

COLLEGE AND UNIVERSITY PRESIDENTS RESPOND TO COVID-19: 2020 FALL TERM SURVEY

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Between April and July 2020, ACE surveyed college and university presidents in order to better understand how they and their institutions were responding to the unfolding COVID-19 pandemic. With the 2020–21 academic year now underway, ACE will survey presidents twice this fall and twice in the spring in order to capture how they are responding to the challenges presented by COVID-19, as well as to better understand both the immediate and long-term effects of the pandemic on higher education more broadly. In this first survey of the new fall term, which was developed in partnership with our colleagues at the TIAA Institute, nearly 300 presidents identified their most pressing concerns, reported on their fall reopening plans, and offered an assessment of the impact the pandemic has had on their institution's fall enrollment and financial health. The following is a summary of our key findings.

*Of the 295 presidents, 126 lead private four-year institutions (43 percent), 66 lead public four-year institutions (22 percent), 71 lead public two-year institutions (24 percent), 15 lead private graduate-only institutions (5 percent), nine lead for-profit institutions (3 percent), five lead private two-year institutions (2 percent), and three lead other institutions (1 percent).

Additionally, 42 percent of presidents classified their institutions as being “primarily residential,” 29 percent identified their institution as being “primarily nonresidential,” and 28 percent reported that their institution does not offer campus-based housing.

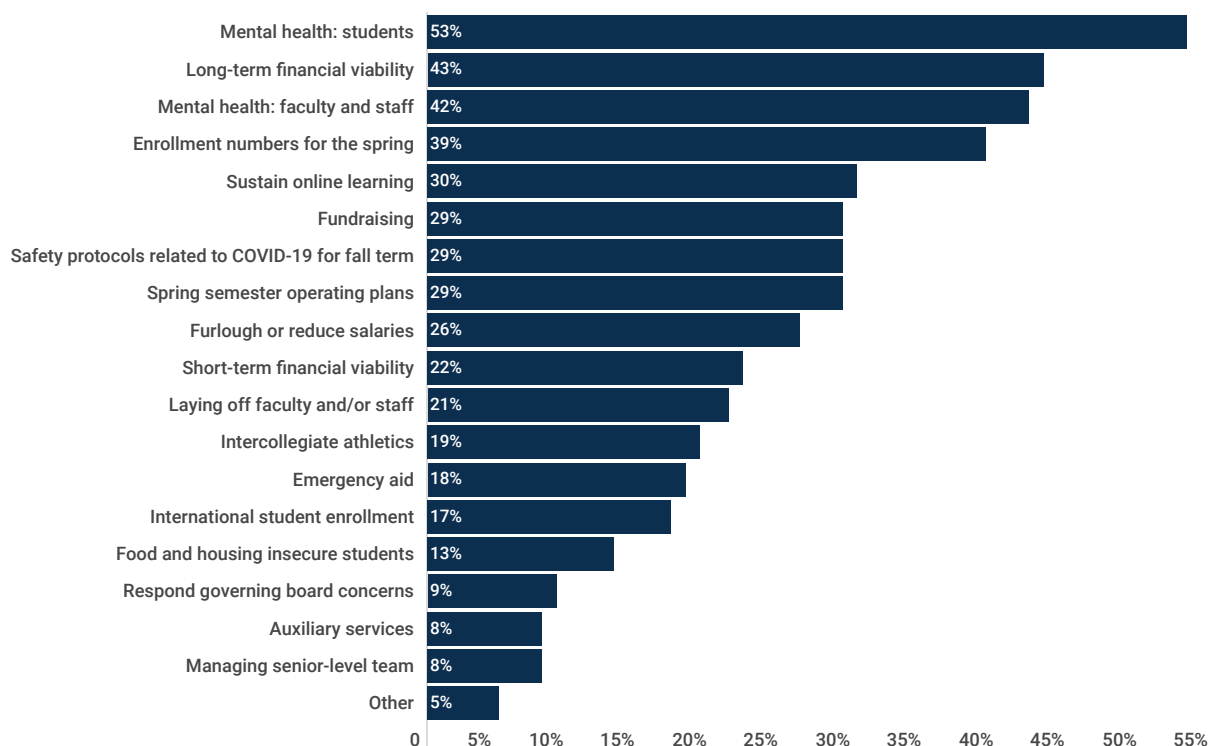
The survey was launched on September 14 and closed on September 22.

MOST PRESSING ISSUES FOR PRESIDENTS

In our spring and summer surveys, presidents were asked to select up to five issues from a list of about 20 that they deemed to be most pressing. In the September survey, presidents were presented with a list of 19 issues and again asked to select up to five they view to be most pressing for them currently (see Figure 1). Mental health of students (53 percent) was the top concern selected by presidents.

- Presidents also indicated “long-term financial viability” (43 percent), “mental health of faculty and staff” (42 percent), “enrollment numbers for the spring” (39 percent), and “sustaining an online learning environment” (30 percent) as other top issues.
- The top two most pressing issues for presidents at public four-year institutions were “mental health of students” (61 percent) and “mental health of faculty and staff” (42 percent), while the top two most pressing issues for presidents at private four-year institutions were “mental health of students” (51 percent) and “long-term financial viability” (48 percent).
- The top two most pressing issues for presidents at public two-year institutions were “spring enrollment numbers” (56 percent) and “mental health of students” (55 percent).

Figure 1: Most Pressing Issues Facing Presidents Due to COVID-19 in September

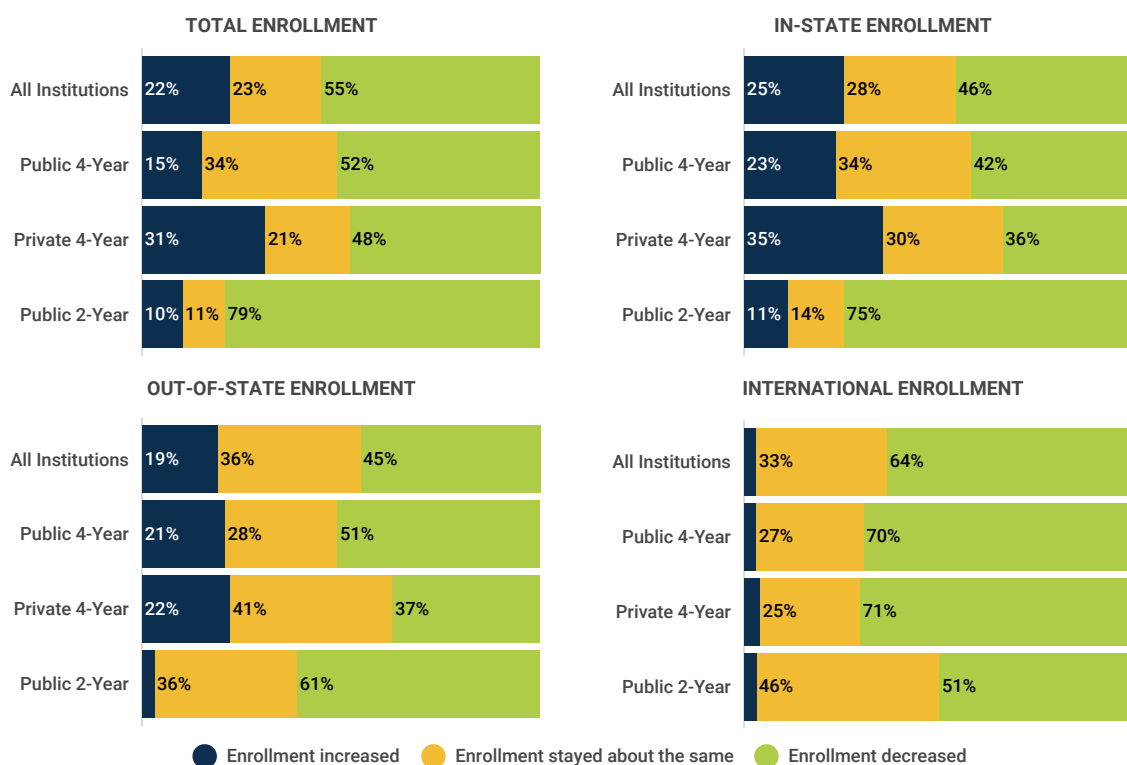


Fall 2020 Enrollment

With the fall term underway at most institutions, presidents were asked to report on how their fall 2020 enrollment compared with their fall 2019 enrollment in four categories: in-state enrollment, out-of-state enrollment, international student enrollment, and total enrollment.¹ For each, presidents could report that their enrollment had increased, decreased, or stayed about the same relative to fall 2019. Presidents who indicated that their institution's enrollment had increased or decreased were asked to report the size of the change.

- Over half of presidents (55 percent) reported that their fall 2020 enrollment had decreased relative to fall 2019 enrollment (see Figure 2). Nearly a quarter (23 percent) of presidents reported that their fall 2020 enrollment remained about the same as last fall, while 22 percent reported that their fall 2020 enrollment had increased relative to fall 2019.
- Presidents at public two-year institutions (79 percent) were the most likely to report an enrollment decrease, followed by presidents at public four-year institutions (52 percent) and presidents at private four-year institutions (48 percent).
- Over half of presidents at public four-year institutions (51 percent) reported a decrease in out-of-state enrollment.
- Approximately 70 percent of presidents at both public and private four-year institutions reported a decrease in international student enrollment.

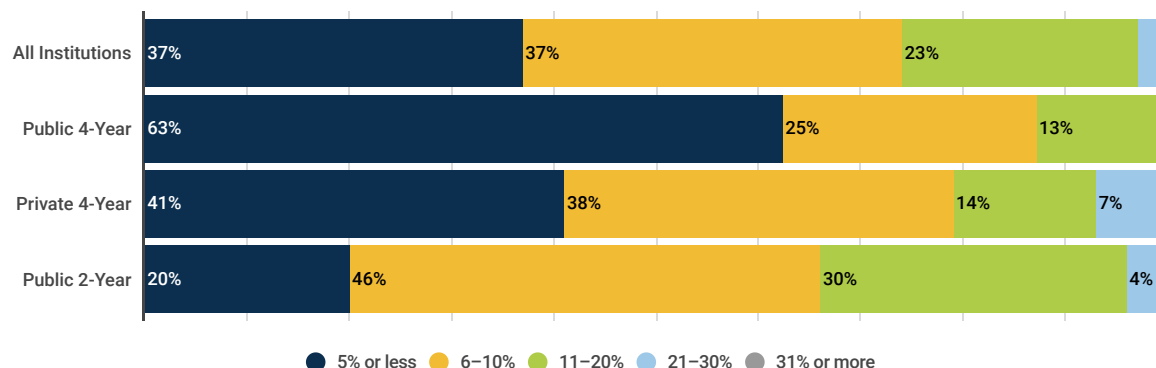
Figure 2: Fall 2020 Enrollment Relative to Fall 2019 Enrollment



¹ Nearly 95 percent of presidents in the September survey indicated that their institution's fall term had started at the time of completing the survey. The remaining 5 percent indicated that their fall term would begin after September 20, 2020 and were thus excluded from the fall enrollment and fall reopening analyses.

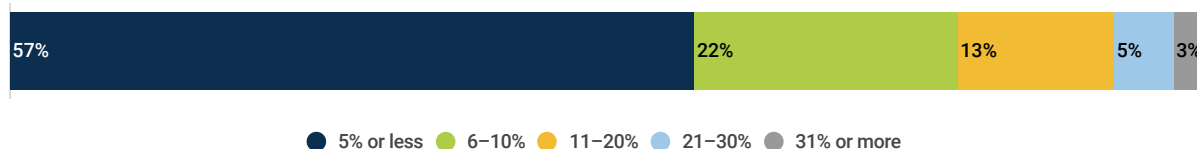
Among the 55 percent of presidents who reported a fall enrollment decline, 37 percent saw a decline of “5 percent or less,” 37 percent saw a decline between “6 and 10 percent,” 23 percent saw a decline between “11 and 20 percent,” 2 percent saw a decline between “21 and 30 percent,” and 1 percent saw a decline of “31 percent or more” (see Figure 3).

Figure 3: Fall 2020 Enrollment Decline Relative to Fall 2019 Enrollment



Because few presidents reported a fall enrollment increase, results on the size of the increase are not presented by sector. Of the 22 percent of presidents who reported expecting a fall enrollment increase, 57 percent saw an increase of “5 percent or less,” 22 percent saw an increase between “6 percent and 10 percent,” 13 percent saw an increase between “11 percent and 20 percent,” 5 percent saw an increase between “21 and 30 percent,” and 3 percent expect an increase of “31 percent or more” (see Figure 4).

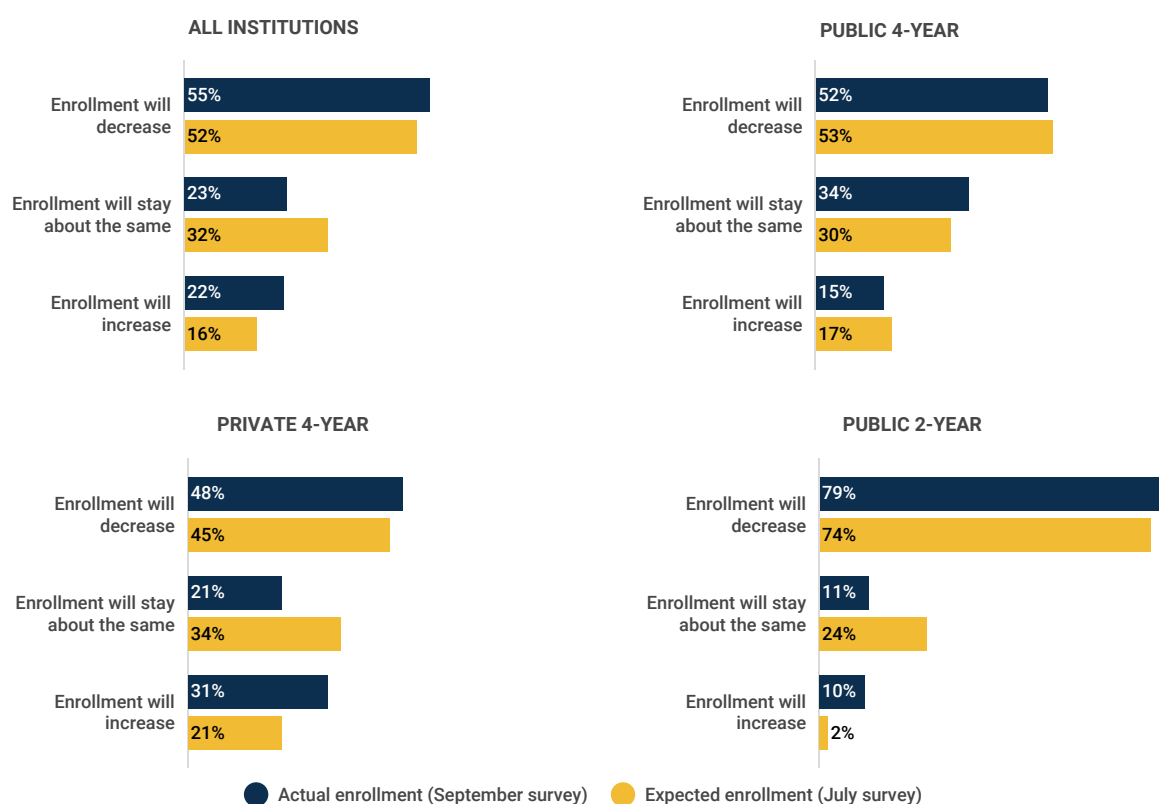
Figure 4: Fall 2020 Enrollment Increase Relative to Fall 2019 Enrollment



In the July survey, presidents were asked to report on their expectations for total fall 2020 enrollment. Figure 5 shows a side-by-side comparison of what presidents who completed the July survey were expecting, compared with what presidents in the September survey had observed regarding actual fall 2020 enrollment.

- Overall, 52 percent of presidents in July reported expecting their institution’s fall 2020 enrollment to decrease relative to fall 2019. As of the September survey, 55 percent of presidents reported that their institution’s fall 2020 enrollment had declined.
- Across each sector, the share of presidents in July who expected fall enrollment to decrease closely mirrors the share of presidents in September who reported an actual fall enrollment decline.

Figure 5: Expectations for Fall 2020 Enrollment in July Compared with Actual Fall 2020 Enrollment



Knowing that the COVID-19 pandemic is affecting whether or where some students enroll in college, presidents were given an opportunity to share their perspectives as to why their institution's enrollment had increased, decreased, or stayed about the same relative to fall 2019.

Thoughts on Fall Enrollment Declines

Again, 55 percent of presidents reported a decline in fall 2020 enrollment relative to fall 2019. Presidents referenced declines in international student enrollment, shifting from in-person instruction to remote teaching and learning, individual financial hardships, increased familial responsibilities, and health concerns related to COVID-19 as some of the main reasons behind the enrollment decline. One president at a public two-year institution wrote, "Fewer adult learners, particularly those taking part-time classes, did not return for the fall semester . . . reasons include child care challenges and decisions to have children taking virtual classes." Another president at a public two-year institution wrote, "The most significant decrease was in concurrent/dual credit secondary student enrollment due to the pandemic and the various formats used by school districts to hold their classes."

Thoughts on Fall Enrollment Increases

Of the 22 percent of presidents who reported an increase in fall 2020 enrollment, the most common explanations included the leveraging of strategic enrollment management tools, increasing the availability of student financial aid, discounting tuition and fees for the fall, the expansion of online class offerings, and the institution's ability to serve unique student populations. One president at a private four-year institution attributed their enrollment increase to retention efforts, including how the institution handled "communication to students and their parents through the spring and summer semesters." Another president at a public four-year institution emphasized the importance of their institution's

preexisting online and distance education offerings, noting that “some of our local students who might normally go to another university are instead staying home [and enrolling in the institution’s online programs].”

Thoughts on Stable Fall Enrollments

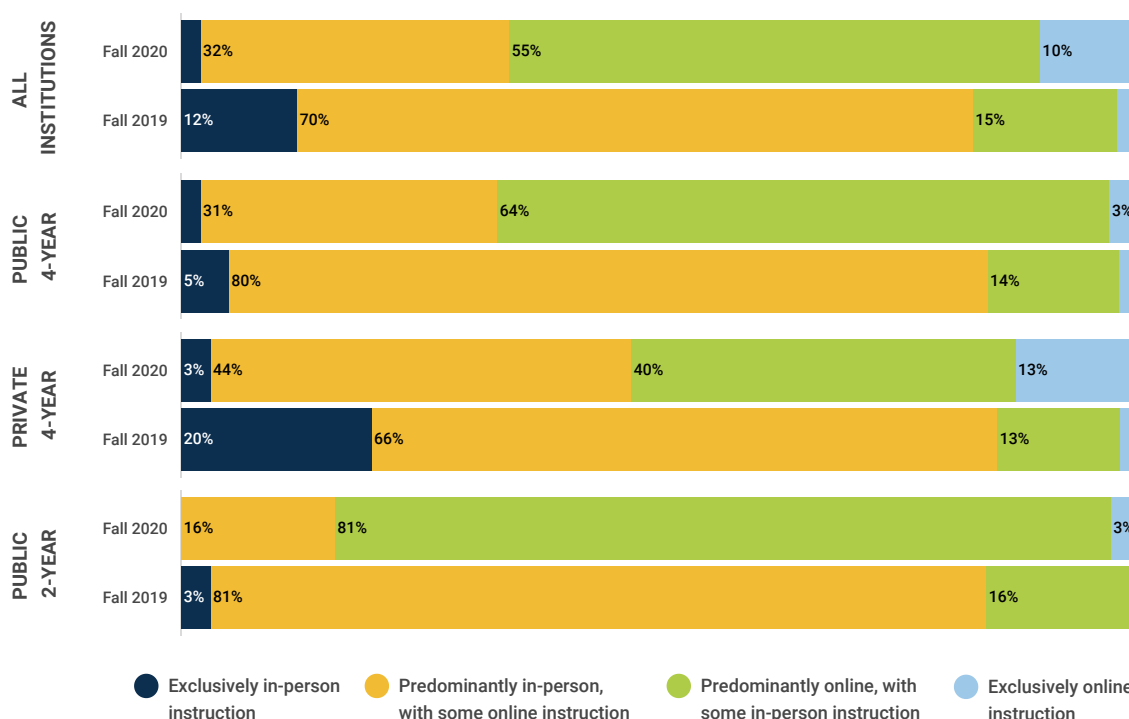
The 23 percent of presidents who reported their fall 2020 enrollment stayed about the same as their fall 2019 enrollment largely attributed this to enrollment changes across different subgroups, which ultimately balanced overall enrollment. One president at a public four-year institution noted a combination of factors that contributed to their steady enrollment: “First, we had fewer new students, but continuing students took more hours. Second, graduate enrollments increased while undergraduate enrollment declined. Third, hard work on the phones and emails by enrollment staff. Fourth, we did not increase tuition.”

MODE OF INSTRUCTION FOR FALL 2020

In response to the pandemic and related uncertainties, college and university leaders spent the summer months drafting multiple contingency plans to guide their institutions’ fall operations. With the fall term underway, we asked presidents to identify the mode of instruction that best described their institution in fall 2019 and which type of instruction best describes their institution at the start of their fall 2020 term. Presidents were given four categories to select from: “exclusively in-person instruction,” “predominantly in-person, with some online instruction,” “predominantly online, with some in-person instruction,” or “exclusively online instruction.”

- At the start of the fall 2020 term, 55 percent of presidents described their institution as offering “predominantly online, with some in-person instruction.”
- Only 32 percent of presidents described their institution as offering “predominantly in-person, with some online instruction” for the fall 2020 term. However, 70 percent of presidents said their institutions offered this form of instruction during fall 2019.
- Presidents at public two-year institutions (81 percent) were the most likely to describe their institution’s fall 2020 mode of instruction as being “predominantly online, with some in-person instruction,” followed by presidents at public four-year (64 percent) and private four-year institutions (40 percent).
- Presidents at private four-year institutions (44 percent) were the most likely to report that their planned mode of instruction was “predominantly in-person, with some online instruction,” followed by presidents at public four-year (31 percent) and public two-year institutions (16 percent).

Figure 6: Primary Mode of Instruction for Fall 2020 Compared with Fall 2019



FACTORS THAT INFORMED FALL 2020 MODE OF INSTRUCTION

Presidents were also given the opportunity to explain the factors or considerations that informed their decision around which mode of instruction to offer this fall. Presidents who responded to this question referenced a multitude of factors that were weighed when making the choice of how to begin the fall 2020 term. Virtually all presidents referenced prioritizing metrics related to physical health and safety.

COVID-19 Numbers and Resources

One president at an institution offering predominantly in-person instruction wrote that the decision was influenced by the “local positivity rate in our surrounding community. Campus isolation and quarantine capacity and local healthcare capacity.” Other presidents of institutions offering predominantly in-person instruction referenced confidence in their COVID-19 testing program, their capacity to contain the virus, low positivity rates on campus and within the campus community, and the number of isolation and quarantine beds available as key factors.

Another president at an institution offering predominantly online instruction reported that the decision was informed by “county, state, and national rates of infection and positivity,” as well as “campus cases and spread.” Presidents at institutions offering exclusively online instruction highlighted the high numbers of COVID-19 cases in their local communities, CDC guidance, access to COVID-19 tests, and quarantine resources as key factors that informed their decisions. One such president wrote that the “health and well-being of students and the workforce and the college’s location is in a densely populated urban environment” contributed greatly to their decision to shift to exclusively online instruction.

Small Programs Necessitating Hands-On Instruction/Training

Many presidents at institutions offering “predominantly online, with some in-person instruction” mentioned that while many programs could be shifted to an online environment, other programs, such as those that have laboratory components and those that train EMTs, nurses, and other health professions require some in-person and hands-on instruction. In these cases, presidents felt that it is important to ensure these key programs could continue, albeit with additional safety protocols in place (e.g., reduced class sizes, PPE for faculty and students).

Preferences for In-Person Instruction and Its Educational Value

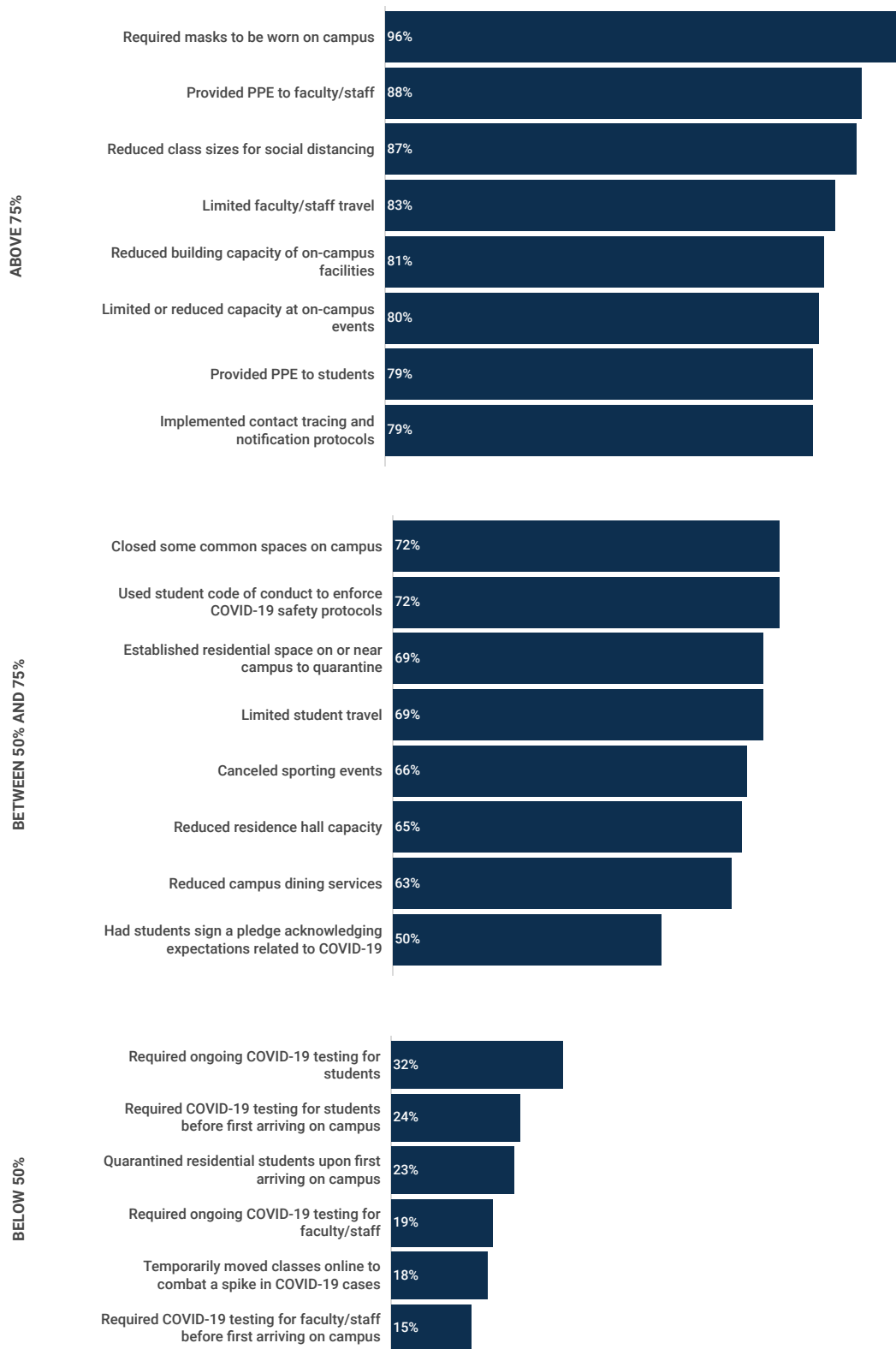
Presidents at institutions offering “exclusively in-person offerings” or “predominantly in-person offerings, with some online instruction” weighed factors such as students’ preference for an in-person experience and the educational value of having in-person learning for students. Illustrating these points, one president wrote: “We are an institution built on relationships in academic, co-curricular, and service areas. Those relationships, both on and off campus, are best facilitated by in-person instruction.” Another president also noted, “Our students had the choice to study remotely or come to campus in person. [Ninety]+ percent chose to come back to campus, but 10 [percent] are studying remotely either out of choice or because of travel or visa restrictions in the case of international students.”

COVID-19 SAFETY MEASURES

In previous surveys, presidents emphasized the importance of implementing a variety of measures and protocols to support safer in-person learning. Presidents who indicated that their institution was offering some amount of in-person instruction this fall were asked to review a list of 23 COVID-19–related safety actions and to select all those their institution has implemented upon starting the fall 2020 term. Figure 7 presents their responses organized into three groups: those safety actions taken by more than 75 percent of institutions, those taken by 50 to 75 percent of institutions, and those taken by less than 50 percent of institutions.

- The top four COVID-19–related safety actions presidents reported implementing at their institutions are “requiring masks to be worn on campus” (96 percent), “providing PPE to faculty and staff” (88 percent), “reducing class sizes for social distancing” (87 percent), and “limiting faculty and staff travel” (83 percent).
- Seventy-two percent of presidents reported that their institutions are “using the student code of conduct to enforce COVID-19 safety protocols” and “closing some common spaces on campus.”
- Less than one-third (32 percent) of presidents reported that their institutions are “requiring ongoing COVID-19 testing for students.”

Figure 7: COVID-19–Related Safety Measures Implemented by Institutions Offering Some Amount of In-Person Instruction This Fall



Monitoring Safety Throughout the Fall Term

Nothing is more top of mind for college and university presidents than the physical health and safety of their campus communities. Given the level of uncertainty that the pandemic poses, institutional leaders recognize that they must be prepared to modify their institutional plans, policies, and procedures based on new information. Presidents who indicated that their institution was offering some amount of in-person instruction this fall were asked what metrics they are reviewing to monitor campus health and safety and inform potential instructional modality changes.

Presidents of institutions that are offering “predominantly in-person, with some online instruction” and “exclusively in-person instruction” this fall reported they were actively monitoring—and in many cases, monitoring daily—COVID-19 test positivity rates on campus and in their local communities. They also referenced monitoring data from daily and weekly symptom checks, student self-reports, quarantine and exposure rates, guidance from health authorities, and availability and capacity of different safety resources (e.g., available quarantine beds, number of available tests). One president commented, “Students and faculty are questioned daily regarding any changes in their health status. Anyone experiencing a change in health status related to COVID-19 symptoms is placed in quarantine.”

One president of an institution that is offering “predominantly online, with some in-person instruction” stated: “We foresee no changes [in instructional modality] for a while, as the only classes that are in-person are certain labs. Capacity in those is limited to eight, including instructors, and everybody wears masks and face shields. If we had a spike in cases from those in these labs, they would return to online. Everything else we do is online already, and faculty and staff are off-campus with very few exceptions. We feel quite confident that we are managing this well.”

THE FINANCIAL IMPACT OF COVID-19

The COVID-19 pandemic has undoubtedly created financial challenges for many colleges and universities. To better understand the effect of the pandemic on institutional finances, presidents were presented with two lists containing sources of revenues and expenses and were asked to indicate if those had increased, decreased, or stayed about the same.

Institutional Expenses

Presidents were asked to report on five different institutional expense categories. Figure 8 shows that more than half of the presidents indicated increases in all five expense categories. The vast majority of presidents (92 percent) reported increases in technology expenses, followed by increases in cleaning and maintenance (90 percent), student financial aid (75 percent), student support services (66 percent), and instruction (58 percent). Overall, very few institutions reported decreases in expenses.

- Presidents at public four-year institutions (74 percent) were more likely than presidents at private four-year institutions (69 percent) and presidents at public two-year institutions (62 percent) to report that their expenses related to student support services had increased (see Figure 9).
- Presidents of public four-year institutions (62 percent) and private four-year institutions (63 percent) were slightly more likely to report increases in instructional expenses than presidents at public two-year institutions (54 percent). In contrast, presidents at two-year institutions (13 percent) were more likely than presidents at private four-year institutions (3 percent) and public four-year institutions (2 percent) to report expense decreases in instructional expenses.
- There are no major differences in student financial aid expenses by sector. Across all three sectors, approximately 80 percent of presidents reported increases in student financial aid expenses.

Figure 8: The Effect of the COVID-19 Pandemic on Institutional Expenses

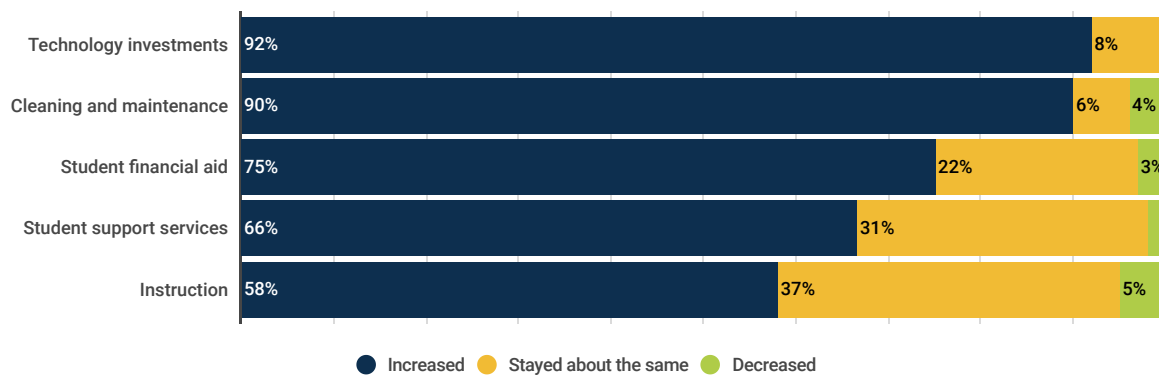
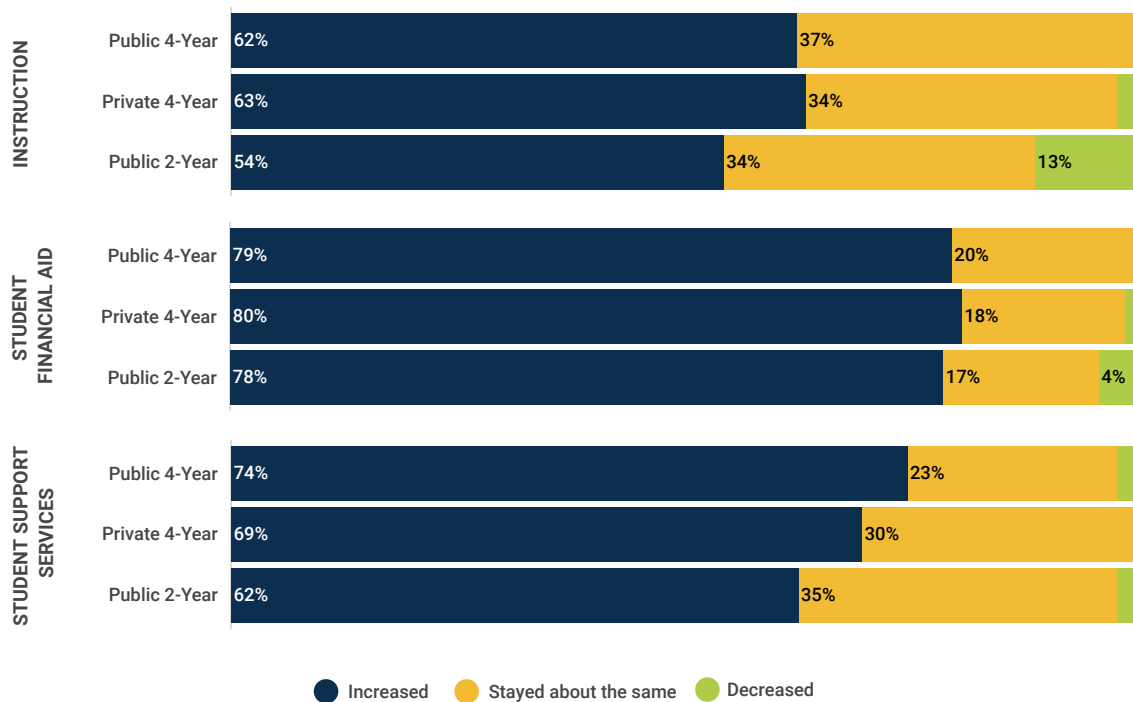


Figure 9: The Effect of the COVID-19 Pandemic on Instructional, Student Financial Aid, and Student Support Expenses, by Sector



Note: Amounts may not total to 100 percent due to rounding.

Institutional Revenues

Presidents were also asked to report on six different institutional revenue categories. Figure 10 shows nearly all presidents (93 percent) reported a decrease in revenue from special programs. A majority of presidents reported a decrease in revenue from auxiliaries (73 percent), room and board (61 percent), and endowment earnings and/or gifts (54 percent). Nearly half of presidents reported that tuition revenue (46 percent) and revenue from fees (47 percent) remained about the same as during the 2019–20 academic year.

- Presidents at private four-year institutions (40 percent) were slightly more likely to report tuition revenue decreases than presidents at public four-year (38 percent) and public two-year institutions (32 percent) (see Figure 11).
- Presidents at public four-year institutions (48 percent) and private four-year institutions (46 percent) were more likely to report revenue decreases in fees than presidents at public two-year institutions (36 percent).

Figure 10: The Effect of the COVID-19 Pandemic on Institutional Revenues

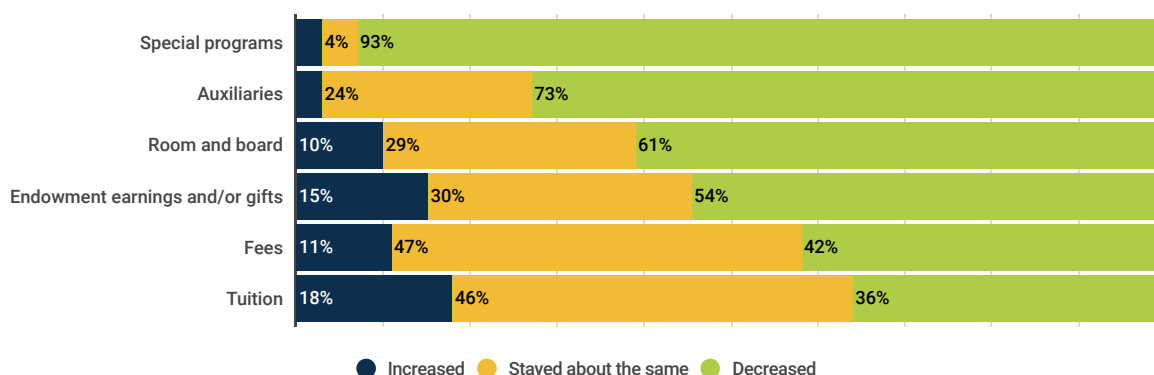
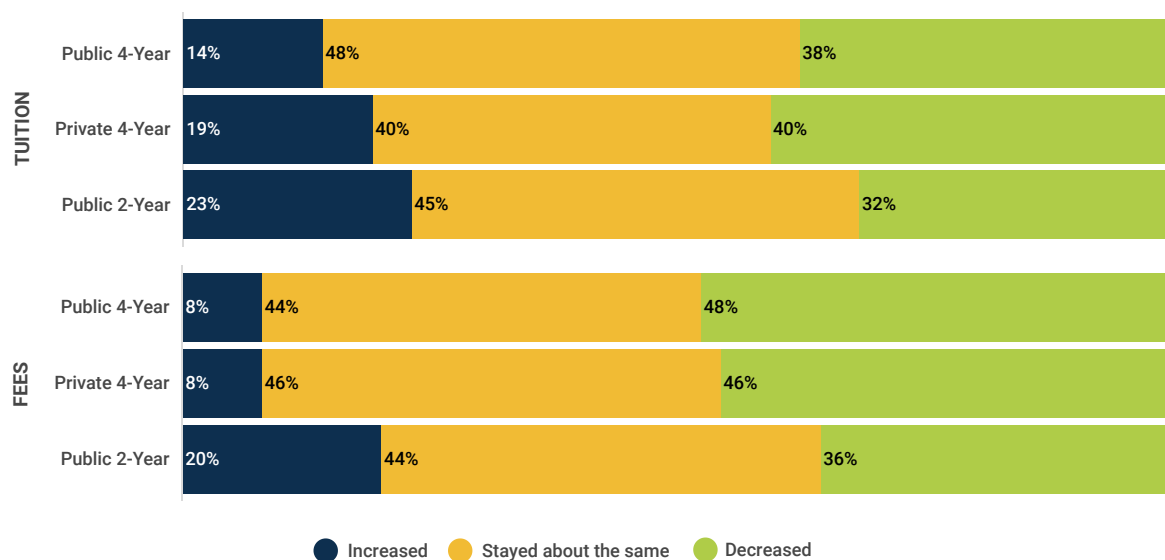


Figure 11: The Effect of the COVID-19 Pandemic on Tuition Revenue and Fee Revenue, by Sector



Note: Amounts may not total to 100 percent due to rounding.

Responding to Financial Challenges

To better understand how presidents are responding to the financial challenges brought on by the COVID-19 pandemic, presidents were given a list of 10 actions and asked to indicate for each whether their institution (1) had already or is currently implementing; (2) may implement within the next 12 months; or (3) does not anticipate implementing.

- The majority of presidents reported that their institution had already implemented “hiring freezes” (61 percent) as well as a “freeze on employee compensation/salary increases” (54 percent) (see Figure 12).
- The majority of presidents reported that they do not anticipate having to take the following actions: “review tenured relationships” (88 percent), “scaled back benefits” (63 percent), “employee pay reductions” (63 percent), and “increase part-time employees” (59 percent).
- In general, presidents at private four-year institutions were more likely to have reported already implementing an action, while presidents at public four-year and public two-year institutions were more likely to report the need to potentially implement the action within the next 12 months (see Figure 13).

Figure 12: Actions Taken or That May Be Taken in the Next 12 Months in Light of Financial Challenges Caused by the COVID-19 Pandemic

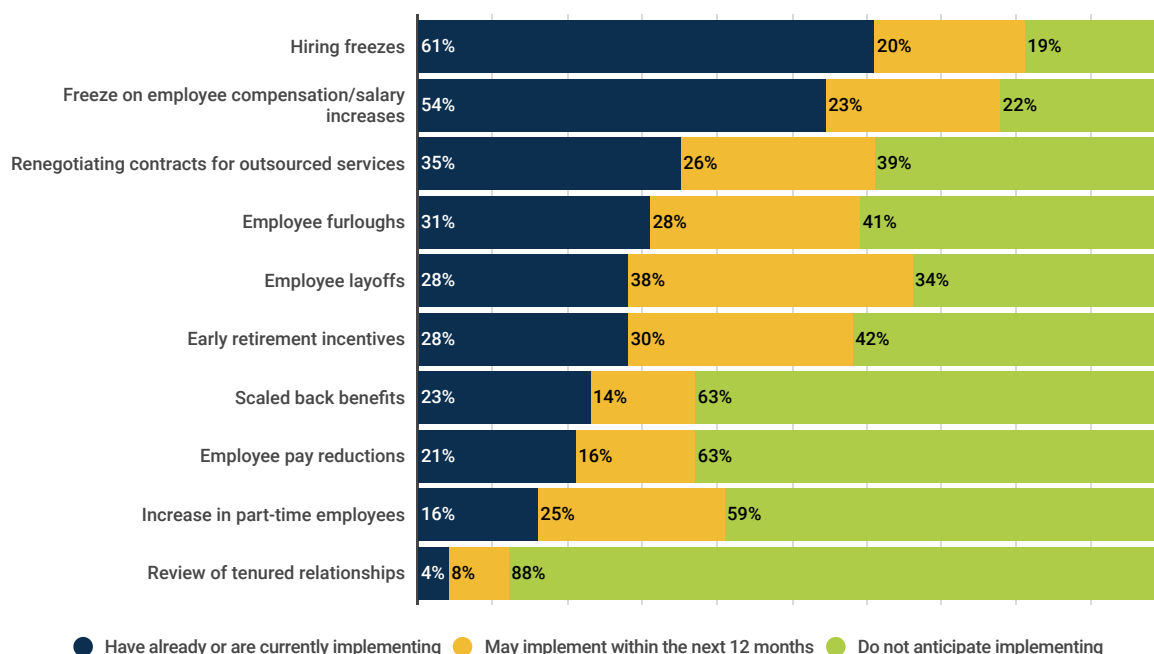
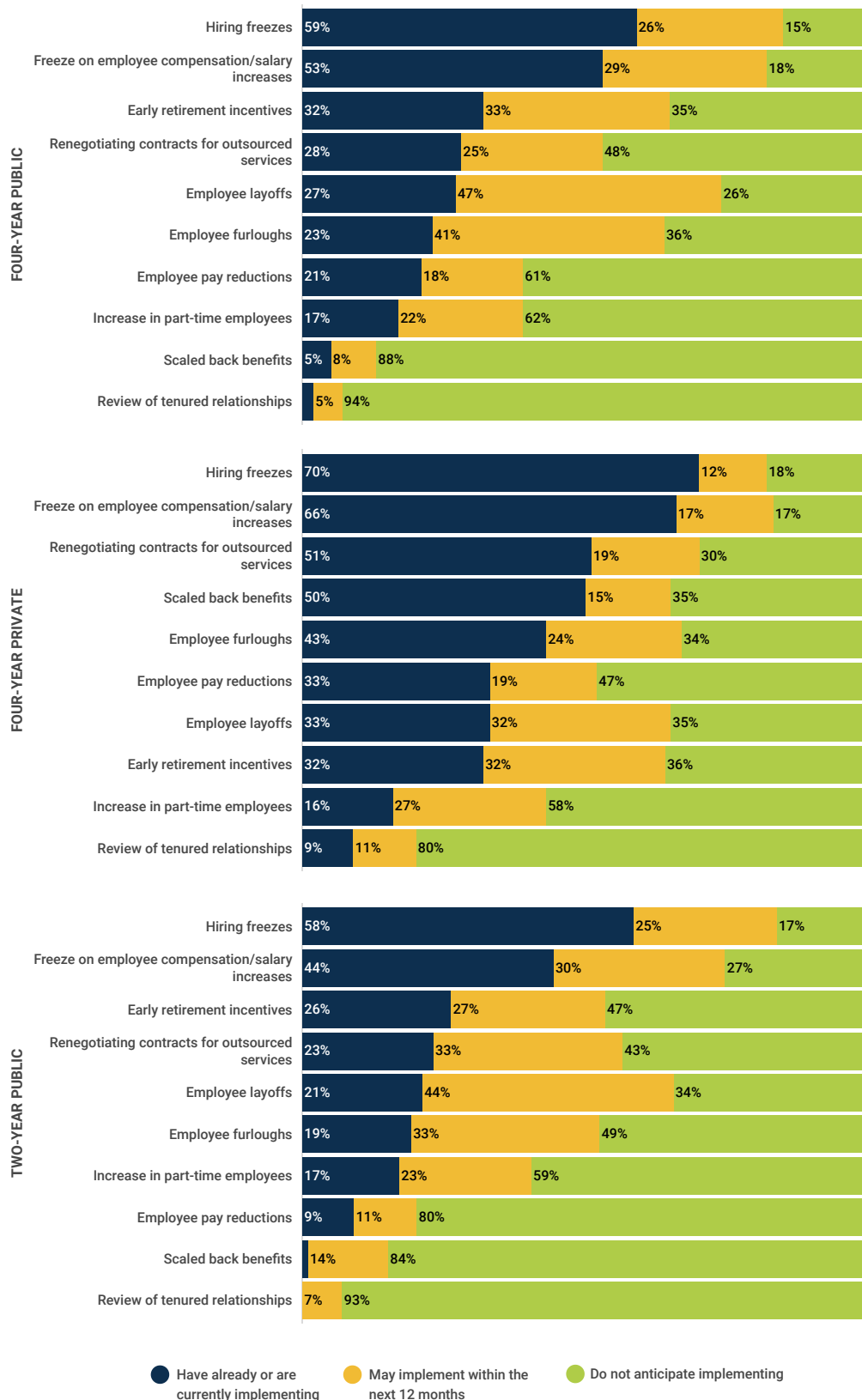


Figure 13: Actions Taken or That May Be Taken in the Next 12 Months in Light of Financial Challenges Caused by the COVID-19 Pandemic, by Sector



Note: Amounts may not total to 100 percent due to rounding.

Presidents who reported that their institution had already implemented employee furloughs, pay reductions, or layoffs were then asked to report the percentage of their employees that were affected by the action. Presidents who reported that they may need to implement any of these three actions in the next 12 months were asked to estimate the percentage of employees who would be affected.

- Thirty-one percent of presidents reported that their institution had already implemented employee furloughs. In general, presidents reported that this affected about 15 percent of all employees.
- Less than one-third of presidents reported having already implemented employee pay reductions (21 percent) and employee layoffs (28 percent). In general, presidents reported these actions affected 10 percent and 15 percent of employees, respectively.
- Thirty-eight percent of presidents reported that their institution may need to implement employee layoffs in the next 12 months. In general, presidents estimate this action affecting around 10 percent of their total employee workforce.
- Less than one-third of presidents reported that their institution may need to implement employee furloughs (28 percent) or employee pay reductions (16 percent) in the next 12 months. In general, presidents estimated that furloughs may affect around 10 percent of employees while employee pay reductions would affect around 30 percent of employees.