

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

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With the summer term nearing an end and the start of the fall 2020 term only weeks away, college and university leaders continue taking steps to support safe operations. In early July, ACE launched its fourth Pulse Point survey of college and university presidents on COVID-19. Two hundred and seventy presidents* responded on topics including summer and fall enrollment, fall instruction modality and balancing in-person, online, and hybrid course offerings, student mental health, and lessons learned from state reopenings. It is important to note that this survey captures what presidents were thinking in early July—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 270 presidents, 115 lead private four-year institutions (43 percent), 69 lead public four-year institutions (26 percent), 63 lead public two-year institutions (23 percent), nine lead private graduate-only institutions (3 percent), seven lead private two-year institutions (3 percent), four lead public graduate-only institutions (1 percent), and three lead for-profit institutions (1 percent).

Additionally, 47 percent of presidents classified their institutions as being “primarily residential,” 23 percent identified their institution as being “primarily nonresidential,” and 30 percent reported that their institution does not offer campus-based housing.

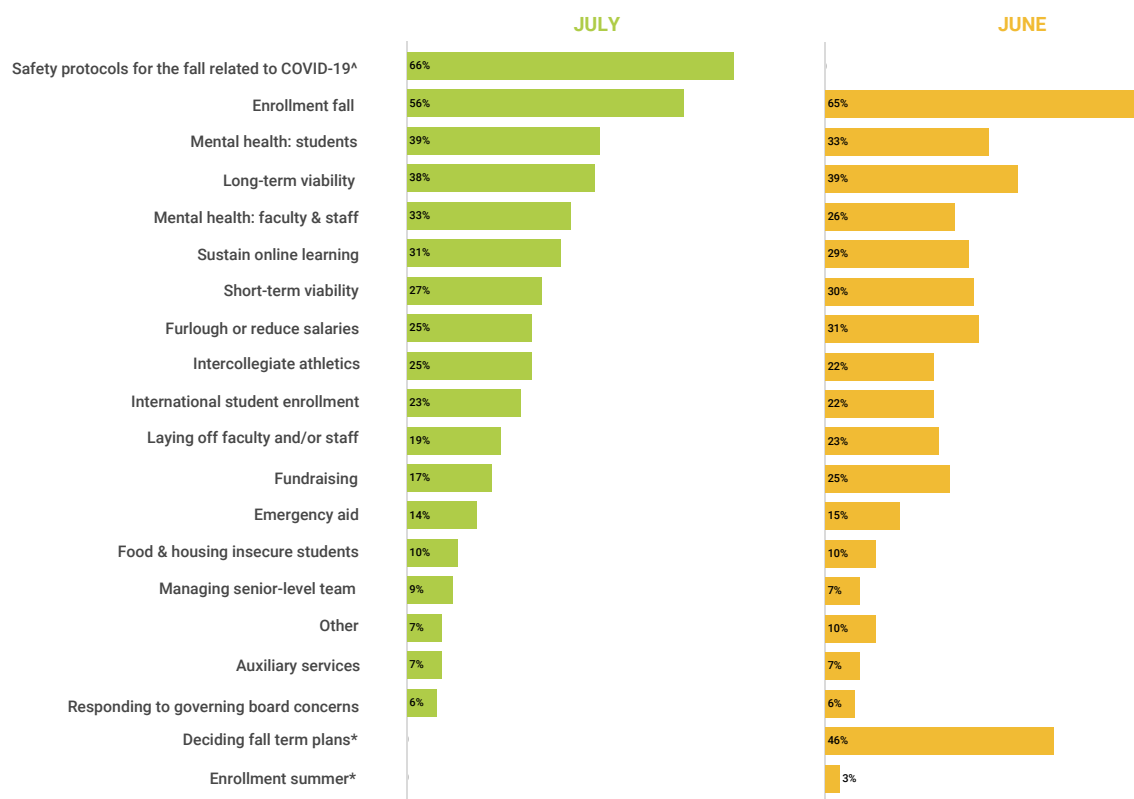
The survey was launched on July 13 and closed on July 20.

MOST PRESSING ISSUES FOR PRESIDENTS

In our [June survey](#), presidents were asked to select up to five issues from a list of 19 they deemed to be most pressing. The top three most pressing issues in June were “fall enrollment,” “deciding fall term plans,” and “long-term financial viability of the institution.” In the July survey, presidents were asked to choose from a similar list, with one additional issue (see Figure 1).

- In the July survey, “safety protocols for the fall related to COVID-19” was the most pressing issue facing presidents (66 percent).
- The next most pressing issue facing presidents was “fall enrollment” (56 percent), followed by “mental health of students” (39 percent), “long-term financial viability of the institution” (38 percent), and “mental health of faculty and staff” (33 percent).
- Presidents at private four-year institutions (71 percent) were more likely than presidents at public four-year institutions (64 percent) and presidents at public two-year institutions (59 percent) to select “safety protocols for the fall related to COVID-19” as among their most pressing issues.
- Presidents at public two-year institutions (83 percent) were more likely than presidents at public four-year institutions (51 percent) and presidents at private four-year institutions (50 percent) to select “fall enrollment numbers” among their most pressing issues.

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



[^] Denotes item available in the July survey only.

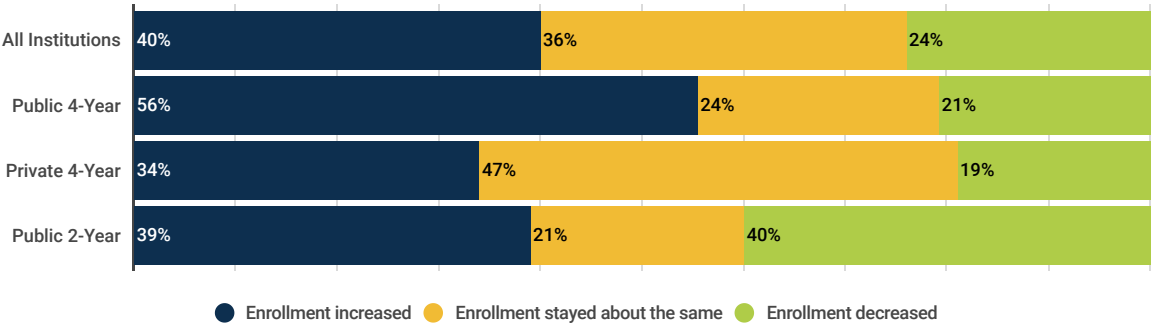
^{*} Denotes items available in the June survey only.

SUMMER 2020 ENROLLMENT

With the last summer term underway at many institutions, presidents were asked to report on how their summer 2020 enrollment compared with their summer 2019 enrollment. The majority of presidents reported that their summer 2020 enrollment had increased (40 percent) or stayed about the same (36 percent) (see Figure 2). This may be due to a number of reasons, including students enrolling to complete a few remaining classes in order to graduate or to get a head start on the fall term, taking advantage of reduced summer tuition rates offered by some institutions, or completing classes they started last spring that were disrupted.

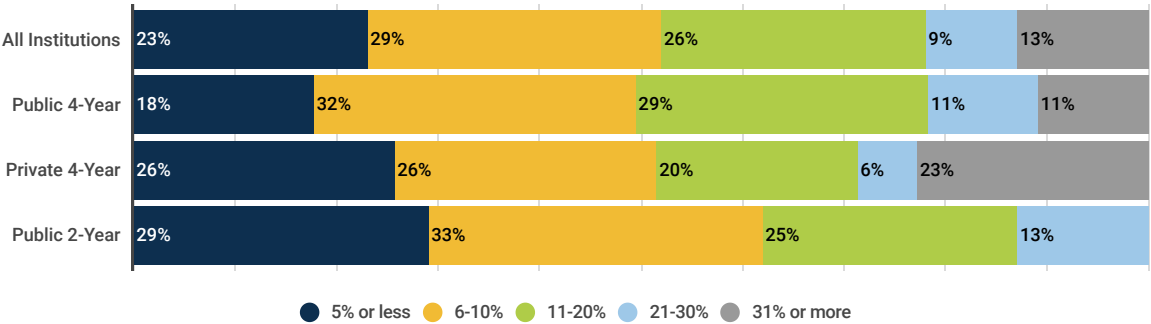
- Presidents at public four-year institutions (56 percent) were the most likely to report that their summer 2020 enrollment had increased over their summer 2019 enrollment. Only 39 percent of presidents at public two-year institutions and 34 percent of presidents at private four-year institutions reported summer 2020 enrollment increases.
- Presidents at public two-year institutions (40 percent) were the most likely to report that their summer 2020 enrollment had decreased relative to their summer 2019 enrollment. In contrast, 21 percent of presidents at public four-year and 19 percent of presidents at private four-year institutions reported a decrease in summer 2020 enrollment.

Figure 2: Summer 2020 Enrollment Relative to Summer 2019 Enrollment



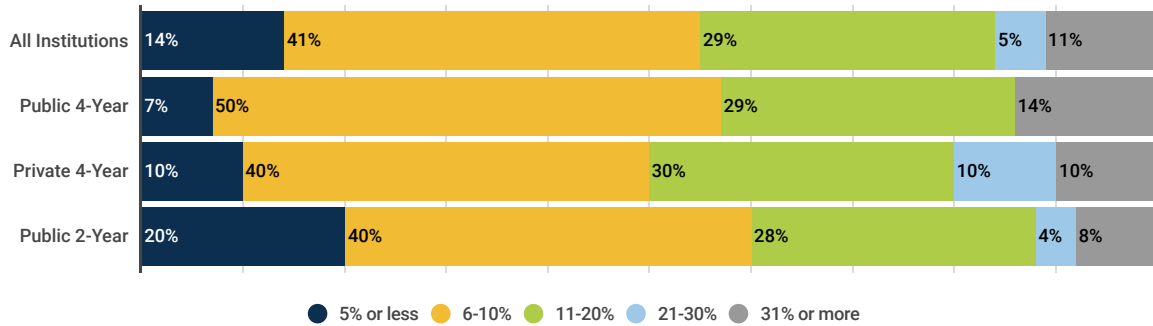
Among the 40 percent of presidents who reported a summer enrollment increase, 23 percent saw an increase of “5 percent or less,” 29 percent saw an increase between “6 percent and 10 percent,” 26 percent saw an increase between “11 percent and 20 percent,” 9 percent saw an increase between “21 percent and 30 percent,” and 13 percent saw an increase of “31 percent or more” (see Figure 3).

Figure 3: Summer 2020 Enrollment Increase



Among the 24 percent of presidents who reported a summer enrollment decrease, 14 percent saw a decrease of “5 percent or less,” 41 percent saw a decrease between “6 percent and 10 percent,” 29 percent saw a decrease between “11 percent and 20 percent,” 5 percent saw a decrease between “21 percent and 30 percent,” and 11 percent saw a decrease of “31 percent or more” (see Figure 4).

Figure 4: Summer 2020 Enrollment Decline

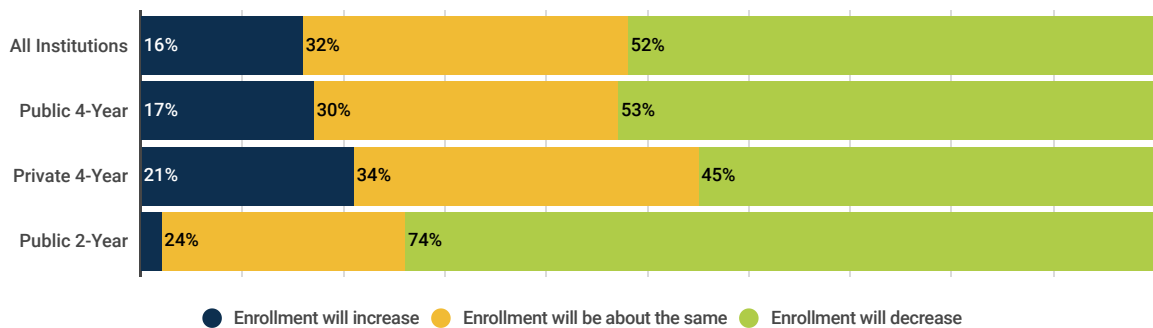


FALL 2020 ENROLLMENT

The continued spread of COVID-19 and ongoing challenges related to the pandemic have kept fall enrollment top of mind for the majority of presidents across all of the Pulse Point surveys. With the start of fall 2020 still approaching, it remains difficult to estimate just what effect the pandemic will have on fall enrollment for many colleges and universities. In the July survey, 52 percent of presidents reported expecting their fall 2020 enrollment to be lower than their fall 2019 enrollment (see Figure 5). About one-third (32 percent) reported expecting their fall 2020 enrollment to be about the same as last year, and only 16 percent expect a fall enrollment increase over last year.

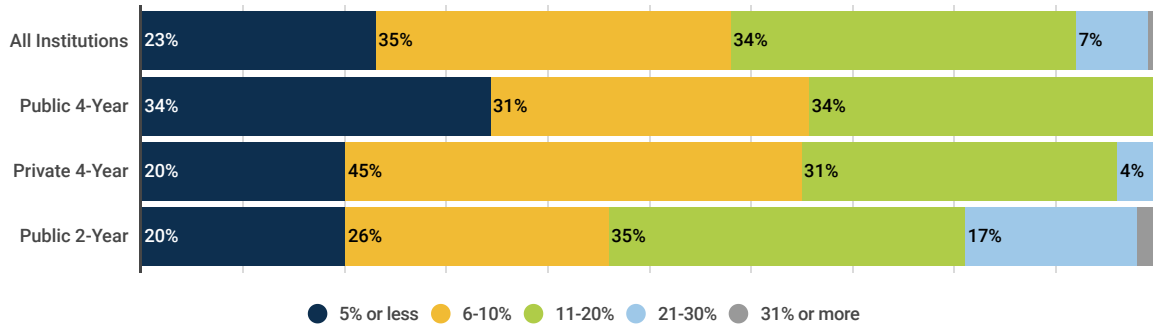
- Nearly three-quarters (74 percent) of presidents at public two-year institutions reported expecting their fall 2020 enrollment to be lower than their fall 2019 enrollment, more than presidents at public four-year institutions (53 percent) and private four-year institutions (45 percent).

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



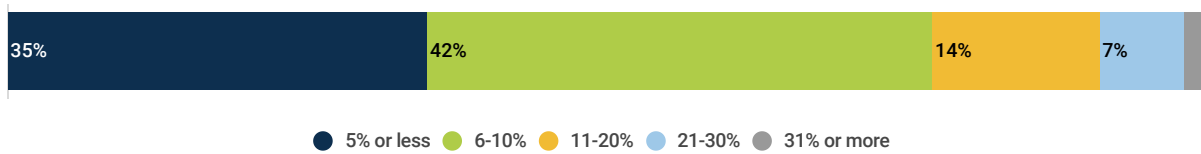
Among the 52 percent of presidents who expect a fall enrollment decrease, 23 percent expect a decline of “5 percent or less,” 35 percent expect a decline between “6 percent and 10 percent,” 34 percent expect a decline between “11 percent and 20 percent,” 7 percent expect a decline between “21 percent and 30 percent,” and only 1 percent expect a decline of “31 percent or more” (see Figure 6).

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 16 percent of presidents who reported expecting a fall enrollment increase, 35 percent expect an increase of “5 percent or less,” 42 percent expect an increase between “6 percent and 10 percent,” 14 percent expect an increase between “11 percent and 20 percent,” 7 percent expect an increase between “21 and 30 percent,” and 2 percent expect an increase of “31 percent or more” (see Figure 7).

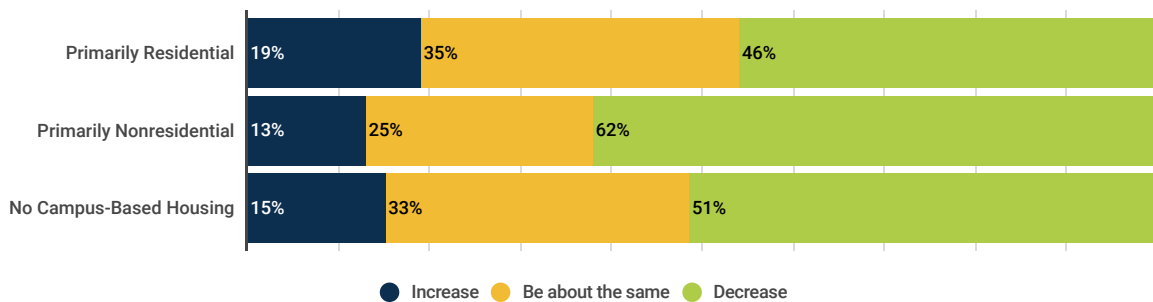
Figure 7: Anticipated Fall 2020 Enrollment Increase



In addition to exploring expectations for fall enrollment by sector, Figure 8 presents the same results by campus residency profile. Please note that presidents were asked to self-classify their institution based on fall 2019 operations.

- Presidents at primarily nonresidential institutions (62 percent) were the most likely to report expecting their fall enrollment to decrease, followed by those who lead institutions without campus-based housing (51 percent), and those who lead primarily residential institutions (46 percent).

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

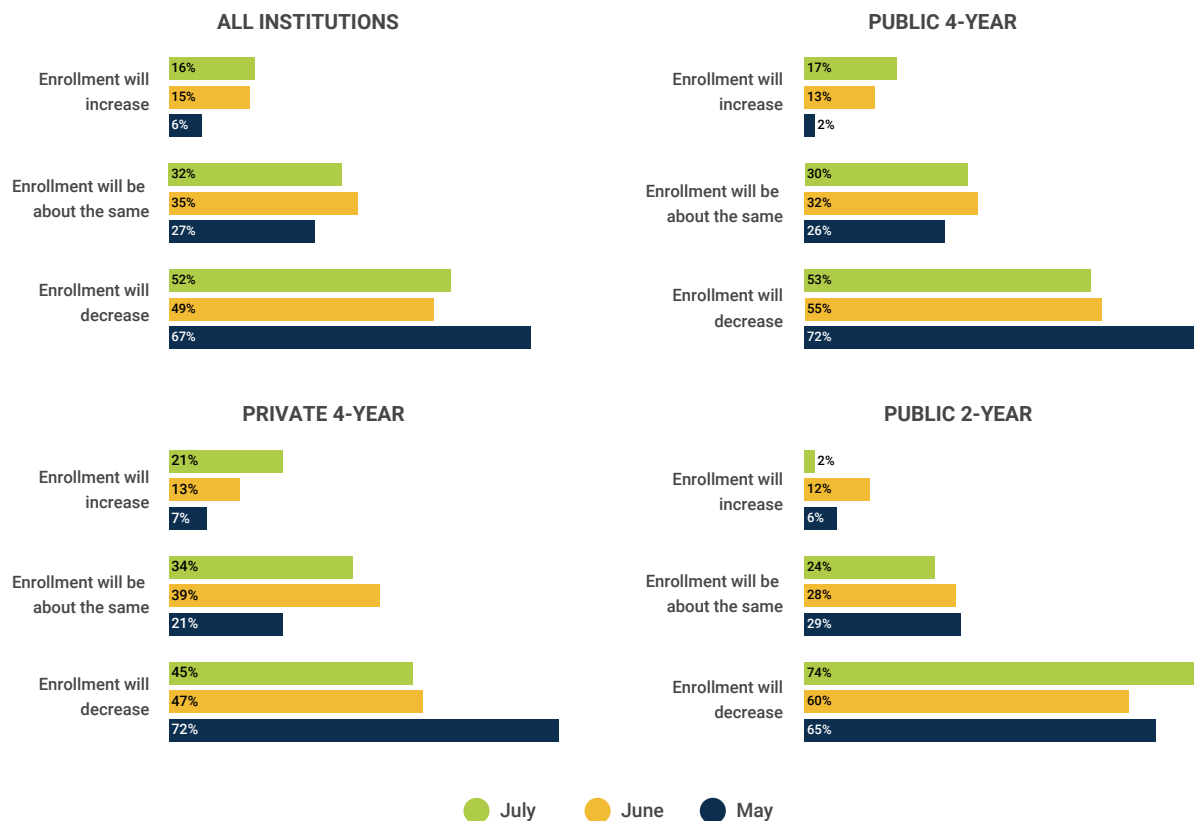


FALL 2020 ENROLLMENT, MAY, JUNE, AND JULY PULSE POINT SURVEYS

Over the last three Pulse Point surveys, presidents were given the opportunity to report their expectations for fall 2020 enrollment relative to fall 2019 enrollment. Figure 9 shows the side-by-side results of how presidents responded to the fall enrollment question in May, June, and July.

- Overall, presidents' expectations for fall enrollment changed little between June and July. While 49 percent of presidents expected a fall enrollment decrease in June, 52 percent of presidents reported expecting a fall enrollment decrease in July. This was largely driven by relatively similar expectations reported by presidents at public and private four-year institutions.
- While the share of presidents at private and public four-year institutions expecting a decline in fall enrollment shrank a bit between June and July, the share of presidents at public two-year institutions expecting a decline in fall enrollment increased by 14 percentage points between June and July.
- Approximately 120 presidents completed both the June and July Pulse Point Surveys. Results of this subsample show trends that are similar to those observed in the multiple panels of data presented in Figure 9.

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

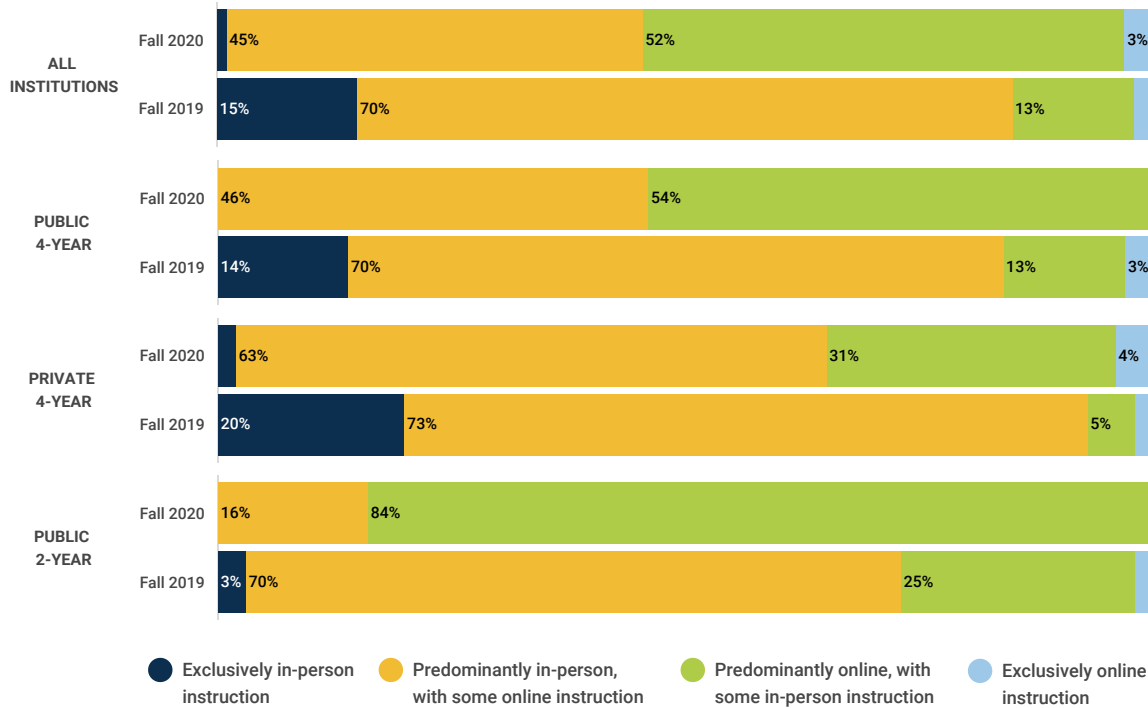


FALL 2020 INSTRUCTION

With the fall term fast approaching and uncertainty around the pandemic still present, colleges and universities are considering a variety of plans and instructional modalities to operate safely this fall. In the July Pulse Point survey, presidents were asked to indicate which type of instruction best described their institution in fall 2019 and which type of instruction they anticipate best describing their institution in fall 2020. 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,” and “exclusively online instruction.” Figure 10 presents their responses for fall 2019 and what they anticipate for fall 2020.

- In fall 2019, 70 percent of presidents described their institution as offering “predominantly in-person, with some online instruction.” However, only 45 percent of presidents report anticipating that mode of instruction in fall 2020.
- The biggest difference between fall 2019 and fall 2020 was reported among presidents at public two-year institutions. In fall 2019, 70 percent of presidents at public two-year institutions reported that their institution offered “predominantly in-person, with some online instruction,” but only 16 percent reported anticipating offering that same mode of instruction in fall 2020.
- Approximately half of all presidents reported no change between their fall 2019 mode of instruction and their anticipated mode of instruction in fall 2020. The other half is made up predominately of presidents reporting a shift from “predominantly in-person, with some online instruction” to “predominantly online, with some in-person instruction” and, to a smaller degree, presidents reporting a shift from “exclusively in-person instruction” to “predominantly in-person, with some online instruction” and “predominantly online, with some in-person instruction.”

Figure 10: Fall 2019 Instruction Type and Anticipated Fall 2020 Instruction Type



BALANCING IN-PERSON, ONLINE, AND HYBRID COURSE OFFERINGS

Approximately 97 percent of presidents reported that they anticipate their institution offering some mix of in-person and online courses this fall. These presidents were asked to identify the roles on campus that have the primary responsibility for determining which undergraduate and graduate courses are taught in-person, online, or in hybrid formats this fall. Presidents were given the following list of six roles and asked to select all that apply: president, provost, deans, department chairs, faculty, and other. Presidents were also asked whether faculty will be provided an avenue to request that their own courses be taught in-person, online, or in hybrid formats. Here, presidents were given a total of six options: “Yes, no justification required,” “Yes, if personally immunocompromised or otherwise at high risk,” “Yes, if caring for or cohabitating with someone who is immunocompromised or otherwise at high risk,” “Yes, for other reasons,” “No,” and “Unsure.” Again, presidents who indicated anticipating their institution’s fall 2020 term to be either “exclusively online” or “exclusively in-person” were not asked these questions.

Undergraduate Courses

Figure 11 shows the number of individuals that presidents identified as having or sharing the primary responsibility of determining the modality of undergraduate courses. These results are limited only to institutions that offer undergraduate courses.

The vast majority of presidents (70 percent) identified multiple individuals as sharing the primary responsibility for determining the modality of undergraduate courses (see Figure 11).

- Presidents at public two-year institutions (37 percent) were the most likely to identify only one individual as having the primary responsibility for determining the modality of undergraduate courses this fall, followed by presidents at private four-year institutions (28 percent) and presidents at public four-year institutions (25 percent).

Figure 11: Number of Individuals Primarily Responsible for Determining Course Modality for Undergraduate Courses in Fall 2020

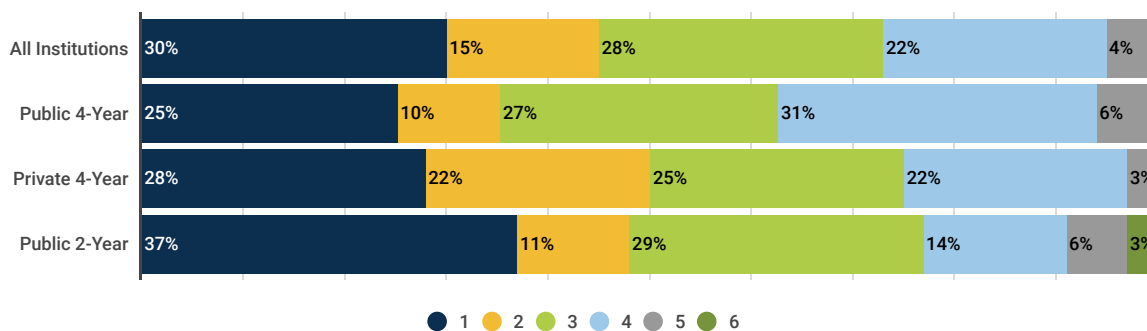


Figure 12 presents the roles that presidents identified as having or sharing the primary responsibility for determining the modality of undergraduate courses this fall. Again, presidents were allowed to select all roles that applied.

- Across all institutions, presidents most frequently identified the provost (73 percent) and deans (58 percent) as among those with primary responsibility for determining undergraduate course modality this fall.
- Presidents at public four-year and private four-year institutions were more likely than presidents at public two-year institutions to indicate department chairs and faculty as among those with primary responsibility for determining the modality of fall courses.

Figure 12: Individuals Primarily Responsible for Determining Course Modality for Undergraduate Courses in Fall 2020

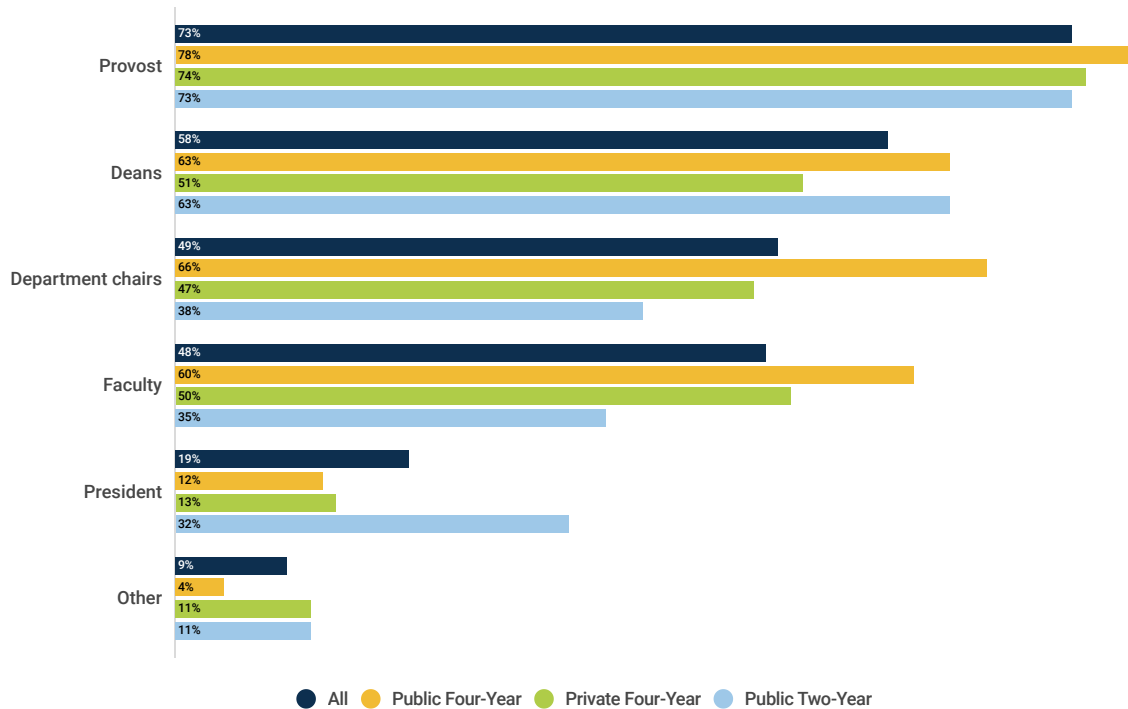
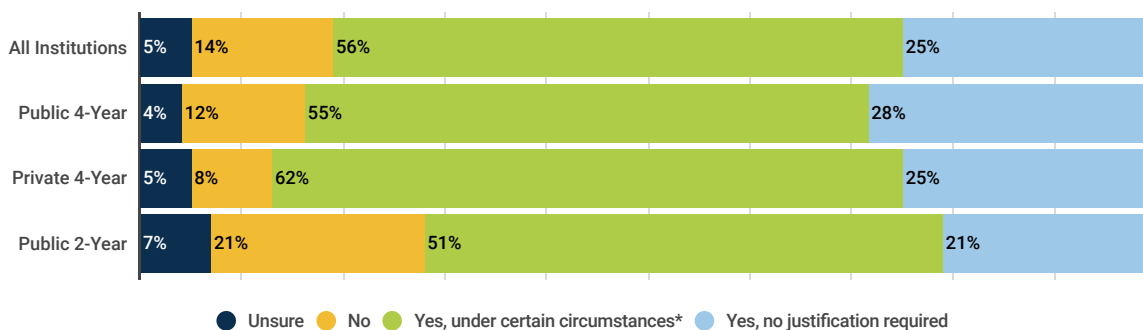


Figure 13 shows that a quarter (25 percent) of all presidents indicated faculty will be able to determine the modality of their undergraduate courses with no justification required. More than half of presidents (56 percent) reported that faculty will be able to request the modality of their undergraduate courses under at least one of the three circumstances presented (personally at high risk, cohabitating or caring for someone who is at high risk, and/or for other reasons). Fourteen percent of presidents reported that faculty would not be provided with a process to request the modality of their undergraduate courses, and 5 percent reported that they were “unsure.”

- Presidents at public four-year institutions (28 percent) were the most likely to report that faculty will be able to determine the modality of their undergraduate courses with no justification required.
- Presidents at private four-year institutions (62 percent) were the most likely to report that faculty will be able to request the modality of their undergraduate courses under certain circumstances.
- Presidents at public two-year institutions (21 percent) were the most likely to report that faculty will not be able to request the modality of their undergraduate courses.

Figure 13: Opportunity for Faculty to Request the Modality of Their Undergraduate Courses in Fall 2020



* "Under certain circumstances" includes presidents who selected one of the following three options: 1) "Yes, if personally immunocompromised or otherwise at high risk;" 2) "Yes, if caring for or cohabitating with someone who is immunocompromised or otherwise at high risk;" or 3) "Yes, for other reasons."

Graduate Courses

Figure 14 shows the number of individuals that presidents identified as having or sharing the primary responsibility of determining the modality of graduate courses. These results are limited only to institutions that offer graduate courses.

Similar to the response of presidents at institutions with undergraduate offerings, 70 percent of presidents identified multiple individuals as sharing the primary responsibility for determining the modality of graduate courses (see Figure 14). There was little difference between presidents at public four-year and private four-year institutions.

Figure 14: Number of Individuals Primarily Responsible for Determining Course Modality for Graduate Courses in Fall 2020

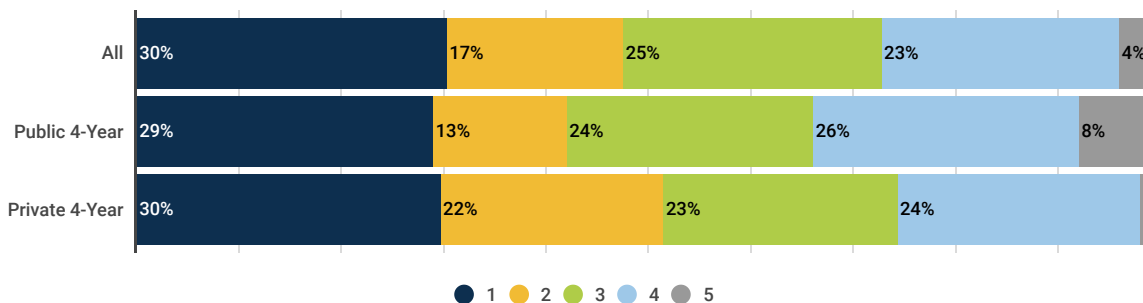


Figure 15 presents the roles that presidents identified as having or sharing the primary responsibility for determining the modality of graduate courses this fall. Once again, presidents were allowed to select all roles that applied.

- Across all institutions, presidents most frequently identified the provost (67 percent) and deans (67 percent) as among those with primary responsibility for determining graduate course modality this fall.
- Overall, deans were more commonly selected in reference to graduate courses (67 percent) than undergraduate courses (58 percent).
- Presidents at public four-year institutions were more likely to select department chairs (61 percent) and faculty (56 percent) as among those with primary responsibility for determining the modality of graduate courses this fall, compared with presidents at private four-year institutions, where 44 percent selected department chairs and 40 percent selected faculty.

Figure 15: Individuals Primarily Responsible for Determining Course Modality for Graduate Courses

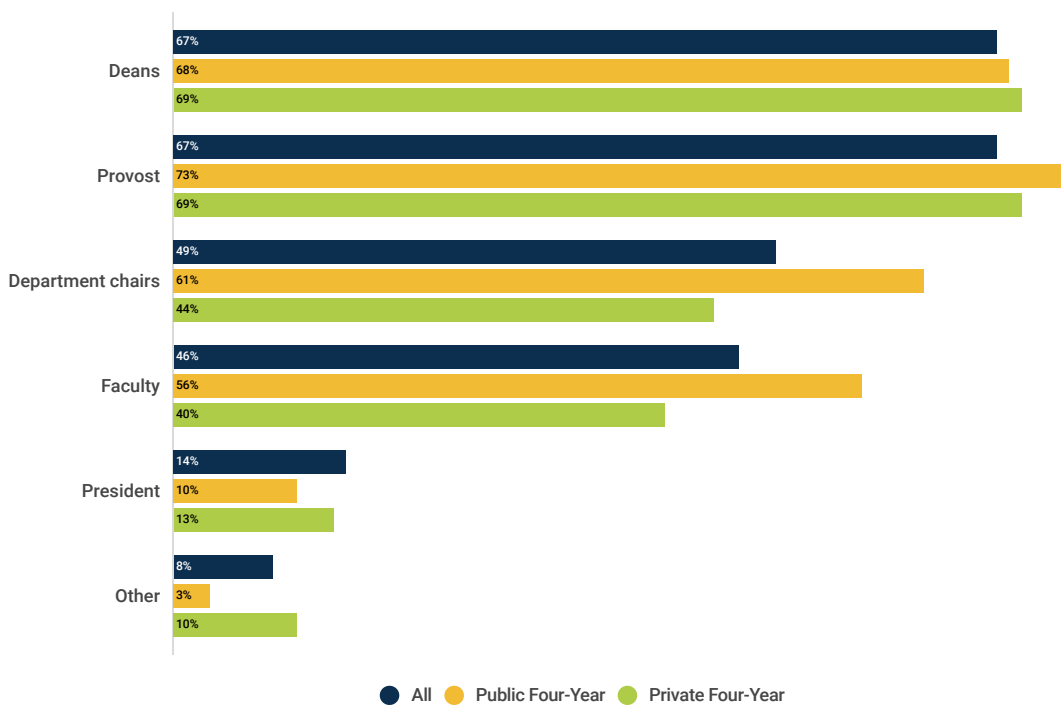
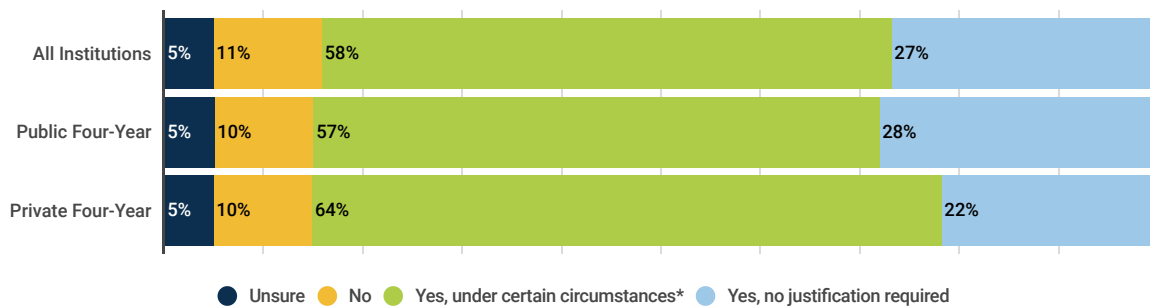


Figure 16 shows that slightly more than a quarter (27 percent) of all presidents indicated faculty will be able to determine the modality of their graduate courses with no justification required. More than half of presidents (58 percent) reported that faculty will be able to request the modality of their graduate courses under at least one of the three circumstances presented (personally at high risk, cohabitating or caring for someone who is at high risk, and/or for other reasons). Eleven percent of presidents reported that faculty would not be provided with a process to request the modality of their undergraduate courses, and 5 percent reported that they were “unsure.”

- Presidents at public four-year institutions (28 percent) were more likely than presidents at private four-year institutions (22 percent) to report that faculty will be able to determine the modality of their graduate courses with no justification required.
- Presidents at private four-year institutions (64 percent) were more likely than presidents at public four-year institutions (57 percent) to report that faculty will be able to request the modality of their graduate courses under certain circumstances.

Figure 16: Opportunity for Faculty to Request the Modality of Their Graduate Courses in Fall 2020



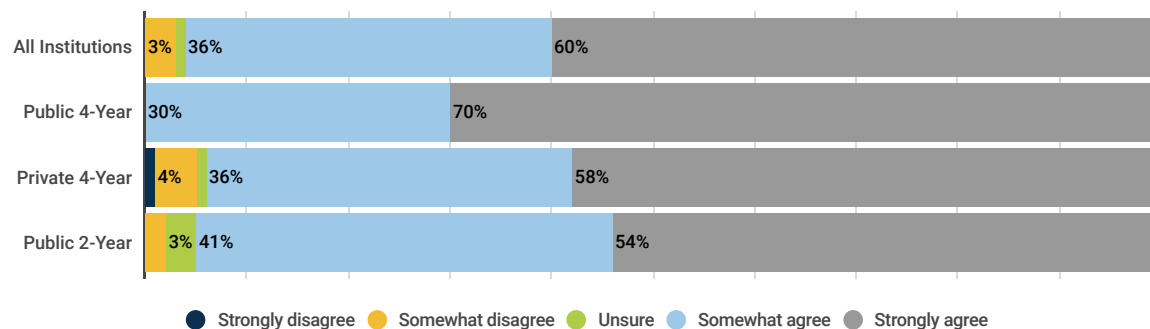
* "Under certain circumstances" includes presidents who selected one of the following three options: 1) "Yes, if personally immunocompromised or otherwise at high risk;" 2) "Yes, if caring for or cohabitating with someone who is immunocompromised or otherwise at high risk;" or 3) "Yes, for other reasons."

When it comes to faculty having the opportunity to request the modality of their courses, presidents indicated similar approaches to undergraduate and graduate courses.

STUDENT MENTAL HEALTH

Throughout the last several Pulse Point surveys, student mental health has been in the top five most pressing issues for college and university presidents. The July survey aimed to understand if presidents were anticipating an increase in student mental health needs this fall due to COVID-19. An overwhelming majority of presidents (96 percent) indicated that they either “strongly agreed” or “somewhat agreed” that the need for student mental health services and support will be greater this fall, relative to last fall, due to COVID-19 (see Figure 17).

Figure 17: Level of Agreement with Statement on the Increased Student Need for Mental Health Services in Fall 2020 Due to COVID-19



The 96 percent of presidents who agreed that there will be an increased need for student mental health services and support were then asked an open-ended question aimed at understanding the strategies they are implementing in anticipation of this increased need. The following strategies were described by presidents:

Virtual or Tele-therapy

The most popular strategy mentioned by presidents was the increased use of virtual or tele-therapy options to serve their students in the fall. This would include individual counseling with current staff, outsourced third-party tele-mental health resources, or online support group sessions. One president at a public two-year institution wrote, “We have an online counseling program which is available 24/7 for all students. We will continue with our part-time counseling service, which is now virtual. Mental health/emotional well-being resources are online for students and regular communiques are sent to students.”

Staffing

The second most popular strategy mentioned was planning to increase college or university staffing to support student mental health needs. Many presidents wrote about hiring counseling center staff. One private four-year president wrote, “[We] are hiring more counseling staff and interns. And increasing staff diversity.” Other presidents wrote about plans to be more intentional in establishing relationships between their institution and community resources. Another president at a public two-year institution wrote, “[We are]...expanding partnerships with local Health and Human Services and seeking additional resources (via foundations/grants) to support expansion of mental health services.” Other presidents mentioned plans to partner with counseling programs at local colleges and universities to augment their services with graduate student interns.

Training and Support

Presidents also articulated strategies that included training student advocates, faculty, and other staff to reach out to students who are remote or may need extra support. Several other presidents wrote about plans to increase awareness of available mental health resources, to identify private spaces on campus where students can have tele-therapy sessions, and to be proactive with health and well-being campaigns and information. One president at a private four-year institution wrote, “[We are]...hiring more staff for the counseling center, working with and providing resources for student life professionals, faculty advisors, and class deans, developing virtual groups for support, and identifying campus spaces for appropriate gatherings, workout space, and athletic team training resources since our league has canceled competitive play.”

INSIGHTS FROM STATE AND LOCAL REOPENINGS

Over the past few months, states and local communities have begun implementing their reopening plans. In this July Pulse Point survey, presidents were asked to respond to this question: What lessons have you learned from your state’s experiences and how might those inform your institution’s fall operations?

Fall Course Modality

Some presidents indicated that predominantly online or remote instruction or some sort of hybrid instruction model would be the best way to operate in the fall. A president at a public two-year institution wrote, “COVID-positive numbers keep rising. This has informed the college of the need to remain mostly online and be extremely diligent about safety protocols.”

Implementing COVID-19 Safety Measures and Protocols

The importance of safety measures and protocols was the one of the biggest lessons learned from states' reopenings. One president at a four-year public institution reported, "Our state has been cautious and has a very low level of infection. We hope to adopt this cautious approach as well. We are putting in place all the safeguards that have been proposed: extensive testing, tracing, masks, distancing, etc." Other presidents were concerned that they will not be able to enforce policies like mask wearing because their state or local community is not making it mandatory. One president at a private four-year institution wrote, "Enforcing a face covering policy is very difficult, and the local community dropped its mandate. We worry we won't be able to enforce our policy."

A Slow and Phased Approach to Fall Operations While Being Agile

Many presidents indicated they learned that a "slow" or "phased" approach to reopening is important, while balancing that with the necessity to be agile and change directions quickly. One president at a private four-year institution stated, "We need to be nimble and ready to shut back down as well as to slowly open up more." One president at a public four-year institution wrote, "Agility is key. When things are changing so quickly, don't get too invested in, or attached to, any one plan because pretty soon it will have to be superseded by a new one. Be ready to fully let go of the old one, and move ahead."

Constant, Clear, and Consistent Communication

Many presidents emphasized the lesson of constant, clear, and consistent communication. One president wrote, "Communication is even more important when uncertainty is part of the message. Letting your employees know that there is uncertainty is an important message in itself. And, that you're doing your best to grapple with uncertainty on their behalves can be comforting both to them, and to you."

Use Local Health Resources and CDC Guidelines

In some cases, presidents mentioned state guidance was lacking. In these situations, presidents wrote that they found it more effective to work directly with local health departments and health facilities. Other presidents indicated they were adhering to CDC guidelines. One president at a public four-year institution wrote, "Our state has determined that protocols are locally based. Regardless, we are following CDC guidelines and recommendations."