

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

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With the summer term in progress and fall quickly approaching, college and university leaders are increasingly focusing on planning for the start of the 2020–21 academic year. In early June, ACE launched its third Pulse Point survey of college and university presidents on COVID-19. Three hundred presidents* responded on topics including summer and fall enrollment projections, contingency plans for the fall term, communication strategies, and student support. It is important to note that this survey captures what presidents were thinking in early June—given the uncertainties related to the pandemic, presidents’ views will almost certainly continue to evolve. What follows is a summary of our key findings.

*Of the 300 presidents, 128 lead private four-year institutions (43 percent), 77 lead public four-year institutions (26 percent), 66 lead public two-year institutions (22 percent), 15 lead private graduate only institutions (5 percent), nine lead for-profit institutions (3 percent), and the remaining 1 percent lead private two-year and public graduate only institutions.

Additionally, 51 percent of presidents classified their institutions as being “primarily residential,” 21 percent identified their institution as being “primarily nonresidential,” and 29 percent reported that their institution does not offer campus-based housing.

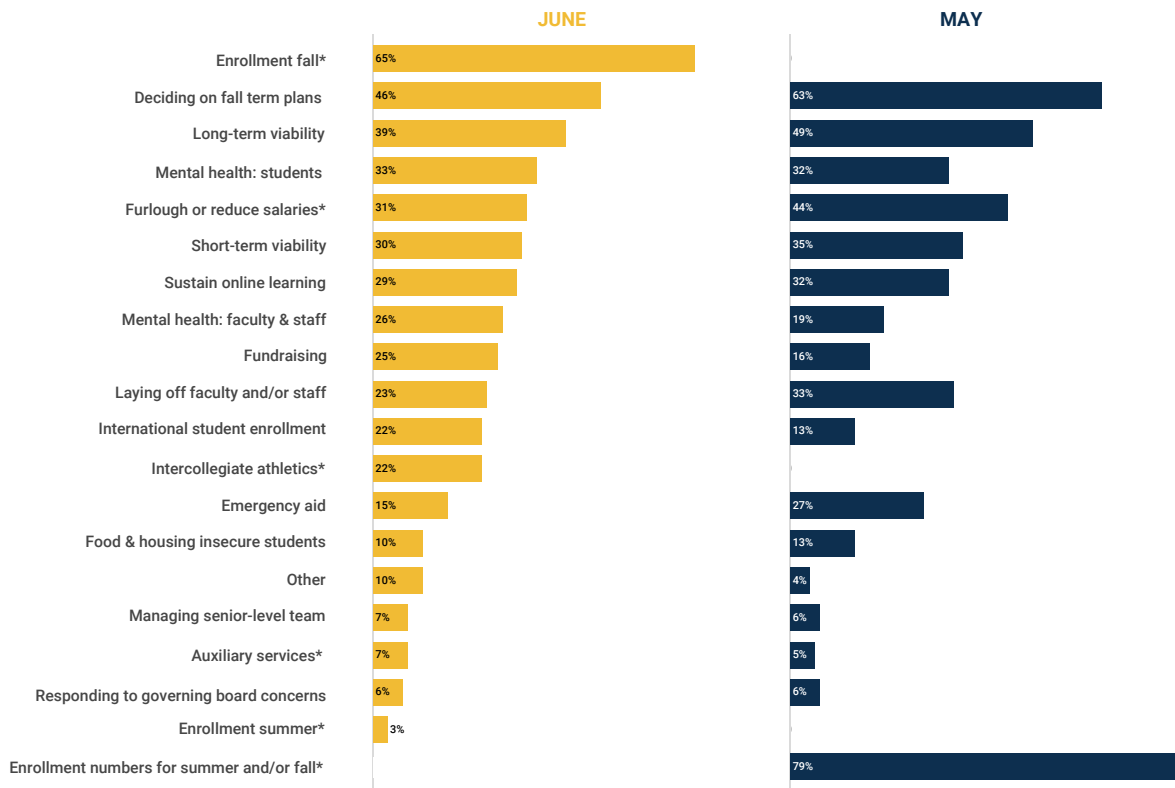
The survey was launched on June 8 and closed on June 15.

MOST PRESSING ISSUES FOR PRESIDENTS

In our *May survey*, presidents were asked to select up to five issues from a list of 15 they deemed to be most pressing. The top three most pressing issues then were “summer or fall enrollment,” “deciding fall term plans,” and “long-term financial viability of the institution.” In the June survey, presidents were asked to choose from the same list, with two additional issues (see Figure 1).

- As in the May survey, “fall enrollment” (65 percent) was the most pressing issue facing presidents.
- The next most pressing issue facing presidents was “deciding on fall term plans” (46 percent), followed by “long-term financial viability of the institution” (39 percent), “mental health of students” (33 percent), and “furloughing or reducing salaries for faculty and/or staff” (31 percent).
- The top two most pressing issues were the same for presidents at public four-year institutions, private four-year institutions, and public two-year institutions.
- Compared with the May survey, fewer presidents in June selected “furloughing or reducing salaries for faculty and/or staff” and “laying off faculty and/or staff.”

Figure 1: Most Pressing Issues Facing Presidents Due to COVID-19 in June, Compared with May



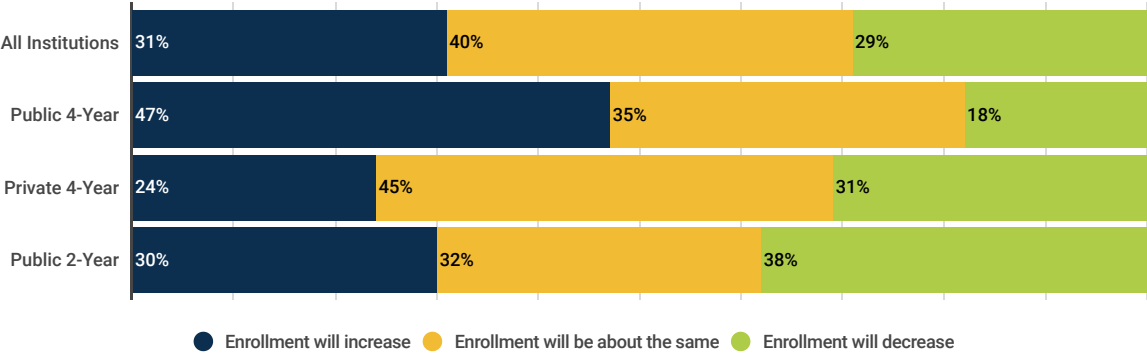
*Denotes items differing from the June survey. Please note that in the May survey, fall and summer enrollment were combined.

SUMMER 2020 ENROLLMENT

With the summer term underway for many institutions, presidents were asked about their expectations for summer enrollment, separate from fall enrollment. The majority of presidents expect their summer 2020 enrollment to be about the same (40 percent) or to increase (31 percent) relative to their 2019 summer enrollment (see Figure 2). This may be due to a number of reasons, including students choosing to get a head start on the fall 2020 term, taking advantage of reduced summer tuition rates, and completing classes they started last spring that were disrupted.

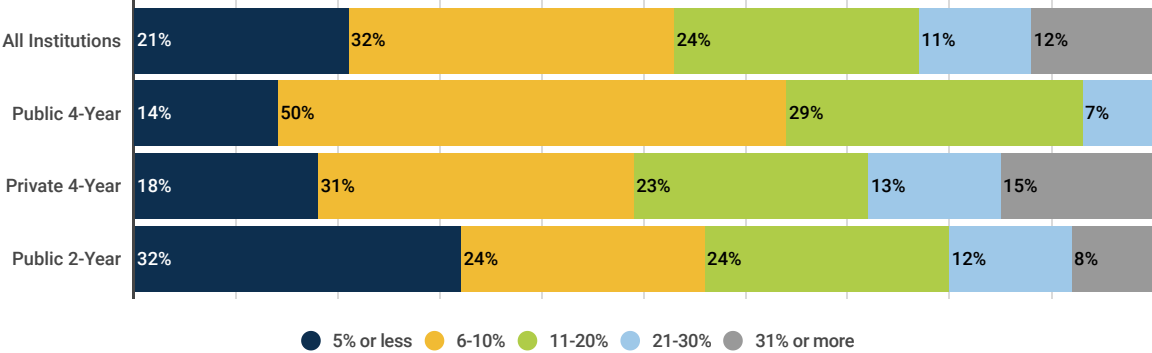
- Presidents at private four-year institutions (45 percent) were the most likely to report expecting their institution’s summer 2020 enrollment to be about the same as summer 2019. Only 35 percent of presidents at public four-year institutions and 32 percent of presidents at public two-year institutions reported expecting their summer enrollment to be about the same.
- Presidents at public two-year institutions (38 percent) were more likely to report expecting their institution’s summer enrollment to decrease than presidents at private four-year institutions (31 percent) and presidents at public four-year institutions (18 percent).

Figure 2: Expectations for Summer 2020 Enrollment Relative to Summer 2019 Enrollment



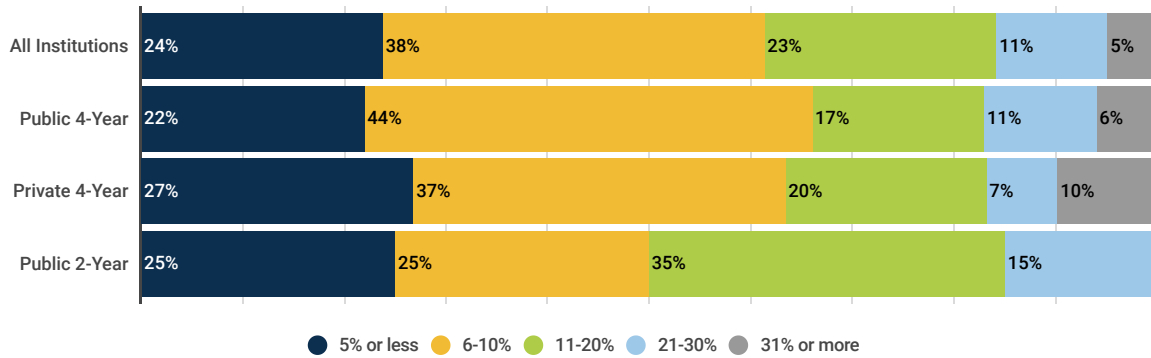
Among the 29 percent of presidents who expect a summer enrollment decrease, 21 percent expect a decline of “5 percent or less,” 32 percent expect a decline between “6 percent and 10 percent,” 24 percent expect a decline between “11 percent and 20 percent,” 11 percent expect a decline between “21 percent and 30 percent,” and 12 percent expect a decline of “31 percent or more” (see Figure 3).

Figure 3: Anticipated Summer 2020 Enrollment Decline



Among the 31 percent of presidents who expect a summer enrollment increase, 24 percent expect an increase of “5 percent or less,” 38 percent expect an increase between “6 percent and 10 percent,” 23 percent expect an increase between “11 percent and 20 percent,” 11 percent expect an increase between “21 percent and 30 percent,” and 5 percent expect an increase of “31 percent or more” (see Figure 4).

Figure 4: Anticipated Summer 2020 Enrollment Increase

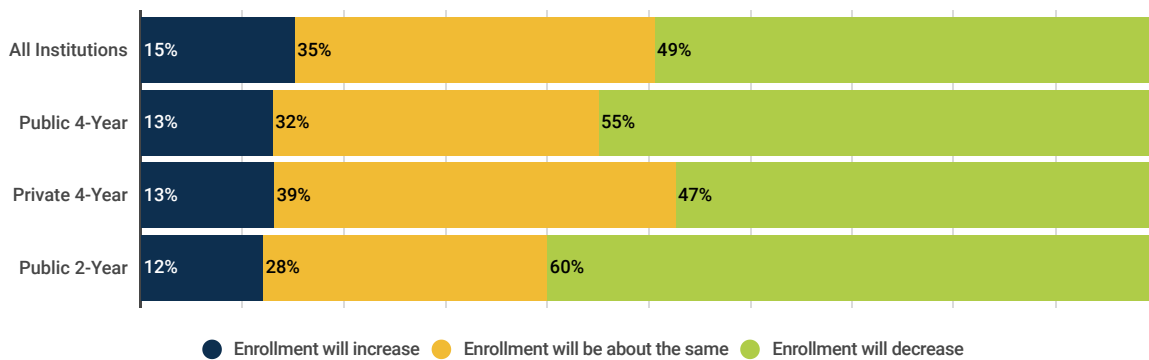


FALL 2020 ENROLLMENT

The potential impact of the global pandemic on fall enrollment has been one of the issues top of mind for the majority of presidents across each of the three Pulse Point surveys on COVID-19. For many institutions, it is still too early to know what fall 2020 enrollment numbers will look like. It will still be a couple of months before we have the definitive answer on fall 2020 enrollment numbers. In the June survey, almost half of presidents (49 percent) expect their fall 2020 enrollment to be lower than their fall 2019 enrollment, while 35 percent expect their fall 2020 enrollment to be about the same as fall 2019 (see Figure 5). Only 15 percent of presidents expect their fall enrollment to increase.

- Presidents at public two-year institutions (60 percent) and public four-year institutions (55 percent) were more likely to report expecting their institution’s fall enrollment to decrease than presidents at private four-year institutions (47 percent).

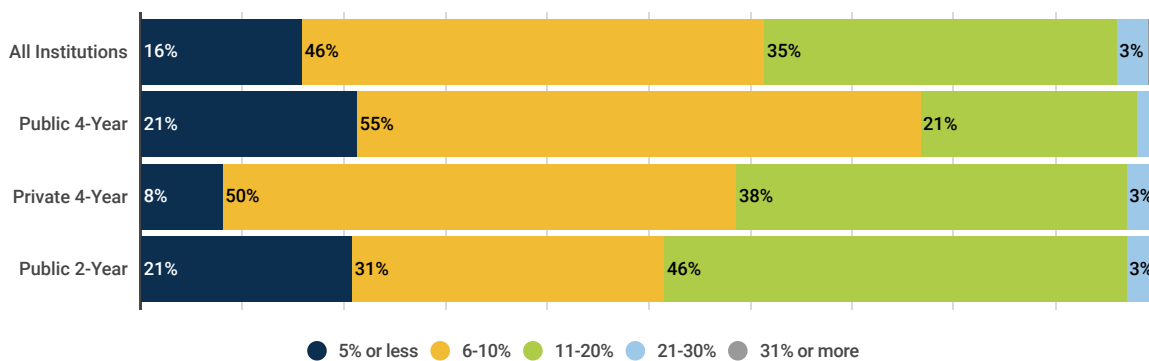
Figure 5: Expectations for Fall 2020 Enrollment Relative to Fall 2019 Enrollment



Among the 49 percent of presidents who expect a fall enrollment decrease, 16 percent expect a decline of “5 percent or less,” 46 percent expect a decline between “6 percent and 10 percent,” 35 percent expect a decline between “11 percent and 20 percent,” 3 percent expect a decline between “21 percent and 30 percent,” and only 1 percent expect a decline of “31 percent or more” (see Figure 6).

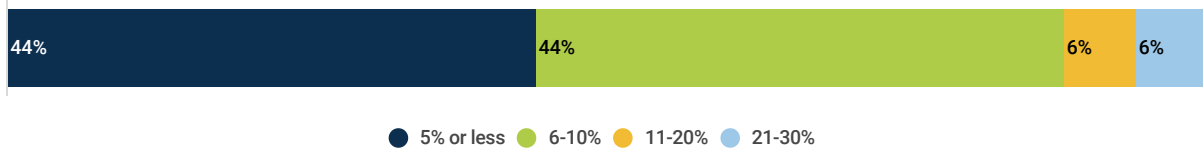
- Presidents at private four-year institutions were more likely to report greater expected enrollment declines than presidents at public four-year and public two-year institutions.

Figure 6: Anticipated Fall 2020 Enrollment Decline



Because few presidents reported expecting fall enrollment to increase, results on the size of the increase are not presented by sector. Of the 15 percent of presidents who reported expecting a fall enrollment increase, the vast majority (88 percent) expect an increase of “5 percent or less” (44 percent) or an increase between “6 percent and 10 percent” (44 percent) (see Figure 7).

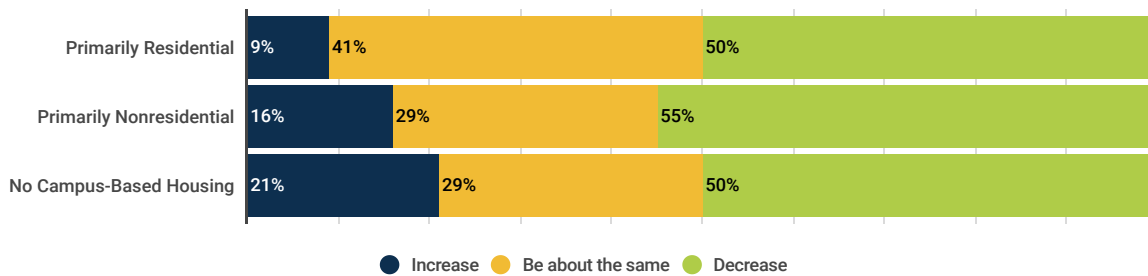
Figure 7: Anticipated Fall 2020 Enrollment Increase



In addition to exploring expectations for fall enrollment by sector, Figure 8 presents the same results by campus residency profile.

- Regardless of residency profile, half of presidents reported expecting fall 2020 enrollment to decrease relative to fall 2019. Presidents at institutions without campus-based housing (21 percent) were the most likely to report expecting fall enrollment to increase. Only 9 percent of presidents at primarily residential institutions reported expecting fall enrollment to increase.

Figure 8: Expectations for Fall 2020 Enrollment Relative to Fall 2019 Enrollment by Campus Residency Profile

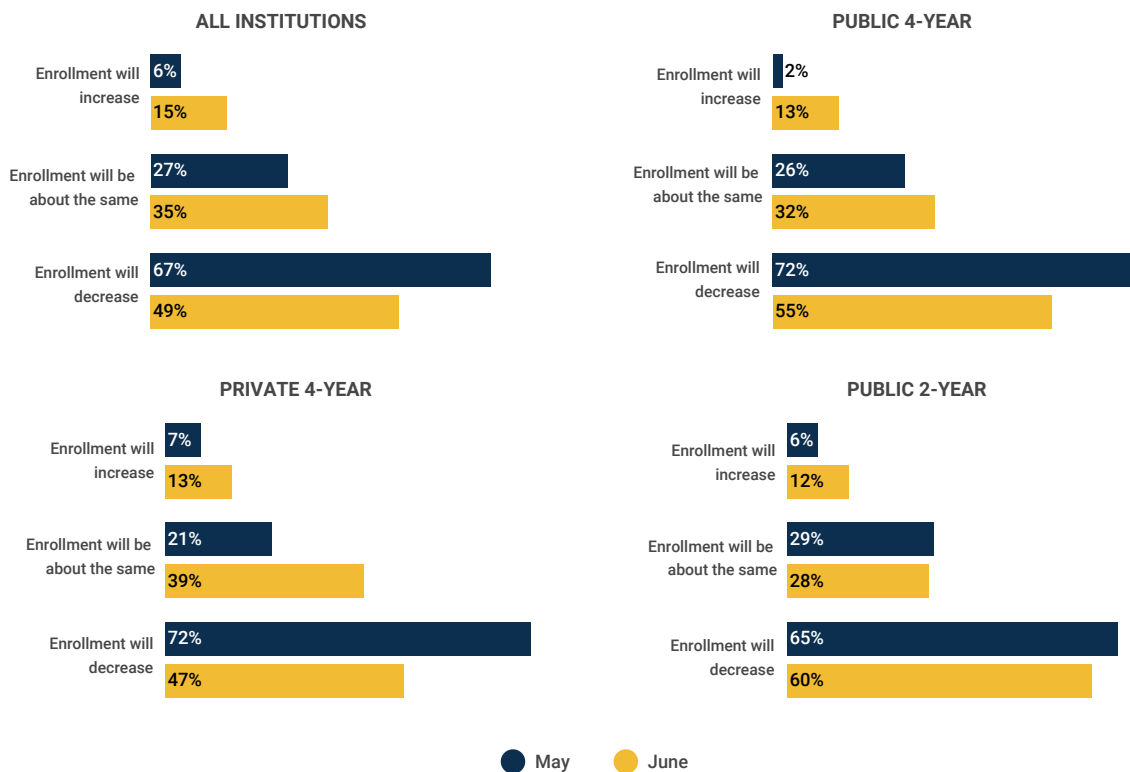


FALL 2020 ENROLLMENT, MAY AND JUNE PULSE POINT SURVEYS

Relative to the results of the May Pulse Point survey, the June Pulse Point survey results suggest that fewer presidents are expecting their institution's fall 2020 enrollment to decrease. As a reminder, 310 presidents completed the survey in May, and 300 presidents completed the survey in June. Figure 9 shows the side-by-side results of how presidents responded to the fall enrollment question in May compared with June.

- In May, 67 percent of presidents reported expecting their fall 2020 enrollment to decrease relative to their fall 2019 enrollment. In the June survey, only 49 percent of presidents reported expecting their fall 2020 enrollment to decrease. Relative to the May results, more presidents reported expecting their fall enrollment to be about the same, and more reported expecting it to increase.
- The greatest change between the May and June surveys occurred among presidents at private four-year institutions. In May, 72 percent of presidents at private four-year institutions reported expecting their fall enrollment to decrease. In the June survey, only 47 percent of presidents reported expecting fall enrollment to decrease.

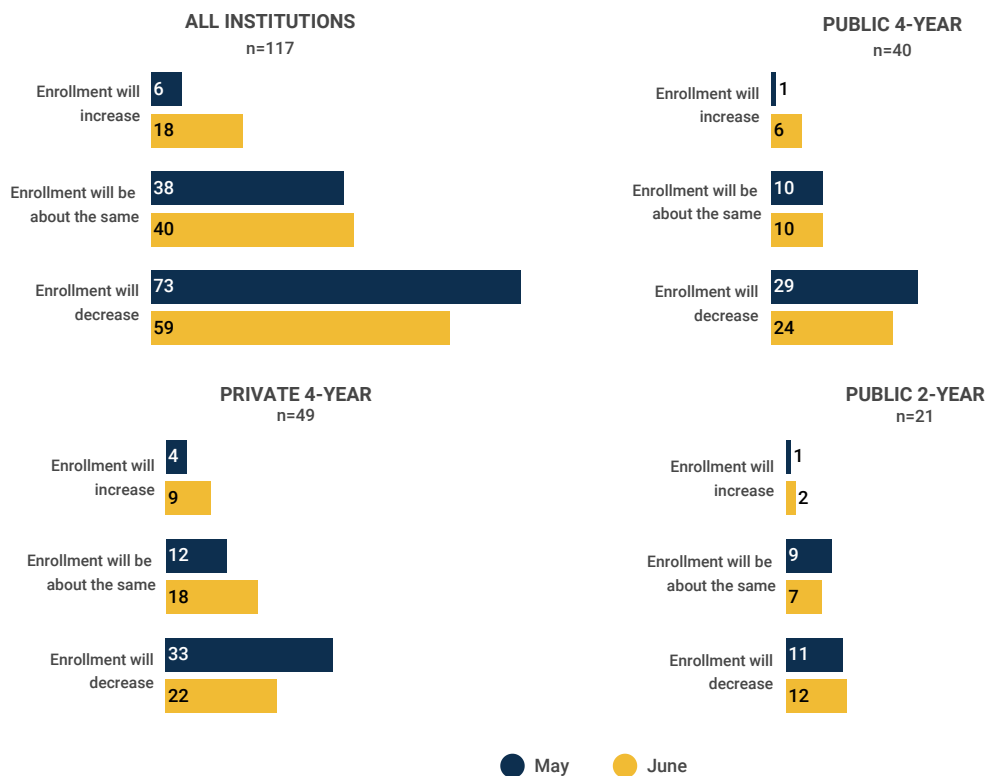
Figure 9: Expectations for Fall 2020 Enrollment Relative to Fall 2019 Enrollment, May and June Pulse Point Survey Results



More than 100 presidents (n = 117) completed both the May and June Pulse Point surveys (40 public four-year presidents, 49 private four-year presidents, 21 public two-year presidents, and seven at other institutions). Figure 10 shows the side-by-side results (in raw counts) of how the same group of presidents responded to the fall enrollment question in May compared with June. Similar to Figure 9, fewer presidents report expecting fall 2020 enrollment to decline.

- In May, 73 (62 percent) of the 117 presidents reported expecting their fall 2020 enrollment to decrease. In June, only 59 (50 percent) of those same presidents reported expecting a fall enrollment decrease relative to last fall. The number of presidents expecting fall 2020 enrollment to be about the same as last fall was roughly the same between May and June. However, in May only six (5 percent) of these presidents said they expect their fall enrollment to increase. In June, that increased to 18 presidents (15 percent).
- Across each sector, it appears that presidents are feeling more confident about fall 2020 enrollment than they did last month. However, it is important to remember that on average, half of presidents still report expecting a fall 2020 enrollment decline relative to fall 2019.

Figure 10: Expectations for Fall 2020 Enrollment Relative to Fall 2019 Enrollment, May and June Pulse Point Survey Results Among Completers of Both Surveys

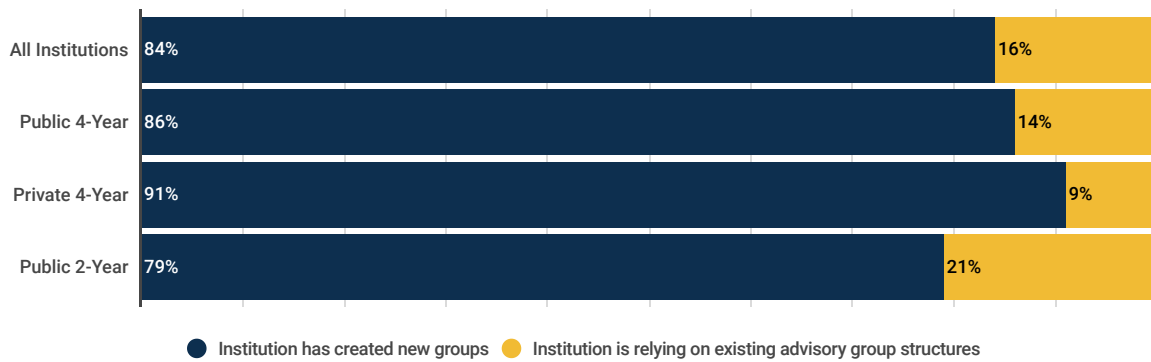


FALL SCENARIO PLANNING

Planning for the fall 2020 term is both a complex and massive undertaking. In leading their institutions, presidents frequently seek input and guidance from a variety of internal and external stakeholders. In this survey, presidents were asked about their campus-based advisory structures and fall 2020 planning. Specifically, whether the pandemic has necessitated the creation of new advisory groups (e.g., special committees, taskforces) or whether existing campus advisory structures were sufficient in supporting fall 2020 planning.

- The vast majority (84 percent) of presidents reported that they had created new advisory groups to support planning efforts for the fall 2020 term (see Figure 11). Only 16 percent of presidents reported that their institution was relying on existing advisory structures.
- Presidents at private four-year institutions (91 percent) were the most likely to report creating new advisory structures, followed by presidents at public four-year institutions (86 percent), and those at public two-year institutions (79 percent).

Figure 11: Campus-Based Advisory Structures to Support Institutional COVID-19 Planning Efforts



In response to the pandemic and related uncertainties, college and university leaders are evaluating a number of potential instructional and residential **scenarios** for the fall 2020 term.

Presidents were presented with 13 possible scenarios, and asked to identify all of those for which their institution is developing plans to possibly address. We did not ask, and these results are not intended to suggest, which scenarios and plans institutions will ultimately implement—for many institutions, it remains too early to decide. Table 1 contains the descriptions of each scenario presented to presidents in the survey.

Table 1: Potential Instructional and Residential Scenarios for Fall 2020

SCENARIO	DESCRIPTION
Normal operations	Students, faculty, and staff are back on campus. The fall 2020 term is essentially the same as the fall 2019 term, but with new safety protocols (e.g., social distancing, mask wearing).
Postpone the start of the fall term to a later date	The start of the fall term is pushed back to October, November, or even January 2021 until there is more efficient testing, effective treatment, or a vaccine. Some institutions may choose to begin the term online and then resume in-person classes later in the term.
Begin the fall term early	Students return to campus for a fall term that begins earlier than originally scheduled, generally without a fall break, in order to mitigate the impact of a potential second wave of COVID-19 infections.
Some virtual courses and some in-person courses (e.g., split curriculum, HyFlex model)	Courses are taught both online and in-person and the student body is split between some who return to campus and some who remain remote. In a split curriculum, courses or course sections are designed to be offered either in-person or online. The HyFlex model requires courses to be taught in-person and online, simultaneously, and by the same instructor. In both models, social distancing guidelines help define in-person course capacity.
Block scheduling	The semester is redesigned so students complete a single course over a three or four week block. Students may complete their typical semester course load, but will do so consecutively rather than simultaneously. Courses may be offered virtually and/or in-person.
Modular scheduling	Unlike institution-wide block scheduling, in modular scheduling, academic departments are granted the flexibility to design courses of varying lengths, topics, sequences, and credits. Courses may be offered virtually and/or in-person.
Modified tutorial model	Students take a common lecture session virtually. Faculty and/or teaching assistants meet with small groups of students in-person to provide tutoring while respecting social distancing.
Targeted curriculum	The overall number of courses being offered is reduced to limit on-campus density. Strategies to implement this model include focusing on core courses, eliminating low-enrollment courses, and/or prioritizing courses that can be adapted to multiple modalities.
Low-residency model	Students come to campus for intensive in-person academic experiences, while still maintaining social distancing and then return home to continue the term virtually.
Students in residence, learning virtually	Students return to campus in iterative waves to have the option of participating in co-curricular activities, but take most of their courses virtually. Co-curricular activities are developed or modified to respect social distancing restrictions.
Only certain groups of students are on campus	Only certain groups of students are back on campus at the same time. One example may be allowing only graduate students or first-year students to return to campus, while other levels continue learning online. Another example may be to divide the student body into groups, each scheduled to be on campus at a different time.
Structured gap year	Faculty and staff support student engagement in structured, project-based off-campus learning experiences that could be implemented in a manner that follow social distancing restrictions (e.g., independent research projects, service-learning projects). Institutions may choose to award academic credit for these experiences.
Only virtual courses	All students continue their studies remotely through online education.

Because of the complexity and uncertainty institutions are facing, it is not surprising to find that nearly two-thirds (63 percent) of presidents indicated that their institution is crafting multiple scenario plans for the fall (see Figure 12). Doing so will allow institutions to respond quickly to whatever circumstances present themselves later this year.

- Of the 13 scenarios presented in the survey, 37 percent of presidents selected only one, 29 percent selected two, 19 percent selected three, 12 percent selected four or five, and 3 percent selected six or more scenarios for which their institution is developing plans for possible implementation this fall.
- Presidents at private four-year institutions were the most likely to say their institution is planning for four to five (14 percent) or six or more scenarios (6 percent). Presidents at public two-year institutions (45 percent) were the most likely to report planning for only one scenario.

Figure 12: Number of Scenario Plans Presidents Report Their Institutions Are Developing

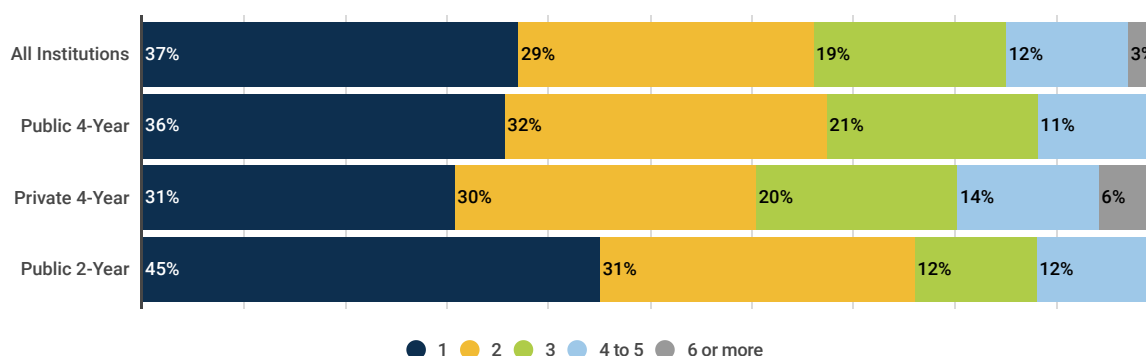


Figure 13 presents, for each of the 13 scenarios, the proportion of presidents who indicated that their institution is developing plans for possible implementation this fall. Figure 14 shows the same information broken down by sector.

- Over three-quarters (76 percent) of presidents indicated that their institution was developing a plan for a fall term that could consist of classes being offered both online and in-person (see Figure 13). This option includes approaches such as the split curriculum and the HyFlex model of instruction (see Table 1).
- Nearly one-quarter (23 percent) of presidents indicated that their institution was developing a plan for fall 2020 to be “normal” or similar to fall 2019 (see Figure 13). It is important to note that scenario could also mean a “new normal”—one where institutions resume in-person classes, but with new safety protocols (e.g., social distancing, mask wearing). Additionally, 22 percent of presidents indicated their institution was developing a plan for possibly moving up the start of the fall term.
- By sector, 24 percent of presidents at public four-year and 35 percent of presidents at private four-year institutions reported that their institution was drafting a plan for possibly moving up the start date of the fall term (see Figure 14). However, no presidents at public two-year institutions reported planning for such a scenario.
- Presidents at public two-year institutions (29 percent) were more likely than presidents at public four-year institutions (12 percent) or private four-year institutions (13 percent) to indicate drafting plans that would allow only certain groups of students to be on campus at the same time (see Figure 14). This scenario includes options such as allowing only first-year students, graduate students, or students in specific programs to return to campus, while other students continue learning online and structuring class schedules so students are on campus only on certain days or weeks (see Table 1).

Figure 13: Scenarios Institutions Have Already Developed or Are Currently Developing Plans for This Fall

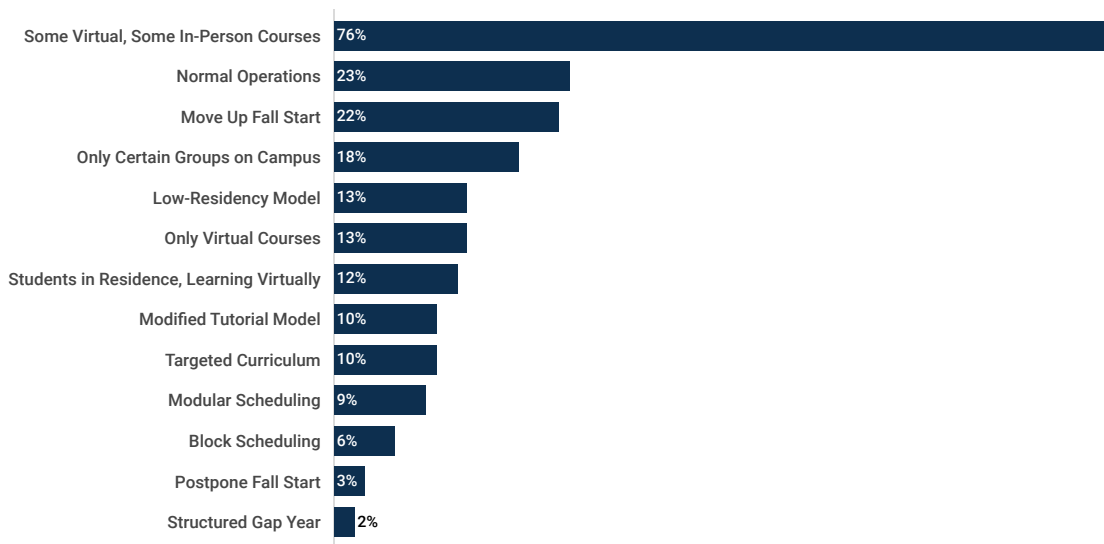
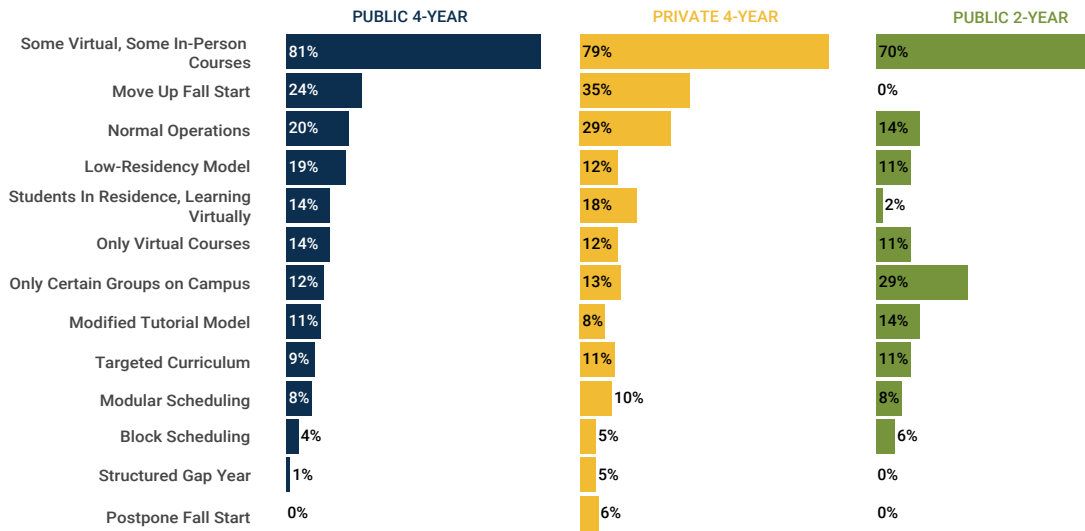


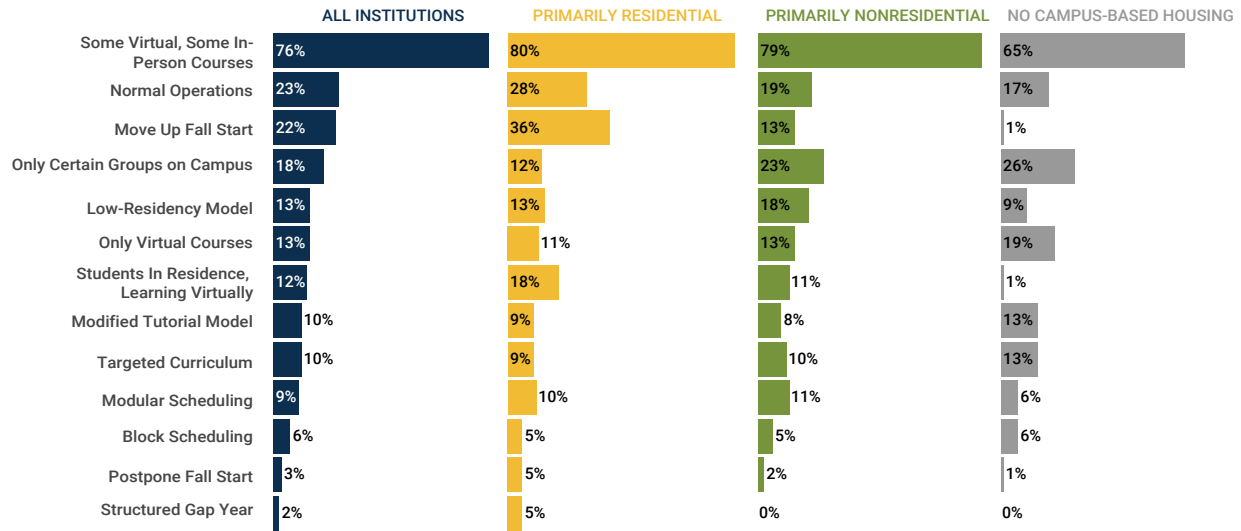
Figure 14: Scenarios Institutions Have Already Developed or Are Currently Developing Plans for This Fall, by Sector



Because of the nature of the pandemic, colleges and universities with large residential populations may be planning for different scenarios. Figure 15 shows the differences in scenario planning by campus residency profile.

- Presidents at primarily residential (80 percent) and primarily nonresidential (79 percent) institutions were equally likely to report developing plans for a fall term that may consist of classes being offered both online and in-person. Only 65 percent of presidents at institutions without campus-based housing reported the same.
- Presidents at primarily residential institutions (36 percent) were the most likely to report developing plans for possibly moving up the start of the fall term. Only 13 percent of presidents at primarily nonresidential institutions and only 1 percent of presidents at institutions without campus-based housing reported the same.
- Presidents at institutions without campus-based housing (26 percent) and presidents at primarily nonresidential institutions (23 percent) were both more likely to report developing plans to possibly have only certain groups of students on campus at a time than presidents at primarily residential institutions (12 percent).

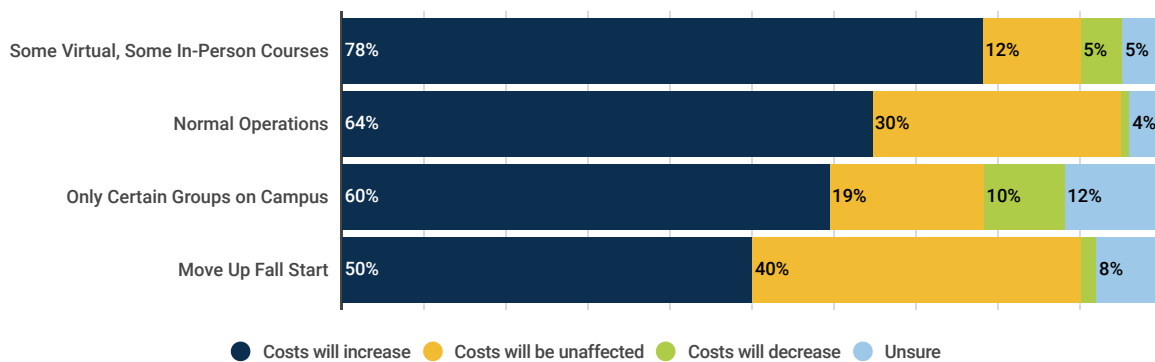
Figure 15: Scenarios Institutions Have Already Developed or Are Currently Developing Plans for This Fall, by Campus Residency Status



As institutions plan for the fall, college and university leaders are also considering how various scenarios would affect their costs. For each scenario presidents selected, they were asked to report whether their costs would increase, decrease, or be unaffected relative to fall 2019. Figure 16 presents their responses to the four most commonly selected scenarios.

- For each of the top four scenarios, the majority of presidents expect their fall 2020 costs to increase relative to fall 2019.
- Again, 76 percent of presidents said they were planning for a fall that could involve some students learning in-person and others learning online. Over three-quarters (78 percent) of these presidents reported that this scenario would increase costs. Twelve percent of these presidents reported that their costs would be unaffected, 5 percent reported that their costs would decrease, and 5 percent reported they were unsure.

Figure 16: Anticipated Effect Top Four Scenarios Will Have on Costs if Plan Is Implemented This Fall



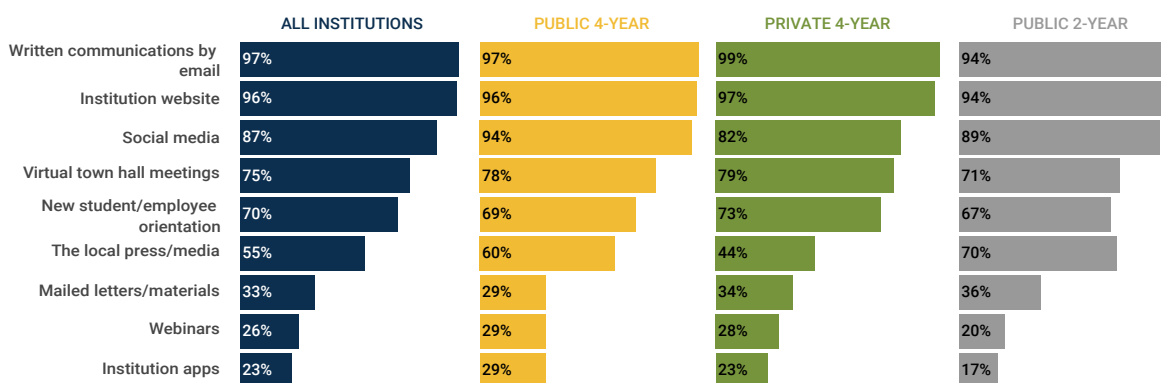
COMMUNICATING FALL PLANS AND NEW POLICIES

As college and university leaders develop plans for operations this fall, presidents were also asked how their institutions are and will be sharing information about new policies, procedures, and expectations for the fall with their stakeholders (e.g., students, faculty, and staff) (see Figure 17).

- Virtually all presidents indicated that their institution is communicating updates through email (97 percent) and through their institution’s website (96 percent). Additionally, 87 percent reported using social media.
- About 75 percent of presidents reported that they are holding virtual town hall meetings, and 70 percent are using or will use their new student and employee orientations as venues to communicate new information.
- There was little difference in presidents’ responses by sector.

Presidents were also given the opportunity to share through an open-ended question any creative or innovative approaches to sharing information with stakeholders. Presidents indicated that their institutions are also using telephone hotlines, virtual front desks, Zoom virtual meetings, text message alerts, student-parent group updates, and presidential videos. A few presidents also emphasized the importance of transparent communication over multiple means to reach as many constituents as possible.

Figure 17: Communication Strategies to Communicate with Stakeholders About Policies, Procedures, and Expectations for the Fall



SUPPORTING STUDENTS WHO WILL NEED TO QUARANTINE

In order to resume in-person classes safely, institutional leaders are considering a variety of ways to support students who will need to quarantine, either on campus or at home, due to exposure to or a positive test for COVID-19. Presidents at institutions who reported having campus-based housing were given a list of 10 potential actions and asked to indicate which, if any, they are planning to take this fall (see Figure 18).

- The vast majority (87 percent) of presidents indicated that their institution is making plans to “provide food deliveries to quarantined students’ rooms.” Additionally, 86 percent of presidents indicated that “students already living on campus will be allowed to quarantine on campus,” and 80 percent indicated that the institution would “offer flexibility for students to complete their course requirements for the period they are in quarantine.” Less than half of presidents (39 percent) reported plans to “provide medical and nursing services.”
- The vast majority of presidents of institutions without campus-based housing were in the public two-year sector. For these institutions only five potential actions from the prior list of 10, those not related to campus-based housing, were presented (see Figure 19). Among presidents of public two-year institutions without campus-based housing, most (90 percent) plan to “offer flexibility for students to complete their course requirements for the period they are in quarantine,” 80 percent plan to “provide technology (e.g., laptops or hotspots) for students who need it to participate in remote learning for the period they are in quarantine,” and 66 percent plan to “provide remote availability of counseling services” (see Figure 19).

Figure 18: Actions Institutions with Campus-Based Housing Plan to Take to Support Students Who Need to Quarantine This Fall

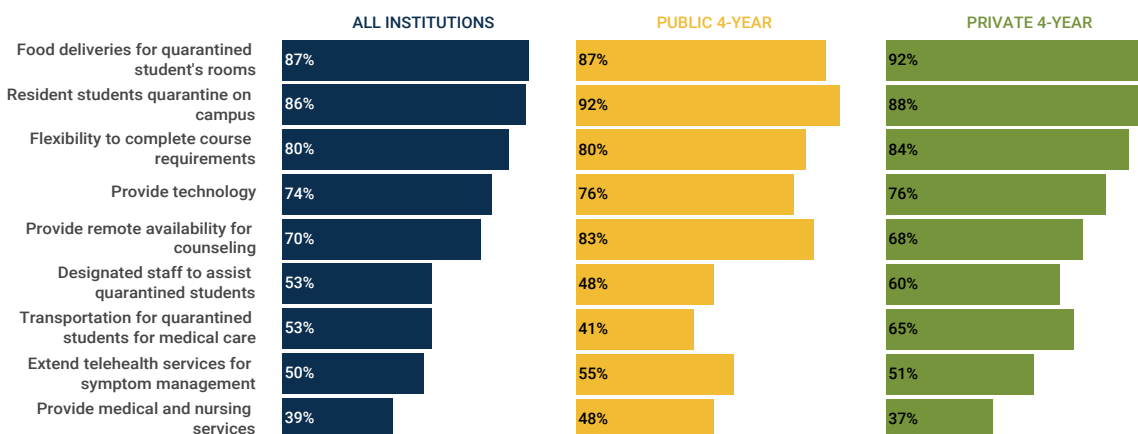
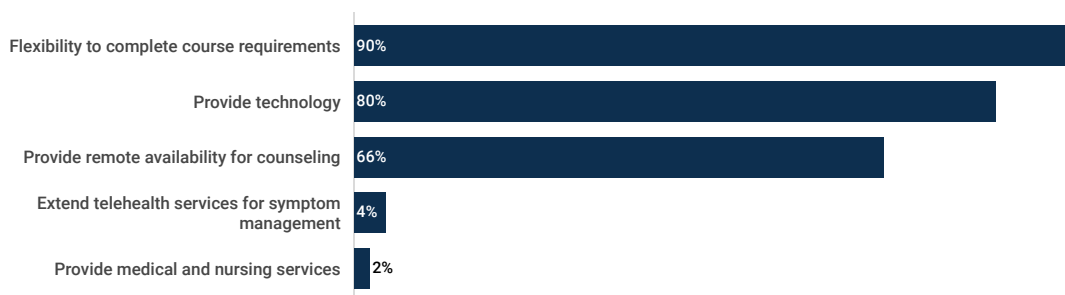


Figure 19: Actions Public Two-Year Institutions Without Campus-Based Housing Plan to Take to Support Students Who Need to Quarantine This Fall



SUPPORTING STUDENTS FROM HISTORICALLY MARGINALIZED BACKGROUNDS

The COVID-19 pandemic has highlighted inequities that many students from historically marginalized backgrounds face. For instance, many students of color, LGBTQ students, and low-income students have experienced particular challenges related to housing, health care access, food insecurity, and online learning, among others. We asked presidents, through two open-ended questions, to identify challenges that underrepresented or marginalized students at their institutions are facing due to the pandemic and how their institutions are planning to support these students in the fall. What follows is a brief summary of some of the most common themes from their responses.

Challenges

Presidents identified a number of challenges facing their students. Many acknowledged that there are disparities among who has access to high-quality and affordable broadband Internet, personal computers, and other technology. Presidents also acknowledged that many students struggled with the abrupt transition to online learning. Presidents also see how the current economic crisis has increased the number of students who are experiencing financial hardships, including the number of students facing housing and food insecurity.

One president noted, “We continue to identify the lack of technology and Internet access [as a challenge]. Students trying to participate in classes and write papers on their phones is more common than we realized.”

Another president shared, “Low income students are having trouble seeing themselves in college at all now. They feel like they need to be at home to support out-of-work parents. They fear having to go online again due to lack of Internet and quiet study spaces.”

A third president shared “20 percent of our community college students withdrew from their courses in the spring of 2020 due to the sudden transition online, most of whom were students of color [...] they did not have adequate technology and connectivity, were suffering from job loss, and/or struggling with other issues such as mental health or food insecurities.”

Additional Supports

Presidents reported on the numerous additional supports their institution is planning to provide to students, both now and this coming fall. Many said that their institution will increase the number of laptops, tablets, and mobile hotspots available to students. Some also mentioned boosting their campus Wi-Fi for students to be able to access it from parking lots. Presidents also reported plans to increase outreach and training for both students and faculty about navigating available online teaching and learning resources. Recognizing the financial hardship many students are facing, presidents frequently mentioned reviewing need-based aid policies, increasing emergency aid availability, and working with donors to create new student support funds. Similarly, many presidents referenced increasing psychological counseling resources, including expanding tele-counseling options. Presidents also mentioned greater support toward combating food and housing insecurity by expanding food pantries on campus, making residence halls available for students in need, and working closely with local community organizations. Finally, many presidents referenced the need for institutions to stay aware of emerging challenges and needs through regular student surveys.

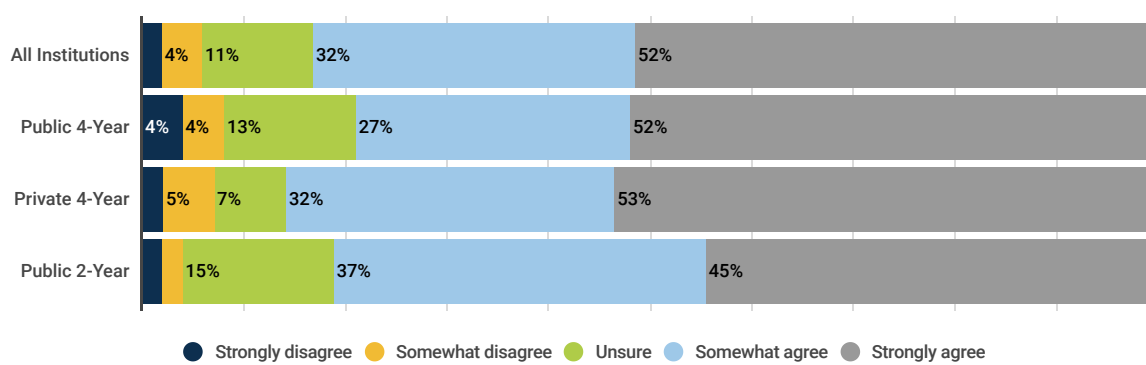
CODES OF STUDENT CONDUCT

Anticipating the challenges associated with having students back on campus, we asked presidents three different questions related to their institutions' codes of student conduct and/or honor codes.

First, presidents were asked to indicate their level of agreement with the statement “My institution will use its code of student conduct/honor code to hold students accountable for following new campus protocols or rules related to COVID-19” (see Figure 20).

- Fifty-two percent of presidents indicated that they “strongly agree” with this statement. Over one-third (32 percent) said they “somewhat agree” with the statement.
- There was little difference in presidents' responses by sector.

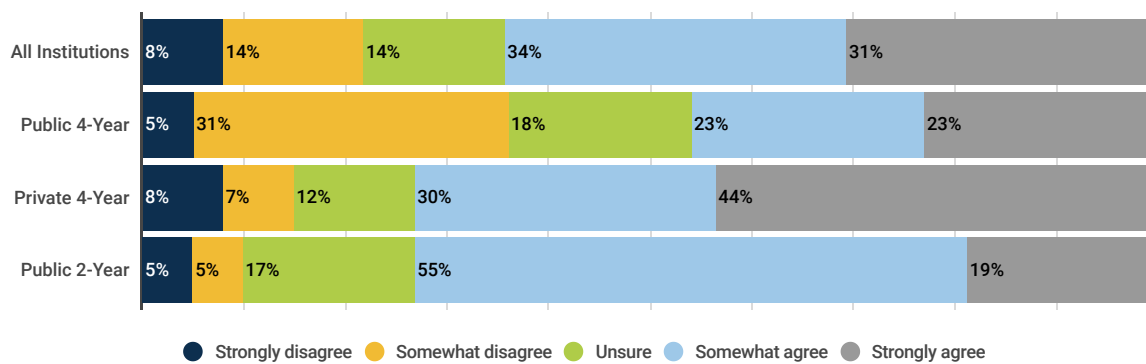
Figure 20: Level of Agreement with Statement on the Use of the Code of Student Conduct/Honor Code to Hold Students Accountable for Following COVID-19 Protocols



Presidents were then asked to rate their level of agreement with this statement “My institution’s current code of student conduct/honor code will require revisions given new campus protocols or rules related to COVID-19” (see Figure 21).

- Thirty-one percent (31 percent) of presidents said they “strongly agree” with this statement, while 34 percent said they “somewhat agree.”
- Presidents at private four-year institutions (74 percent) and public two-year institutions (74 percent) were much more likely to “strongly agree” or “somewhat agree” that their institution will need to revise their code of student conduct or honor code than presidents at public four-year institutions (46 percent).

Figure 21: Level of Agreement with Statement on the Need to Revise Code of Student Conduct/Honor Code in Light of New COVID-19 Protocols



Finally, we asked presidents to rate the likelihood that their institution would require students to sign a pledge agreeing to follow new campus protocols or rules related to COVID-19 (see Figure 22).

- Over one-quarter (28 percent) of presidents indicated it is “very likely,” followed by 24 percent who indicated it is “somewhat likely,” 21 percent who reported being “unsure,” 14 percent who reported it is “somewhat unlikely,” and 13 percent who reported it is “very unlikely.”
- Presidents of private four-year institutions were the most likely to indicate they would ask students to sign a pledge. Among them, 41 percent of presidents at private four-year institutions indicated it was “very likely,” followed by 24 percent who said it was “somewhat likely.”

Figure 22: Likelihood Students Will Be Asked to Sign a Pledge Agreeing to Follow New Campus Protocols Related to COVID-19

