

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

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As colleges and universities move past their initial responses to the COVID-19 pandemic, including transitions to remote instruction and operations, higher education leaders are working diligently to plan for the future. In early May, ACE launched its second of 12 monthly Pulse Point surveys of college and university presidents on COVID-19. Three hundred ten presidents* responded on topics such as their current plans for the fall, including actions they may require to consider reopening campus, the impact of the pandemic on future revenue, and the projected impact on fall enrollment numbers. It is important to note that circumstances surrounding the pandemic are constantly evolving, and responses to this survey represent presidents' thinking at one moment in time. What follows is a summary of our key findings.

* Of the 310 presidents, 129 lead private four-year institutions (42 percent), 83 lead public four-year institutions (27 percent), 67 lead public two-year institutions (22 percent), 12 lead private graduate only institutions (4 percent), eight lead private two-year institutions (3 percent), seven lead for-profit institutions (2 percent), and four lead public graduate only institutions (1 percent).

Given sample size limitations, we caution against generalizing these findings to all colleges and universities or relying too heavily on comparisons across institutional sector.

The survey was launched on May 4 and closed on May 11.

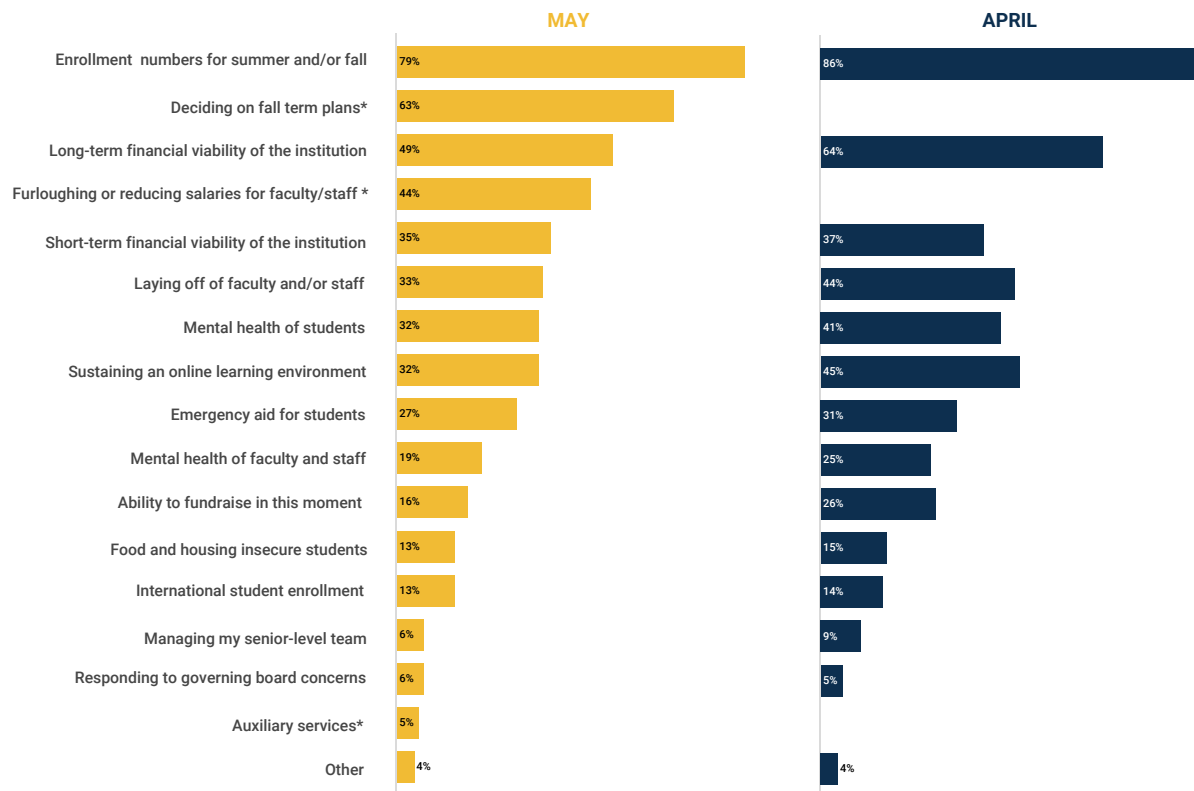
MOST PRESSING ISSUES FOR PRESIDENTS

In our [April survey](#), presidents were asked to select up to five issues from a list of 14 they deemed most pressing. The top three issues then were “summer or fall enrollment,” “long-term financial viability,” and “sustaining an online learning environment.”

In the May survey, presidents were asked to choose from the same list, with three additional issues (see Figure 1).

- As in the April survey, “summer or fall enrollment” (79 percent) was the most pressing issue facing presidents in May.
- The next most pressing issue facing presidents was “deciding on fall term plans” (63 percent), followed by “long-term financial viability of the institution” (49 percent), “furloughing or reducing salaries for faculty and/or staff” (44 percent), and “short-term financial viability of the institution” (35 percent).
- The top three most pressing issues were the same for presidents at public four-year institutions, private four-year institutions, and public two-year institutions.

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



*Denotes items new to the May survey.

LIKELIHOOD OF RESUMING IN-PERSON CLASSES AND ON-CAMPUS HOUSING THIS FALL

Anticipating that resuming in-person classes and on-campus housing would be top of mind for many presidents, we asked them to rate the likelihood that their institution would resume in-person classes and on-campus housing for at least some portion of the fall term.

- Fifty-three percent of all presidents indicated that it was “very likely” that their institution would resume in-person classes for at least some portion of the fall term (see Figure 2). Roughly one-third (31 percent) reported that it was “somewhat likely” they would resume in-person classes this fall.
- Eleven percent of presidents reported that it was “somewhat unlikely” (6 percent) or “very unlikely” (5 percent) their institution would resume in-person classes this fall, while 5 percent said they were “unsure.”
- Presidents at public two-year institutions (38 percent) were less likely than their colleagues at public four-year (53 percent) and private four-year (58 percent) institutions to indicate that it was “very likely” that their institution would resume in-person classes this fall.
- Approximately 230, or 74 percent, of presidents in our sample indicated that their institution offered on-campus housing. Just over half (51 percent) of these presidents indicated that it was “very likely” that their institution would resume on-campus housing for at least some portion of the fall term (see Figure 3). Nearly 40 percent of presidents reported that it was “somewhat likely.”

Figure 2: Likelihood of Resuming In-Person Classes This Fall

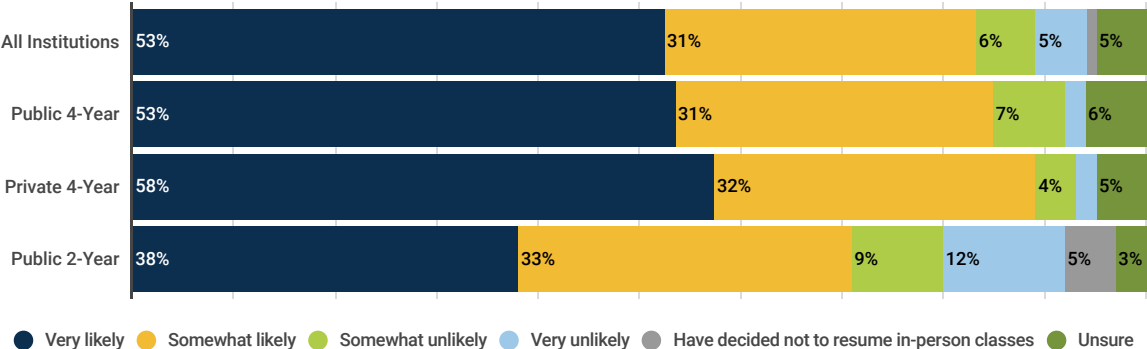
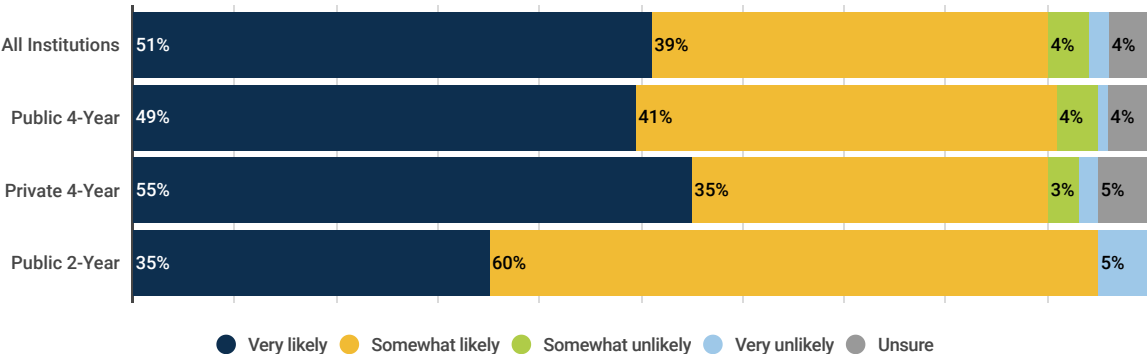


Figure 3: Likelihood of Resuming On-Campus Housing Operations This Fall

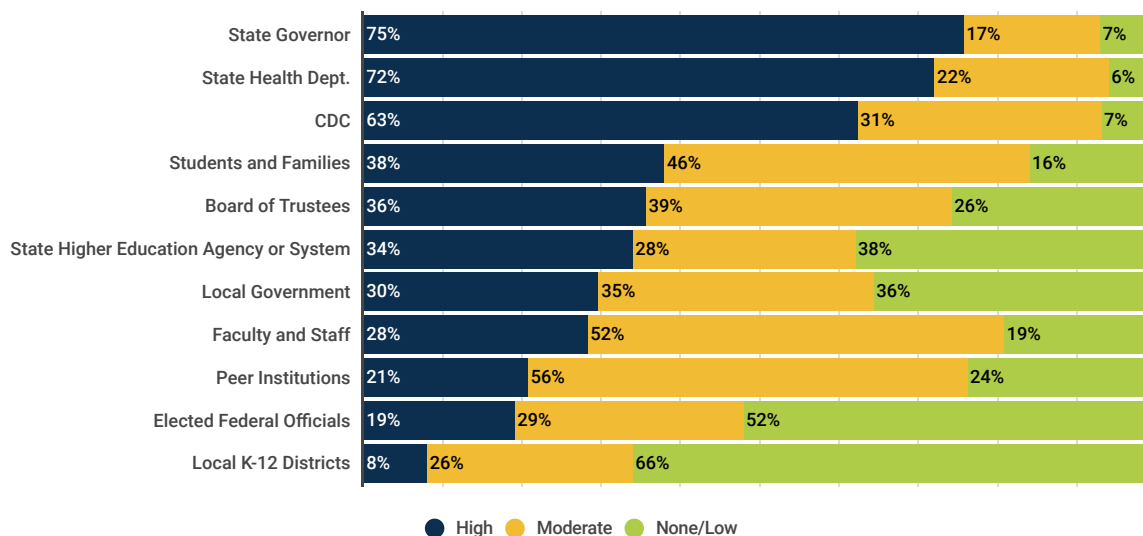


STAKEHOLDER INFLUENCE ON DECISION TO RESUME IN-PERSON CLASSES

College and university presidents are examining guidance and other input from many stakeholders in order to resume in-person classes safely. Using a four-point scale, presidents were asked to rate the level of influence of 11 stakeholder groups on their decision whether to resume in-person classes this fall (see Figure 4).

- “State governor” was the most selected influential stakeholder, with 75 percent of presidents rating their governor as having a “high level” of influence on their decision. Presidents also indicated that “state department of health” (72 percent) and “Centers for Disease Control and Prevention” (63 percent) had high levels of influence.
- “Students and families” were another stakeholder group presidents reported as being influential in their decision to resume in-person classes. Nearly 40 percent of presidents rated this group as having a “high level” of influence, while about 50 percent rated them as having a “moderate level” of influence.
- “Local K–12 school districts” (66 percent) and “elected federal officials” (52 percent) were the least influential stakeholders—those most likely to be rated as having either a “low level” of influence or “no influence” on presidents’ decisions.

Figure 4: The Level of Influence Each Stakeholder Has or Has Had on Decision Whether or Not to Resume In-Person Classes



ACTIONS TO RESUME IN-PERSON CLASSES AND ON-CAMPUS OPERATIONS

In order to resume in-person classes and on-campus operations safely, presidents will have to weigh taking a variety of actions on their campuses. Presidents were given a list of 20 actions and asked to indicate for each whether their institution is currently (1) planning to take the action, (2) still deciding whether to take the action, or (3) not planning to take the action.

Presented here are the 20 actions organized into two sets grouped by theme. Again, it is important to note that presidents responded to this question with the information available to them in early May and with the knowledge that some of these actions require resources beyond their control (e.g., expanded testing). As time progresses and more information and guidance is released, presidents' responses to these actions may change.

The first set contains actions related to COVID-19 screening and testing, as well as the distribution and use of personal protective equipment (PPE) on campus (see Figure 5).

- Nearly two-thirds (65 percent) of presidents with on-campus housing reported that their institution is currently planning to “establish residential space on campus for individuals who test positive to quarantine.”
- About half of presidents reported that their institution is planning to “require masks to be worn on campus” (53 percent) and “provide PPE to faculty and staff” (48 percent).
- Approximately one-third of presidents reported that their institution is currently planning to “require regular temperature screening for faculty and staff” (36 percent) and “require regular temperature screening for students” (33 percent).
- About two-thirds of presidents reported that their institution is still deciding whether to “require COVID-19 testing for faculty, staff, and students” before arriving back on campus.

Figure 5: Actions to Resume In-Person Classes and On-Campus Operations: Set 1

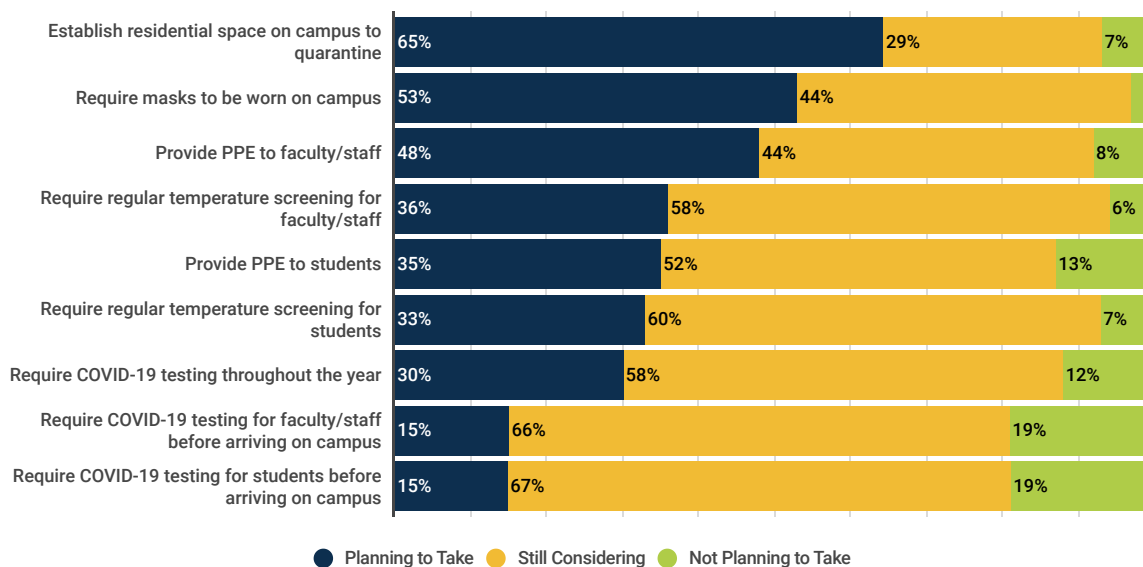
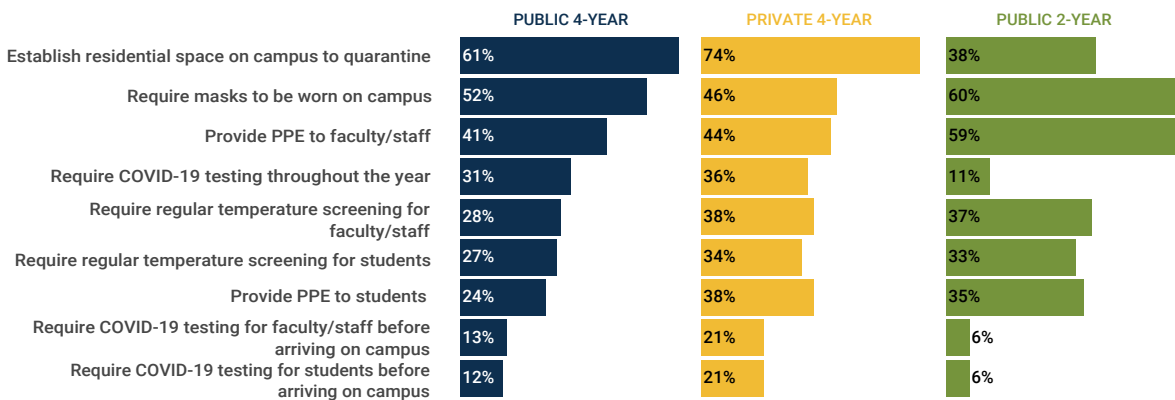


Figure 6 contains a breakdown of this first set of actions by sector. The figure contains only the proportion of presidents who reported that their institution was, as of early May, “planning to take” the specific action.

- Among institutions that offer on-campus housing (74 percent of the sample), presidents at private four-year institutions (74 percent) and public four-year institutions (61 percent) were both more likely than those from public two-year institutions (38 percent) to report plans to “establish residential space on campus for individuals who test positive to quarantine.”
- Presidents at public two-year institutions (59 percent) were more likely than presidents of both public four-year (41 percent) and private four-year (44 percent) institutions to report plans to “provide PPE to faculty and staff.”
- Presidents at private four-year institutions (36 percent) and public four-year institutions (31 percent) were both more likely than those from public two-year institutions (11 percent) to report plans to “require testing throughout the year for individuals who have been exposed to COVID-19.”

Figure 6: Actions Institutions Are “Planning to Take” Upon Resuming In-Person Classes and On-Campus Operations, by Sector: Set 1



The second set contains actions related to the organization of the fall term, class sizes, and study abroad; campus facilities, housing, and dining services; and faculty, staff, and student travel (see Figure 7).

- Only 12 percent of presidents reported that their institution is currently planning to “subdivide the fall term into shorter modules,” 52 percent are still considering the action, and 36 percent are currently not planning to take the action.
- Overall, 62 percent of presidents reported that their institution is currently planning to “allow faculty and staff who are elderly and those who have compromised immune systems to work remotely.”
- More than half of presidents reported that their institution is currently planning to “limit lab and studio class sizes to promote social distancing” (61 percent), “limit faculty and staff travel” (60 percent), “limit general class sizes to promote social distancing” (60 percent), or “limit student travel” (52 percent).
- Forty-three percent of presidents reported that their institution is currently planning to “cancel all study abroad experiences,” 48 percent are still deciding whether to take this action, and 9 percent are currently not planning to take the action.

Figure 7: Actions to Resume In-Person Classes and On-Campus Operations: Set 2

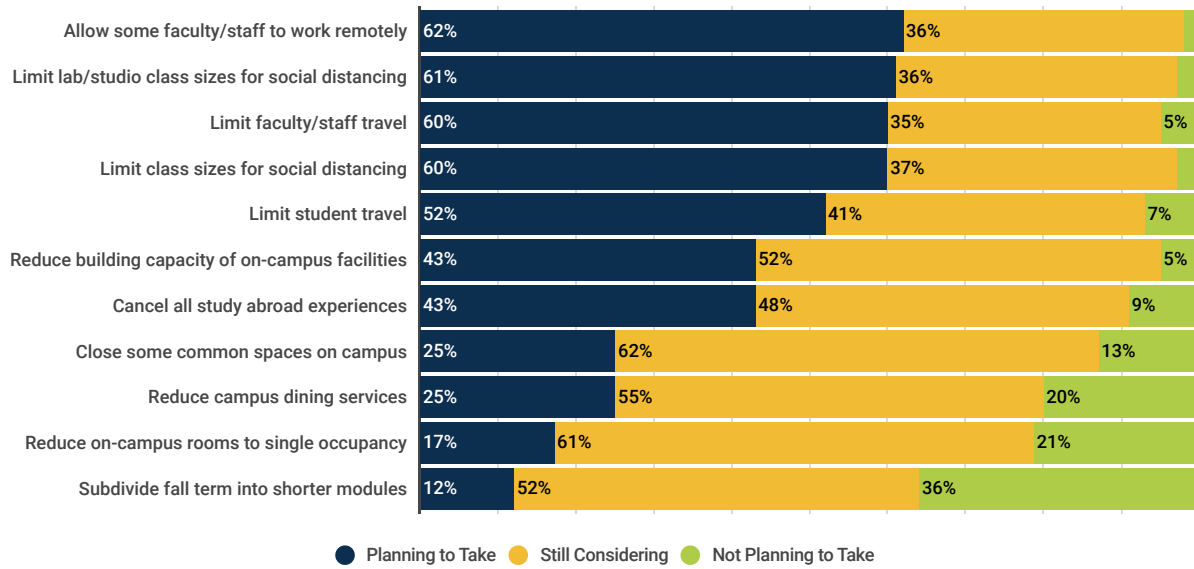
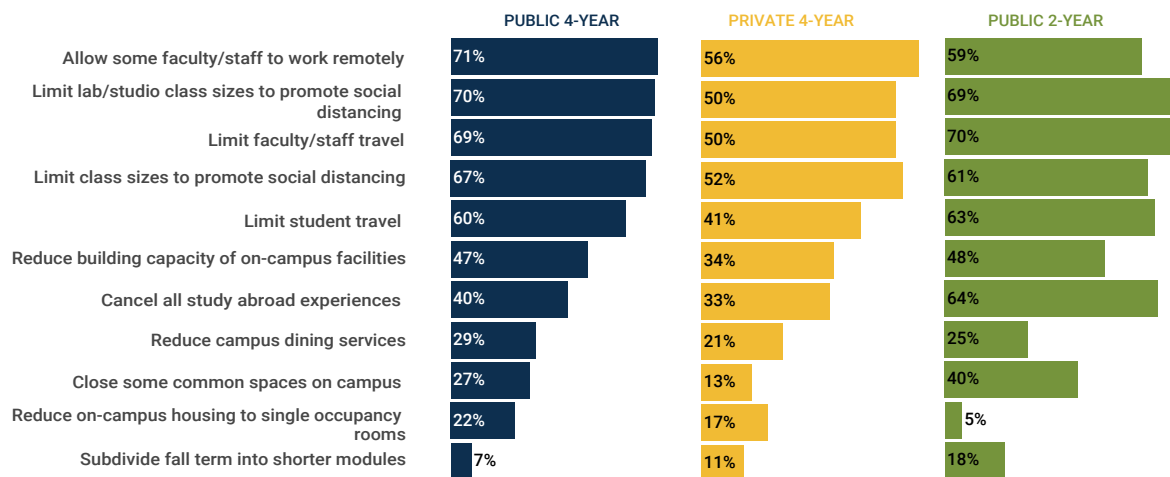


Figure 8 contains a breakdown of this second set of actions by sector. This chart contains only the proportion of presidents who reported that their institution was, as of early May, “planning to take” the specific action.

- Presidents at public four-year institutions (71 percent) were the most likely to report planning to allow “faculty and staff who are elderly and those who have compromised immune systems to work remotely.” This was true for only 56 percent of presidents at private four-year institutions and 59 percent of presidents at public two-year institutions.
- Nearly 70 percent of presidents at public four-year and public two-year institutions reported plans to “limit faculty and staff travel,” while 50 percent of private four-year institutions reported the same.
- Presidents at public four-year (40 percent), private four-year (33 percent), and public two-year (64 percent) institutions all reported planning to “cancel all study abroad experiences.”

Figure 8: Actions Institutions Are “Planning to Take” Upon Resuming In-Person Classes and On-Campus Operations by Sector: Set 2

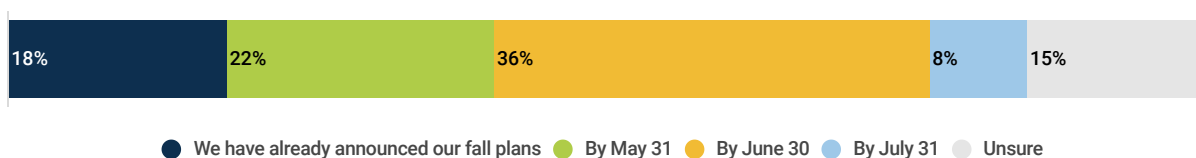


ANNOUNCEMENT OF FALL PLANS

College and university administrations are actively working through a number of potential operating plans for this fall. To conclude the first section of the survey, presidents were asked to indicate a date by which they anticipate announcing their institution's plans for the fall term (see Figure 9).

- As of the week of May 4, about 18 percent of presidents reported that their institution had already announced their plans for the fall term.
- About one in five presidents (22 percent) reported that they anticipate announcing their fall term plans by May 31; 36 percent anticipate announcing by June 30; and 8 percent anticipate announcing by July 31. Approximately 15 percent of presidents were “unsure” of when they anticipate they will announce their fall plans.
- There was little difference in presidents’ responses by sector.

Figure 9: When Presidents Anticipate Announcing Fall Plans

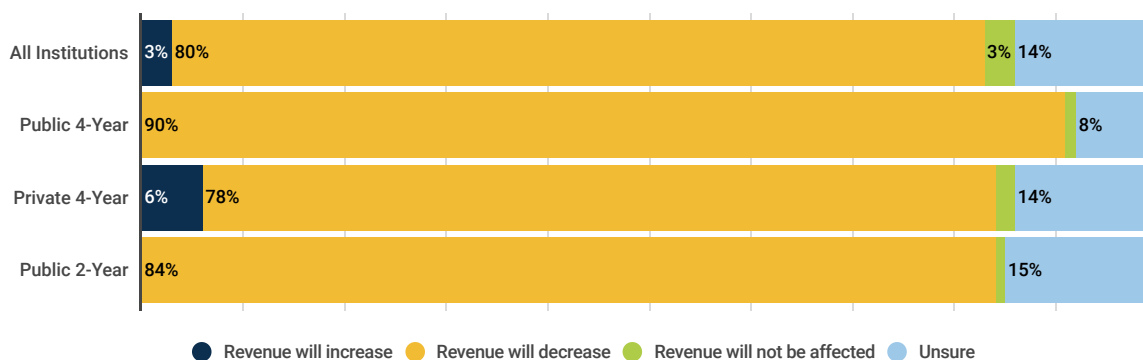


COVID-19'S IMPACT ON INSTITUTIONAL REVENUES IN THE NEXT FISCAL YEAR

We know that COVID-19 will continue to have a financial impact on higher education beyond this current fiscal year. Presidents were asked to anticipate how the global pandemic will affect revenues in the next fiscal year (see Figure 10).

- Eighty percent of presidents reported that they anticipate the global pandemic will result in a decrease in their institution's revenue next fiscal year, 14 percent reported they were unsure how the pandemic would affect their revenue next year, and 3 percent reported they anticipate their institution's revenue will increase or that it will not be affected.
- Presidents at public four-year institutions were more likely to report that they anticipate the pandemic will result in a decrease in their institution's revenue (90 percent) than presidents at public two-year (84 percent) and private four-year (78 percent) institutions.

Figure 10: Anticipated Effect on Institutional Revenue Next Fiscal Year



FALL 2020 ENROLLMENT

One of the issues top of mind to almost every president is the impact the global pandemic will have on their institution's fall enrollment. The majority of presidents (67 percent) expect their fall 2020 enrollment to be lower than their fall 2019 enrollment (see Figure 11).

- Presidents at public four-year (72 percent) and private four-year (72 percent) institutions were both slightly more likely to report expecting their institution's fall 2020 enrollment to decrease than presidents at public two-year institutions (65 percent).
- Among presidents who expect an enrollment decline, 45 percent expect a decline of 10 percent or less relative to fall 2019, 50 percent expect a decline between "11 percent to 20 percent," and 6 percent expect a decline between "21 percent to 30 percent."
- Overall, presidents at private four-year institutions reported expecting larger declines in fall 2020 enrollment than presidents at public four-year and public two-year institutions (see Figure 12).

Figure 11: Expectations for Fall 2020 Enrollment Relative to Fall 2019 Enrollment

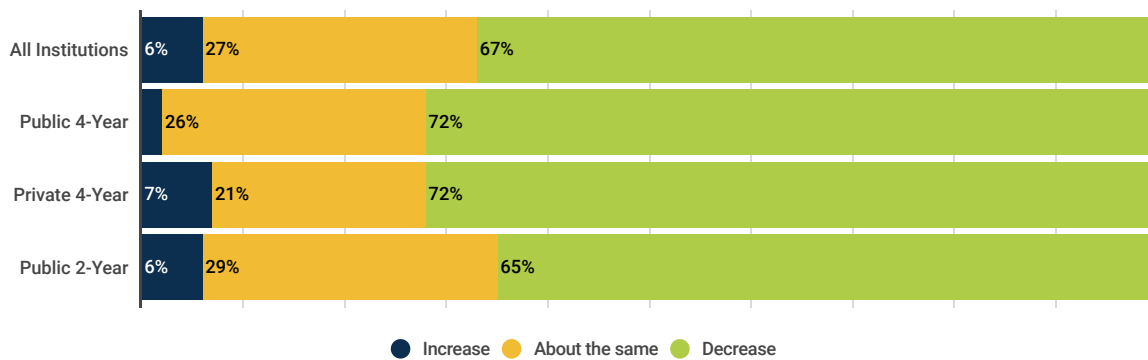


Figure 12: Anticipated Fall 2020 Enrollment Decline

