SERVITIUS: LEARNING AND SUCCESS SERVICES

Higher education faces the great challenge of re-balancing access and success with cost-effective solutions. This and related forces are creating an emerging student learning and success services market. While students may continue to self-source via online providers (new and old), institutions need scalable alternatives. The primary publishers and many start-up, technology-enabled providers are emerging as potential solutions for institutions to contract their way to a new future of student success and achievement. Institutions (potentially with the college store as an aggregator) or other providers that can offer the “smartest” and most effective services will win out—so long as students acknowledge the value and vote with their dollars and engagement.

Key Points:

1. Pressure to improve graduation rates at U.S. institutions is driving many to expand services that help students resolve academic difficulties or life and work issues that threaten their progress.
2. Higher education’s underinvestment in academic support, frenzied private-sector experimentation, and digital destabilization have produced an emergent student learning services sector in which students are gaining more power to substitute options they prefer for officially sanctioned ones.
3. The landscape that is emerging might be pictured as an archipelago of separate islands of varying sizes— influenced by improved understanding of the inter-play between cognitive and non-cognitive factors impacting student success.
4. Higher education’s chief value proposition is that it alone can provide the educated workforce and citizenry needed to meet 21st-century challenges. So if a large proportion of those who want a degree fail to earn one, a basic promise is compromised. And it has become evident that access does not guarantee success.
5. Evidence is mounting that “ancillary” services and co-curricular support offerings factor heavily into student persistence, course completion, retention, and eventual graduation. However, those services are expensive and difficult to scale as traditionally delivered.
6. The new student learning services ecosystem is being shaped by four kinds of disruption:
   a. the institutional challenge of adopting a culture of student success in an era of declining funding;
   b. a digital solutions marketplace able to economically deliver student learning services;
   c. the growing availability of do-it-yourself learning services; and
   d. an alliance of leaders keen to persuade or coerce higher education into new practices.
7. New entrants and partners will emerge that have the capacity to help institutions identify at-risk or unguided students for targeted attention, build better self-service resources, track advising case histories, and equip limited institutional staff with information to increase their effectiveness. The college store could play a role in sourcing, distributing, and brokering services contracted by the institution or sought by students themselves.
Supplier Power
- Movement to improve student success increases power of service providers
- Performance-based funding serves to lock in success awareness
- Publishers’ investments focused on learning success support positions them well as suppliers
- Outsourcing resistance in this campus-student relationship area may be a tough sell

Buyer Power
- Intense competition between potential new service providers gives both institutions and students increased buyer power
- Institutions contracting for learning services or implementing success systems have a range of options
- Student acculturation to online services being limitless and free diminishes power of consumer-oriented learning services sites and increases student consumer power

New Entrants
- Dominated by new entrants as an emerging ecosystem segment
- Barriers to entry at the institutional level are substantial due to cost and scale
- Publisher motivations are high due to lost revenue on traditional textbooks
- Parade of new cloud-based, technology-enable, venture-capital supported projects will continue

Substitutes
- Substitutes are needed as traditional services have been too few, underperforming, or not scalable
- Cultural, technical, procedural, and policy constraints of current services will not likely characterize or limit substitutes
- Trends and forces related to consumers, revenues, achievement, and data analytics that are fueling disruption and changes in other ecosystem segments will be drivers of substitutes in this emerging segment

*Rivalry is an indication of competition in the segment from 1-lowest to 5-highest; both among current players and between them and new entrants.
Critical Questions: Learning and Success Services

1. What is the state of learning and success services on your campus? Does the variety and supply meet the needs of the student body? Do students or staff talk of too few or missing services?

2. What learning and success services are your students currently using? How well are learning and study aid products selling through your store?

3. Are there signs of student self-sourcing for these products and services (such as student-sponsored tutoring or study programs, or questions about/use of online support services)?

4. To what extent are students seeking product support and help with maximizing the benefit of homework and online learning courseware assigned or recommended for their classes?

5. What role can your store play in aggregating, curating, and/or providing student learning services for your campus? Are there ways the store can partner with existing campus services, publishers, or online providers to be a physical location, broker, or other partner?