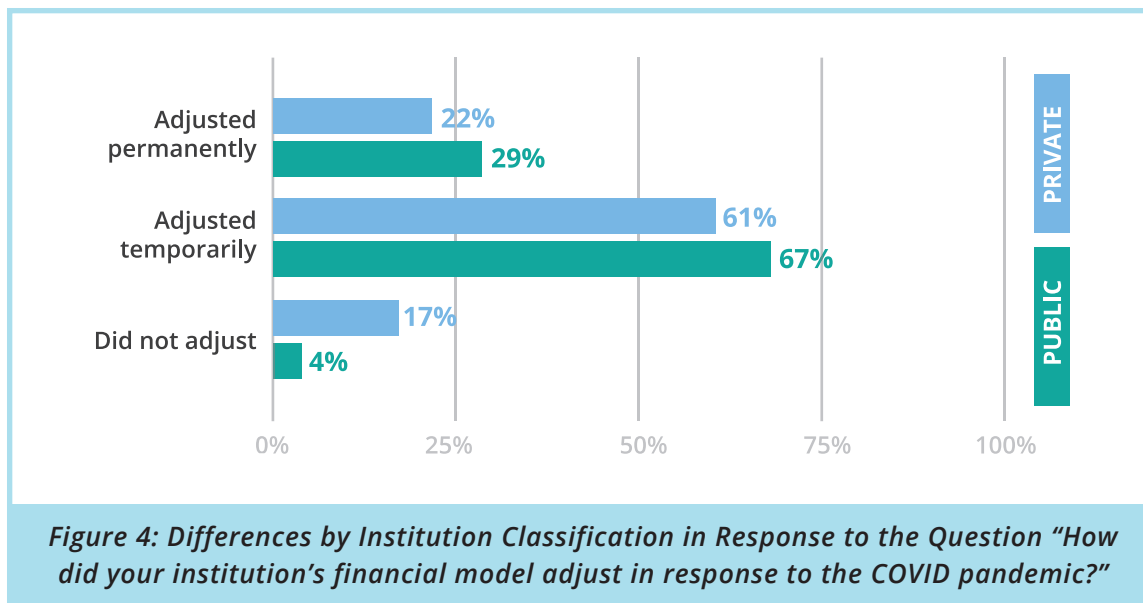
There are notable differences between public and private institutions in their responses to the COVID-19 pandemic. Public institutions report a higher percentage of permanent adjustments (29 percent) compared to private institutions (22 percent). Conversely, a larger proportion of private institutions (61 percent) than public ones (67 percent) reverted to their pre-pandemic situation after making temporary adjustments. Notably, a significant difference appears in the proportion of institutions that did not adjust at all, with 17 percent of private institutions maintaining the status quo compared to only 4 percent of public institutions.

Survey and interview data suggest these differences are partly due to the varying degrees of flexibility, resources, and constraints between private and

public institutions. Public institutions may have more regulatory requirements or public accountability that drive permanent changes. They might also receive more government support or public funding, which can mandate or facilitate lasting transformations. Private institutions, on the other hand, often have more autonomy and may be more financially dependent on tuition and fees, leading them to revert to pre-pandemic operations to maintain student enrollment and satisfaction.

Many universities' financial models changed to accommodate adjustments to their tuition and fees, considering the shift to online learning and the financial strain on students and families, and private institutions may have more autonomy to do this. For example, Dr. Eda Coutinho Machado noted that at IESB "We gave 1,500 scholarships that were 90 percent of the tuition fee and 3,000 that were between 70 percent and 50 percent," and that they increased their distance learning and blended learning programs.

"We had to rethink our entire budgeting process... the pandemic forced us to be more agile and responsive in our financial planning."
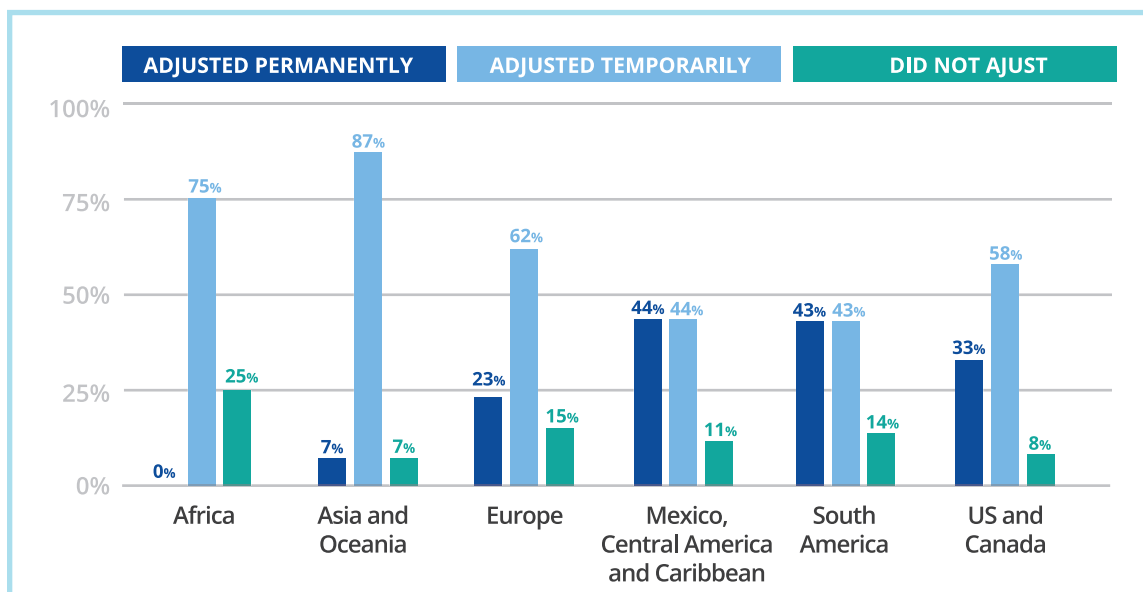
Figure 5: Differences by Institution Region to the Question "How did your institution's financial model adjust in response to the COVID pandemic?"

The most common response was that the institution made a temporary adjustment of their financial model. This response was particularly prominent in Asia and Oceania, Europe, Africa, and the US and Canada. Permanent and major adjustments were also noted, especially in Mexico, Central America, and Caribbean, and South America.

Europe (23 percent), Mexico, Central America, and the Caribbean, along with South America (both 43 percent), and the US and Canada (33 percent) report higher rates of permanent adjustments compared to Asia and Oceania (7 percent). Most institutions in Asia and Oceania (87 percent) and a significant portion in Europe (62 percent) and the US and Canada (58 percent) have returned to their pre-pandemic situation after temporary adjustments. Notably, Europe (15 percent) and South America (14 percent) have a higher percentage of institutions that did not adjust, compared to the US and Canada (8 percent) and Asia and Oceania (7 percent).

The reasons for these regional differences are multifaceted. Cultural, economic, and political factors likely play roles, as do the severity and duration of the pandemic's impact in each region. Institutions in Europe, the Americas, and Canada might have had more resources or external pressures to make lasting changes, while those in Asia and Oceania could have been more conservative or agile, enabling a quicker return to traditional operations. Dr. Mustafa Aydin, President and Founder of Istanbul Aydin University—a private university in Turkey founded in 2007—says that the COVID period "also somewhat refreshed the universities. Some senior academics and administrators found it a little hard to adapt to the digital campus and teaching environment. We assisted them as much as we could, but also observed with great delight the rise of the new generation academics' skills and success."

	Less than 5,000 enrolled students	Between 5,000 and 10,000 enrolled students	Between 10,000 and 20,000 enrolled students	More than 20,000 enrolled students
Adjusted permanently	0%	42%	20%	23%
Adjusted temporarily	89%	42%	70%	68%
Did not ajust	11%	16%	10%	9%
GRAND TOTAL	**100%**	**100%**	**100%**	**100%**

Table 1: Differences by Institution Size to the Question "How did your institution's financial model adjust in response to the COVID pandemic?"
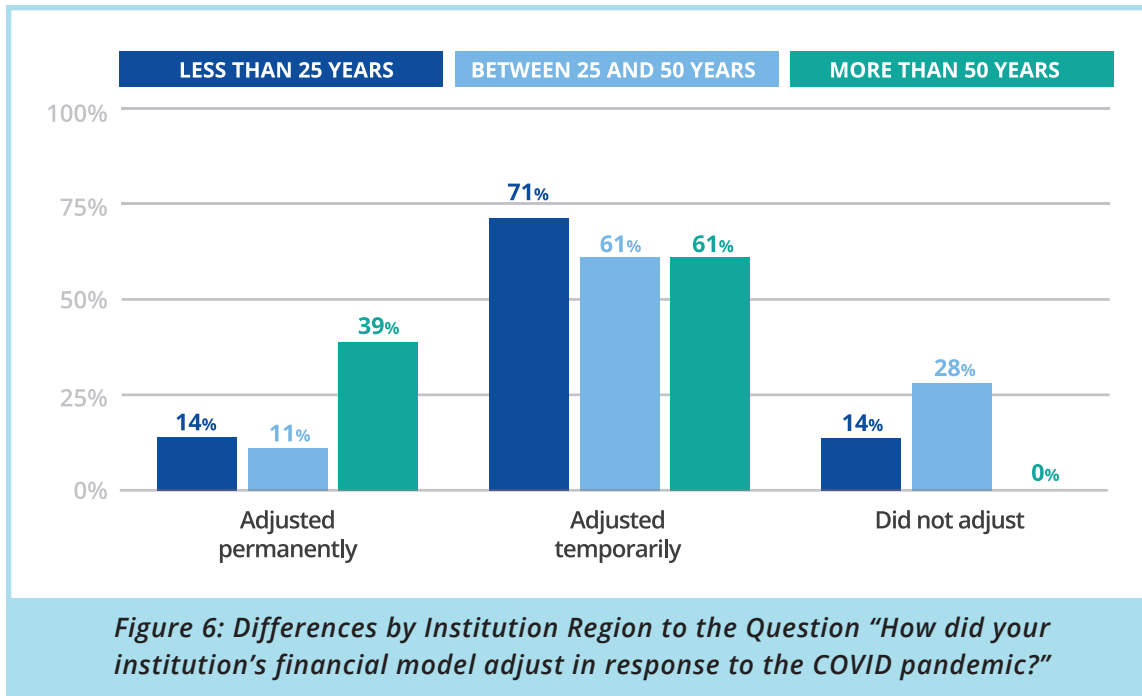
Data shows that educational institutions of different sizes responded to the pandemic differently in terms of making permanent or temporary adjustments to their financial models, or not adjusting at all. Institutions with enrollments between 5,000 and 10,000 students have the highest percentage of permanent adjustments (42 percent), which is notably more than those with over 20,000 students (23 percent), between 10,000 and 20,000 (20 percent), and significantly higher than smaller institutions with less than 5,000 students, where none made permanent adjustments.

Conversely, the majority of the largest (68 percent) and smallest institutions (89 percent) returned to their pre-pandemic situation after temporary adjustments, compared to 70 percent of those with enrollments between 10,000 and 20,000, and 42 percent of medium-sized institutions (between 5,000 and 10,000). Institutions that did not adjust at all are relatively few across all sizes, ranging from 9 percent to 16 percent, with medium-sized institutions being the most resistant to change (16 percent).

These differences could be due to the varying capacities and flexibilities of institutions based on size. Medium-sized institutions may have the optimal balance of resources and agility to implement permanent changes, while the largest institutions may have more complex structures that favor temporary adjustments. Smaller institutions, often more agile, might find it easier to pivot temporarily and then revert as they seek to solidify their identities and practices. For example, Dr. Hicham El Habti, President of Mohammed VI Polytechnic University (UM6P)—a private university founded in 2013 in Morocco with fewer than 5,000 students, described the attitude toward change at the university as a small and young university: "We are developing our own culture and our own business model, and [faculty] need to be involved. It's not a top-down approach. I need them to be committed to that involvement. I have a meeting with the young faculty tomorrow to hear from them about new ways of doing education, about how to think out of the box, and discuss with them our competitive advantage."

Figure 6: Differences by Institution Region to the Question "How did your institution's financial model adjust in response to the COVID pandemic?"

The above figure displays how institutions of varying ages have responded to the pandemic financially. Older institutions, those in existence for more than 50 years, have made the most significant number of permanent adjustments (39 percent), compared to just 11 percent of those aged between 25 and 50 years, and 14 percent of the youngest institutions—those less than 25 years old.

Most institutions across all age groups reverted to their pre-pandemic situation after temporary adjustments, with 71 percent of the youngest institutions doing so, compared to 61 percent of both the oldest and middle-aged institutions. Notably, none of the oldest institutions maintained the status quo without any adjustments, whereas 28 percent of middle-aged institutions and 14 percent of the youngest ones did not adjust at all.

The reasons for these disparities may be rooted in the institutions' life stages and corresponding levels of established procedures and infrastructure. Older institutions might possess more robust systems and resources to implement and sustain permanent changes. They may also feel a stronger impetus to evolve, driven by a long history and a sense of legacy. Dr. Pilar Aranda, Former Rector of the Universidad de Granada, a public university in Spain, recounts, "I remember saying that a 500-year-old university, mainly in-person, has become a necessarily

virtual university in 48 hours. That meant a very important change. We had a platform to support teaching and it became the only teaching platform, with 70,000 users, and at peak moments 40,000 people were connected."

Likewise, Ricardo Villanueva Lomelí, Rector of the University of Guadalajara, a public university established in 1792, noted that a component of the Institutional Development Plan 2019-2025, Vision 2030 "highlights the importance of digital transformation and hybrid education as essential elements for the modernization and adaptability of the institution in response to the challenges of the 21st century." In addition, he says, the university seeks to create "educational programs that are not only flexible in terms of delivery modalities (in-person, online, hybrid) but which also promote multidisciplinary approaches to learning, preparing students to face complex challenges in diverse professional environments. Therefore, the University of Guadalajara recognizes digital transformation and hybrid education as fundamental pillars for its evolution and adaptation to new educational realities. These efforts are aimed at improving the accessibility, quality and relevance of the education it offers, ensuring that its students are prepared to thrive in a globalized and digitally intertwined world."

	Bachelor	Master's	Doctoral, M.D.
Adjusted permanently	0%	18%	28%
Adjusted temporarily	100%	73%	60%
Did not ajust	0%	9%	13%
GRAND TOTAL	**100%**	**100%**	**100%**

Table 2: Differences by Institution Highest Degree Awarded in Response to the Question "How did your institution's financial model adjust in response to the COVID pandemic?"

This table shows that none of the institutions offering only Bachelor's degrees made permanent changes, whereas 28 percent of those offering Doctoral or M.D. degrees and 18 percent offering Master's degrees did. In contrast, all institutions offering Bachelor's degrees returned to their pre-pandemic situation after making temporary adjustments, compared to 60 percent of Doctoral/M.D. and 73 percent

of Master's degree-granting institutions. The tendency not to adjust at all was absent in institutions offering Bachelor's degrees, while 13 percent of Doctoral/M.D. and 9 percent of Master's degree-granting institutions did not adjust.

These differences could be influenced by the nature of the programs and the resources required to deliver them. Doctoral and M.D. programs, often involving intensive research and clinical components, may have required substantial permanent restructuring to continue effectively during the pandemic. Master's programs, being more flexible and less resource-intensive than Doctoral/M.D. programs, could revert more easily to traditional methods post-pandemic. Bachelor's programs, typically the most standardized and largest scale, might have been able to adapt temporarily with the expectation of returning to well-established norms, avoiding permanent changes due to the logistical complexities and potential disruption to a larger student body.
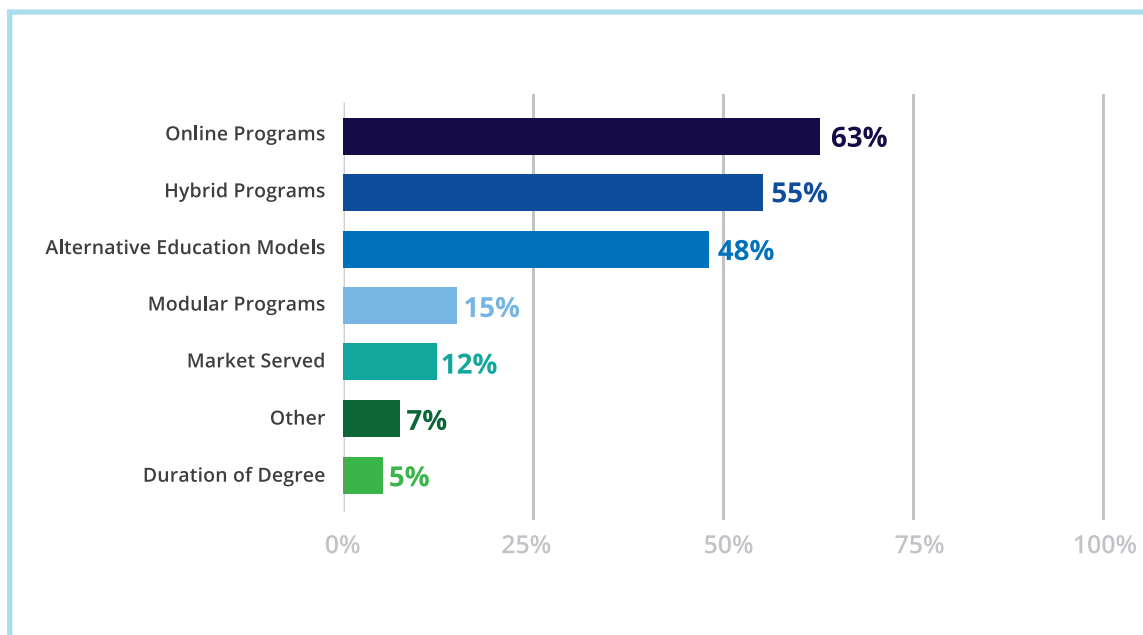
CASE STUDY: The Potential of Online Learning

There is much discussion of what the role online learning may play in the future of higher education. Survey data and interviews reveal the following important insights:

1. **Improvements in Online Learning:** Interviews highlighted the need for institutional preparedness to switch between online and offline teaching, with a view to evolve online teaching beyond an "emergency mode" into a powerful competitor or substitute for offline teaching. Dr. Amine Bensaid, President of Al Akhawayn University in Morocco, noted "as part of our strategy, we planned in 2019 to introduce more technology. But our mindset and that of our faculty was such that we thought it was going to take us three years or so in order to get significantly more technology into the classroom. COVID helped us do it overnight." Though his university has not adopted fully online courses, there is a plan to operate some online courses, especially for postgraduate education.

2. **Satisfaction and Engagement**: Leaders expressed a variety of opinions on the equivalency of online vs. in person learning outcomes. While some institutional leaders report that online learning outcomes are on par or even exceed those of traditional formats in terms of student engagement and satisfaction, other leaders assert that in person learning leads to higher engagement. Osaka University of Commerce President Dr. Ichiro Tanioka explained that at his university, courses with fewer than 30 students or so must be taught in person, so that students can interact with one another, whereas large classes that are lecture based may be taught online with prior permission.

3. **Innovation and Flexibility:** The integration of new learning tools in face-to-face learning, along with online and hybrid schedule options, is seen as essential to prepare students for the digital world and to distinguish universities from their peers. There is discussion of which subjects lend themselves to online modalities. For example, Md. Sabur Khan, Chairman and Founder of Daffodil University in Bangladesh, feels that online learning "is not effective in areas like computer science, multimedia, and engineering, though it is true that business, English literature, and others sorts of subjects can be taught online."

4. **Hybrid and Blended Learning Focus:** Leaders interviewed highlighted the growing role of hybrid and flexible learning programs, which are expected to increase in the coming years , but emphasized that face-to-face learning will always form part of higher education. Dr. Ricardo Villanueva Lomelí, Rector of the University of Guadalajara, shared that his university's institutional plan focuses on hybrid learning, "combining face-to-face and online teaching. This approach seeks not only to respond to emerging needs, such as those presented during the COVID-19 pandemic, but also to improve the accessibility and flexibility of education, allowing students to combine their studies with other responsibilities."

5. **Faculty Perspectives:** Some interviewees mention faculty's initial resistance to online learning, highlighting the challenge of integrating online education in traditional institutions. However, the increased role of online learning has also allowed more flexible work arrangements that appeal to many staff. President Michele Nealon of the Chicago School says "Our faculty model has moved toward a much more flexible model. We still have thousands of students on campus, and they still expect to walk into an office and meet in-person with faculty. In conversations with faculty, we were able to move to more flexible, and also more extensive faculty presence that now covers days, evenings, and weekends, yet staggered for individual faculty. This provides the best for faculty and students, we were able to expand our services but still provide faculty, and indeed staff, with an optimal way of working." Dr. Mustafa Aydin says that at Istanbul Aydin University they returned to a complete full-time workplace. "I do not believe that university education can proceed with remote working and teaching. So, although we use many advanced technological tools to connect with the world and conduct various projects and collaborations, we are back to face-to-face in campus interaction to the full extent."

Taken together, these perspectives reveal a complex and evolving landscape of online learning, with varying degrees of acceptance and integration across institutions.

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LASTING TRANSFORMATIONS

When asked to indicate the extent to which the COVID pandemic drove transformation at institutions, 63 percent of institutions noted that their online programs were greatly affected by the pandemic, 55 percent noted that their hybrid programs were greatly affected by the pandemic, and 48 percent noted that their alternative education models were greatly affected by the pandemic.

Category	Percentage
Online Programs	63%
Hybrid Programs	55%
Alternative Education Models	48%
Modular Programs	15%
Market Served	12%
Other	7%
Duration of Degree	5%

Figure 7: Responses to the Question "Which of the following areas were greatly transformed at your institution by the COVID-19 pandemic?"

These trends indicate that online programs and hybrid programs experienced the greatest level of transformation. This likely reflects the immediate need for remote teaching capabilities during the pandemic. Looking forward, Dr. Fernando León García notes that CETYS University "has unveiled for the 2023-24 academic year what we call the 'multi experiential model', which still favors and underscores the importance of face-to-face, but now includes hybrid and online as part of the formula. On average, about 60 percent of the total curriculum is face-to-face, but up to 40 percent is hybrid or online."

The markets served have seen some changes, but fewer institutions report significant transformation in this area, which could indicate that while teaching methods changed, the target demographic for many institutions remained consistent. For example, Dr. Edward Peck notes that Nottingham Trent University opened a campus in London in September 2023 "because most student growth is in London, and we want to be in the most buoyant market. It's a very novel step for us, since though a lot of UK universities have London campuses, what's unusual about ours is it offers things like gaming, graphic design, and music performance, rather than law or business or anything like that. We've gone through a real niche, high value approach."

Dr. Kakha Shengelia, the President of Caucasus University, a private university in Georgia, endeavors to expand markets served though "introducing English-instructed programs, double degrees, joint programs, and short-term offerings. Additionally, we are forming new partnerships and collaborations with universities and educational networks globally. Our initiatives extend into projects, research, and capacity-building with local and international donors."

Survey respondents that reported 'Other' transformations made various clarifications in the survey: one respondent noted that their institution "transformed 100 percent in technology faculty, staff, student mobility among campus locations; closing of campuses with low enrollment, market changes, and ability to serve through online programs." Other respondents clarified that transformations occurred in "research and innovation activities"; "blended education models"; adopting a "new approach and academic tools", and changes to the "home office and focus on customer experience" as well as their "collaborating disposition."

The impact of the COVID pandemic on the transformation of educational models at institutions varied by region and type of educational program. Many institutions in Asia and Oceania, as well as South America, reported a 'Great' degree of transformation in alternative education models, suggesting significant changes in their approach to education in response to the pandemic. Illustrating this, Dr. Shawn Chen, President and Founder of SIAS University, a private institution located in Zhengzhou, China, conveyed his institution's decision to focus on technological innovation, explaining "Machines are always better than

humans. You cannot run faster than a car. You cannot swim faster than a boat. You cannot do better in calculations than a calculator. So, machines are always better. That's how we differentiate. We are a new university, and we say the old and university model is obsolete."

European institutions also largely reported a 'Great' impact in alternative education models. Dr. Pilar Aranda, noted that though Universidad de Granada is a European university, in some ways it operates "more like a university in Latin America, perhaps because it has more of a history of doing things online. Compared to the Anglo-Saxon universities, where students like to talk on camera, culturally we are different. Students would turn on their cameras, but then leave." To this end, the university has thought about what education models are most effective, and how to train faculty and staff to engage students online.

Post-pandemic, there has been a focus on learning from what worked and identifying pressure points and wins. While many leaders acknowledged that hybrid and remote models were effective, they have since shifted towards a more human-centered approach for both students and faculty. UCR Chancellor Wilcox noted that "if we opted for a world where everybody worked in their bedroom at home, the opportunities for informal mentoring, informal development, and engagement all diminish greatly. We log on, we do our business, we log off. There's no hanging around after to talk about stuff, to introduce people to other people. All that stuff falls away. That aspect of remote I think has much bigger implications and risks for younger people. They need that opportunity. Many of us got to be where we are through those kinds of connections."

PLANS TO EXPAND LEARNING MODALITIES

Now that institutions have emerged from the pandemic, their plans to expand in person, hybrid, and online learning in the coming 1-3 years vary. While all have returned to some form of in person learning, 93 percent have plans to develop one or more forms of other learning modalities in addition to in person. Eighty-five percent of survey respondents plan to expand hybrid or mixed learning, 48 percent plan to expand online learning at their institutions and 18 percent plan to expand both. For example, Dr. Amine Bensaid, President of Al Akhawayn University in Ifrane, Morocco, an independent public liberal arts university modeled on the American style, noted that "what online really did for us was that it gave us more resilience. It gave more degrees of freedom to our faculty and to our students. But the dynamic growth we have achieved has not come from online programs."

Interestingly, seven percent plan to expand only in person learning, signaling that for some institutions this is a primary focus, and/or that the demand for other modalities has been met. University of La Verne Former President Devorah Lieberman points out that some types of students are very eager to continue their education at a distance, while others prefer to be on campus: "Graduate students embraced the change in having more online experience. They were working full-time, they didn't want to have to drive to campus, all of that. The undergraduate students were dying to come back to campus—go to football games, be in their sororities, live on campus, etc. So, the undergraduates didn't want that much change around online and services delivered online."

SDSU's President de la Torre notes that they are focused on in person teaching because "one of the things that makes [us] a popular campus is that there's a sense of community, and you're not going to get a sense of community in a Zoom room. For the traditional 18 or 19-year-old that comes to San Diego State as a freshman, or even as a graduate student, one of the things they're longing for is belonging. They are in their formative years, and you can't socialize by being on a flat screen."

Dr. Gerald Reisinger observes a similar sentiment among some of the students at the University of Applied Sciences Upper Austria, saying "even when we offer them the option to study from home, they say no. They want to be at the university. They want to discuss with each other, they want to go for a beer after lecture, things like that. So, at the moment, students are more or less back at the university, even if that means a one-hour drive to campus or taking the train a long distance."

Some leaders believe in the higher success rate of in-person courses due to hands-on activities, collaborative projects, and personal interactions between students and academics. UCR Chancellor Wilcox expressed this belief, noting "I routinely say students 'go' to college. They want to go to an actual place, and they go to that place with some expectations, not just about buildings and trees, but about the interactions that are there."

He explained "I can turn on the TV right now and watch the Vienna Symphony Orchestra, or I can go downtown and watch the local one. I've never been in a town that didn't want their own orchestra, even knowing it wasn't going to be nearly as good as the Vienna Philharmonic. But everybody wants their own personal experience, and that's also true in universities. In our case, it turned out to be more than true."

POSITIVE LESSONS FROM COVID-19

Survey data and interviews highlight the challenges of effectively forecasting the needs of higher education institutions given the complexity and precarity brought by the COVID-19 pandemic. Leaders interviewed confirmed that the pandemic was one of the most difficult, yet also most gratifying, times to be the head of a higher education institution. For example, Dr. Fernando León García notes that "On the whole, people are very much forward looking, and I think the pandemic inspired them to refresh and take another look at how things are done, exactly what should be retained, and what was learned. A few institutions have even created documents about the learnings from the pandemic and how they are changing things going forward and rethink the value proposition of the institution."

In this same spirit of growth, Md. Sabur Khan, Chairman and Founder of Daffodil University, a private institution in Bangladesh, points out that "I should say that COVID was good for us because it brought about innovation and lots of technological adaption, so in one sense it had a positive impact on our university because of the automation we were able to implement."

While there are myriad problems facing higher education today, Dr. Edward Peck, Vice Chancellor of Nottingham Trent University in the UK, points out that this always been the case. Higher education institutions are constantly faced with global challenges: "Now the thing that's pressing is the war in Ukraine, the earthquake in Morocco that just happened, what's happening in Gaza, and climate change in general. So, it's kind of like, yes, COVID was a huge thing and it brought on a lot of change, but it's not as though now we'll sit back and have peace forever. It's more like, here's the new crisis, here's the new thing that's having a huge impact."

CASE STUDY: Leading in Times of Precarity
President Michele Nealon, The Chicago School

As a clinical psychologist and the President of the Chicago School for 13 years, Dr. Michele Nealon recognizes the importance of building and maintaining positive relationships with employees, which is an integral part of the school's culture and her leadership. Her recounting of her experience during the pandemic reflects a leadership style that is empathic, collaborative, adaptable, and student focused. Some of the key strategies she practiced during the COVID-19 pandemic are below:

1. **Emphasis on Communication:** President Nealon, like many leaders, highlighted the crucial lesson of constantly communicating, especially during the pandemic. This approach was pivotal in transitioning to a hybrid working model, catering to the varying needs of employees and students based on their locations and roles. "At the Chicago School," she notes, "we pride ourselves on having a very positive culture for our employees. I've been the president for 13 years, and I'm a clinical psychologist, so I'm very sensitive to building quality relationships and subsequently maintaining those relationships."

2. **Empathic Leadership:** President Nealon stressed the importance of empathy in leadership, especially during challenging times. She modeled compassion towards employees and students dealing with personal challenges during the pandemic. "One of the best lessons I ever learned about leadership is 'communicate, communicate, communicate, communicate'."

3. **Collaborative Decision-Making:** Decisions regarding changes at the university were made collaboratively, keeping in mind the needs of the students and our responsibilities towards them. This collaborative approach was central to framing conversations and implementing changes. "Collective decision-making was especially important during the uncertain times of the pandemic. [We would] get employee ideas on the table, and then we collectively made a decision about what was in the best interest of all of us moving forward. And like any university in the middle of it, we were dealing with enormous ambiguity. None of us knew what the future held. We infused [communication] with change management language, such as, 'this is what we understand today; This is how we need to work today, etc.'."

4. **Focus on Student Outcomes:** The primary focus of their leadership was on collaboration to ensure quality student outcomes, demonstrating a student-centered approach in higher education. With international students, for example, she reports "we did everything we could financially to help them... We extended work study for our international students, and we went out of our way to identify students that needed that added additional support."

5. **Prioritizing Student Needs:** Leadership involved adapting to the evolving situation of the pandemic, always leading with the principle of putting student needs first. This included maintaining contact and providing necessary services to international students. "I always respond to every single international student directly. We're all rallied around student success, because we believe in that so much. We can always do more, without a shadow of a doubt, but every year we build on what we fundamentally believe in."

6. **Supportive Messages and Tone-Setting:** As a leader and a single mother, President Nealon was attuned to the challenges faced by parents and caregivers, sending out supportive messages and setting a tone of understanding and acceptance for interruptions during work hours. I was acutely aware that we were working with so many parents, so many caregivers. People were in meetings and suddenly a small child would come flying in and jump up on the parent's knee crying. I sent out messages of nothing but support for the ways our collective lives were."
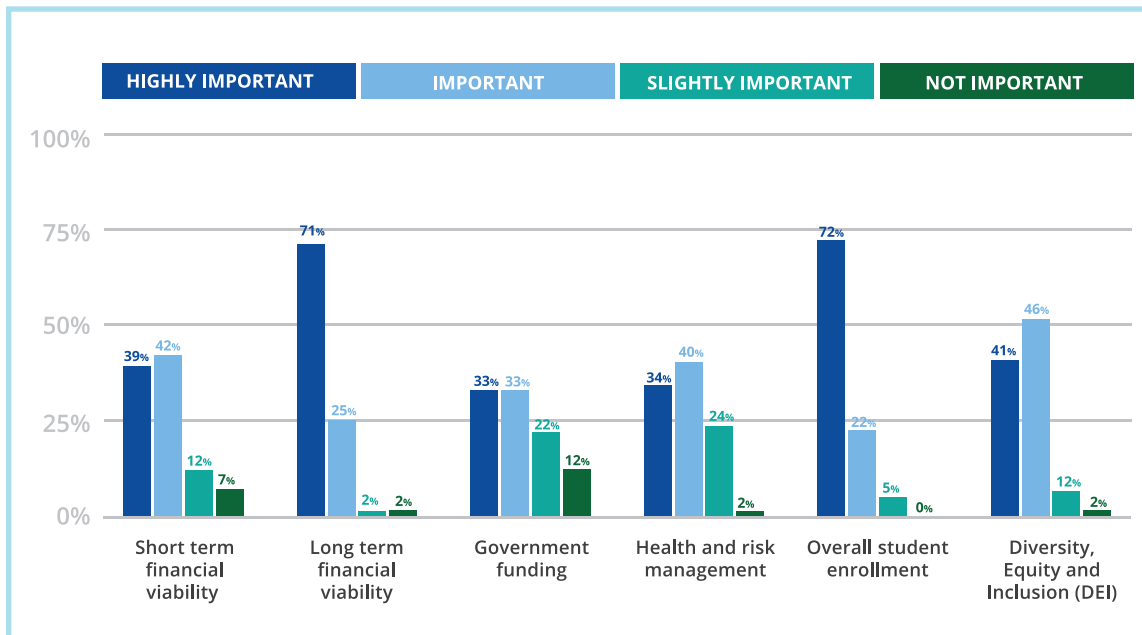
INSTITUTIONAL STRATEGY AND OPERATIONS

INSTITUTIONAL PRIORITIES

In the post-pandemic era, many leaders have reassessed their priorities and strategies in their role. Asked to rate the level of importance of various areas of their institution's strategy and operations revealed that long term financial viability is an important or highly important focus at 96 percent of institutions, and that overall student enrollment was a top priority for 95 percent of institutions.

HIGHLY IMPORTANT | **IMPORTANT** | **SLIGHTLY IMPORTANT** | **NOT IMPORTANT**

	Highly Important	Important	Slightly Important	Not Important
Short term financial viability	39%	42%	12%	7%
Long term financial viability	71%	25%	2%	2%
Government funding	33%	33%	22%	12%
Health and risk management	34%	40%	24%	2%
Overall student enrollment	72%	22%	5%	0%
Diversity, Equity and Inclusion (DEI)	41%	46%	12%	2%

Figure 8: Responses on the level of importance of the following areas to your institution's strategy and operations:

Given the opportunity to list other priorities, some respondents cited "expanding programs that meet regional workforce needs: STEM, healthcare, communications"; and paying attention to the "reputation and visibility to our donors and elected officials". Other leaders noted a focus on "lifelong learning and microcredencials, digital transformation, mainstreaming sustainability" and addressing an "aging teaching staff"; and prioritizing "digital transformation". Dr. Ricardo Villanueva Lomelí, Rector of the University of Guadalajara, noted that "the university seeks to enrich formal teaching through hybrid and active learning and

apply the principles of instructional design focused on student success in all its current programs. On the other hand, microcredentials, certifications and online micro-credits, as part of the lifelong education strategy, will also be strengthened."

"[The Board of Trustees] has had different stances. Initially one year into our strategy they were happy that we thought we could grow, but did not really believe that we would be able to do it. Now after three campaigns, they want to stick to the most optimistic growth scenarios, because now they know that we can do it and they're very happy that we're doing it."

VARIATIONS BY REGION AND INSTITUTIONAL CHARACTERISTICS

Differences between public and private institutions, and between regions, reveal significant differences in institutional strategies and operations.

	DEI Initiatives	Government Funding	Short Term Financial Viability	Long Term Financial Viability	Overall Student Enrollment	Health and Risk Management
Africa	75%	0%	25%	0%	25%	25%
Asia and Oceania	20%	20%	20%	20%	60%	27%
Europe	46%	46%	54%	46%	69%	31%
Mexico, Central America and Caribbean	33%	33%	44%	33%	78%	33%
South America	43%	14%	0%	43%	71%	43%
US and Canada	50%	50%	58%	50%	92%	42%

Table 3: Differences in Institutional Priorities by Region (% 'Highly Important')

Data highlights regional differences in the prioritization of institutional objectives within higher education. Asia and Oceania show balanced importance across objectives, with a notable priority for student enrollment (60 percent). European institutions exhibit moderate importance across all areas, particularly overall student enrollment (69 percent), while African institutions place a strong emphasis on DEI initiatives (75 percent). For instance, Dr. Hicham El Habti, President of Mohammed VI Polytechnic University (UM6P) in Morocco notes that living on campus is mandatory, in order to create a space where females feel safe. As a result, their undergraduate enrollment is 60 percent female, 40 percent male.

For Mexico, Central America, and the Caribbean, student enrollment (78 percent) stands out as the highest priority. South American institutions prioritize

DEI initiatives and health and risk management (both 43 percent) but show less concern for financial viability. Institutions in the US and Canada demonstrate a high priority for student enrollment (92 percent) and health and risk management (42 percent), alongside a balanced view on other objectives.

Institution Classification	DEI Initiatives	Government Funding	Short Term Financial Viability	Long Term Financial Viability	Overall Student Enrollment	Health and Risk Management
Private Institutions	36%	8%	36%	64%	69%	28%
Public Institutions	46%	67%	38%	79%	71%	42%

Table 4: Differences in Institutional Priorities by University Classification (% 'Highly Important')

Data shows that Diversity, Equity, and Inclusion (DEI) initiatives are more emphasized in public institutions (46 percent) compared to private ones (36 percent). Government funding, a critical aspect for public institutions, is considered highly important by 67 percent of them, in contrast to only 8 percent of private institutions. Both institution types view long-term financial viability as crucial, with 79 percent of public and 64 percent of private institutions rating it highly. Student enrollment is similarly important across both, with a slight preference at public institutions (71 percent) over private (69 percent). Health and risk management is rated as highly important by 42 percent of public institutions, indicating a more significant concern than in private institutions (28 percent). This analysis suggests public institutions place a higher emphasis on government support, DEI initiatives, and health and risk management compared to private institutions, which could be due to their operational models and funding structures.

Related to DEI initiatives, Dr. Laura Alba-Juez, Vice-Rector for Internationalization and Multilingualism at UNED, a public university in Spain, expresses the institution's commitment to DEI in education, saying "We are a socially conscious university, because we have a very important social purpose. As a distance university, we provide education to handicapped people, people in

penitentiary centers. Military personnel, and to rural populations." Likewise, Dr. Fernando León García seeks to lead CETYS University "to where we want to be as a result of being deliberate. We are making sure of that in terms of the students we recruit, the faculty we hire, the staff we train, and the leadership we are nurturing across the institution."

Public institutions are more concerned with both **short- and long-term financial viability** than private institutions since their funding schemes are often tied to governmental support and determined by national policies. For example, Dr. Edward Peck, VC of Nottingham Trent University, a public university in the UK, explains that "The fee regime has been frozen. It was very generous when it first came in, and it's got less generous because it's been frozen for the best part of seven years now at the same figure. And of course, that becomes particularly germane when you have the sort of inflation levels we have. The fee is probably worth two thirds of what it was when it was first introduced, and that just drives you to think more seriously about your business model and where you spend money if you don't have to or if you can avoid doing it."

Private university leaders are also concerned with the financial status of their institutions, including **governmental funding:** Dr. Juan Camilo Montoya Bozzi, Rector of Universidad Autónoma de Bucaramanga (UNAB), a private university in Colombia, notes that "Colombia had a program between 2014 and 2018 called 'Ser Pilo Paga'. In Colombia we call someone who has a very good academic performance a 'Pilo'. The program used public resources from the national government, allowing young people from low-income levels who had very good performance in school to choose a high-quality accredited university, whether public or private, and the government paid the tuition. UNAB was very attractive and received many young people from that program. So, between 2014 and 2018 we had a boom, a significant growth in enrollment that was financed by government resources. After that program ended, we began to feel the pain of falling enrollments."

ANTICIPATED CHANGES

When asked what areas of strategy and operations were set to increase in the coming 3-5 academic years revealed a variety of expectations. Overall, areas of most significant increase were partnerships, research, and investment in infrastructure.
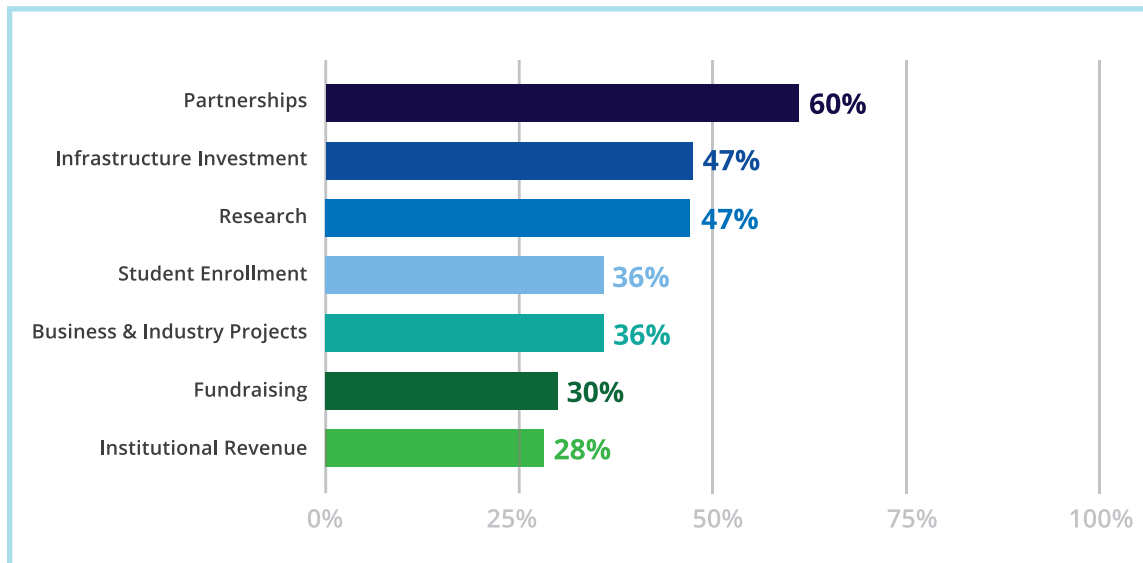
Figure 9: Areas of Strategy and Operations in Which Institutions Anticipate a 'Significant Increase' in the Upcoming 3-5 Academic Years

The emphasis on **partnerships with business and industry** suggests a trend towards globalization and interdisciplinary collaboration. SDSU's President de la Torre notes that through their new campus in Mission Valley, they intend to grow public private partnerships: "The future of higher ed is going to be through collaboration and partnerships. There's no way you can fund innovative work through state dollars and tuition." She explains that their new campus requires them to work closely with industry. "Right now, the focus is primarily with the life sciences, and we will be bringing in our top research faculty, because San Diego is known for biotech. From a regional perspective, it's a goal to become the Silicon Valley of biotech." She continues, "in our campus in the Imperial Valley, we received $80 million from the state [of California]. We're working with the lithium industry, since the largest deposit of lithium in the United States is in the Salton Sea, and our campus is just a few miles from that."

Investing in modern **infrastructure** is a draw for both students and faculty, and they play a critical role in the overall learning and research capabilities of an institution. Upgraded infrastructure can support more sophisticated research activities, improve the student experience, and ensure that the institution remains competitive. Continuing with the example from SDSU, President de la Torre shared that they "have a lot of plans" related to infrastructure. They are building a brand-new campus in Mission Valley in California, which will allow them to grow to 50,000 students. This campus expansion is also designed to generate research, foster employability, and create partnerships with industry. They also have a campus in Imperial Valley in California and major centers in Oaxaca, MX, the Republic of Georgia, and Palau.

Mr. Billy Crissien, Executive Director and Board Member of EAN University in Colombia highlights the importance of offering ultramodern infrastructure, describing "We made a building that is 20,000 square meters and ten floors. The building has a room where people can rest or sleep, like in airports. It has a finance lab, a language lab, and a Makerspace lab, where students can experiment and experience challenges that come from the industry that concerns them. The building is the 'hardware' that expresses what we have inside our university. It demonstrates our commitment to sustainable entrepreneurship."

Infrastructure for virtual connectivity is especially relevant in a post-pandemic world where the need for remote learning and operations has become clear. Durban University of Technology Vice-Chancellor and Principal, Dr. Thandwa Mthembu, noted that "as you can imagine, with more use of our learning management system model and MS Teams, our lecturers can easily go online. This is especially important with us, since we've got seven campuses, [two of which] are 90 kilometers away from the main university."

Dr. Juan Camilo Montoya Bozzi, Rector of Universidad Autónoma de Bucaramanga (UNAB), also investigated how to equip his university for many modes of learning. "Regarding investments in the university's infrastructure on campus, we did a judicious study that we called the Infrastructure Capitalization Plan to understand how we should transform the spaces and modernize the spaces of the university. More than growing, the emphasis was not on the growth of new square meters, but on the transformation and adaptation of many spaces that required new uses and making them more modern and optimal for learning."
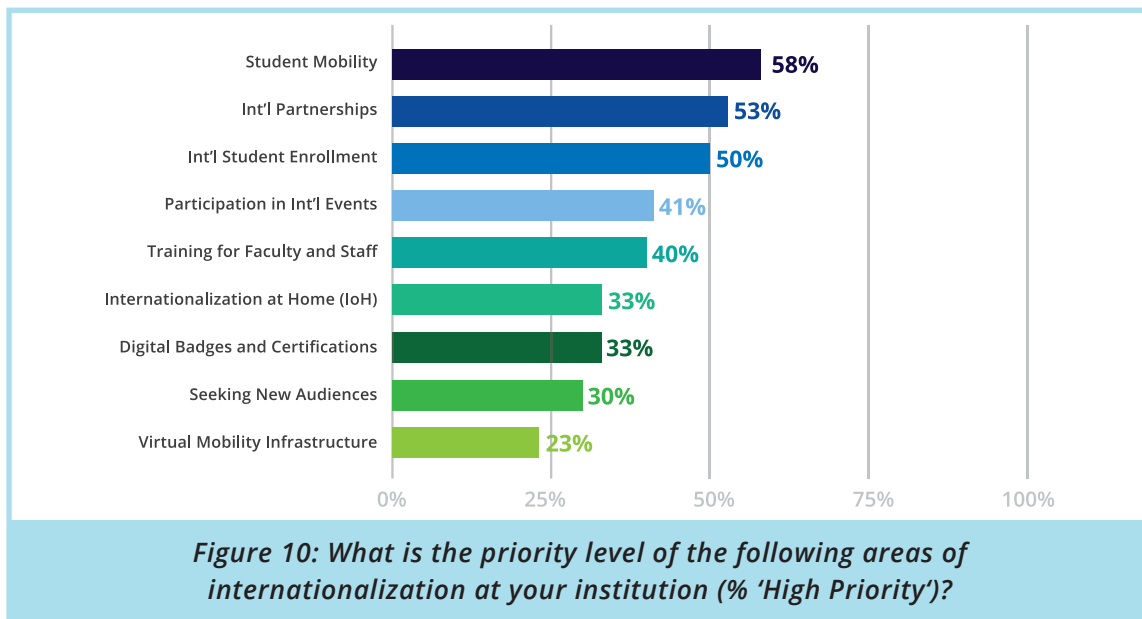
INTERNATIONALIZATION

INTERNATIONALIZATION PRIORITIES

The following tables provide a snapshot of how institutional leaders prioritize different aspects of internationalization, ranging from student mobility to seeking new audiences to serve.

Figure 10: What is the priority level of the following areas of internationalization at your institution (% 'High Priority')?

Area	% High Priority
Student Mobility	58%
Int'l Partnerships	53%
Int'l Student Enrollment	50%
Participation in Int'l Events	41%
Training for Faculty and Staff	40%
Internationalization at Home (IoH)	33%
Digital Badges and Certifications	33%
Seeking New Audiences	30%
Virtual Mobility Infrastructure	23%

Data reveal the top priorities to be student mobility, international partnerships and international student enrollment, all of which were considered 'top priorities' by more than 50 percent of respondents. This finding serves to identify the key strategic goals within higher education institutions, supported by evidence from interviews with leaders.

Student Mobility (58 percent High Priority): The emphasis on student mobility underscores the value placed on international exposure and the exchange of cultural and educational experiences. It is indicative of institutions aiming to prepare students for a globalized workforce where cross-cultural competencies and international networking are increasingly important. For example, University of Johannesburg, a public institution in South Africa, Vice-Chancellor and Principal Letlhokwa Mpedi emphasizes the importance of mobility, saying "We don't want our students to graduate being narrow-minded. Even if you study engineering, we want you to understand how the world works. There is a saying in my language: 'a person who doesn't travel will marry his or her sibling.' We value providing our students with an opportunity to learn

about the world in totality, not just about Johannesburg and South Africa."

Likewise, Dr. Tomás Morales notes that at CSUSB "one of the goals that I have as president is to increase the number of our domestic students who have a study abroad experience. We had about a 60 percent increase year to year in the number of students that studied abroad this past summer."

International Partnerships (53 percent High Priority): International partnerships often lead to collaborative research, joint academic programs, and faculty exchanges, which can enhance the institution's global reputation and academic excellence. Such collaborations can lead to innovations, enhance the quality of education, and provide institutions with a broader platform to address global challenges. Dr. Laura Alba-Juez describes that UNED is using partnerships to build up their microcredencials, saying then "are also working a very important European project with the EADTU on micro credentials, which is designed to create an enriching and ethical educational environment utilizing Artificial Intelligence."

She continues, "we suddenly started having lots of proposals and petitions for teaching or designing courses on digital competencies for Latin American universities. We have prepared courses, for instance, in conjunction with the World Bank and the government of Peru to help develop their nation's digital competencies. We have also done work in this area in Panama, in Bolivia, and many other places. We are quite well known in Latin America, and since the pandemic our services have been even more in demand."

Dr. Randy C. Frisch, President of the City University of Seattle—a private institution in the US—notes that partnerships have been key to expanding reach and learning to both students and staff. "What we have found is the benefits of partnering with institutions [in other countries] are profound. We can develop joint programs, and we get a chance to share the US style education not only with students but also with faculty and administrators."

International Student Enrollment (50 percent High Priority): The high priority placed on international student enrollment shows institutions' recognition of the benefits that a diverse student body brings. It fosters an inclusive environment that prepares all students for global citizenship. For example, Durban University of Technology Vice-Chancellor and Principal, Dr. Thandwa Mthembu, notes that "most of our international students come from around Southern Africa, though we do have

partnerships all across the world, in Europe, Asia, and so forth. The South African higher education system is seen as the best in Africa—if you look at international rankings, you'll see that around 70 percent of the top 10 universities in Africa are South African universities. The brand is good relative to other countries in Africa, so you would think that anyone in Europe, Asia, North or South America looking at doing something in Africa would want to come here because of the strength of our system. But the challenge of student protests that become violent stands in the way of attracting international students." Osaka University of Commerce President Dr. Ichiro Tanioka noted that due to Japan's aging population, international student enrollment is an important focus of his university. "The number of 18 year old students [in Japan} is decreasing, so the way we can keep our student body the same size is by attracting international students and exchange students to our campus," he says.

Additionally, international and TNE students often bring economic benefits, contributing to the institution's revenue through tuition fees and living expenses, which can be particularly important for institutions seeking financial stability and growth. Dr. Randy C. Frisch, President of the City University of Seattle explains that some international students are enrolled at the university's partners abroad and the institution must work through time zone issues. "In China, we have faculty who start class at 6:00 PM if it's an online synchronous class with the US." The university has faculty travel to different sites, during which time a course may be asynchronous. "For example, I taught a class at the Universidad Autónoma de Nuevo Leon and went down for an intense four-day block, and then returned to Seattle for the rest of the quarter."

These priorities reflect a strategic focus on internationalization as a means to elevate educational quality, foster global engagement, and enhance institutional prestige and financial health.

"Internationalization training for faculty and staff is necessary to equip faculty with cross-cultural competencies and teaching strategies for diverse student populations."

VARIATIONS BY REGION AND INSTITUTIONAL CHARACTERISTICS

While internationalization priorities varied, interviews and survey data shed light on regional trends.

Student Mobility: Africa, US, and Canada tend to prioritize student mobility, but it is not necessarily a high priority. For Asia and Oceania, Europe, and Mexico, Central America, and the Caribbean, student mobility is often considered a high priority. Dr. León García notes that at CETYS University, using a combination of partnerships, virtual mobility, and various types of student mobility, "the most recent data showed that 70 percent of the graduating class had an international experience. We hope to be able to claim by the year 2036 that 100 percent have had an international experience through all these modes of delivery and facilitating internationalization."

Despite virtual alternatives, many leaders still place high value on in-person student mobility experiences. SIAS University President and Founder Shawn Chen shared that "in terms of international experience, we want to encourage in person [experiences], because students learn by observing the culture. If you have a virtual experience, you don't gain as much, because you don't touch, you don't feel, you don't understand and experience on site. Talking to people is much deeper than just reading book and then going online." As a result, the university tries to give scholarships and subsidize mobility experiences to allow as many students as possible to have an international experience.

Participation in International Events: High priority in Asia and Oceania, and Europe. Other regions, like Africa, Mexico, Central America, and the Caribbean, and US and Canada, consider it a general priority, which may indicate a balanced approach to international events rather than a focused strategy. Dr. Kakha Shengelia, the President of Caucasus University in Georgia, shares that "by engaging in conferences, symposiums, and workshops, we not only contribute to global academic discourse but also stay abreast of the latest trends and innovations in education. This ensures that our institution remains dynamic and responsive to evolving global educational landscapes."

Internationalization Training for Faculty and Staff: This is a high priority in Europe and Asia and Oceania. Other regions consider it a priority, showing a commitment to developing faculty and staff competencies in internationalization across the board. Dr. Mustafa Aydin explained that at Istanbul Aydin University "During the pandemic there were three waves of training over a thousand faculty members so that we could cope during the pandemic. Because of that it was possible to launch the multi-experiential model. Student success is the name of the game."

International Partnerships: High priority in Asia and Oceania and considered a priority in other regions, highlighting the importance of partnerships across all regions with some variability in emphasis. Universidad de Granada Former Rector Dr. Pilar Aranda, said there was an increased focus on "international partnerships, participation in international events, and internationalization training for faculty and staff." She notes that "80 percent of our research groups have international links. We participate very actively in the framework programs of the European Union and programs with Latin America. We have approximately contact with 3000 research centers and universities in the world."

Internationalization at Home (IoH): This is a high priority in Europe, indicating a strong focus on creating an internationalized campus environment. Other regions prioritize this aspect but may not place it at the highest level, suggesting differing strategies for integrating internationalization into campus life. Dr. Kakha Shengelia, the President of Caucasus University, notes that "internationalization at home (IoH) is a key component to our internationalization strategy. We recognize the importance of creating an inclusive and globally aware environment on our campus. IoH initiatives include cultural exchange programs, language learning opportunities, and events that celebrate diversity, ensuring that the internationalization experience is not limited to those who physically travel abroad."

Dr. Antonio Leaño Reyes, Rector of the Universidad Autónoma de Guadalajara, notes that "Internationalization at Home received a strong boost during the pandemic through the multiple virtual collaborations it had with institutions. These types of collaborations continue and have been strengthened in such a way that the autonomous university community has the opportunity to have international

experiences at home. Likewise, we have incorporated the participation of international speakers at all educational levels of the UAG system to strengthen internationalization at home."

The President and Founder of IESB University Dr. Eda Coutinho Machado describes her institution's strategy toward IoH and student mobility: "IESB started bringing specialists and very important people from all over the world to talk to our students in a way that they would understand the culture and values of other countries. It was a successful strategy for 'internal' internationalization. 'External' internationalization started in 2010 with exchange students from Penn State University and IESB students. Every year, over the course of 15 days, students from Penn State visited IESB and vice-versa. IESB also sent students to Mexico (CETYS University and Universidad Autónoma de Guadalajara); Portugal (Universidade de Leiria); China (SIAS University); Spain (Alcalá University and Universidad de Salamanca); Georgia (Caucasus University); and Italy (IED-Instituto Europeo di Design). The Santander Bank was a very good partner giving scholarships to the majority of IESB students."

International Student Enrollment: This area is a high priority in Europe, demonstrating a focus on diversifying the student body. Other regions show a varied approach, with some considering it a priority and others viewing it as a high priority. Mykolas Romeris University's Rector, Dr. Inga Žalėnienė, is concerned with both domestic and international student enrollment, explaining that "currently international students constitute about 12 percent of MRU students, and our strategy for the upcoming seven years is to grow the percentage to 20. This is in part "due to the brain drain, because a lot of domestic students are selecting universities in other EU countries. In order to have a somewhat equal brain circulation one of our university priorities is to increase international student numbers." In terms of diversifying markets, she notes that "we want to attract students from as many countries of the world as we can. Currently we have students from more than 60 countries, and we hope that in the next five years the number will continue to grow."

Infrastructure for Virtual Mobility is considered a priority across most regions, which may reflect a growing recognition of the importance of virtual exchanges and learning experiences, especially post-pandemic. Former President Devorah Lieberman notes that the University of La Verne is now "offering a doctorate in

business administration that's one hundred percent online and is being offered in Mandarin and English." Programs like this can attract international students and also open pathways for virtual mobility experiences.

Dr. Inga Žalėnienė notes that infrastructure for virtual or hybrid international collaborations is also enhanced at MRU: "We have returned to the physical space of campus after the pandemic, but the elements of online education remained. The use of digital platforms and digital technologies is now widespread, and all new developments of international projects, dual degree programs, and research collaborations are being executed with the aid of digital means."

Digital Badges, Credentials, and Certifications are a high priority in Asia and Oceania. In other regions, it varies between high priority and priority, showing an interest in alternative credentials and certifications as part of internationalization. Dr. Antonio Leaño Reyes notes that "at the UAG, several of our undergraduate, postgraduate and continuing education degrees have micro-credentials where the student receives a digital badge that in its metadata has the authenticity validation of the UAG and also implies that the holder has mastery of a very specific skill."

Seeking New Audiences to Serve: This was shown to be a high priority in South America, suggesting a focus on expanding the reach and impact of their institutions. Other regions generally prioritize this aspect, showing an interest in reaching out to new student populations or stakeholders. Dr. Gonzalo Mendieta, Rector of Universidad de Las Américas Ecuador explained that his campus is undergoing a digital transformation by "partnering with Minerva to implement some of their ways of doing things at the university." He says, "it's a big challenge, but as I see it, if we don't do this we are going to be lagging behind in terms of where higher education is going."

Dr. Elizabeth Stroble, Chancellor of Webster University in St. Louis, Missouri, explained that the university is constantly looking at which international and domestic markets would benefit from certain programs. Doing this, she says, "requires strategic partnerships. To give an example, the Webster campus launched in Tashkent, Uzbekistan, at the invitation of President Mirziyoyev just prior to the pandemic, continues to grow at a rapid pace because the unique array of programs offered there respond to the needs identified in partnership with ministry officials

and regional industry leaders. The undergraduate and graduate programs range from business administration and management of information systems to TESOL, education & innovation, health administration, international relations, and media studies. As a result of these strong partnerships, Webster is now poised to meet needs in Central Asia in the broad areas of sciences and health professions, unprecedented in the university's 40+ year of global campuses."

These trends suggest that while internationalization is a priority across different regions, the emphasis on specific aspects of internationalization varies, possibly reflecting regional strategies, opportunities, and challenges.

"We can ask 'Did they have an internationalization at home experience'? Maybe they didn't go abroad but they did come into interaction with foreign students with foreign professors through technology?"
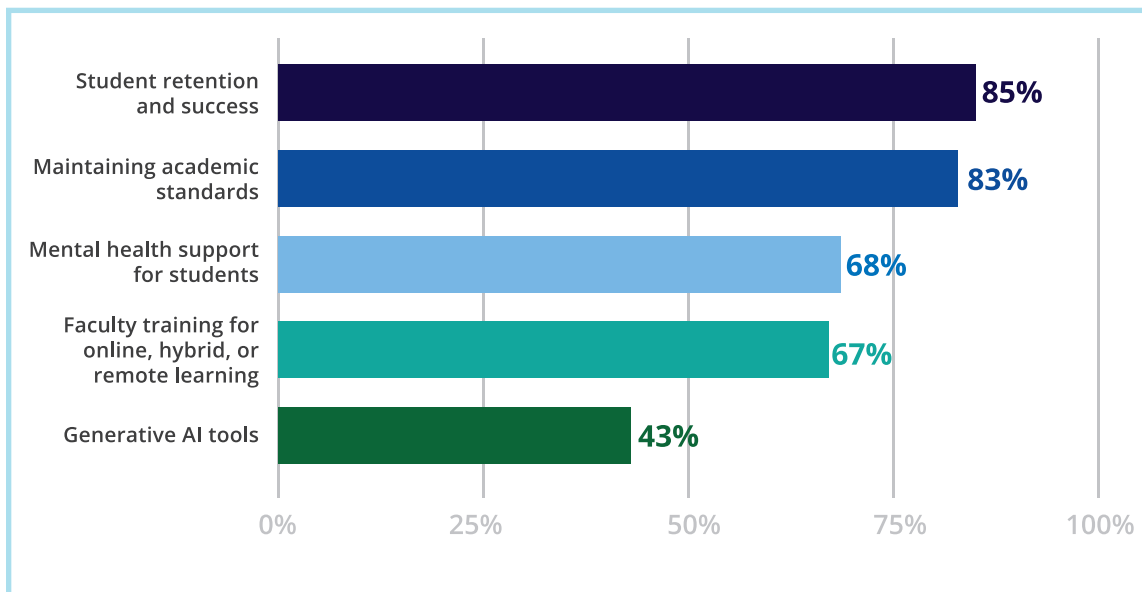
STUDENT AND ACADEMIC EXPERIENCE

PRIORITY AREAS

Trends indicate a collective focus on adapting to new educational technologies and methodologies while ensuring the preservation of academic integrity and standards. There is, however, variation in the importance assigned to emerging technologies like Artificial Intelligence (AI), reflecting a landscape of exploration and cautious integration into the academic experience.

Figure 11: Please indicate the level of importance of the following areas related to your institution's student and academic experience (% 'Highly Important')

"We use a lot of student analytics around engagement and we're about to use it to track mental wellbeing as well."

Interestingly, there were few differences between regions, classifications (public/private) or enrollment sizes.

Faculty Training for Online, Hybrid, or Remote Learning: Across all enrollment sizes, faculty training for online, hybrid, or remote learning is considered "Highly Important", indicating a universal recognition of the need for faculty development in these areas post-pandemic. Dr. Antonio Leaño Reyes, Rector of the Universidad Autónoma de Guadalajara, notes that "teacher training in online, hybrid or remote learning modalities is a crucial priority at our institution. The transition towards these educational models demands specific pedagogical and technological skills on the part of the teaching staff. Ensuring that our teachers are properly trained not only strengthens the quality of teaching, but also ensures a comprehensive and effective educational experience for our students. In this sense, through the Corporate University and the Educational Innovation Directorate we developed a teacher training program focused on the development of 6 competencies: Pedagogical capabilities focused on meaningful learning, Digital technologies for meaningful learning, Academic accompaniment, administrative management academic, research and continuing professional training."

Maintaining Academic Standards: Maintaining academic standards is also universally seen as "Highly Important" regardless of the institution's size. For example, Dr. Fernando León García emphasizes that at CETYS "Academic Affairs has adjusted the evaluation of hybrid and online courses. One of the things that we have to pay more attention to is that if you're moving from face-to-face to these options, then you have to make sure that the type of learning activities, learning assessments, and learning support is there." Durban University of Technology Vice-Chancellor and Principal, Dr. Thandwa Mthembu, points out an issue related to switching back and forth between online and in person learning: "one of the pressures that we are facing around going back face-to-face has been the quality of the instruction and assessments and so on. All sorts of applications are available, and all sorts of companies have sprung up that focus on academic fraud, because as much as we have a proctor system, it's not everything that you need to end fraudulent academic behavior."

Supporting the academic quality, faculty research and publications are deemed important across institutions of different sizes, reflecting the ongoing emphasis

on research activity and academic contribution. Dr. Hicham El Habti, President of Mohammed VI Polytechnic University (UM6P) in Morocco said "The DNA of the university is research, which is very important. We have had this from day one. When we start something, we start with the research before developing the innovation. Seventy percent of our revenue comes from research with industry, ten percent comes from executive training, another ten percent comes from tuition fees, and the last ten percent comes from consulting and advisory projects."

Student Retention and Success is considered important in all regions, institution classifications, and sizes, indicating a focus on student outcomes and institutional effectiveness. Dr. Mustafa Aydin asserts that IAU is focused on "supporting students all the way to graduation. Retaining students is cost-effective as it's more expensive to recruit new students than to retain existing ones. Successful graduates become ambassadors for the university, contributing to its reputation and potentially attracting new students."

Across regions, classifications, and sizes, there is a tendency towards an increase in financial support, with variations in the degree of increase. President Bensaid of Al Akhawayn University — an independent public liberal arts institution in Morocco — notes that the university seeks to resume its regular increases in tuition and housing cost, which have been paused since the pandemic: "before the pandemic, we used to increase tuition and housing fees every two years, alternating years so that every year either tuition or housing fees increased by 5 percent. However, since COVID, we have not increased any of that." Likewise, Dr. Fernando León García noted that CETYS University is "temporarily allowing a higher percent of the budget to go to additional student support. What we need to monitor is that it does not get out of control. What we have done is focus on those [families] that were with us during the pandemic and are in the process of graduating, and then with new generations not necessarily providing the extra support."

Dr. Randy C. Frisch, President of the City University of Seattle emphasizes that faculty training is an important part of the university's success, saying "faculty matter—they are an important part of the learning process. For that reason, we're not very interested in following asynchronous learning." He continues, "scalable is a word you'll hear from some folks, however we believe sometimes student success and scale to us are at opposite ends of the spectrum."

Importance of **Generative AI Tools** varies significantly across regions, classifications, and sizes, with a general trend of importance but with some regions showing a mix of opinions. This signifies a growing interest, but varied levels of adoption and significance placed on AI technologies in the academic experience. Durban University of Technology Vice-Chancellor and Principal, Dr. Thandwa Mthembu, notes that "we are in the very early stages of having to adopt artificial intelligence in policy and practice or respond to some of its unintended consequences."

Mental Health Support for Students: Mental health support for students is deemed "Highly Important" in both private and public institutions, reflecting the increasing awareness and response to student well-being. President Bensaid describes the intensified strategy toward student well-being and fulfillment: "We decided to learn and partner with this new generation of students in order to maintain with them at least the same level of achievements that we did with the prior generation. One of the things that we discovered was that one of the distinctions of this generation was a significant increase of mental health challenges. When we looked at the theories behind what was causing that, social media and smartphones seemed to be the biggest and most likely reason. We thought if we want to empower them for success then addressing wellbeing was a perquisite."

Osaka University of Commerce President Dr. Ichiro Tanioka points out that the mental needs of students increased during and after the pandemic: "On Zoom, obviously you can see others' faces, but that was not enough. Students needed real face-to-face interaction, like to go to dinner together. This socialization was very important, and they were missing it. Secondly, we noticed that some students, after getting COVID, had fatigue and symptoms related to the depression." To address this the university has increased the availability of mental health services to meet the needs of students.

Dr. Randy C. Frisch shared that mental health is a very high priority for the City University of Seattle, since "faculty, staff and students need to be their best selves or on their way to it. Mental health is a big part of that. Students don't learn if they're not confident. We realize our biggest competitor or enrollment is not another institution. Our biggest competitor is when a student says 'I can't'. What we need to do is help students be strong mentally and believe in themselves, so that they can allow themselves to dream of a degree or a certificate that will help them have the kind of life they want."

CASE STUDY: Generative AI's Role in Universities

The Economist's 2023 Word of the Year was "ChatGPT", in recognition of the fast and unrelenting breakthroughs of large language models (llms). The role that generative Artificial Intelligence (AI) will play in higher education is unknown—while some think it will be more revolutionary than advent of the internet, others believe it will not play a significant role in higher education. Universities are approaching the use of AI in various innovative and strategic ways, as highlighted in the below interview summaries:

Europe

1. University of Granada has founded a Center for AI Research, which is "the third European research center in artificial intelligence. The first is Oxford, the second is Zurich University of Technology, and the third is the University of Granada." They are using a hands-on approach to AI integration in teaching.

2. Universidad Nacional de Educación a Distancia (UNED): Dr. Laura Alba-Juez, Vice-Rector for Internationalization and Multilingualism at UNED, summed up the uncertainty of AI's future, noting that "we should be friends and not foes of AI, and teach students to use it for the good of their education, helping them to learn, not to cheat."

Asia and Oceania

3. Daffodil University in Bangladesh is "implementing AI seriously, with around 20 teachers already having developed AI-based courses," says Chairman Md. Sabur Khan. This includes the development of "dummy teachers" using their own pictures.

4. SIAS University President and Founder Shawn Chen is fully embracing artificial intelligence and its possibilities. The university already uses hologram teachers that appear in courses without physically being present. They are eager to fully utilize AI to act as teaching assistants, help with assessments, and carry out other functions that can be effectively handled by machines.

Mexico, Central America, and the Caribbean

5. The Universidad Autónoma de Guadalajara (UAG) is integrating generative AI tools like ChatGPT to stay at the forefront of emerging technologies. "These tools are being used to enrich educational experiences and develop AI courses for teachers and students, reflecting a commitment to innovation and digital preparedness," says President Leaño Reyes.

South America

6. Pontificia Universidad Católica de Chile is integrating AI in teaching, research, and management, and President Sanchez believes artificial intelligence has to be tackled in a more comprehensive way. Over three years ago the university founded an institute of applied ethics to analyze how artificial intelligence can be used as a tool in daily life and what it can contribute to society.

7. IESB University: Since the start, ChatGPT, Metaverse, and Problem Based Learning were introduced in short programs with lots of visibility and success. The professors gained awards and became leaders in this area. An AI undergraduate program was created, and it is in the third year. The leader of this area, Professor Sérgio Cortes, won the SAS Global Academic Program, an international award in April 2024, says Founder and President Dr. Eda Coutinho Machado.

Africa

8. Al Akhawayn University: President Bensaid is a computer scientist, and so fully appreciates the role of AI, especially in its liberal arts context. The university, including a large critical mass of its faculty, is aware of the potential and underlying algorithms of AI and has adopted an informed and positive stance towards its integration in the activities of the university, while mitigating its risks and biases.

9. Mohammed VI Polytechnic University (UM6P): Dr. Hicham El Habti is actively engaging professors to see how to introduce ChatGPT in the learning process. The university has an AI research center that is recognized by UNESCO.

US and Canada

10. UC Riverside Chancellor Kim Wilcox believes ChatGPT is a lasting fixture in higher education: "I had a reporter ask me last week, 'Well, do you think you've had any admissions essays written by a chatbot? And I said, probably, but I know we've had some written essays by parents as well'."

These insights demonstrate a diverse range of strategies employed by universities globally in embracing AI, from developing AI-focused courses and degrees to cautiously approaching AI integration.

ANTICIPATED CHANGES

Trends from the survey and interviews indicate that higher education institutions are planning to evolve their academic offerings and support systems, with a strong focus on enhancing the use of technology in learning, expanding financial support, and increasing program variety to adapt to changing educational demands. The most common areas expected to significantly increase are "continuing education", "launching new programs", and "programs supporting student employability."
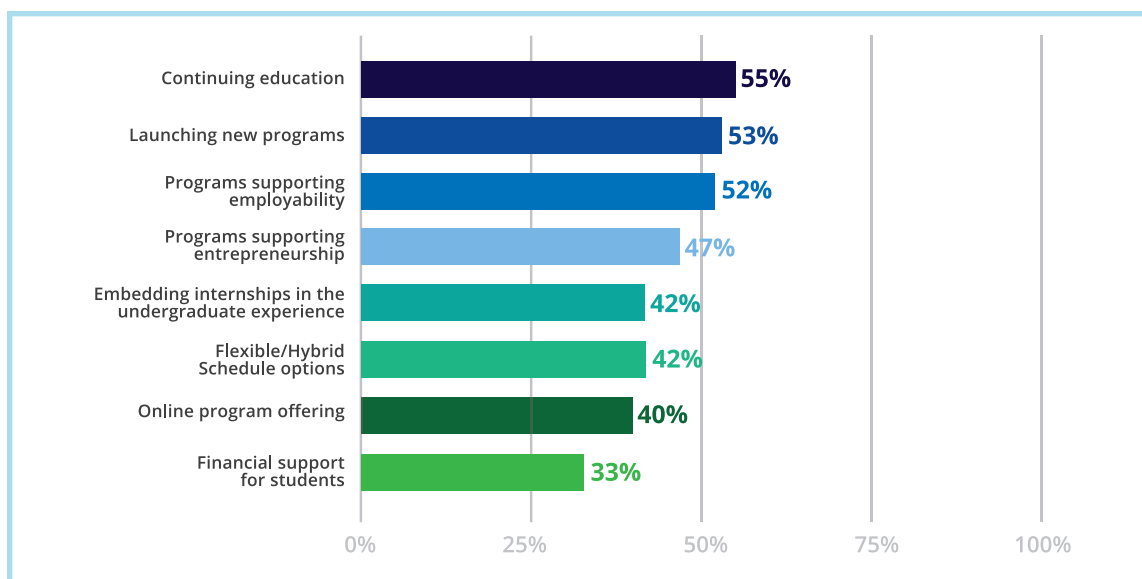
Figure 12: Thinking about the upcoming 3-5 academic years, what changes do you foresee within the following areas related to the academic and student experience at your institution (% 'Significant Increase')?

When asked to elaborate on areas that were set to grow, institutions reported various focuses: one institution noted that their focus is on expanding "MS Teams, Zoom, etc.," indicating an importance placed on communication and virtual meeting platforms. Another institution emphasized "mentorship and experimental learning activities," suggesting a prioritization of hands-on and supportive learning experiences. A third respondent mentioned a focus on the "student journey in the overall experience," pointing to a comprehensive approach to student experience. A fourth institution highlighted a focus on "new learning tools in face-to-face learning," signaling a push toward integrating innovative technologies in traditional learning settings.

VARIATIONS BY REGION AND INSTITUTIONAL CHARACTERISTICS

Continuing to examine the ways in which priorities vary according to institution's region, classification, and size reveals interesting trends.

Financial Support for Students: A "slight increase" in financial support for students is anticipated across all institution sizes except for the smallest category (less than 5,000 students), where a "significant increase" is expected. This may reflect a greater need or strategic focus on financial aid within smaller institutions. Most regions expect a slight or significant increase. Both private and public institutions mostly expect a slight increase.

Programs Supporting Student Employability: A slight increase is expected in most regions. Both public and private institutions predominantly expect a slight increase. For example, President Bensaid of Al Akhawayn University in Morocco notes that "the other challenge we decided to tackle was how do we deal with this fast change in the job market that, in our part of the world, is doubled with the challenge of unemployment of young college graduates. The entire equation becomes how we can train Gen Z, which is different from previous generations, so that students can land — then thrive — in a job market that is moving at a very fast pace. We decided to focus on experiential learning and a more intimate partnership with employers, while strengthening our liberal arts education. The outcomes so far have been most impressive."

Dr. Gerald Reisinger, President of University of Applied Sciences Upper Austria, describes that "We have obligatory internships and things like that included in our programs. So [students] get in touch with industry in undergrad programs, master programs, and PhD programs of course. Students come here to get this chance. They also gain experience working in Austrian companies and small companies. That's a big advantage for them."

Dr. Tomás Morales, President of California State University, San Bernardino (CSUSB), points out that "The literature on student success and student retention is

very clear in terms of student employment. Students that work on campus persist and graduate at higher rates than students who work off campus. Students who work off campus have a much higher propensity to drop out or to lead the institution. Students who work on campus tend to do better academically. So, we want to increase the number of students that work on campus. We have about a thousand students that work on campus, and we would like to see that those numbers increase."

In addition, he notes that CSUSB links together employability with serving the local community: "We have a program where we are hiring our graduates who are interested in law enforcement. We pay for them to go to the [police] academy, pay for their uniforms and their expenses, and in return they agree to work with us for three years. It's a program to hire younger officers who are really part of the campus community."

CASE STUDY: Approaching Student Employability by Listening to the Community
University of La Verne Former President Devorah Lieberman

Dr. Devorah Lieberman, who served as President of the University of La Verne from 2011-2023, led the institution in attracting and graduating top students in the field of healthcare—an area that did not exist at the university prior to her tenure. She did this through a multiyear process of listening to regional leaders in healthcare and translating their needs into educational offerings. The success of this strategy is measurable: "The US News and World Report rankings created a new category called social mobility, and La Verne has been ranked the number one private institution for graduating students earn an excellent living in the field that they enter." She attributes this to being "very strategic" in academic offerings that were in demand in the job market. "We coined a phrase called the 'brain remain', as opposed to the 'brain drain'. This was the idea that students, right in their own backyard, should have a university that has the field that they want to study and that can place them in the region where they want to live, which is in our case is Southern California."

All of this began, she says, "Ten years ago, when I was still relatively new [to the presidency]. We hired a local firm to identify what would be the most needed professions in the next 10, 20, 30 years in Southern California. They came back and they said there was unmet demand for health professions: allied health, doctors, nurses, physician assistants, etc. We then invited 30 or 40 healthcare leaders from the entire region of 6 million people to the university and created a group called the President's Health Advisory Council. We decided to invest in an Allied Health program and created a Physician Assistant program. I was told by the Admissions office that we had 1400 applications for 30 seats. Based on the success of this, we decided to create a fifth college, the College of Health and Community Wellbeing, and we started a nursing program. The College now has nine programs and, as of 2023, we've raised $38 million cash to construct the building."

To conclude, she notes "I think the combination of the 'brain remain' phenomenon and listening to the community, to what they say they want and need, was sort of the secret sauce."

Programs Supporting Entrepreneurship: Institutions across different sizes anticipate changes, possibly increases, in programs supporting entrepreneurship. A slight increase is expected in most regions. Both classifications predominantly expect a slight increase. University of Johannesburg Vice-Chancellor and Principal Letlhokwa Mpedi explains that his university is soon launching a free online course on entrepreneurship for their students. "South Africa has got a high youth unemployment, so we try to tackle this through various methods. We realized that students that have got part-time jobs during their studies are quickly absorbed by the labour market upon completion of their studies," and offering a course on entrepreneurship is one way to help them.

Launching New Programs: A "significant increase" in launching new programs is expected across most institutions, regardless of size, with the exception of the largest institutions, where only a "slight increase" is anticipated. This could be due to the larger institutions already having a broad range of programs and thus a less dramatic increase in new offerings. Significant increases are expected in Asia and Oceania, South America, and US and Canada. Public institutions expect a slight increase, whereas private institutions expect a significant increase. For example, Dr. Gonzalo Mendieta, Rector of the private Universidad de Las Américas Ecuador, says that at his campus is exploring articulation programs with some US institutions which would allow them to attract both Ecuadorian and international students. Dual degree programs are also being explored.

Continuing Education: There is a strong trend towards a "significant increase" in continuing education across institutions of varying sizes, which may be driven by the need for lifelong learning opportunities and the expansion of education to non-traditional students or professionals seeking to upskill. For example, University of La Verne Former President Devorah Lieberman remarked on the university's significant expansion of non-degree granting certificate programs.

Dr. Elizabeth Stroble, Chancellor of Webster University, notes that her institution is looking to expand longstanding online master's degree offerings to better serve international and non-degree seeking audiences. "Our online division, called Webster Online, is considering additional online programs for working adults. I'm particularly interested in expanding programs online that are certificates or degree completion for undergraduates or even programs that are not degrees; they may be just groups of courses that are more continuing education or professional development offerings."
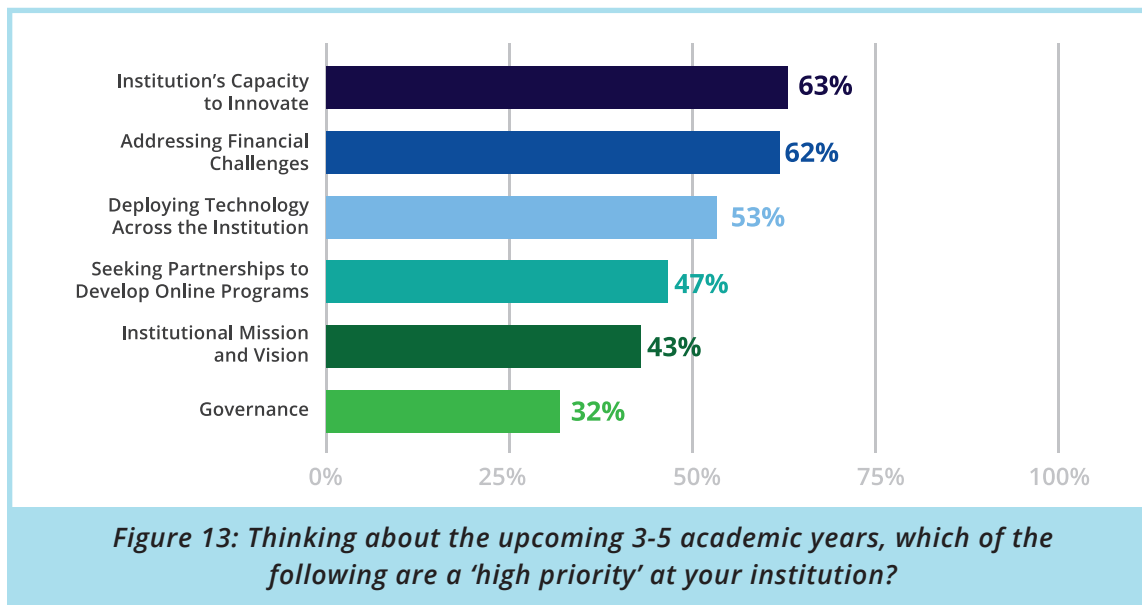
LOOKING AHEAD

PRIORITY AREAS

Priorities of institutional leaders in the upcoming 3-5 academic years reflect a focus on innovation, financial stability, technology deployment, partnerships for online programs, adherence to institutional mission and vision, and effective governance. This suggests that higher education leaders are emphasizing adaptability, technological advancement, financial security, and strategic partnerships in the upcoming years.

Institution's Capacity to Innovate — **63%**
Addressing Financial Challenges — **62%**
Deploying Technology Across the Institution — **53%**
Seeking Partnerships to Develop Online Programs — **47%**
Institutional Mission and Vision — **43%**
Governance — **32%**

Figure 13: Thinking about the upcoming 3-5 academic years, which of the following are a 'high priority' at your institution?

Some examples of the ways these priorities are being addressed are below.

Concerning **'Institution's Capacity to Innovate',** which was the most commonly selected response, Mr. Billy Crissien, Executive Director and Board Member of EAN University- a private university in Colombia—notes that "Naturally people who were not ready to innovate retired from the university and newer talent began to arrive, ready to bring innovation. Others fell in love with this proposition, and adopted this form of working, so much that tech stakeholders said that our university doesn't seem like a university—we seem like a startup, because we are always innovating and finding ways to disrupt."

Regarding **'Innovation'** as well as **'Deploying Technology Across the Institution',** Dr. Mustafa Aydin notes that innovation is a core focus of IAU:

"Innovation in teaching methods can distinguish a university from its peers and attract students seeking a modern and dynamic educational experience. If we can use technology to make learning more engaging, interactive, and adaptable to different learning styles, we can prepare students for the fast-paced digital world of today."

'Addressing Financial Challenges', selected by 62% of institutions, is testament to the constant need to deal with financial aspects of running a HEI. Dr. Mustafa Aydin notes that "What I truly believe is if you can plan for not today, not 5 years but 10 years and more, you will be ready for most hard situations. My experience in education for 50+ years and discipline to plan ahead and work with the best possible team of visionaries has helped us to stay afloat and strive to be even more successful."

Dr. Edward Peck, Vice Chancellor of Nottingham Trent University in the UK, notes that he keeps the university focus on current problems, iterating that "I'm not sure to what extent things like the war in Ukraine have affected the institution practically as opposed to existentially. I would find it difficult to articulate beyond that it has driven inflation, so our costs have gone up at a time when our fees are frozen. And that's quite a challenge. What has affected us as well is some of the declines in the value of African currencies, particularly Nigeria, which has meant we've had lots of students who were going to come not coming because they couldn't afford to come anymore."

With regards to **Seeking Partnerships to Develop Online Programs**, Dr. Antonio Leaño Reyes is expanding the markets served by his institution through partnerships: "The UAG, in its desire to diversify its offer, as well as take advantage of new opportunities for international experiences, has established an alliance with Cintana Education and Arizona State University. This partnership allows the university to transcend its borders by offering a wide range of attractive programs for HEIs that belong to the network."

When asked about **Institutional Mission and Vision**, most interviewees noted that while 'institutional mission and vision' were important, they were relatively consistent. Dr. Tomás Morales, President of CSUSB, said that "our mission statement was to promote each other's growth and success and enhance

the vitality of our region through active learning, effective mentoring, impactful scholarship, and civic engagement. We cultivate the professional, ethical, and intellectual development of our diverse students, faculty, and staff, so that they thrive and make positive contributions to our globally connected society. The only change between the 2015 vision and mission and the 2023-2028 new strategic plan was that we doubled down on connections with the community and region where we are located, and we emphasize and celebrate our diversity."

Likewise, Dr. Ricardo Villanueva Lomelí, Rector of the University of Guadalajara in Mexico, noted that the institutional mission of the university was updated, as "some objectives and strategies had lost relevance or needed to be adapted to new conditions and challenges, especially those emerging from the COVID-19 pandemic and changes in national and international educational policy." For example, he notes that "Global and national trends in education were taken into account, such as the need for more flexible and multidisciplinary educational programs, and the demand for training in digital and socio-emotional skills. These elements are crucial to train professionals capable of adapting to a constantly evolving labor market and effectively contributing to social development."

Concerns with **'Governance'** vary by region and university characteristics. Daffodil University Chairman and Founder Md. Sabur Khan explains that in the "Bangladesh context, governance is an issue because we still have limitations to higher education policy. If we are doing well, hopefully the government will allow us to open branch campuses to spread education to the whole country."

Dr. Edward Peck, Vice Chancellor of Nottingham Trent University in the UK, notes that he has tried to cultivate a positive relationship with faculty through his leadership: "I think we have a very unusual relationship with our own people. I've been here 10 years, and it takes that much time to build up sort of trust and confidence that you have their best interests at heart. I'm not saying all the staff would say that all the time, but broadly, you can create some degree of credibility That enables you to have conversations that perhaps some institutions can't, if you've got a bigger churn in your senior leaders.

PRIORITY ISSUES
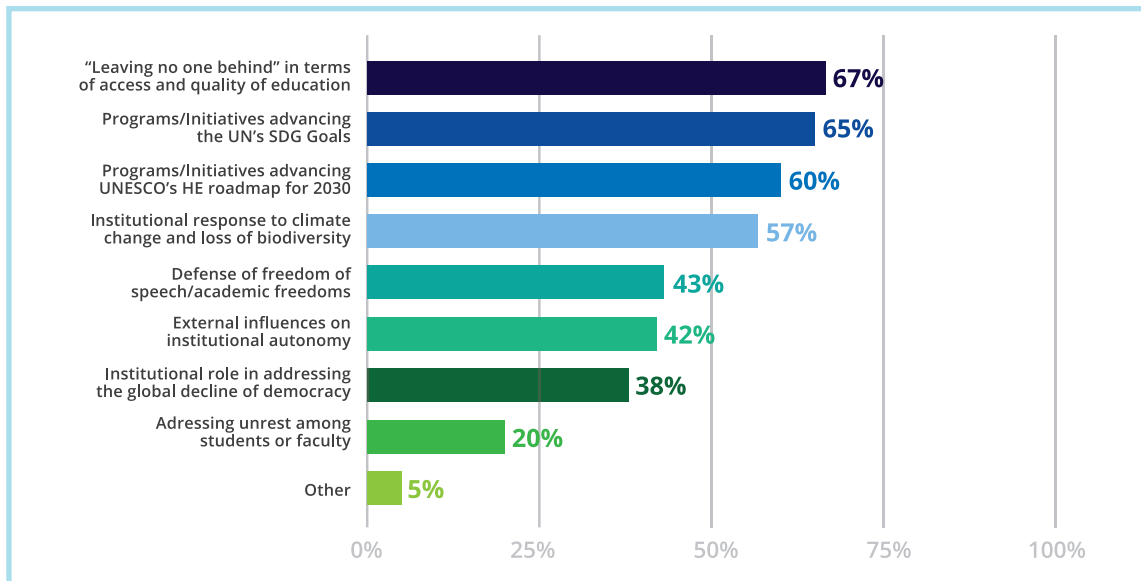
Figure 14: Which of the following global/societal issues are a high priority for your institution?

In the survey, many respondents chose to write in additional responses related to their institutional priorities. A list of these responses includes:

- More international collaborations;

- Expanding academic programs through partnerships and micro-sites in new areas of the world;

- Digital transformation (integration of AI related technologies and platforms), Sustainability mainstreaming, Internationalization mainstreaming, Research Impact/Interdisciplinarity and Community wellbeing;

- We have already implemented innovative ideas among our professors, such as ChatGPT, metaverse, and problem-based learning. We hope to increase the number of professors who are innovating in their classrooms and laboratories.

- Working together with the most prominent European Open Universities, within the OpenEU Consortium;

- Focusing on different activities related to Community Involvement, Internationalization, Research & Innovation, Quality Assurance, SDGs, etc.;

- Offering a human view of today's challenges and advances, making sure students and faculty search for transcendent principles and ethics far beyond wealth and fame.

Examining the contexts of the institutions, including regional, political, economic, historical, and culture, reveals rich differences. For example, the issue of 'Leaving no one behind' in terms of access and quality of education is notably a high priority in the US and Canada region with 12 mentions. Programs/initiatives advancing the UN's SDG Goals are most frequently marked as a high priority in Europe. There is consistent concern across all regions for the UN's SDG Goals, UNESCO's HE roadmap for 2030, and the response to climate change and loss of biodiversity.

INSTITUTION REGION	TOP ISSUE 1	TOP ISSUE 2	TOP ISSUE 3
Africa	Programs/Initiatives advancing the UN's SDG Goals	Programs/Initiatives advancing the UNESCO's HE roadmap	"Leaving no one behind" in terms of access and affordability
Asia and Oceania	Programs/Initiatives advancing the UNESCO's HE roadmap	"Leaving no one behind" in terms of access and affordability	Programs/Initiatives advancing the UN's SDG Goals
Europe	Programs/Initiatives advancing the UN's SDG Goals	Institutional response to climate change and loss of biodiversity	Leaving no one behing" in terms of access and affordability
Mexico, Central America and Caribbean	Programs/Initiatives advancing the UNESCO's HE roadmap	Programs/Initiatives advancing the UN's SDG Goals	"Leaving no one behind" in terms of access and affordability
South America	Institutional role in addressing the global decline of democracy	Programs/Initiatives advancing the UNESCO's HE roadmap	Institutional response to climate change and loss of biodiversity
US and Canada	"Leaving no one behind" in terms of access and affordability	Institutional response to climate change and loss of biodiversity	Defense of freedom of speech/academic freedoms

Table 5: Which of the following global/societal issues are a high priority for your institution?

The observed trends in the prioritization of global/societal issues by educational institutions across different regions can be influenced by a variety of factors:

Cultural and Regional Priorities: The emphasis on certain issues can reflect the cultural, economic, and political priorities of the region. The widespread prominence of **Programs/initiatives advancing the UN's SDG Goals** is partly due to the global push for these goals. Many institutions align with these broader goals to highlight their commitment to global development and to attract partnerships, funding, and international students. Often, these goals involve initiatives and practices to address climate change and loss of biodiversity. For example, Dr. Ignacio Sánchez, the President of Pontificia Universidad Católica de Chile, says his university is "very aligned with the SDG goals. We have committed to being carbon zero in 2038, ahead of Chile's national goal 2050, and are taking many decisions as an institution to be carbon free. Looking at wider SDG goals, a university study found that almost 60 percent of our research is aligned to the goals."

Dr. Pilar Aranda, Former Rector of the Universidad de Granada in Spain, noted that "the SDGs have permeated university life. Just next week I have to participate in a round table in Madrid, organized by UNESCO with rectors from Latin America to see how we are implementing the SDGs at our universities. In our case, we have it in our strategic plan. Approximately six years ago, we asked each center at the university to choose objectives from the 17 SDGs and start working on them with their students. At the same time, teachers were asked to incorporate SDGs into their subjects and articulate which objectives were being addressed. For example, physiology and nutrition might address [the SDG related to] hunger. Additionally, all our research projects must have a descriptive line of what development objectives they are aimed at addressing."

Economic Factors: The prioritization of issues such as **'Leaving no one behind'** in terms of access and quality of education reflects the economic disparities and the focus on inclusivity and equal opportunity in education.

For example, University of Johannesburg Vice-Chancellor and Principal Letlhokwa Mpedi emphasizes his personal prioritization of this, saying "I come from a village. Education transformed my life. Through education, we want to provide an opportunity for the marginalized and excluded groups and categories

of people to be able to transform their lives. The majority of our students are the first generation to come to university, and as a result, when they graduate, we transform the professions they enter."

He continues, "We provide food to students. We've got a feeding program, which is done with dignity and humility. I met one of my former students at a conference who was part of this program. He's now a partner at one of the top five law firms in South Africa. He told me 'Without your support, I wouldn't be where I am'. He contributed from his own pocket and also brought his partners to see how they can support students. These programs are how we're going to change lives."

Political Climate: In regions experiencing political unrest or challenges to democratic values, institutions may place a higher priority on issues like **'Defense of freedom of speech/academic freedoms'** and the **'Global decline of democracy'**. For example, Dr. Gonzalo Mendieta, Rector of the private Universidad de Las Américas Ecuador, notes that "the political situation here in Ecuador is very polarized. We want our students to become critical thinkers so that they are able to distinguish some of these problems and understand the cacophony between opposing ideas."

Public institutions have a slightly higher count for defense of freedom of speech/academic freedoms, which may be due to their often-larger size and more direct governance by public policies, potentially making them more susceptible to external influences and thus prioritizing this issue more. Dr. Edward Peck, Vice Chancellor of Nottingham Trent University—a public university in the UK—shares that "we have very engaged group of staff. You might say every institution says that, but my evidence would be that we're the only [UK] university in 10 years that's never had an industrial action."

Differences in priorities could be influenced by the nature of the institutions' funding, governance, and the populations they serve. Public institutions may be more influenced by government priorities and public policies, while private institutions may have more flexibility to prioritize based on their own missions and the needs of their stakeholders.

Related to **'External influences on institutional autonomy'**, Dr. Juan Camilo Montoya Bozzi, Rector of Universidad Autónoma de Bucaramanga (UNAB), a

private university in Colombia, notes that "a concern that we have today in Colombia, is that the government wants to reform the higher education laws and has a bias toward strengthening public universities That is to say, at this moment there are possible big changes, and we must defend the fact that in Colombia almost half of higher education is private. Yes, it is good that public universities are strengthened, and that the government invests more resources in them, but private, non-profit higher education must be respected and allowed to remain strong and current, and form part of the entire higher education system."

Environmental Concerns: The priority given to **'Institutional response to climate change and loss of biodiversity'** is partly driven by the global recognition of climate change as an urgent issue. Regions more immediately affected by climate change might be more inclined to prioritize it. University of Johannesburg Vice-Chancellor and Principal Letlhokwa Mpedi explains "We believe as a university we should have a meaningful impact on the environment and the society, and we are living that: 15 percent of the university's energy comes from solar, and we want to increase it in the next few years. My wish is to take it to 30 during my time as Vice Chancellor." He explains the university is using its skills and resources to improve public health and provide local energy solutions. "We've set up a bakery. They bake 200 loaves of bread per day serving 10 villages using solar energy. We provide fresh water to these villages as well. They used to drink water from the river, crocodile infested river, where malaria cases were high. Cases have dropped because people now use the fresh water to cultivate their own food. The list is long of what we're doing."

Regional Challenges and History: Each region has its unique historical and ongoing challenges that shape institutional priorities. The focus on **'Addressing unrest among students or faculty'** could reflect the region's social dynamics and the institution's recent history with such events. Durban University of Technology Vice-Chancellor and Principal Dr. Thandwa Mthembu, recounts agility in offering online learning has been useful since "South Africa has a culture of protest. So now when students are on protests, academic work could continue online. For example, we had protests around a bursary scheme that our government runs for indigent students about three weeks ago, and we were able to revert to online learning during that period when the protests heightened."

It's important to note that these trends are also influenced by the strategic objectives of the institutions, which seek to position themselves as leaders in addressing the challenges relevant to their stakeholders and communities.

CONCLUSION

IAUP members exemplify leadership in the dynamic landscape of higher education in the post pandemic era at a time marked by renewed commitment to internationalization and an acute awareness of the evolving challenges and opportunities that institutions face globally. This report underscores the significant regional and institutional variations in post pandemic priorities, enabling institutions to leverage their unique strengths and address their specific challenges.

Anticipated changes in the coming years reveal a collective optimism towards increased international collaborations and program expansions, highlighting the resilience and adaptability of higher education institutions in the face of global uncertainties. The growing interest in online and hybrid modalities, alongside the expansion of continuing education and new program offerings, points to a commitment to delivering quality education and enhancing student employability. Many leaders have placed strategic emphasis on internationalization as a linchpin for enhancing educational quality, fostering global engagement, and augmenting institutional prestige and financial health.

Other critical areas highlighted in the report include the importance of faculty training for online and hybrid learning, the maintenance of academic standards, and an emphasis on student retention and success. These focus areas are paramount in ensuring that the shift towards more technologically integrated and flexible learning environments does not compromise the quality and integrity of education.

The contents of the report paint a picture of a higher education sector that is actively navigating the complexities of a rapidly changing world. By embracing internationalization, adapting to technological advancements, and prioritizing student and faculty development, institutions are laying the groundwork for a future where education transcends borders and prepares students to thrive in a globalized society. The commitment to addressing global and societal challenges, while upholding academic freedoms and ensuring inclusivity, further exemplifies the sector's role as a pivotal force for positive change in the world.

Overall, the IAUP report on Global Perspectives of College & University Leaders in the Post Pandemic Era demonstrates the interconnectedness of HEIs, as well as the inseparability of the challenges and opportunities they face. While the leadership styles of each individual may differ, the arc of their priorities and strategies reveals meaningful trends. Echoing a common sentiment among IAUP leaders interviewed, President Bensaid of Al Akhawayn University noted that "I no longer distinguish — and I don't think my board does either — what is due to COVID, or what is due to the Ukraine war, or the increase in energy prices, or the problems with the supply chain, and so on." NTU VC Edward Peck concludes "While world events do affect us, it's in a much more episodic way, I think, and in specific parts of our activity, not overall in the way that COVID-19 did. And you always expect to be something going on, wouldn't you? In my view, much of the role of the leadership team is to absorb a lot of those pressures and anxieties without transmitting them to either our staff or our students."