

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

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In September 2020, ACE surveyed college and university presidents 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 second survey of the fall 2020 term, 268 presidents responded to share their most pressing concerns, how the pandemic has affected their fall enrollment and financial health, plans for the spring 2021 term, efforts to support student, faculty, and staff mental health, and strategies for internationalization. The survey also captures college and university efforts to promote civic engagement and student voting in the last election, as well as presidents' thoughts on the level of priority the incoming Biden administration should place on some key higher education-related policy topics. What follows is a summary of our key findings.

* Of the 268 presidents, 117 lead private four-year institutions (44 percent), 62 lead public four-year institutions (23 percent), 63 lead public two-year institutions (24 percent), 12 lead private graduate-only institutions (4 percent), seven lead for-profit institutions (3 percent), five lead private two-year institutions (2 percent), and two 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.

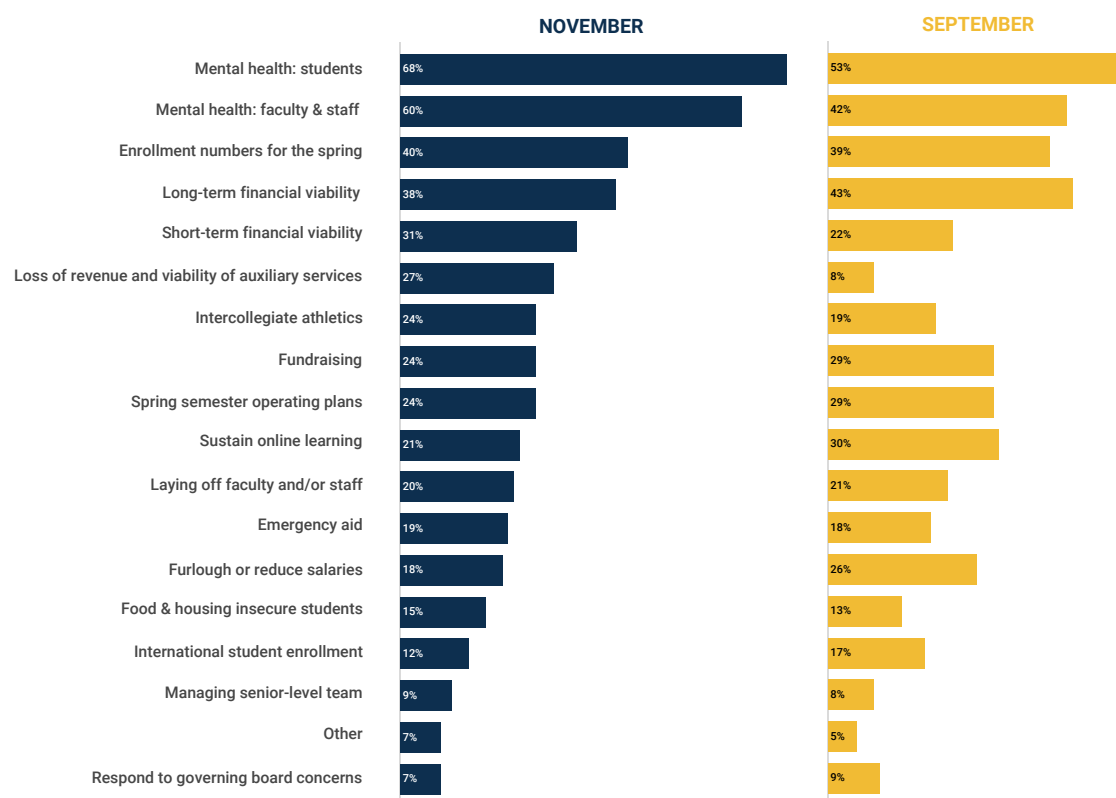
The survey was launched on November 10 and closed on November 17.

MOST PRESSING ISSUES FOR PRESIDENTS

In our September survey, presidents were asked to select up to five issues from a list of 18 that they deemed to be most pressing. In the November survey, presidents were again presented with a list of 18 issues and asked to select up to five they view to be most pressing for them currently (see Figure 1). As was the case in September, the most commonly selected pressing issue was student mental health. Nearly 70 percent of presidents identified student mental health as among their most pressing issues.

- Presidents also indicated “mental health of faculty and staff” (60 percent), “enrollment numbers for the spring” (40 percent), and “long-term financial viability” (38 percent) as top issues.
- The top two most pressing issues for presidents across all sectors were “mental health of students” and “mental health of faculty and staff.”
- Regardless of sector, “enrollment numbers for the spring” was the third most pressing issue among all presidents. However, a higher share of presidents of public two-year institutions (54 percent) than that of presidents of public four-year institutions (35 percent) and presidents of private four-year institutions (35 percent) indicated that enrollment for the spring was a pressing issue.

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

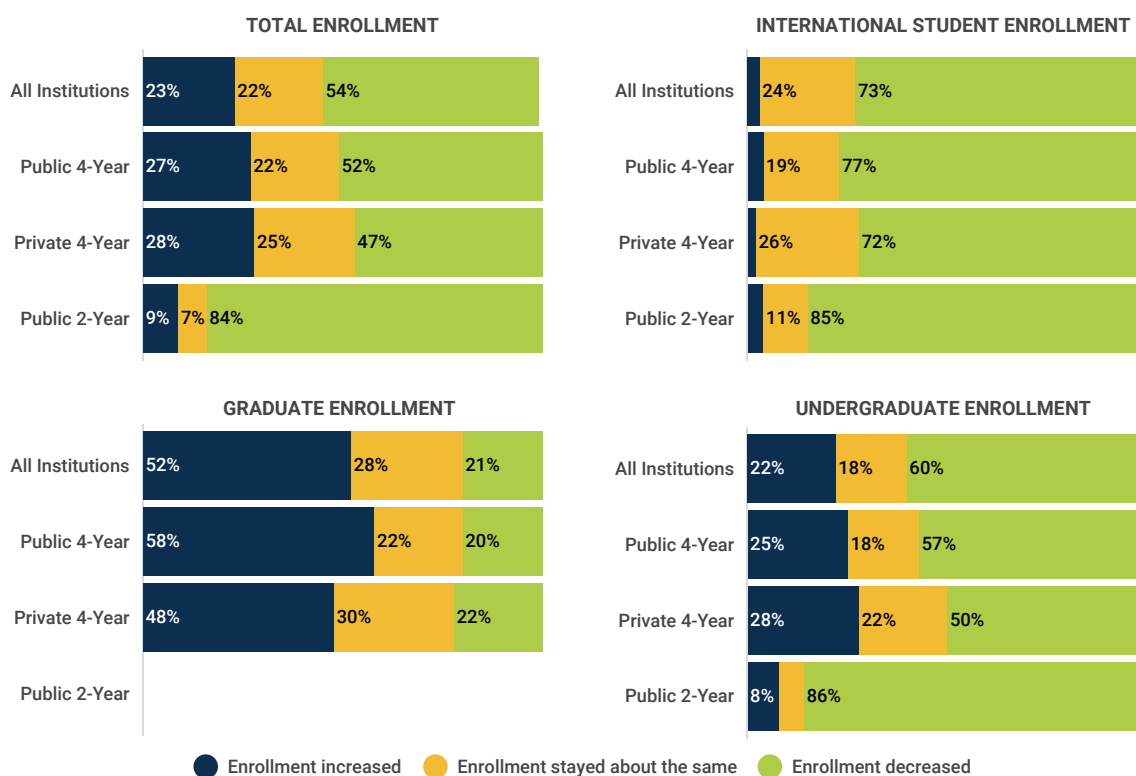


FALL 2020 ENROLLMENT

With the fall 2020 term in full swing, presidents were asked to report on how their fall 2020 enrollment compared with their fall 2019 enrollment in four categories: undergraduate enrollment, graduate enrollment, international student enrollment, and total enrollment. For each category, presidents could report that their enrollment had increased, decreased, or stayed about the same relative to fall 2019. Presidents could also indicate that a particular enrollment category was not applicable to their institution (e.g., undergraduate enrollment at a graduate-only institution).

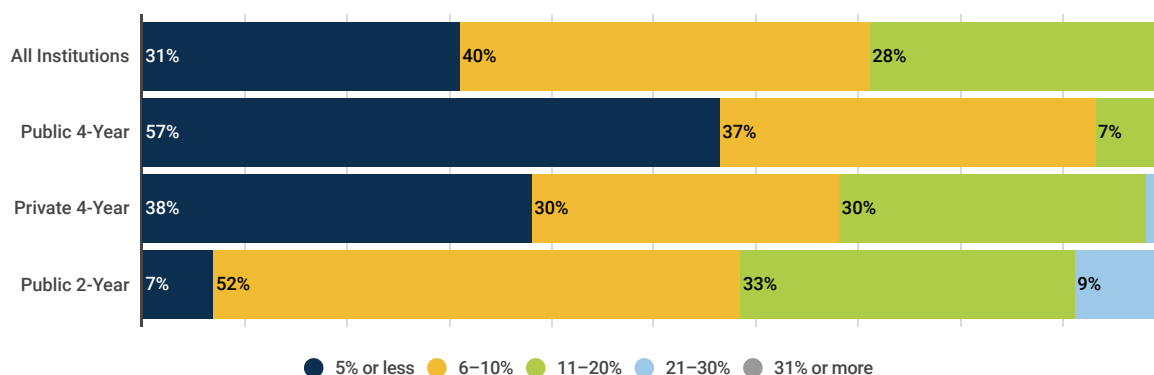
- Over half of presidents (54 percent) reported that their fall 2020 total enrollment had decreased relative to fall 2019 enrollment (see Figure 2). About a quarter (22 percent) of presidents reported that their fall 2020 total enrollment remained about the same as last fall, while 23 percent reported that their fall 2020 total enrollment had increased relative to fall 2019.
- Presidents at public two-year institutions (84 percent) were the most likely to report a total enrollment decrease, followed by presidents at public four-year institutions (52 percent) and presidents at private four-year institutions (47 percent).
- Unlike undergraduate enrollment, presidents were more likely to report an increase in graduate enrollment. Fifty-eight percent of presidents at public four-year institutions and 48 percent of presidents at private four-year institutions reported an increase in graduate enrollment.
- More than 70 percent of presidents across each sector reported a decrease in international student enrollment.

Figure 2: Fall 2020 Enrollment Relative to Fall 2019 Enrollment



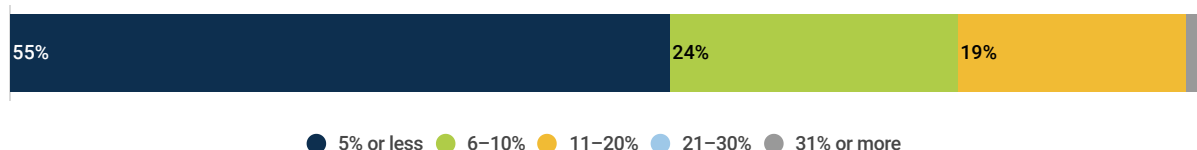
Among the 54 percent of presidents who reported a decline in total fall enrollment, 31 percent saw a decline of “5 percent or less,” 40 percent saw a decline between “6 and 10 percent,” 28 percent saw a decline between “11 and 20 percent,” and 1 percent saw a decline between “21 and 30 percent” (see Figure 3).

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



Because few presidents reported an increase in total fall enrollment, results regarding the size of the increase are not presented by sector. Of the 23 percent of presidents who reported a fall enrollment increase, 55 percent saw an increase of “5 percent or less,” 24 percent saw an increase between “6 percent and 10 percent,” 19 percent saw an increase between “11 percent and 20 percent,” and 2 percent saw an increase of “31 percent or more” (see Figure 4).

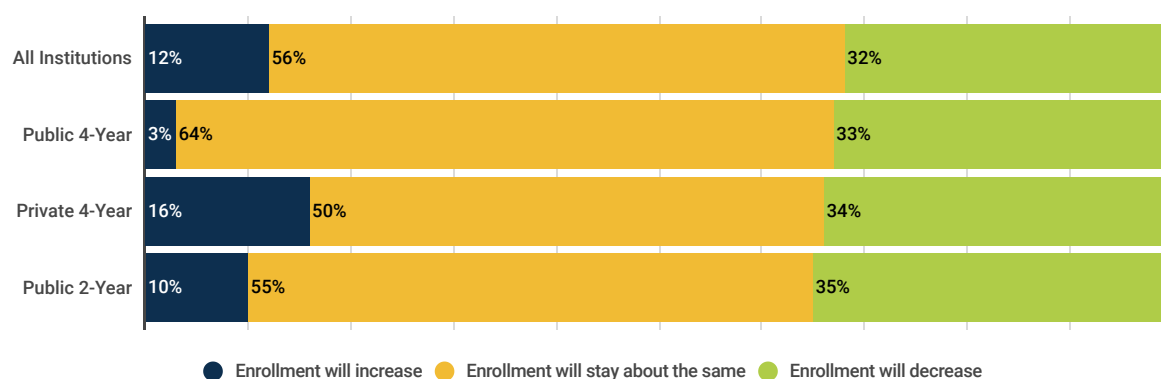
Figure 4: Fall 2020 Enrollment Increase Relative to Fall 2019 Enrollment



Presidents were also asked to estimate how their institution’s total enrollment numbers for spring 2021 will differ from the fall. Overall, more than half of presidents (56 percent) reported that they expect their spring 2021 enrollment to be similar to their fall 2020 enrollment. However, close to one-third (32 percent) of presidents reported expecting an enrollment decline from the fall 2020 term to the spring 2021 term (see Figure 5).

- Presidents at private four-year institutions (16 percent) were the most likely to report expecting an increase in total enrollment between fall 2020 and spring 2021.
- Across each sector, the share of presidents expecting a decline in enrollment between fall 2020 and spring 2021 was the same, at approximately 32 percent.

Figure 5: Spring 2021 Enrollment Relative to Fall 2020 Enrollment



To further understand institutional responses to changes in enrollment, presidents who reported decreases in total enrollment were asked an open-ended question about the strategies their institutions have implemented to encourage student retention and new student enrollment in the spring term. Presidents shared strategies such as increasing monitoring of student progress data, increasing financial assistance, and enhanced outreach and multi-layer communication strategies involving social media to increase enrollment. For example, one president noted launching targeted marketing via social media, individual outreach to prospective students, and targeted follow-up with currently enrolled students and those who stopped out to encourage their return. Other presidents referenced their institutions' expanded efforts to support student success by enhancing in-person and virtual services, such as student coaching, tutoring, and academic advising. Regarding financial support, one president noted awarding COVID-19 relief grants equal to 25 percent of tuition to all students to help support retention.

SPRING 2021 OPERATING PLANS

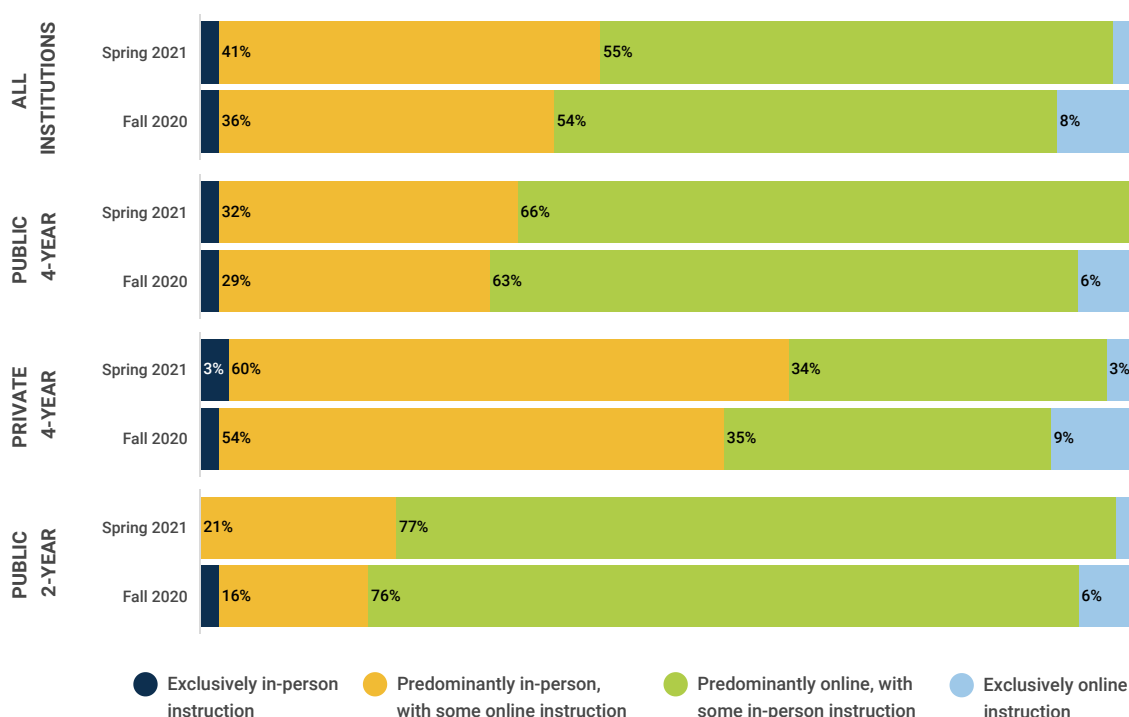
With the end of the fall term fast approaching, campus leaders are working to finalize their institutions' operating plans for the spring 2021 term. In this survey, presidents were asked three questions related to their spring 2021 plans. First, presidents were asked to indicate the mode of instruction their institution is planning to offer in the spring term. Next, presidents were asked about any changes or adjustments being made to their spring academic calendar. Finally, an open-ended question allowed presidents to share any lessons learned this fall that they felt have been particularly helpful in aiding their spring 2021 planning efforts.

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 anticipate offering 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 6).

- More than half of the presidents (55 percent) indicated that their institution plans to offer "predominantly online, with some in-person instruction" in the spring. This percentage is similar to the share of presidents who reported that their institution offered this mode of instruction in fall 2020 (54 percent).
- Across sectors, the type of instruction planned for the spring 2021 term closely mirrors the type of instruction offered at the beginning of the fall 2020 term. The largest difference is among institutions who plan to offer "exclusively online instruction." While 8 percent of the presidents indicated offering "exclusively online instruction" in fall 2020, only 2 percent of the presidents reported plans to offer "exclusively online instruction" in the spring.

Figure 6. Primary Mode of Instruction for Fall 2020 and Anticipated Mode of Instruction for Spring 2021



Lessons from the Fall Term to Guide the Spring Term

Knowing that the fall experience will affect how institutions prepare for the spring, presidents were given the opportunity to share lessons learned from their institutions' experiences in fall 2020. Regardless of the mode of instruction offered at institutions this fall, some key themes emerged.

Many presidents emphasized the importance of being flexible and prepared for change as a top lesson from this fall. For presidents at institutions that offered some amount of in-person instruction, this meant being prepared to move instruction online if case positivity rates began to increase. One president noted, "If necessary, we are prepared to shift to exclusively online instruction on short notice. All instructors have been asked to prepare their courses for online and for in-person." Other presidents discussed maintaining flexibility in pacing the semester, shortening the number of weeks of the fall term, and understanding differences in preferences among students and staff. To this last point, one president shared, "Flexibility is key. Some students and employees need completely virtual experiences while others demand/require in-person experiences, but what really complicates matters is that those who want/intend to participate in person may need to shift to virtual participation for portions of the semester due to quarantine requirements, mostly due to off-campus exposures."

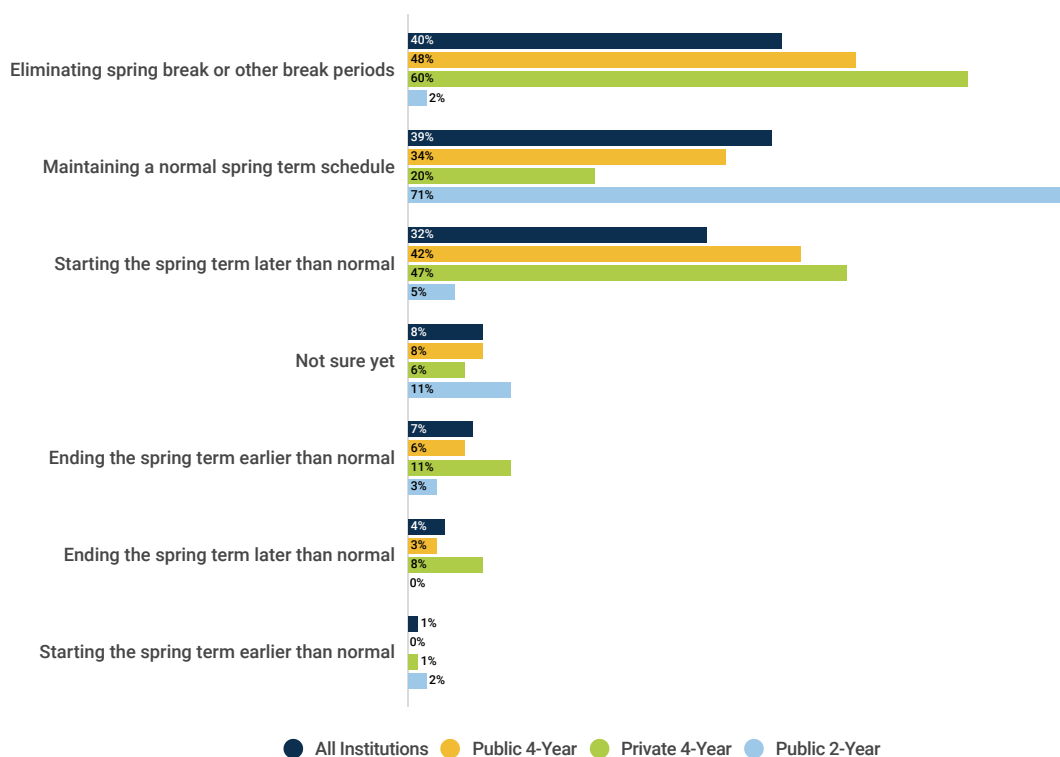
Beyond flexibility, many presidents shared that their faculty and staff have gained valuable experience and knowledge related to implementing COVID-19 safety protocols. One president wrote that their campus community has developed, "better knowledge of how to open limited residence hall occupancy, ability to more effectively test and contact trace enabling in person instruction." Presidents at institutions that held classes predominantly online or in blended formats discussed the importance of implementing a variety of classroom strategies and technologies to enable both online and in-person instruction and to combat online education fatigue. Presidents emphasized the importance of increased communications and interactive instructional activities, the use of pre-recorded lectures and breakout rooms to stimulate discussion, and flexibility regarding when and how many students meet in person. To this point, many presidents mentioned professional development opportunities for faculty to support effective online teaching.

Spring 2021 Academic Calendar

Presidents were also asked to report any changes being made to their spring 2021 academic calendar due to the COVID-19 pandemic. Presidents were presented with a list of eight potential adjustments and were asked to indicate all that apply to their institution. If their spring 2021 academic calendar will look like past spring terms, then presidents were instructed to select the option “maintaining a normal spring term schedule” (see Figure 7).

- Forty percent of all presidents indicated that their institution plans to “eliminate spring break or other break periods.” This was followed by 39 percent of presidents, who indicated that their plan is to “maintain a normal spring term schedule,” and 32 percent who indicated that they plan to “start the spring term later than normal.”
- The majority of presidents at public two-year institutions (71 percent) indicated that their institution plans to “maintain a normal spring term schedule.” Only 34 percent of presidents at public four-year institutions and 20 percent of presidents at private four-year institutions reported plans to “maintain a normal spring term schedule.”

Figure 7. Modifications to the Spring 2021 Academic Calendar



THE FINANCIAL IMPACT OF COVID-19

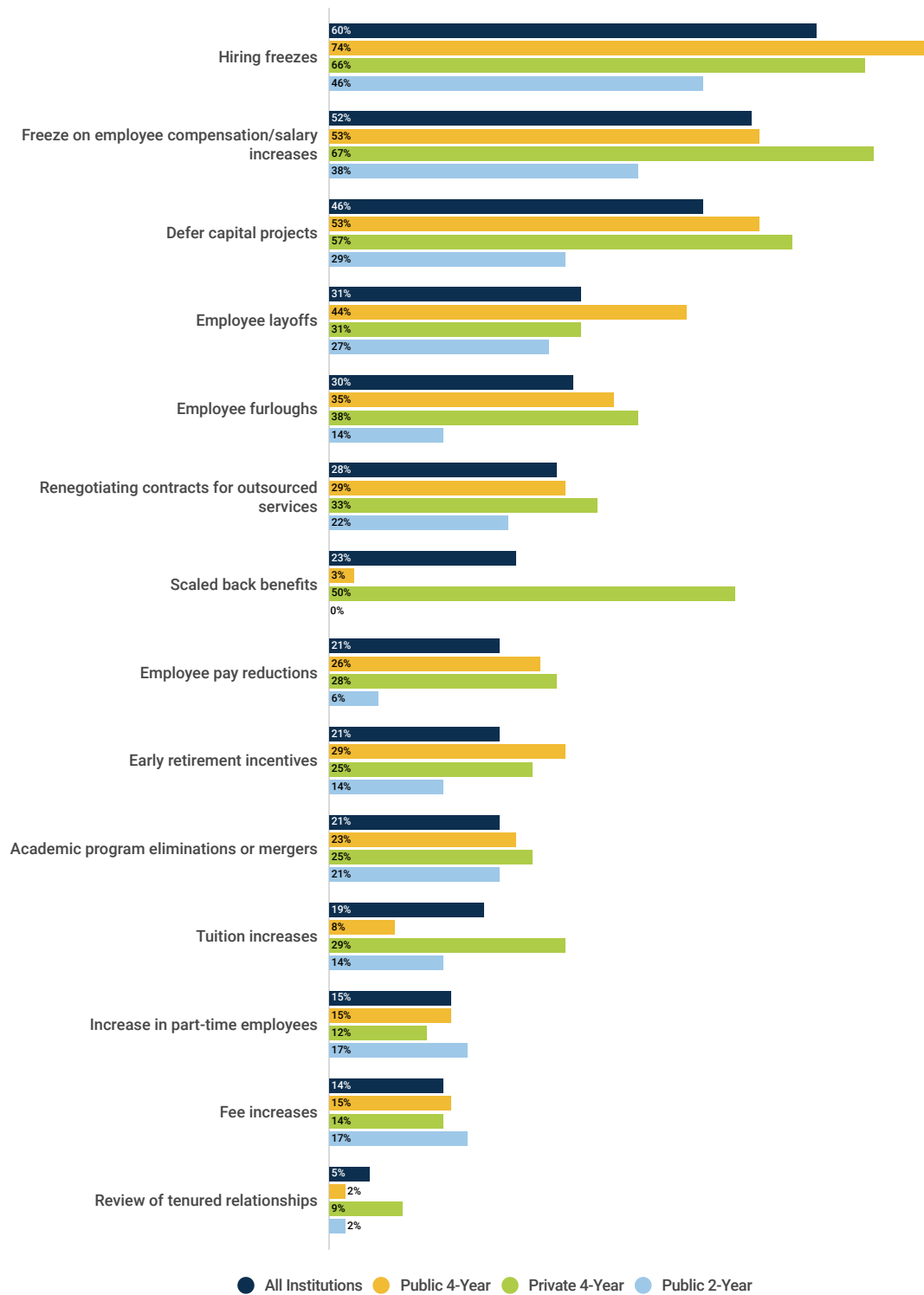
The COVID-19 pandemic has undoubtedly created financial challenges for many colleges and universities. In the September survey, presidents reported on how revenues and expenses were being affected by the pandemic. In this survey we asked presidents to indicate what financial actions their institution had already implemented and which actions they may implement within the next year due to the pandemic. Presidents were also asked their perspectives on the overall financial health and stability of their institution.

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 14 actions and asked if the actions had already been implemented at their institution (see Figure 8).

- The majority of presidents reported that their institution had already implemented “hiring freezes” (60 percent) and freezes on employee compensation and salary increases (52 percent). However, presidents at public two-year institutions were less likely than their four-year institution counterparts to report having implemented either of these two actions.
- Presidents at private four-year institutions were much more likely to report “scaling back benefits” (50 percent). Only 3 percent of presidents at public four-year institutions and no presidents at public two-year institutions reported taking this action.
- Presidents at public four-year institutions (44 percent) were more likely to report having instituted employee layoffs than presidents at private four-year institutions (31 percent) and presidents at public two-year institutions (27 percent).

Figure 8. Financial Actions Already Taken in Light of Financial Challenges Caused by the COVID-19 Pandemic



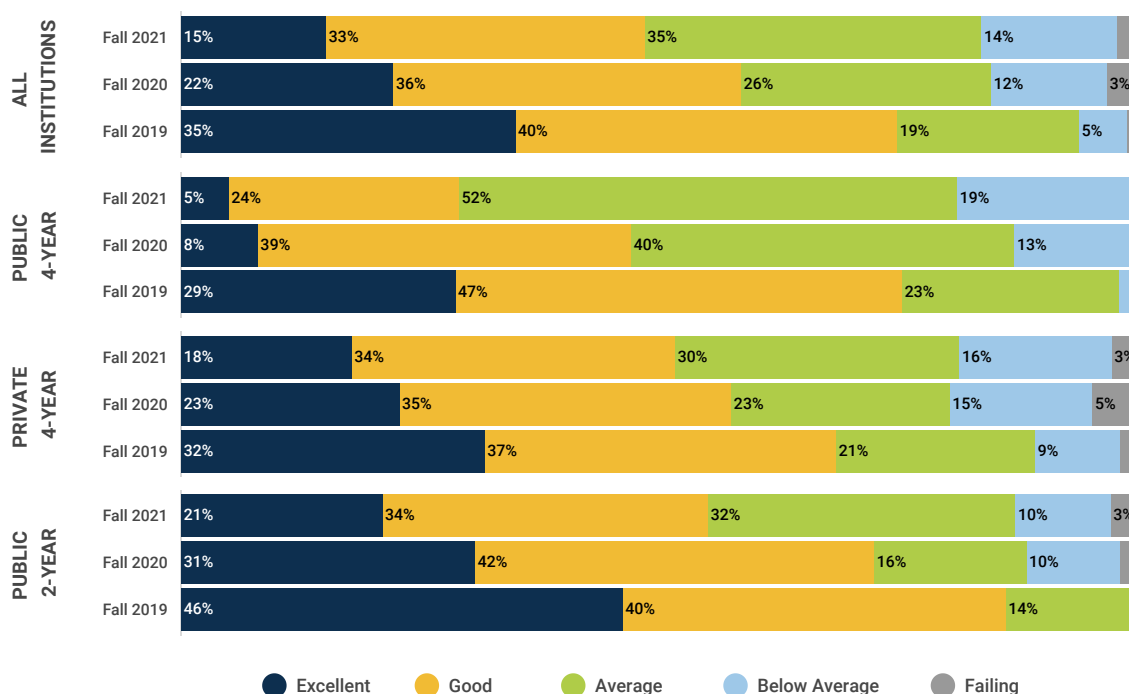
Pulse Point Survey of College and University Presidents on COVID-19: November 2020, American Council on Education, 2020.

Overall Financial Health and Stability

In order to better understand the overall financial health and stability in light of the COVID-19 pandemic, presidents were asked to grade their own institution's overall financial health at three points in time—fall 2019, fall 2020, and fall 2021. 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 9).

- Three-quarters (75 percent) of presidents graded their institution's overall financial health in fall 2019 as being either “Excellent” or “Good.” However, only 58 percent of presidents graded their institution's financial health in fall 2020 as either “Excellent” or “Good,” and only 48 percent expect their institution's overall financial health to be “Excellent” or “Good” by fall 2021.
- Only 6 percent of presidents graded their institution's overall financial health in fall 2019 as “Below Average” or “Failing.” However, 16 percent of presidents expect their institution's overall financial health to be “Below Average” or “Failing” by fall 2021.
- Among presidents at public four-year institutions, 76 percent graded their institution's financial health in fall 2019 as either “Excellent” or “Good.” However, only 29 percent expect their institution's overall financial health to be “Excellent” or “Good” by fall 2021—a drop of 47 percentage points.
- Among presidents at public two-year institutions, 86 percent graded their institution's financial health in fall 2019 as either “Excellent” or “Good.” However, 55 percent expect their institution's overall financial health to be “Excellent” or “Good” by fall 2021—a drop of 31 percentage points.
- Among presidents at private four-year institutions, 69 percent graded their institution's financial health in fall 2019 as either “Excellent” or “Good.” However, 52 percent expect their institution's overall financial health to be “Excellent” or “Good” by fall 2021—a drop of 17 percentage points.

Figure 9. Presidents' Self-Grading of Their Institution's Overall Financial Health in Fall 2019, Fall 2020, and Fall 2021

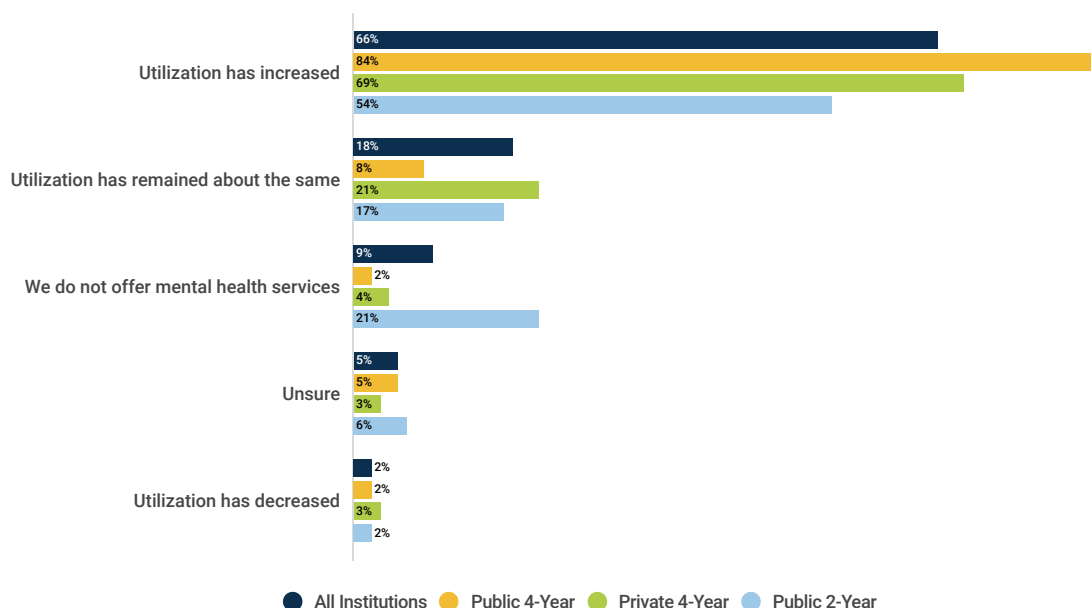


MENTAL HEALTH

Student mental health remains a top of mind concern for college and university presidents, with good reason. Over 66 percent of all presidents are reporting an increase in the utilization of mental health services at their institution due to COVID-19 (see Figure 10).

- Presidents at public four-year institutions (84 percent) were most likely to report a rise in the utilization of mental health services, followed by presidents at private four-year (69 percent) and public two-year institutions (54 percent).
- Approximately one in four presidents at public two-year institutions (21 percent) reported that their campus does not offer mental health services.

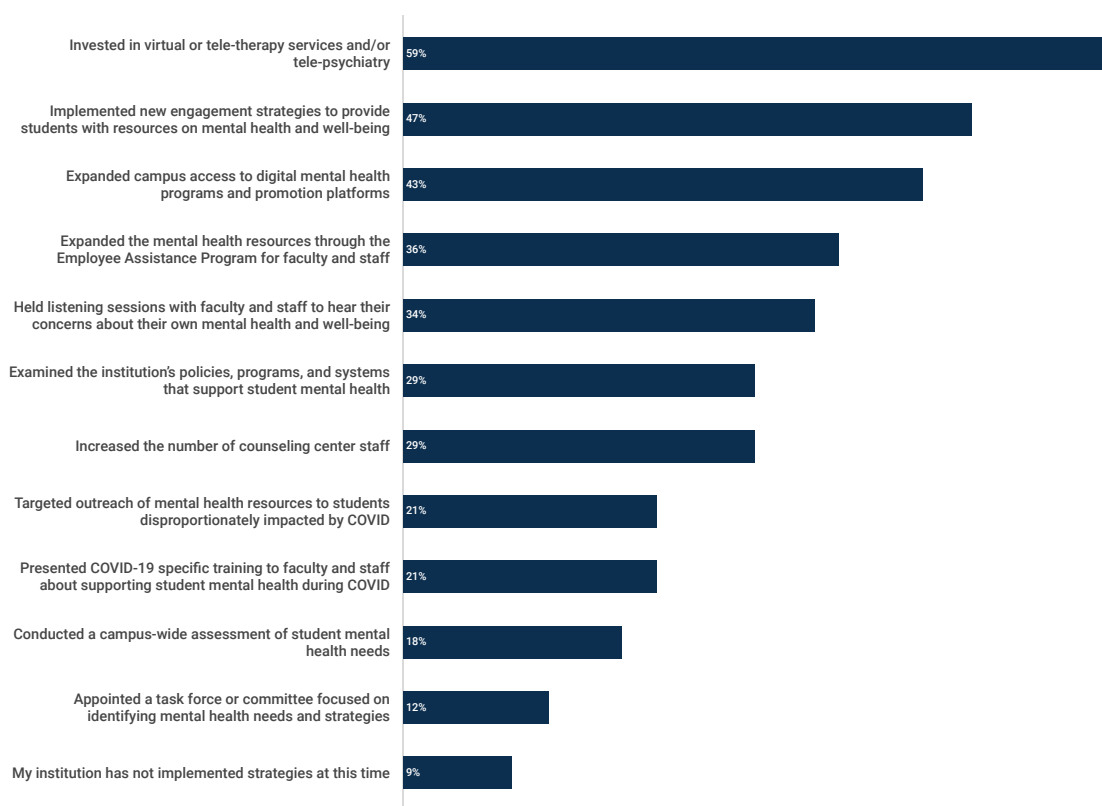
Figure 10. COVID-19 Pandemic's Effect on the Utilization of Mental Health Services



In order to address growing concerns over mental health, college and university leaders are implementing different strategies to support the mental health and well-being of their campus community. Presidents were asked to select from a list of 12 strategies those that their institution has implemented as a result of the COVID-19 pandemic (see Figure 11).

- Over half of presidents (59 percent) reported that their institution has “invested in virtual or tele-therapy services and/or tele-psychiatry,” the most commonly implemented strategy.
- Slightly less than half of presidents reported that their institution has “implemented new student engagement strategies to provide students with resources on mental health and well-being” (47 percent) and “expanded campus access to digital mental health programs and promotion platforms” (43 percent).
- Over one-third of presidents reported their institution had “expanded mental health resources through the Employee Assistance Program (EAP) for faculty and staff and/or encouraged utilization of this program” (36 percent), and that they had “held listening sessions with faculty and staff to hear their concerns about their own mental health and well-being” (34 percent).

Figure 11. Strategies Implemented to Support Mental Health, as a Result of the COVID-19 Pandemic



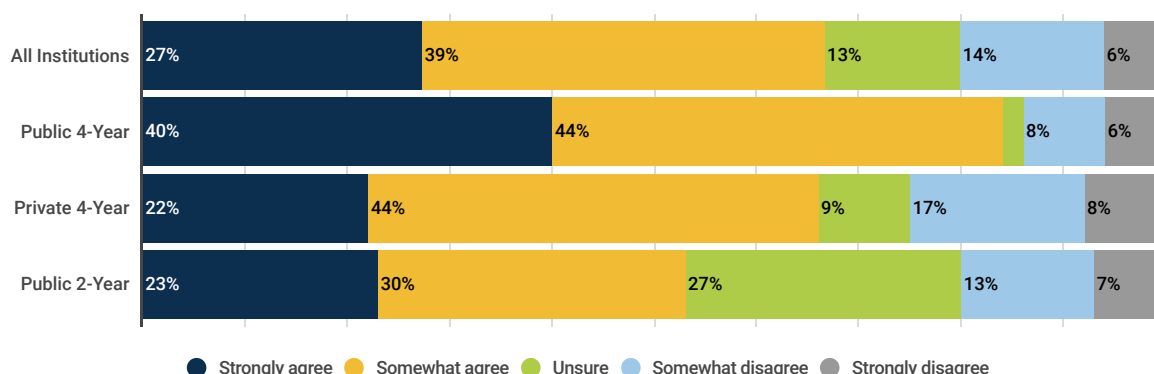
INTERNATIONALIZATION AND GLOBAL ENGAGEMENT

ACE has long been committed to supporting colleges and universities in defining and meeting their internationalization and global engagement goals. With that in mind, two questions were included in this survey in order to better understand how the COVID-19 pandemic is affecting institutions' internationalization strategies and priorities.

Using a five-point scale, presidents were asked to indicate their level of agreement with the statement, "The COVID-19 pandemic will affect my institution's long-term strategy (past the 2020–21 academic year) related to internationalization."

- Sixty-six percent of presidents said they "strongly agree" or "somewhat agree" with the statement.
- Presidents at public four-year institutions were the most likely to "strongly agree" or "somewhat agree" with this statement (84 percent), while 66 percent of presidents at private four-year institutions and 53 percent of presidents at public two-year institutions said the same.

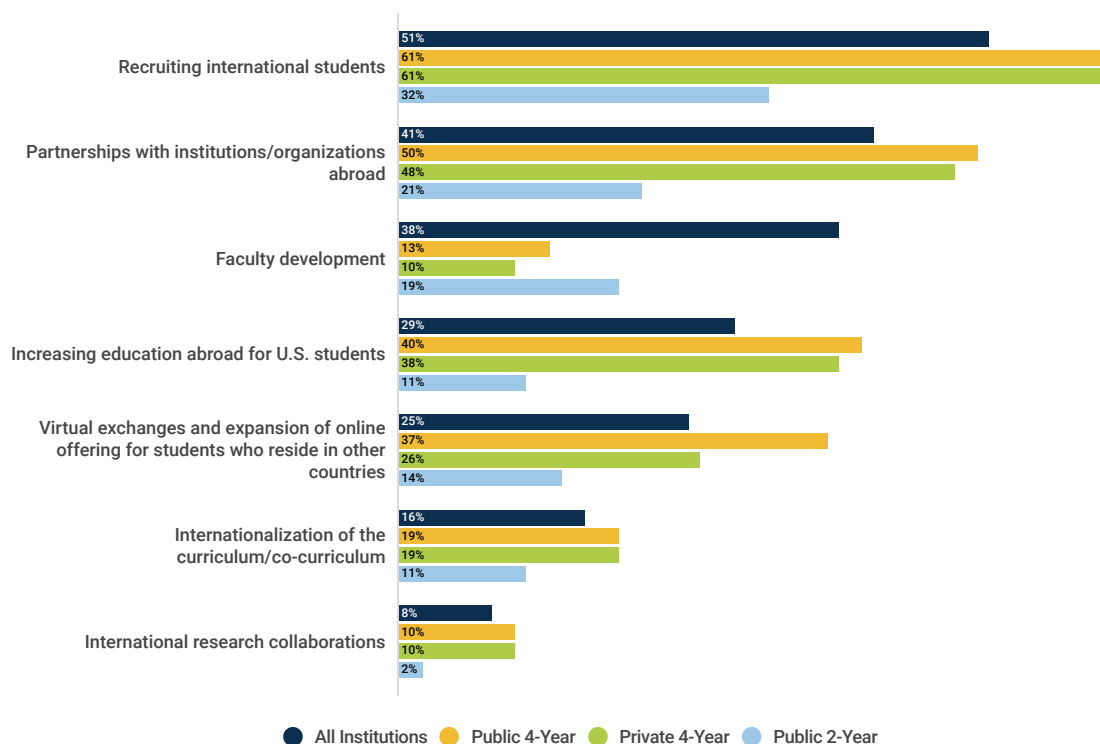
Figure 12. Level of Agreement with the Statement: “The COVID-19 pandemic will affect my institution’s long-term strategy (past the 2020–21 academic year) related to internationalization.”



Presidents were also presented with a list of nine internationalization actions and asked to select up to three they believe will be priorities for their institution’s internationalization strategy beyond the 2020–21 academic year (see Figure 13).

- More than half of presidents (51 percent) indicated that “recruiting international students” will be their institution’s top internationalization priority. This was followed by “partnerships with institutions/organizations abroad” (41 percent) and “faculty development” (38 percent).
- Presidents at public two-year institutions (19 percent) were the most likely to select “faculty development” as a top internationalization priority compared with presidents of both public four-year (13 percent) and private four-year institutions (10 percent).
- “International research collaborations” (8 percent) and “internationalization of the curriculum/co-curriculum” (16 percent) were ranked at the bottom of the list of priorities.

Figure 13. Long-Term Internationalization Priorities Beyond 2020–21 Academic Year

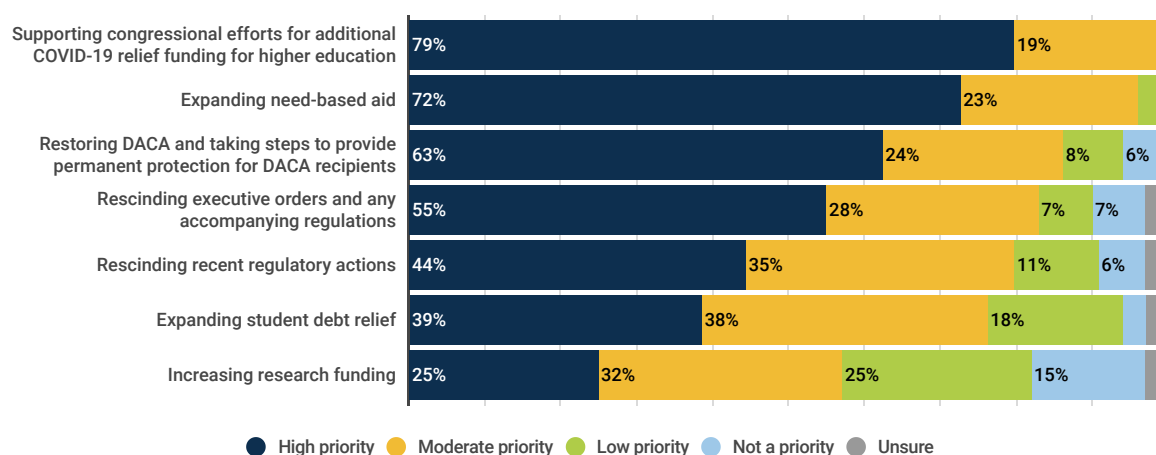


THE 2020 PRESIDENTIAL ELECTION

On November 7, 2020, Joe Biden became president-elect of the United States. Given this important moment, presidents were asked to review seven higher education policy topics and using a four-point scale, indicate the level of priority the Biden administration should place on each topic (see Figure 14).

- Almost 80 percent of presidents thought “supporting congressional efforts for additional, substantive COVID-19 relief funding for higher education” should be a high priority for the Biden administration.
- Seventy-two percent of presidents thought “expanding need-based aid (e.g., double the maximum Pell Grant)” should be a high priority for the Biden administration.
- Only 25 percent of presidents thought “increasing research funding” and only 39 percent thought “expanding student debt relief” should be high priorities for the Biden administration.

Figure 14. Presidents’ Views on the Level of Priority a Biden Administration Should Place on Select Topics

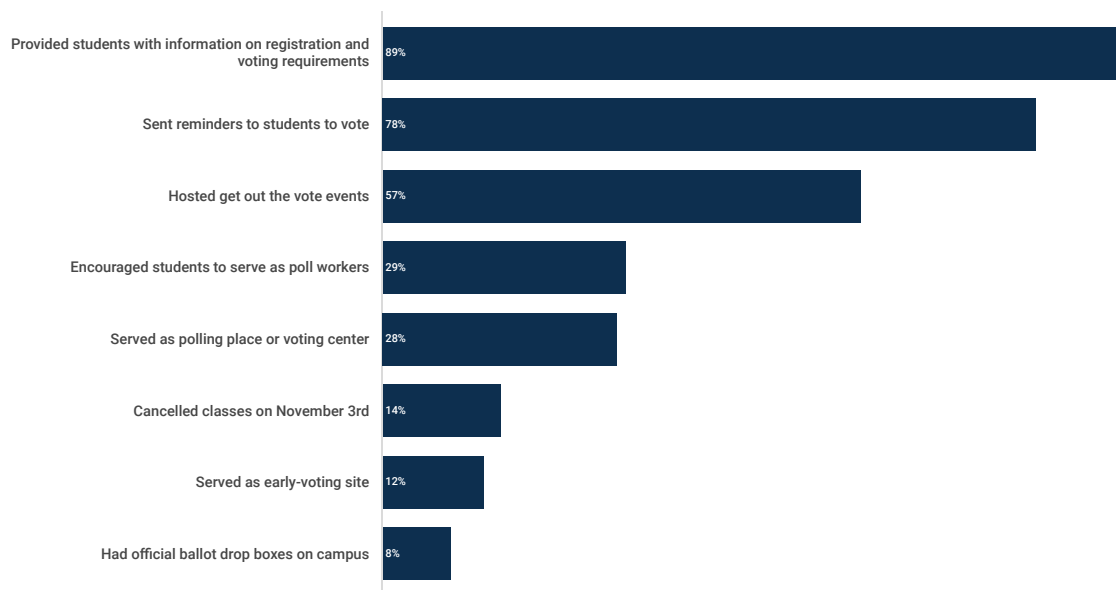


Presidents were also given an opportunity to write in other topics they believe the Biden administration should prioritize. Across all sectors, presidents expressed hope that the Biden administration will do more to support international students and address visa issues. Some presidents expressed hope that the new administration will work to increase funding for workforce education programs, the National Science Foundation, and the Fulbright programs. Additionally, other presidents discussed “beefing up the support for the needs [of students] outside the classroom including food, child/elder care, transportation and mental health.” Other priorities mentioned include a renewed commitment to the value of higher education, support for new ways to pay for college, support for civic engagement and service, strategies to incentivize institutional partnerships, and an increased focus on racial equity in higher education and support for minority serving institutions.

Student Voting and Civic Engagement

Presidents were also asked to share how their institutions helped support student voting and civic engagement during the 2020 election cycle, beyond distributing voter registration forms to students as required by the Higher Education Act (HEA) (see Figure 15). Almost all presidents (89 percent) reported that their institutions had active campaigns to help students understand their state voter registration and voting requirements. More than three-quarters (78 percent) of presidents reported that their institution sent out reminders to students encouraging them to vote. Over half (57 percent) indicated that their institution held in-person and/or virtual get-out-the-vote events.

Figure 15. Institutional Support for Student Voting and Civic Engagement



In an open-ended question, presidents were asked about any challenges they perceived students at their institution encountered in trying to vote. While the majority of presidents who responded to this question reported no issues or challenges, a few presidents expressed concerns around voter manipulation and suppression. Additionally, a few presidents reflected on challenges in voting logistics, such as confusion around mail-in voting or long lines for in-person voting. Others noted challenges around combating voter apathy: “Despite all of our educational efforts, some students still believe their vote does not matter.”