

COLLEGE AND UNIVERSITY PRESIDENTS RESPOND TO COVID-19: 2021 SPRING TERM SURVEY

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Since April 2020, ACE has surveyed college and university presidents in order to capture how they are responding to the challenges presented by COVID-19. In our previous survey in November 2020, this included responses on their institution's efforts to promote civic engagement and student voting in the 2020 election. In this first survey of the spring 2021 term, developed in partnership with our colleagues at the TIAA Institute, 348 presidents* identified their most pressing concerns, how the pandemic has affected their spring enrollment and financial health, adaptations made to institutional services and support for students, and predictions on future fall enrollment and state appropriations. What follows is a summary of our key findings.

* Of the 348 presidents, 147 lead private four-year institutions (42 percent), 85 lead public four-year institutions (24 percent), 88 lead public two-year institutions (25 percent), 13 lead private graduate-only institutions (4 percent), six lead for-profit institutions (2 percent), seven lead private two-year institutions (2 percent), and two lead other institutions (1 percent).

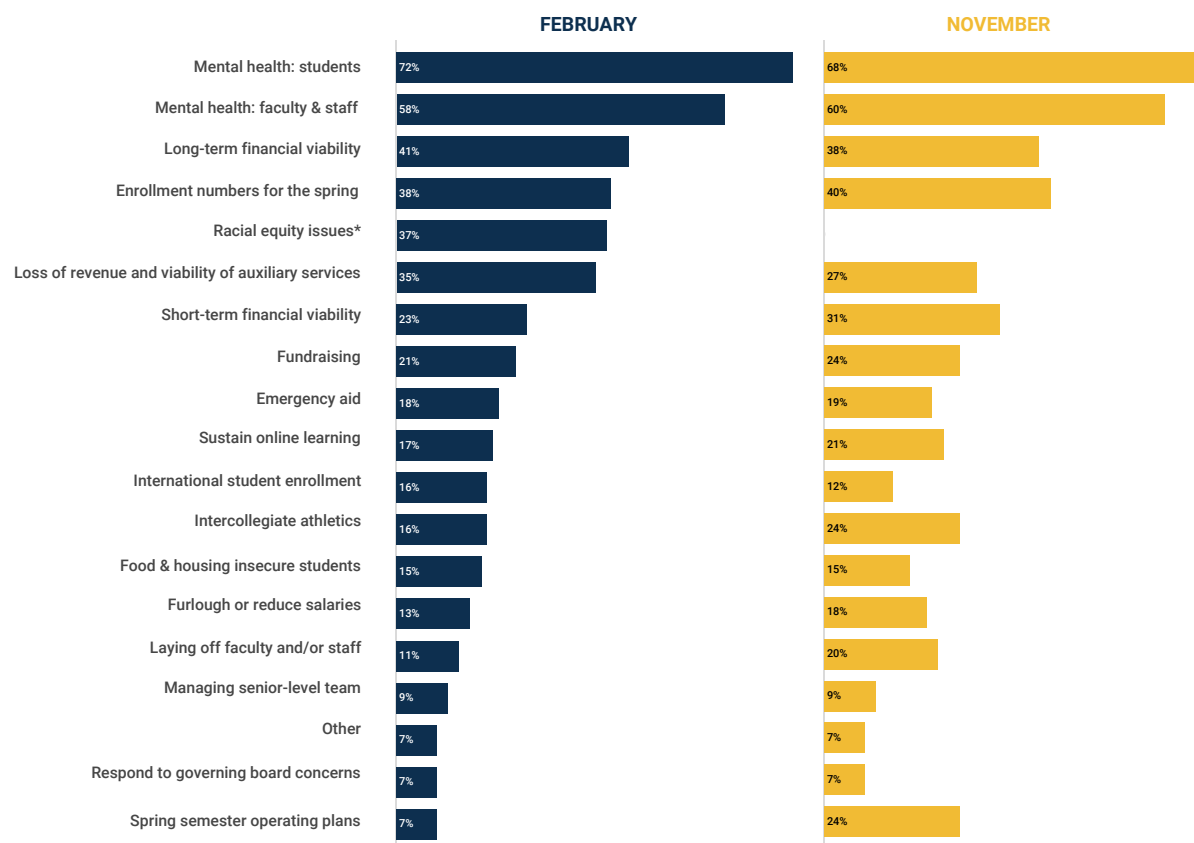
The survey was launched on February 1 and closed on February 12.

MOST PRESSING ISSUES FOR PRESIDENTS

In the November survey, presidents were presented with a list of 18 issues and asked to select up to five they viewed to be most pressing. In the February survey, presidents were given a list of 19 issues and asked to select up to five they view to be most pressing for them currently (see Figure 1). For the fourth time in our survey series, the pressing issue most commonly selected by presidents was “mental health of students.” Slightly less than three-quarters of all presidents (72 percent) identified student mental health as a pressing issue, up from 68 percent in November.

- For the second consecutive survey, “mental health of faculty and staff” was the second most commonly selected pressing concern among all presidents (58 percent), followed by the “long-term financial viability of the institution” (41 percent).
- More than one-third of all presidents (37 percent) selected “racial equity issues” as a most pressing issue, a new item included on the list in the February survey.
- Presidents at public four-year institutions and private four-year institutions indicated “mental health of students” as their most commonly selected pressing issue (82 percent and 73 percent, respectively), while the most commonly selected top-of-mind issue among presidents at public two-year institutions was “enrollment numbers for the spring” (66 percent).

Figure 1: Most Pressing Issues Facing Presidents Due to COVID-19 in November 2020 and February 2021



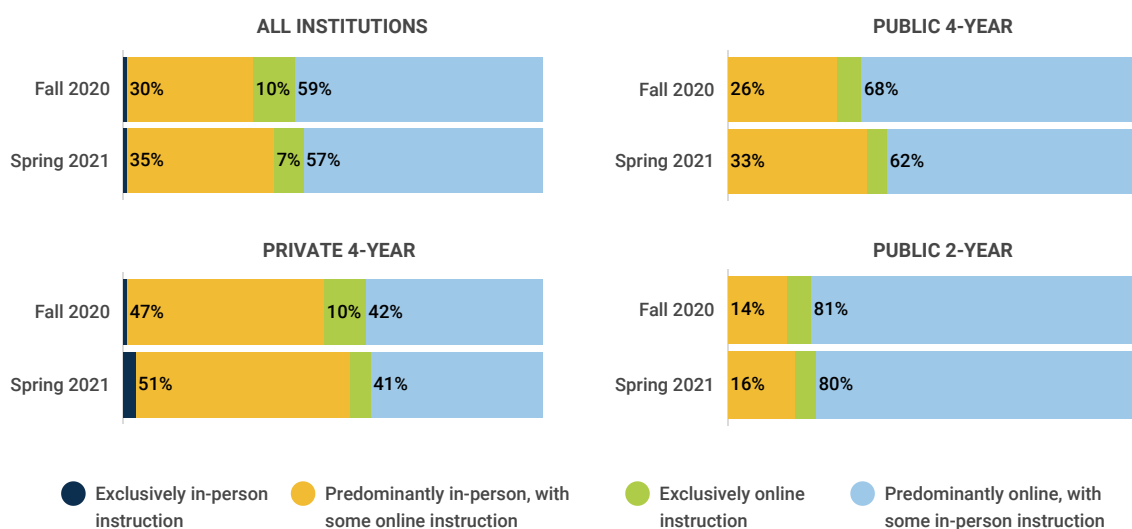
* Denotes item available in the February survey only.

PRIMARY MODE OF INSTRUCTION

Presidents were asked to identify the mode of instruction that best described their institution in fall 2020 and which type of instruction they were currently offering or planning to offer at the start of the spring 2021 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” (see Figure 2).

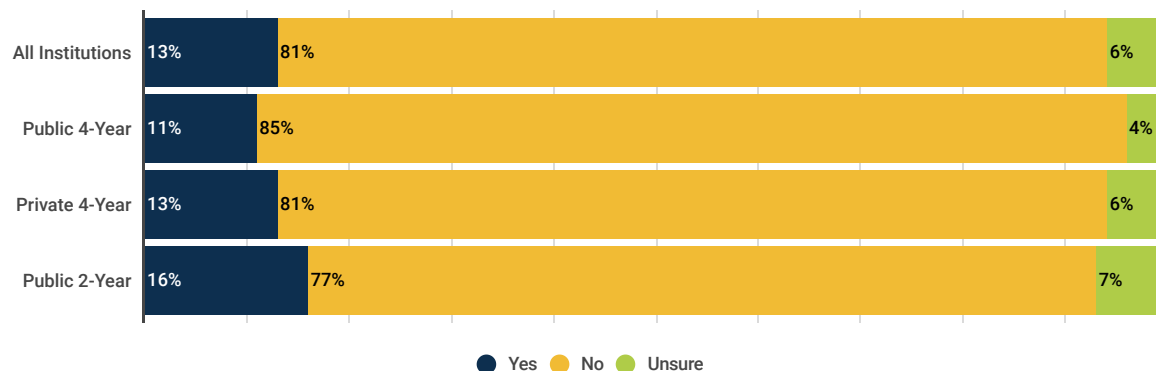
- More than half of all presidents indicated that they were currently offering or planning to offer “predominantly online, with some in-person instruction” in spring 2021 (57 percent). This was slightly lower than the percentage of presidents who indicated that their institution offered this mode of instruction in fall 2020 (59 percent).
- Over one-third of all presidents indicated that they were currently offering or planning to offer “predominantly in-person, with some online instruction” in spring 2021 (35 percent), a slightly higher share than those who reported using this mode of instruction in fall 2020 (30 percent).
- Presidents at public two-year institutions were the most likely to report that they were currently offering or were planning to offer “predominantly online, with some in-person instruction” in spring 2021 (80 percent), followed by presidents at public four-year institutions (62 percent).
- About half of all presidents at private four-year institutions indicated that they were currently offering or were planning to offer “predominantly in-person, with some online instruction” in spring 2021 (51 percent), the highest share across all sectors.

Figure 2: Primary Mode of Instruction in Fall 2020 and Spring 2021



As 2020 came to a close and COVID-19 cases were beginning to once again increase, some institutions reported plans to begin the spring 2021 term primarily online and then shift to primarily in-person instruction later in the term once positivity rates decreased. In this survey, presidents were asked whether their institution was beginning the spring term by offering primarily online instruction with plans to shift to primarily in-person instruction later in the term (see Figure 3). The majority (81 percent) of presidents indicated that their institution did not plan to begin their semester online and then shift to predominantly in-person instruction during the spring term, 13 percent indicated that their institution does plan to make this shift, and 6 percent noted that they were unsure. Presidents at public two-year institutions were the most likely to report anticipating this change in their instruction (16 percent).

Figure 3: Anticipated Change in Primary Mode of Instruction from Online to In-Person in Spring 2021

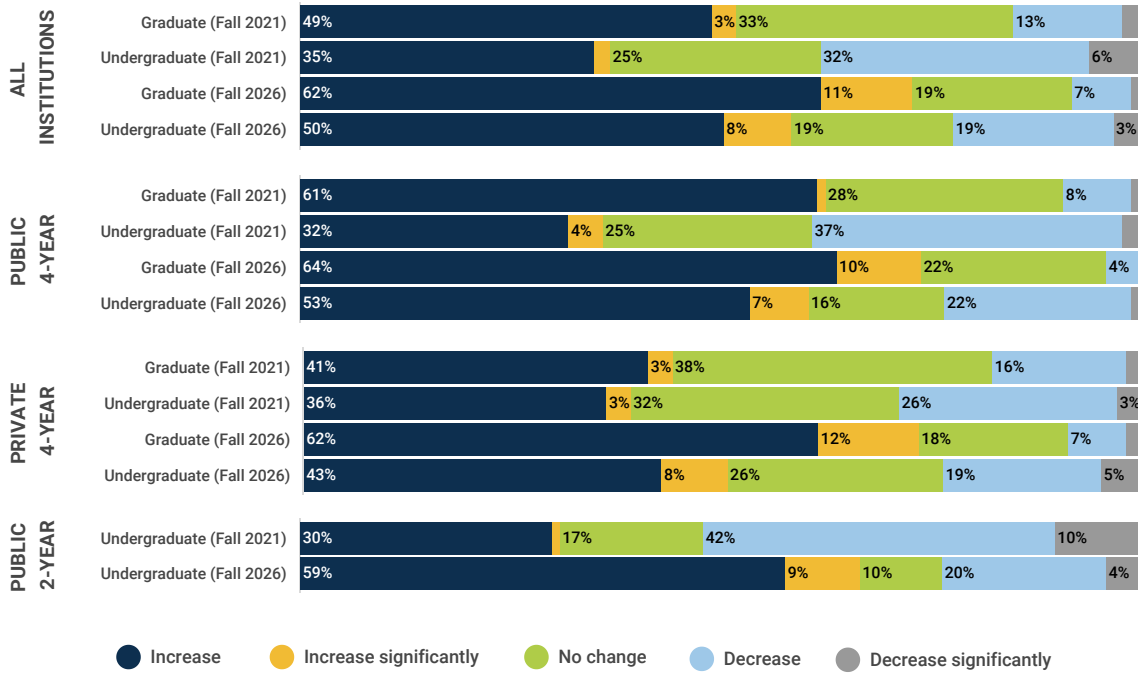


ANTICIPATED CHANGES IN ENROLLMENT

Presidents were asked about their expectations regarding their institution's undergraduate and graduate enrollment for the next academic year (fall 2021) and five years from now (fall 2026), relative to their fall enrollment pre-pandemic (fall 2019) (see Figure 4). Presidents were asked to indicate whether they anticipate enrollment to: “increase significantly,” “increase,” “no change,” “decrease,” or “decrease significantly,” relative to fall 2019 enrollment.

- Slightly more than one-third (35 percent) of all presidents reported expecting an “increase” among undergraduate enrollment in fall 2021, while only 2 percent reported expecting a significant increase.
- Almost half (49 percent) of all presidents reported expecting an “increase” in graduate enrollment in fall 2021, while only 3 percent reported expecting a significant increase.
- For both undergraduate and graduate enrollment, the share of presidents who indicated expecting an “increase” in enrollment in fall 2026 was higher than those who expect an “increase” in 2021. By 2026, half of all presidents indicated they expect an “increase” in undergraduate enrollment, and 62 percent of presidents indicated they expect an “increase” in graduate enrollment.
- One-quarter of all presidents reported expecting “no change” in undergraduate enrollment for the fall 2021 term. An even higher share of presidents (33 percent) reported expecting “no change” for graduate enrollment for the fall 2021 term.
- Notably, 52 percent of presidents of public two-year colleges indicated anticipating lower undergraduate enrollment for fall 2021. This was much higher than that of presidents at public four-year (39 percent) and private four-year (29 percent) institutions.
- More than two-thirds of presidents (73 percent) reported expecting increases in graduate enrollment by the fall 2026 term. By contrast, only 8 percent of respondents anticipate decreases in graduate enrollment by fall 2026.

Figure 4: Anticipated Enrollment Trends for Fall 2021 and Fall 2026 Relative to Fall 2019

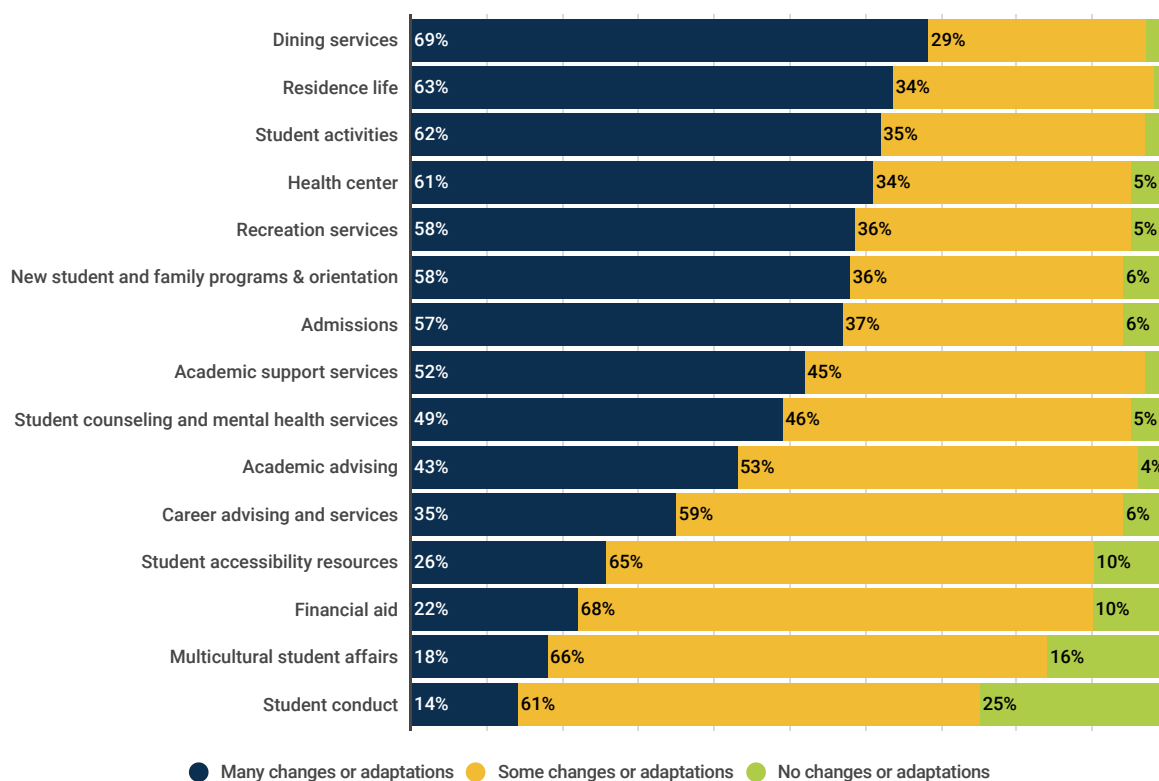


ADAPTATIONS TO STUDENT SERVICES

In response to the COVID-19 pandemic, colleges and universities have had to adapt and innovate many of their student services in order to continue to meet students' needs. To better understand these efforts, presidents were given a list of 15 student services and asked to indicate whether their institution made "many changes or adaptations," "some changes or adaptations," or "no changes or adaptations" in order to continue to meet the needs of their students during this challenging time (see Figure 5).

- The areas in which presidents were most likely to indicate they made "many changes or adaptations" were dining services (69 percent), followed by residence life (63 percent), student activities (62 percent), and their institution's health center (61 percent).
- The top five areas in which presidents indicated having made "some changes or adaptations" were financial aid (68 percent), multicultural student affairs (66 percent), student accessibility resources (65 percent), student conduct (61 percent), and career advising/services (59 percent).
- One-quarter of all presidents indicated having made "no changes or adaptations" to student conduct operations, the area in which the highest share of presidents reported no changes had been made.

Figure 5: Level of Changes or Adaptations Made to Student Services to Meet Students' Needs

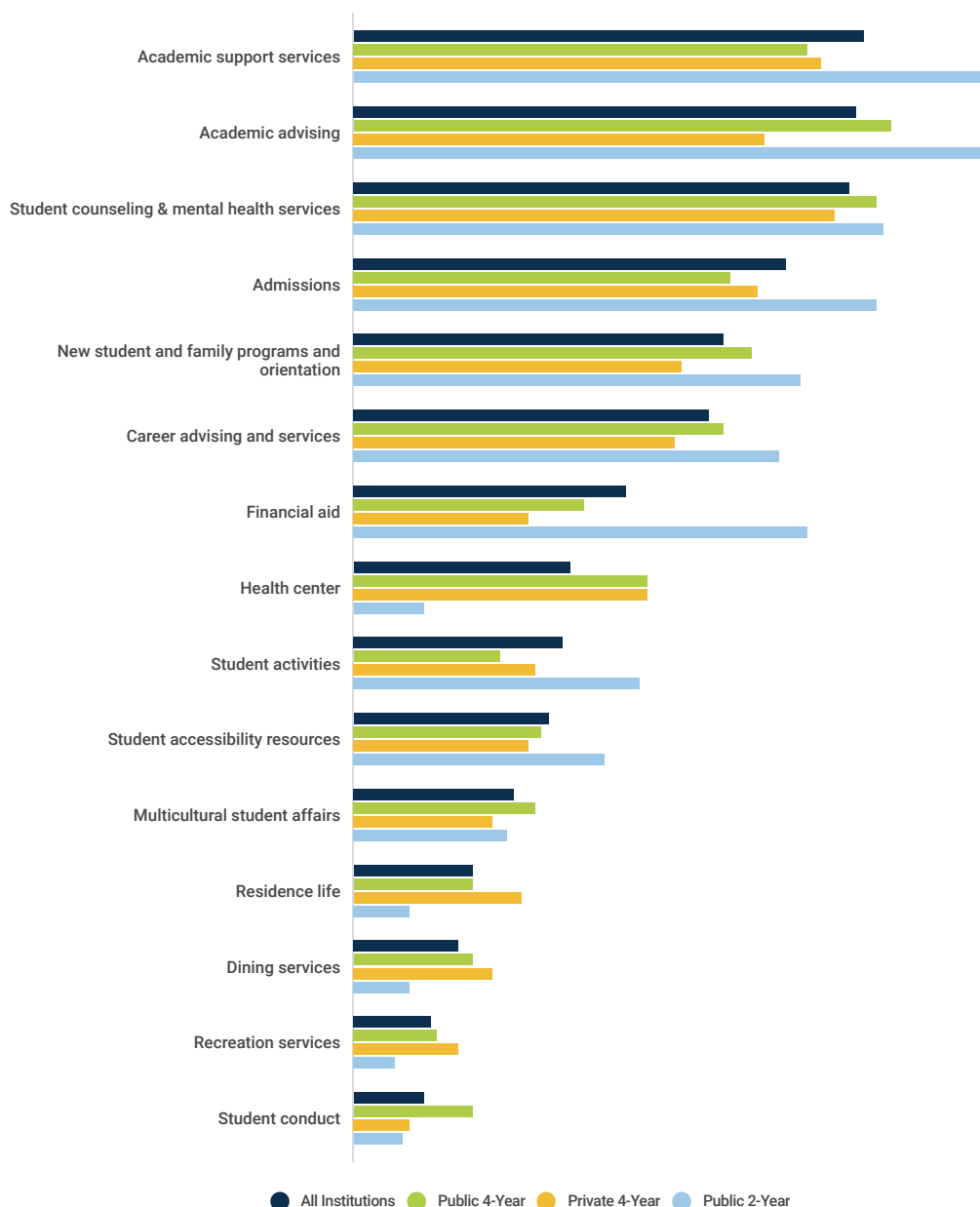


It is clear that the crisis of the COVID-19 pandemic has caused many colleges and universities to adapt their services in order to continue to meet the needs of their students. In this survey, we asked presidents to consider what changes or adaptations that have been made in light of the pandemic might continue to be in place after the pandemic (see Figure 6).

- The three most commonly chosen student services in which presidents anticipated keeping at least some of the changes or adaptations made as a result of the pandemic were "academic support services" (73 percent), "academic advising" (72 percent), and "student counseling and mental health services" (71 percent).

- More than half of respondents also anticipated they would keep at least some changes to “admissions” (62 percent), “new student and family programs and orientation” (53 percent), and “career advising/services” (51 percent) in the post-pandemic period.
- Presidents at public four-year institutions were most likely to anticipate keeping changes made to “academic advising” (77 percent), “student counseling and mental health services” (75 percent), “academic support services” (65 percent), and “new student and family programs and orientation” (57 percent).
- Presidents at private four-year institutions were most likely to anticipate keeping changes made to “student counseling and mental health services” (69 percent), “academic support services” (67 percent), “academic advising” (59 percent), and “admissions” (58 percent).
- Among presidents at public two-year institutions, the vast majority anticipated keeping changes made to “academic support services” (91 percent) and “academic advising” (90 percent). This was followed by “student counseling and mental health services” (76 percent) and “admissions” (75 percent).

Figure 6: Percent of Presidents Who Anticipate Keeping Changes or Adaptations Made to Student Services



When asked to elaborate on changes, adaptations, and innovations institutions implemented during the pandemic that they plan to keep, presidents across the board expressed interest in continued virtual events and activities, including options for virtual orientation, campus tours, and meetings. Presidents across sectors also shared plans of continued remote access for academic advising, counseling, and other support services. Presidents of public four-year colleges indicated particular interest in maintaining their expanded virtual counseling options. One president of a public four-year institution reported that the pandemic has brought “greater visibility to telephonic and Zoom-linked resources that were already available and that are now seeing greater use.”

Speaking to a broader interest in continuing to make support services available virtually, another respondent shared, “We are a commuter campus so not having to drive through or around the city to come for service appointments has been much more convenient for students.” Relative to other sectors, presidents of private four-year institutions were more inclined to report an interest in making remote instruction available in the long run. For example, one leader of a private four-year college explained hopes to “Continue to offer more flexible academic programming [for] meeting the needs of students via virtual, hybrid and online offerings, especially for our adult students.”

College presidents were also asked to describe the resources made available to students hit particularly hard by the pandemic and the economic crisis, including students of color and low-income students. Across sectors, the most common form of institutional support provided was financial or emergency aid. These resources were often made available through CARES Act funding and/or institution-level fundraising. In addition to this financial assistance, many institution leaders noted their institution’s expanded mental health supports or improved efforts to check in with students.

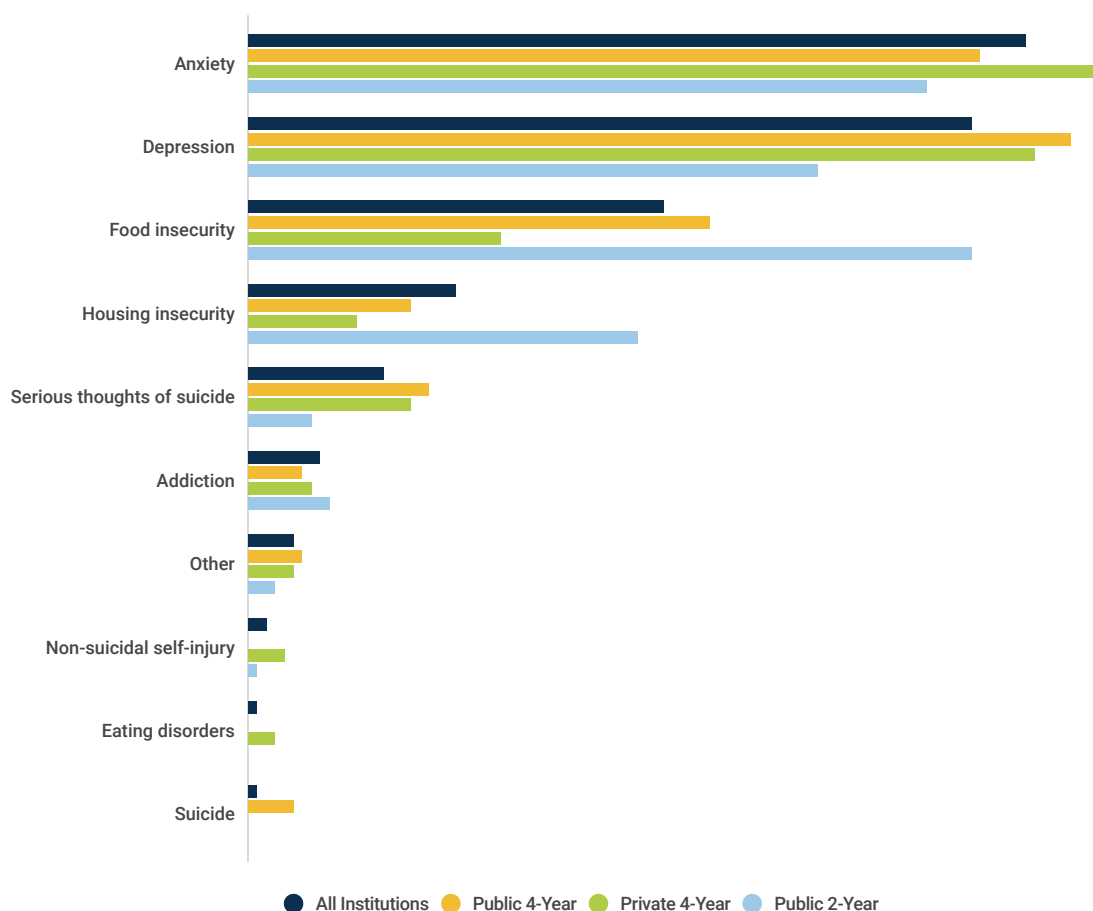
As part of these efforts, presidents reported that their college has hired additional counseling staff, expanded hours for mental health services, and created student affinity or support groups. One president shared, “Every person on the campus, beginning with our faculty, are rolling up their sleeves and finding ways to support or connect students to resources, or individuals.” In addition, presidents of some colleges commonly reported creating or improving their institution’s food pantries, to assist students currently challenged with meeting their basic needs. On top of these campus-level reforms, presidents of public two-year colleges indicated that their institutions were particularly inclined to provide tangible supports to students, including technology, books, Wi-Fi, and/or clothing. Across the three sectors, presidents of public two-year colleges were also more likely to indicate that their institutions have developed housing resources or referral services. Many presidents also relayed that administrative policies and payment deadlines have become more flexible during the pandemic.

STUDENT MENTAL HEALTH AND WELL-BEING

Over the course of the pandemic, student mental health has been one of the most pressing issues for college and university presidents. In February, presidents were asked to select the three mental health and well-being issues they were most frequently hearing about related to their students (see Figure 7).

- Eighty-six percent of all presidents indicated that they are most frequently hearing about students with anxiety, followed by depression (80 percent). The other top issues presidents reported hearing about included students who were dealing with food insecurity (46 percent) and housing insecurity (23 percent).
- Presidents at public two-year institutions were much more likely to indicate that they were frequently hearing about food insecurity (80 percent), compared with presidents of four-year institutions. Presidents at public two-year institutions were also more than twice as likely to indicate that housing insecurity (43 percent) was a frequent issue they were hearing about, compared with presidents at four-year institutions.
- Presidents at private four-year institutions were more likely to report anxiety (94 percent) as an issue they frequently heard about, while presidents at public four-year institutions were more likely to report depression (91 percent) as an issue they frequently heard about, while presidents at public four-year institutions were more likely to report depression (91 percent).

Figure 7. Most Frequent Mental Health and Well-Being Issues Presidents Are Hearing About

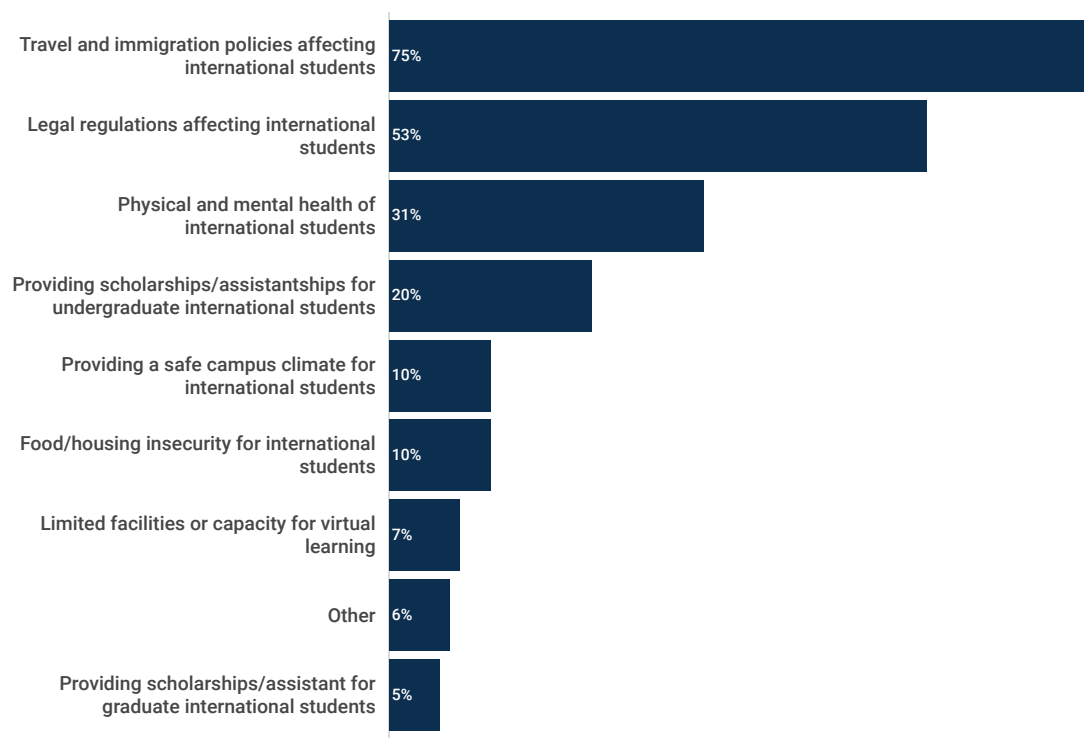


INTERNATIONAL STUDENTS

In our previous surveys, presidents have noted concern about the unique challenges facing international students in the midst of the pandemic. Presidents were given a list of 11 common issues facing this population, and asked to select the three they were most concerned about regarding their international students (see Figure 8).

- Three out of four presidents (75 percent) indicated that “travel and immigration policies affecting international students” were a top concern regarding this student population. This was followed by a little over half of the presidents (53 percent) who indicated that “legal regulations affecting international students” was a top concern.
- Almost one-third of presidents (31 percent) indicated that the “physical and mental health of international students” was a top concern.
- One in five presidents indicated they were concerned about “providing scholarships and assistantships for undergraduate international students.”

Figure 8. Presidents’ Greatest Concerns for Their International Student Population



THE FINANCIAL IMPACT OF COVID-19

The COVID-19 pandemic has undoubtedly created financial challenges for many colleges and universities. In the November survey, presidents reported on financial measures their institution had implemented and may implement within the next year due to the pandemic, as well as their perspectives on their institution's overall financial health. In this survey, we asked presidents to indicate how expenses and revenues were being affected by the pandemic. Presidents were also asked about their perspectives on the current and future overall financial health of their institution and their predictions on future state appropriations.

Institutional Expenses

Presidents were asked to indicate how their institution's expenses, excluding financial aid and scholarships, have been impacted as a direct result of the COVID-19 pandemic. Over half (60 percent) of all presidents indicated that their institutional expenses increased, 21 percent reported that their expenses decreased, and 19 percent indicated that their expenses stayed about the same (see Figure 9).

- While most presidents reported that institutional expenses increased, a higher share of presidents at public four-year institutions reported that their institutional expenses increased (67 percent) than presidents at private four-year (61 percent) and public two-year (56 percent) institutions.
- Among presidents who noted an increase in their institutional expenses as a direct result of the COVID-19 pandemic, 41 percent reported an increase of "10 percent or less," 46 percent reported an increase of "11 to 20 percent," 12 percent reported an increase of "21 to 30 percent," and 1 percent reported an increase of "31 percent or more" (see Figure 10).

Figure 9. Impact of the Pandemic on Institutional Expenses

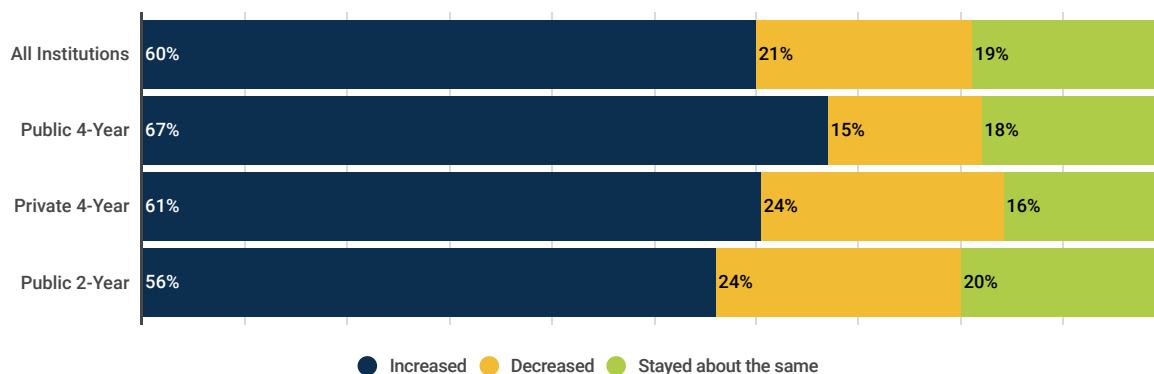
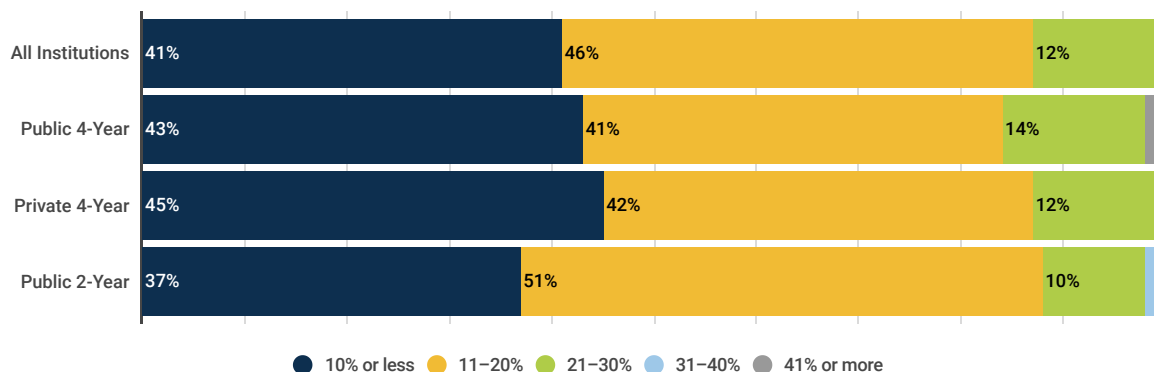


Figure 10. Institutional Expense Increase as a Direct Result of the Pandemic



Presidents who reported an increase in institutional expenses were asked to select three functional areas from a list of 12 that saw the greatest increase in expenses resulting from the pandemic (see Figure 11). Nearly two-thirds of all presidents identified “instruction” as an area in which expenses increased, followed by “student services” (55 percent) and “academic support” (50 percent).

- Presidents at public two-year (69 percent) and public four-year (66 percent) institutions most commonly selected “instruction” as the functional area with an increase in expenses as a direct result of the pandemic. This was the second most commonly chosen functional area among presidents at private four-year institutions (61 percent).
- Two-thirds (66 percent) of all presidents at private four-year institutions indicated “student services” had an increase in expenses, the most commonly chosen functional area for this sector. This was the third most commonly selected functional area among presidents at public four-year (48 percent) and public two-year (43 percent) institutions.
- About half of all presidents at public two-year (51 percent) and public four-year (50 percent) institutions selected “academic support” as having an increase in expenses as a result of the pandemic, the second most commonly chosen functional area by these sectors. This was the third most commonly selected functional area with expense increases among private four-year institutions (44 percent).

Figure 11. Functional Areas with the Greatest Increase in Expenses as a Direct Result of the Pandemic



Institutional Revenues

Presidents were asked to indicate how their institution's revenues, including net tuition and fees, were affected as a direct result of the COVID-19 pandemic. About three-quarters (72 percent) of all presidents indicated that their institutional revenues decreased, 21 percent indicated that their revenues stayed about the same, and only 8 percent reported that their revenues increased (see Figure 12).

- Presidents at public two-year institutions were more likely to report that their institutional revenues decreased (81 percent) than presidents at public four-year (76 percent) and private four-year (72 percent) institutions.
- Among presidents who noted a decrease in their institutional revenues as a direct result of the COVID-19 pandemic, 44 percent reported a decrease of "10 percent or less," 44 percent reported a decrease of "11 to 20 percent," 10 percent reported a decrease of "21 to 30 percent," 3 percent reported a decrease of "31 to 40 percent," and 3 percent reported a decrease of "41 percent or more" (see Figure 13).

Figure 12. Impact of the Pandemic on Institutional Revenues

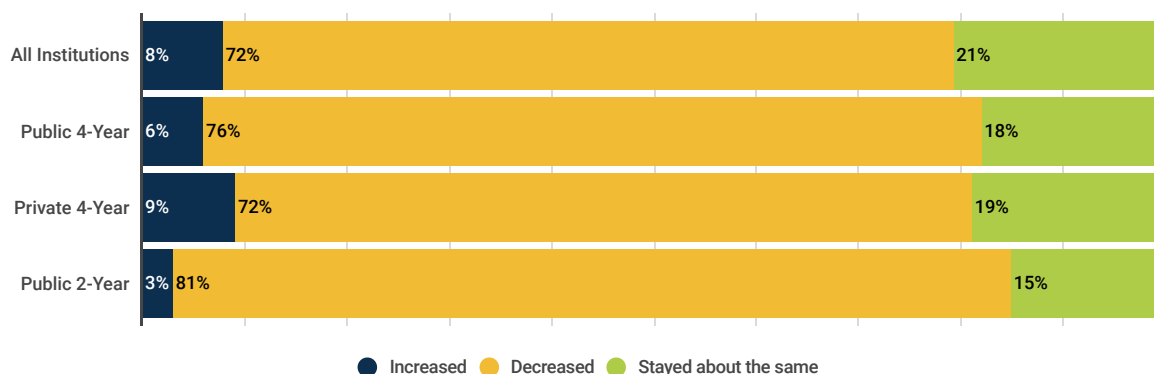
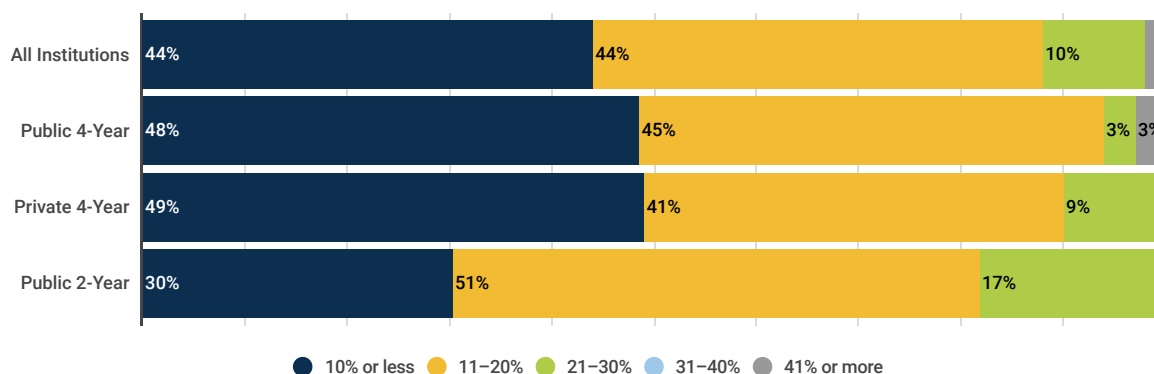


Figure 13. Institutional Revenue Decrease as a Direct Result of the Pandemic

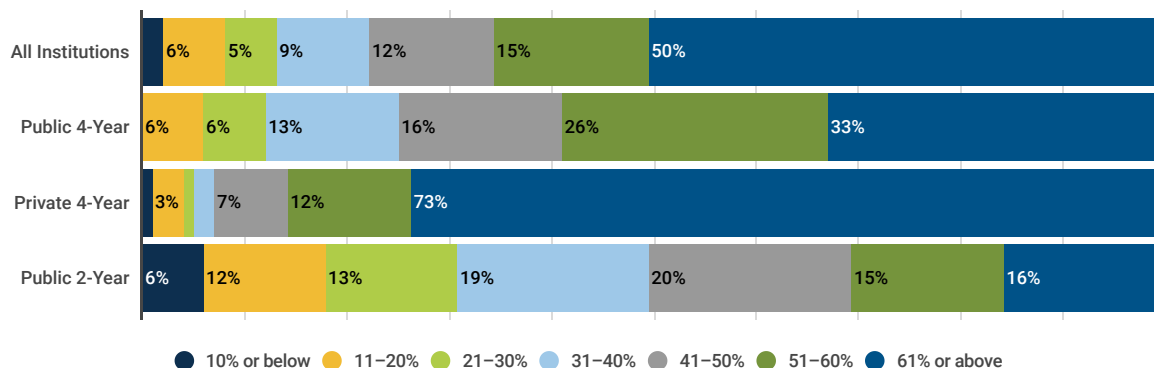


Presidents were asked to indicate what percentage of their annual expenses are covered by tuition revenues or their institution's level of tuition dependency (see Figure 14). Half of all presidents reported a dependency level of "61 percent or above," 15 percent indicated a dependency level of "51 to 60 percent," 12 percent indicated a dependency level of "41 to 50 percent," 9 percent indicated a dependency level of "31 to 40 percent," 5 percent indicated a dependency level of "21 to 30 percent," 6 percent indicated a dependency level of "11 to 20 percent," and 2 percent indicated a dependency level of "10 percent or below."

- Nearly three-quarters (73 percent) of presidents at private four-year institutions reported their institutions as being highly tuition dependent ("61 percent or above") to meet annual expenses.

- Because public institutions typically receive state appropriations, presidents at public four-year and two-year institutions were less likely to report higher levels of tuition dependency than presidents at private four-year institutions. However, 33 percent of presidents at public four-year institutions and 16 percent of presidents at public two-year institutions reported their institution as highly tuition dependent (“61 percent or above”).

Figure 14. Institution’s Level of Dependency on Tuition Revenue for Annual Operating Expenses

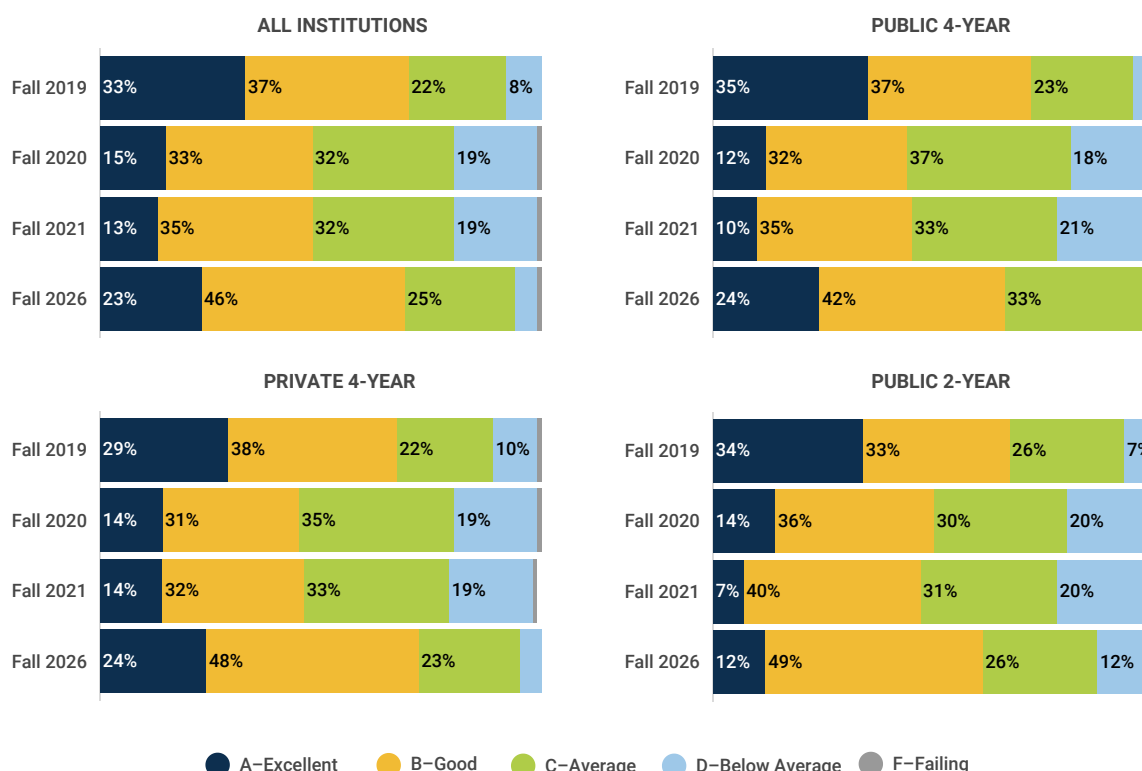


Overall Financial Health and Stability

In order to better understand presidents’ perspectives on their institution’s current financial health and projections for their institution’s financial health in the future, presidents were asked to grade their own institution’s overall financial health at four points in time—fall 2019 (prior to the pandemic), fall 2020 (during the pandemic), fall 2021, and fall 2026. Presidents were allowed to use their own interpretation of overall financial health and stability, but were provided with following simplified grading scale: “Excellent,” “Good,” “Average,” “Below Average,” and “Failing.” It is important to note that financial health and stability is a complex and multidimensional construct. However, responses to this question do suggest that the overall financial health and stability for many institutions is in jeopardy because of the pandemic (see Figure 15).

- Seven in 10 presidents graded their institution’s overall financial health in fall 2019 (prior to the pandemic) as being either “Excellent” or “Good.” However, only 48 percent of presidents graded their institution’s financial health in fall 2020 as either “Excellent” or “Good.” When asked to predict their institution’s overall health in the future, 48 percent expect their institution’s overall financial health to be “Excellent” or “Good” by fall 2021, and 69 percent predicted “Excellent” or “Good” institutional financial health for fall 2026.
- Only 8 percent of presidents graded their institution’s overall financial health in fall 2019 as “Below Average” or “Failing.” However, 20 percent of presidents reported “Below Average” or “Failing” overall financial health in fall 2020. Twenty percent of presidents predicted similar institutional health in fall 2021, while only 6 percent predicted “Below Average” or “Failing” financial health by fall 2026.
- Among presidents at public four-year institutions, 72 percent graded their institution’s financial health in fall 2019 as either “Excellent” or “Good.” However, only 45 percent expect their institution’s overall financial health to be “Excellent” or “Good” by fall 2021—a drop of 27 percentage points. Presidents at public four-year institutions did indicate that they expect a rebound in their institutional health, with 66 percent predicting “Excellent” or “Good” institutional financial health by fall 2026.
- Among presidents at public two-year institutions, 67 percent graded their institution’s financial health in fall 2019 as either “Excellent” or “Good.” However, 47 percent expect their institution’s overall financial health to be “Excellent” or “Good” by fall 2021—a drop of 20 percentage points. Presidents at public two-year institutions expect a rebound in their institutional health, with 61 percent reporting expecting “Excellent” or “Good” overall financial health by fall 2026.
- Among presidents at private four-year institutions, 67 percent graded their institution’s financial health in fall 2019 as either “Excellent” or “Good.” However, 46 percent expect their institution’s overall financial health to be “Excellent” or “Good” by fall 2021—a drop of 21 percentage points. The majority of presidents at private four-year institutions (72 percent) expect “Excellent” or “Good” overall financial health by fall 2026.

Figure 15. Presidents' Self-Grading of Their Institution's Overall Financial Health in Fall 2019, Fall 2020, Fall 2021, and Fall 2026

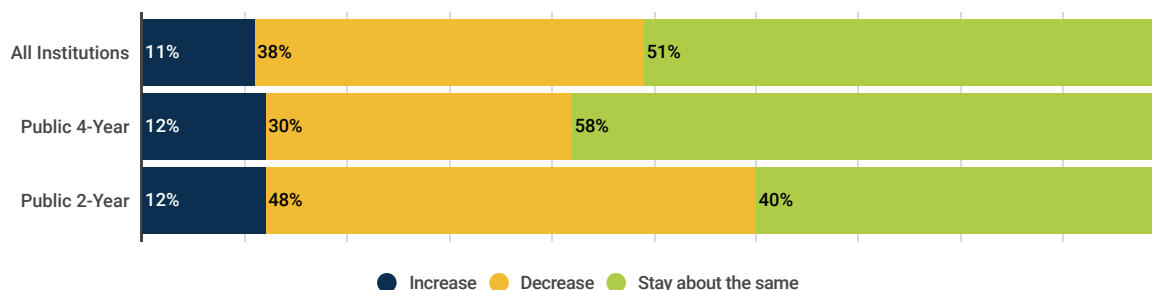


Predictions on State Appropriations

Overall, 54 percent of presidents indicated that their institution typically receives state appropriations. Of those, presidents were asked to indicate whether they anticipate state appropriations for fiscal year 2022 to increase, decrease, or stay the same relative to fiscal year 2021 (see Figure 16).

- Overall, 11 percent of presidents at institutions that typically receive state appropriations anticipated an increase, 38 percent anticipated a decrease, and 51 percent anticipated that their state appropriations would stay about the same.
- Among presidents at public four-year institutions, 12 percent anticipated an increase, 30 percent anticipated a decrease, and 58 percent of presidents anticipated that they would stay about the same.
- Among presidents at public two-year institutions, 12 percent anticipated an increase, 48 percent anticipated a decrease, and 40 percent anticipated that they would stay about the same.

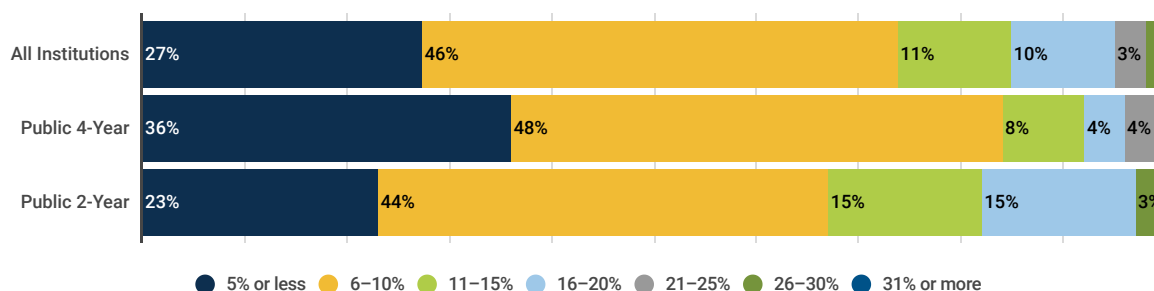
Figure 16. Anticipated Changes in State Appropriations Between Fiscal Years 2021 and 2022



Among presidents who reported anticipating a decrease in their state appropriations between fiscal years 2021 and 2022, 27 percent anticipated a decrease of “5 percent or less,” 46 percent anticipated a decrease of “6 to 10 percent,” 11 percent anticipated a decrease of “11 to 15 percent,” 10 percent anticipated a decrease of “16 to 20 percent,” and 5 percent anticipated a decrease of “21 percent or more” (see Figure 17).

- Among presidents at public four-year institutions, 36 percent anticipated a decrease of “5 percent or less,” 48 percent anticipated a decrease of “6 to 10 percent,” 8 percent anticipated a decrease of “11 to 15 percent,” 4 percent anticipated a decrease of “16 to 20 percent,” and 4 percent anticipated a decrease of “21 to 25 percent.”
- Among presidents at public two-year institutions, 23 percent anticipated a decrease of “5 percent or less,” 44 percent anticipated a decrease of “6 to 10 percent,” 15 percent anticipated a decrease of “11 to 15 percent,” 15 percent anticipated a decrease of “16 to 20 percent,” 3 percent anticipated a decrease of “26 to 30 percent.”

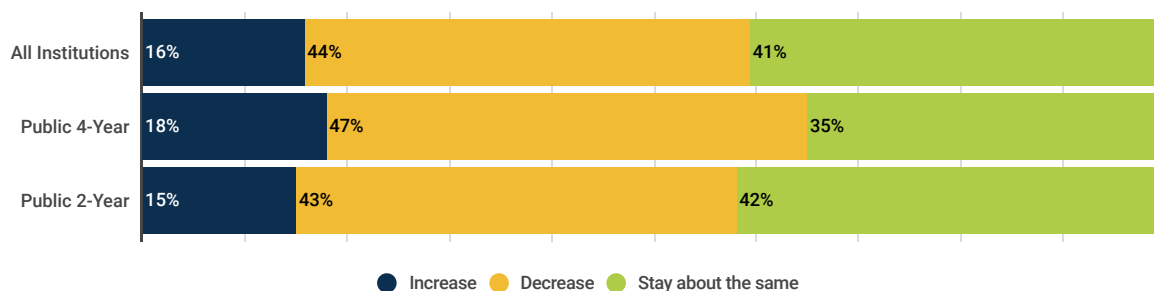
Figure 17. Anticipated Decrease in State Appropriations Between Fiscal Years 2021 and 2022



Presidents whose institutions typically receive state appropriations were asked to indicate whether they expect their institution’s state support to increase, decrease, or stay about the same over the next five years (see Figure 18). Overall, 16 percent of presidents indicated that they anticipate an increase in state support, 44 percent anticipate a decrease, and 41 percent anticipate that their institution’s state support will stay about the same.

- Among presidents at public four-year institutions, 18 percent anticipate an increase, 47 percent anticipate a decrease, and 35 percent of presidents anticipate that their institution’s state support will stay about the same.
- Among presidents at public two-year institutions, 15 percent anticipate an increase, 43 percent anticipate a decrease, and 42 percent anticipate that their institution’s state support will stay about the same.

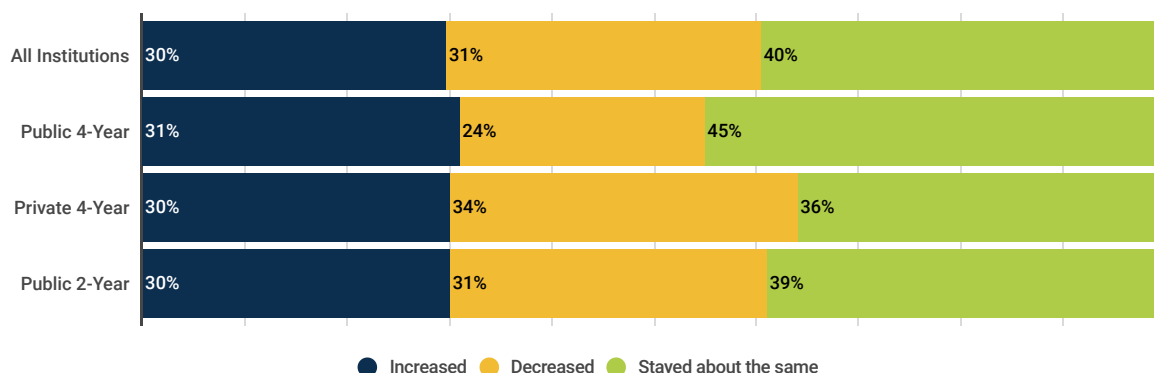
Figure 18. Anticipated Change in State Support in the Next Five Years



Fundraising and Endowments

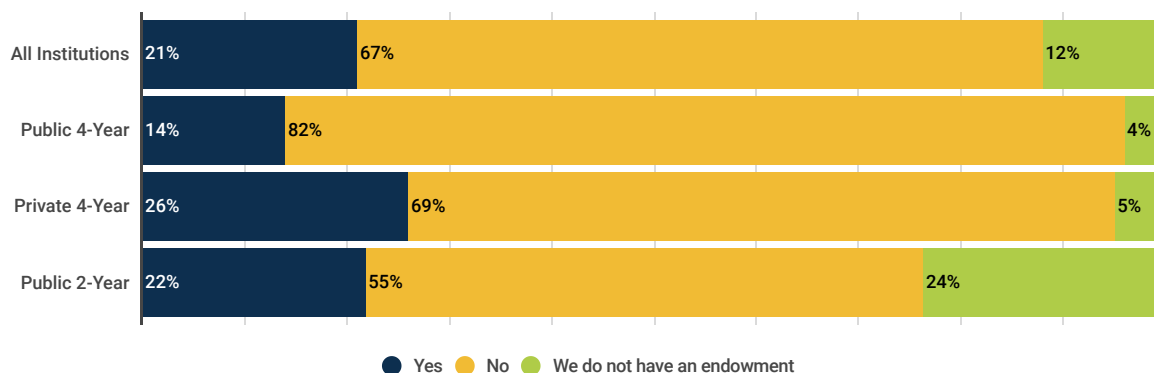
Presidents were asked how their institutional fundraising has changed since the onset of the pandemic (see Figure 19). Three in 10 presidents reported that institutional fundraising had increased, 31 percent reported that it had decreased, and 40 percent reported that institutional fundraising stayed about the same. A similar pattern was seen across institutional sector; however, presidents at public four-year institutions were more likely than presidents in other sectors to note that institutional fundraising had stayed about the same (45 percent).

Figure 19. Changes in Institutional Fundraising Since the Onset of the Pandemic



Presidents were also asked to indicate whether their institution had increased its endowment spend rate since the onset of the pandemic (see Figure 20). About two-thirds (67 percent) of presidents indicated that their institutional endowment spend rate had not increased, 21 percent noted an increase in their endowment spend rate, and 12 percent reported that their institution did not have an endowment. Presidents at private four-year institutions were the most likely to note an increase in their endowment spend rate (26 percent).

Figure 20. Reported Increase in Institutional Endowment Spend Rate Since the Onset of the Pandemic



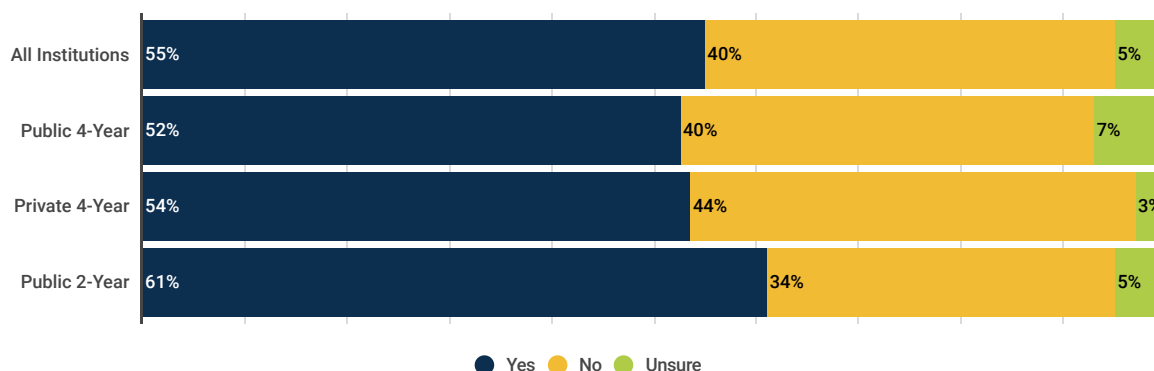
Institutional Partnerships

In light of the pandemic's effects on the overall financial health and stability of colleges and universities, some higher education leaders are exploring partnerships with institutions and organizations to help share and reduce costs. Presidents were asked whether their institution has had discussions with other colleges and universities or organizations about partnerships designed to reduce costs and improve the institution's overall financial health (see Figure 21).

- More than half of all presidents (55 percent) indicated that their institution has had discussions with other institutions and organizations about forming partnerships to reduce costs, 40 percent reported that they had not had such discussions, and 5 percent were unsure.

- Presidents at public two-year institutions (61 percent) were more likely than presidents at public four-year (52 percent) and private four-year (54 percent) institutions to report having had discussions regarding forming partnerships to reduce costs.

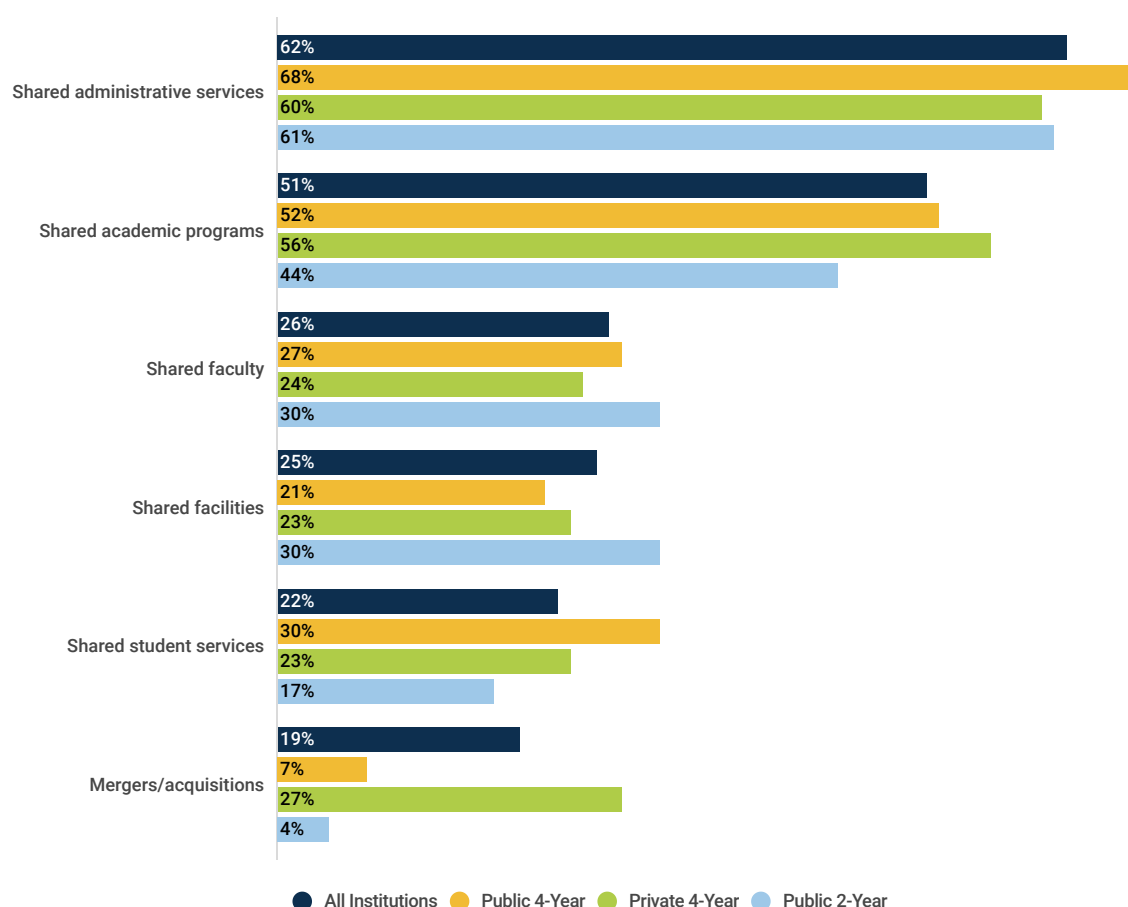
Figure 21. Participation in Discussions Regarding Institutional and Organizational Partnerships



Presidents who indicated that they had discussions with other institutions or organizations about partnerships were asked to select the types of partnerships they were considering (see Figure 22). Over half of all presidents (62 percent) who had discussed partnerships indicated that they were considering “shared administrative services,” followed by “shared academic programs” (51 percent).

- Presidents of public two-year institution who had discussed partnerships were more likely to indicate they were considering “shared facilities” or “shared faculty” (30 percent each) than presidents at four-year institutions.
- Presidents at public four-year institutions who had discussed partnerships were more likely to consider “shared administrative services” (68 percent) and “shared student services” (30 percent), compared with presidents at private four-year institutions and public two-year institutions.
- Presidents at private four-year institutions who had discussed partnerships were much more likely to consider “mergers/acquisitions” (27 percent), compared with presidents at public two-year (4 percent) and public four-year (7 percent) institutions. Presidents at private four-year institutions were also more likely to indicate they had discussed “shared academic programs” (56 percent).

Figure 22. Potential Partnerships Being Considered with Other Institutions and Organizations



Using Funds from the Second Round of Federal Stimulus

In this survey, we asked presidents to share how they were planning or had already started to use funds allocated to their institution through the second round of stimulus signed into law in late December 2020. College and university presidents most commonly shared that they plan to use federal stimulus funding for financial support for students and to begin recouping from budgetary challenges incurred over the past year. These budget issues include tuition and housing revenue losses, staff compensation, student aid increases, and state funding cuts. In addition, presidents of four-year institutions often noted a need to use stimulus funds to make the necessary health and safety improvements for in-person instruction, including improved air filtration systems, more extensive campus cleaning procedures, continued COVID-19 testing, and vaccine distribution. One four-year institution president projected that their stimulus funds would help cover the costs of COVID-19 surveillance testing, stating “We will spend nearly \$2 million on that in AY 2020–21.”

Presidents of public two-year institutions were more likely to report a need to use stimulus funds for improving classroom or instructional technologies. In describing this effort, one president explained that their campus is “taking a longer view on equipment needs and training so [we] will invest stimulus funds to, for example, outfit classrooms with better tech to allow students to be present or remote for a class. We are doing that with one cohort of students [so we can then use] what we’ve learned to scale [to] the rest of the campus.” Finally, a small but notable share of respondents expressed interest in using stimulus funds to maintain or expand mental health supports for students, faculty, and staff.