



Responding to the COVID-19 Crisis: A Survey of College and University Presidents

A study by *Inside Higher Ed* and Hanover Research

March 2020

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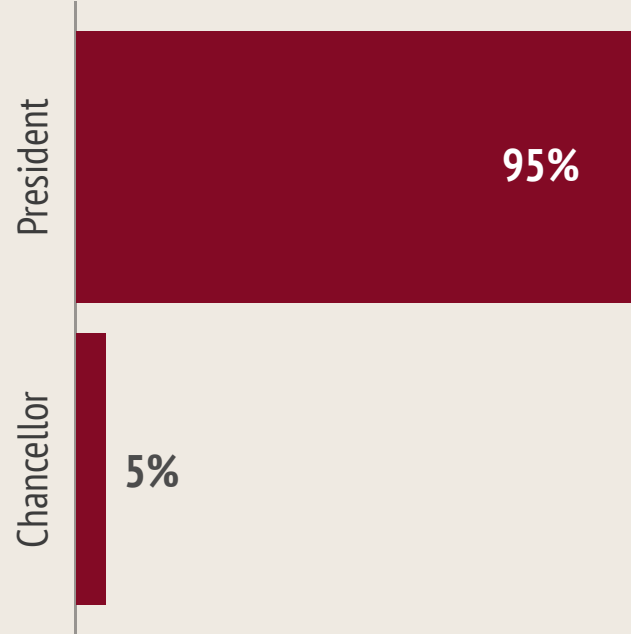
INTRODUCTION AND METHODOLOGY

Inside Higher Ed partnered with Hanover Research to develop and disseminate a COVID-19 Perceptions and Response Survey to college and university presidents.

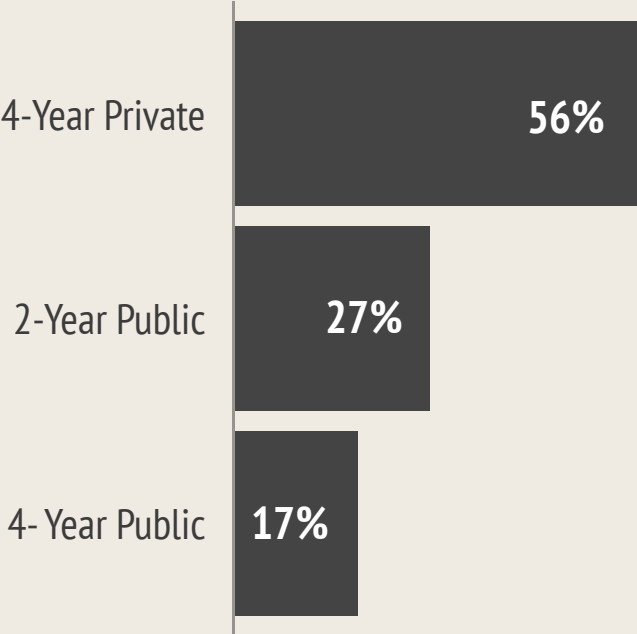
The survey was administered online in March 2020. The analysis includes a total of 172 respondents. Respondents were President or Chancellor, currently employed at a 4-year Private, 4-year Public, or 2-year Public institution. Statistically significant differences (95% confidence level) between groups are noted with an asterisk (*).

RESPONDENT PROFILE

Which of the following best describes your primary role at your institution? (n=172)



Which of the following best describes your institution? (n=172)

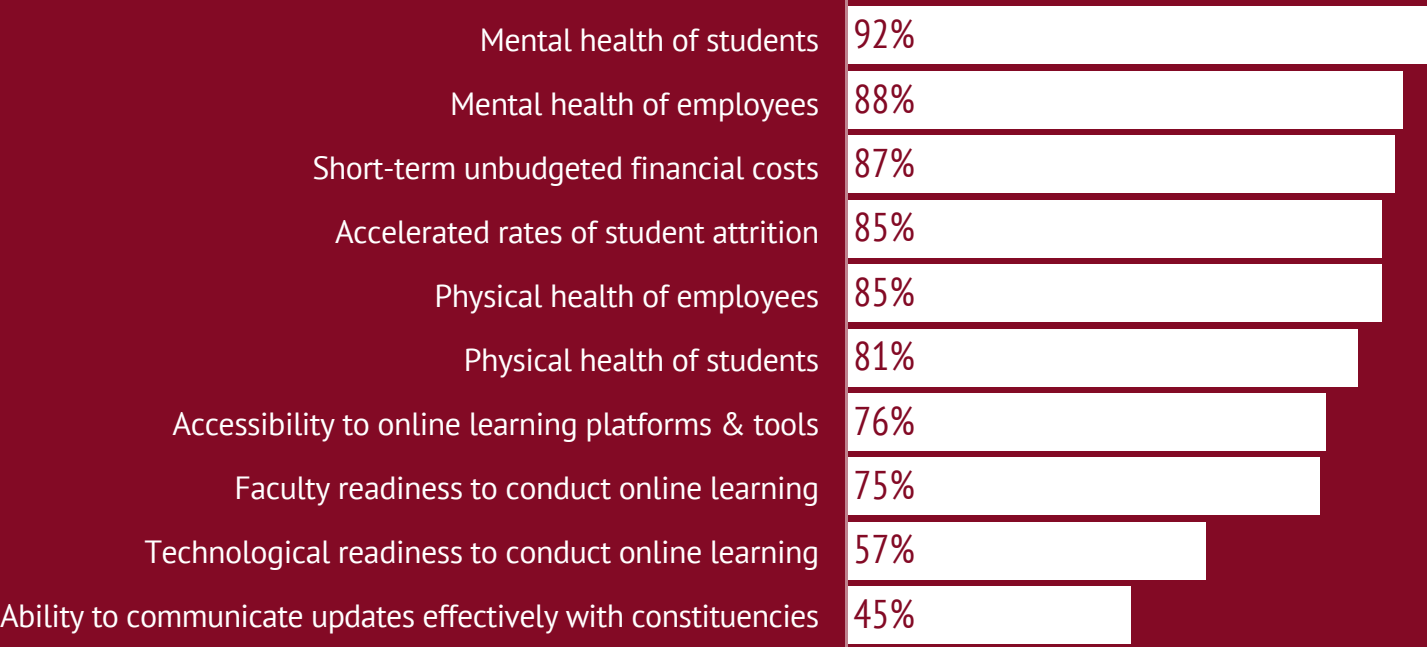


IMMEDIATE-TERM ISSUES

Respondents worry most about the mental and physical health of students and employees in the immediate term. As shown in the figure below, at least 80% of respondents are somewhat or very concerned about the mental and physical health of students and employees alike.

How would you rate your current level of concern related to the following immediate-term issues in regard to COVID-19? (n=164)

% Very Concerned + % Somewhat Concerned



CHALLENGES IN ADDRESSING CONCERNS



18%

Respondents whose institutions have already invested in additional physical or mental health resources.



44%

Of the institutions that have yet to invest in physical or mental health resources, just under half report that they are somewhat or very likely to do so in the future.



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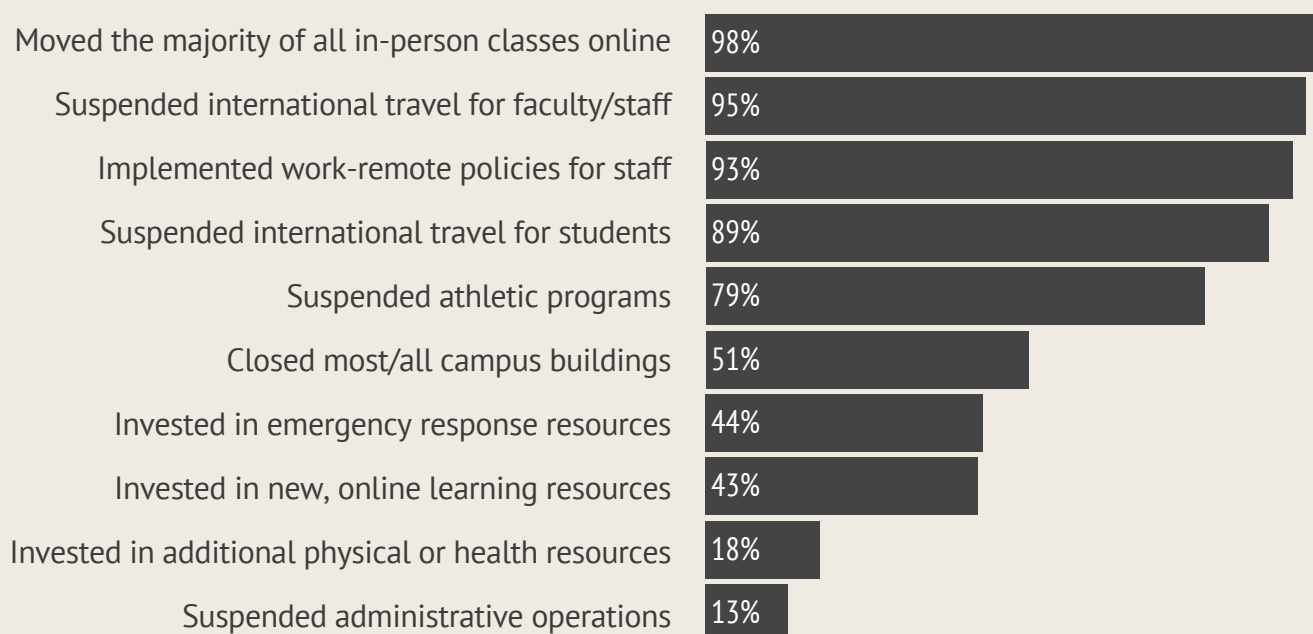


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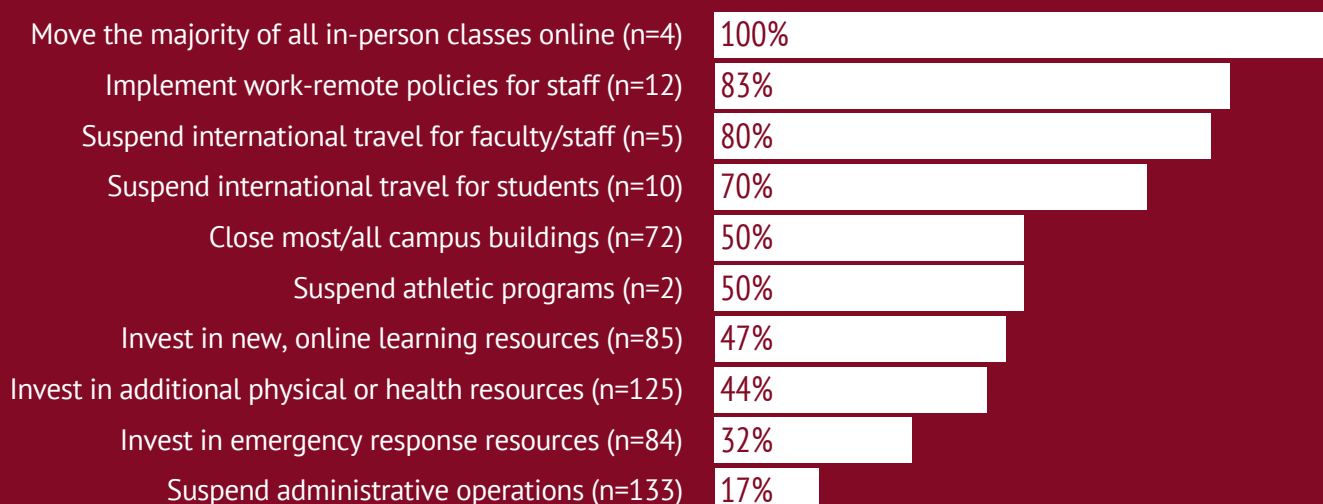
INSTITUTIONAL RESPONSE

Though respondents report an immediate concern for the mental and physical health of their institutional community, only a few institutions have invested in additional physical or mental health resources, and a limited number of presidents or chancellors report they are likely to do so in the future.

Which of the following actions have you already taken at your institution in response to COVID-19? (n=164)



How likely is your institution to take the following actions in the future? % Very Likely + % Somewhat Likely

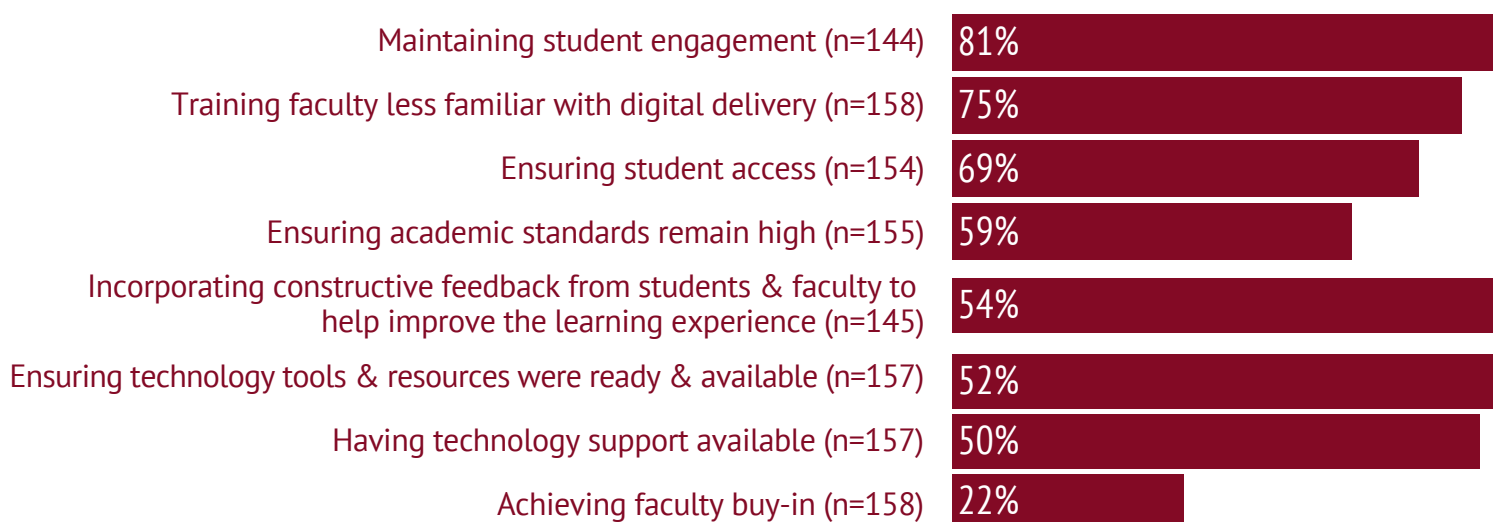


REMOTE LEARNING CHALLENGES

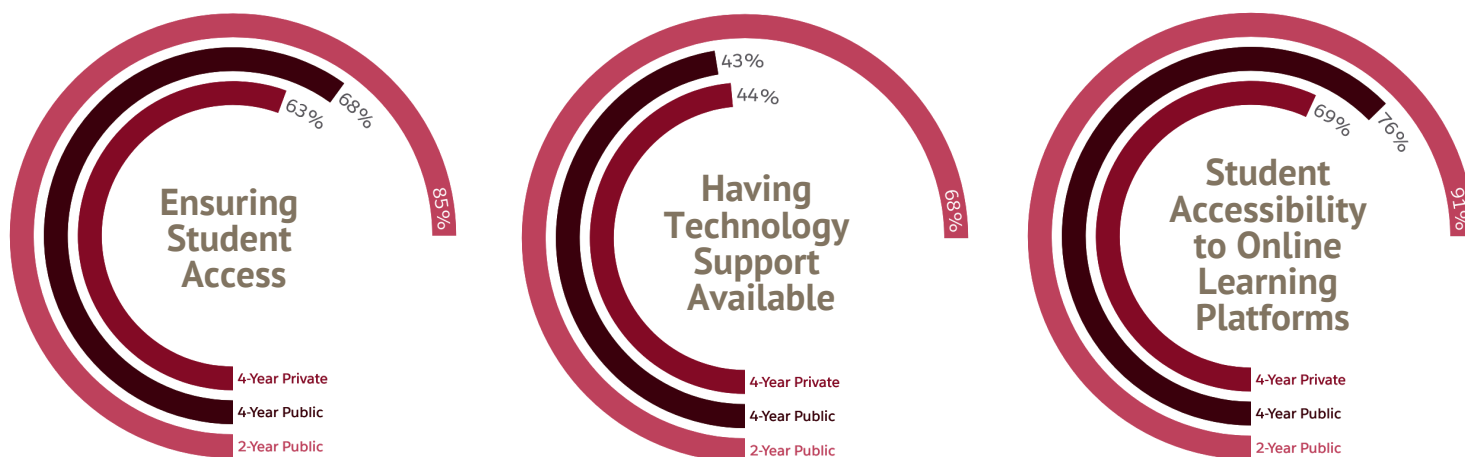
Student access and engagement are among the largest obstacles to continuing to serve and teach students. As shown in the chart below, a large majority of respondents rate maintaining student engagement (81%) and ensuring student access (69%) as somewhat or very challenging issues for their institution.

How would you rate the level of challenge at your institution associated with moving in-person classes to a remote or online setting for the following activities?

% Very Challenging + % Somewhat Challenging



Challenges associated with moving in-person classes to a remote or online setting vary by institution type. Here is how each type rated a given challenge (% Very Challenging + % Somewhat Challenging).



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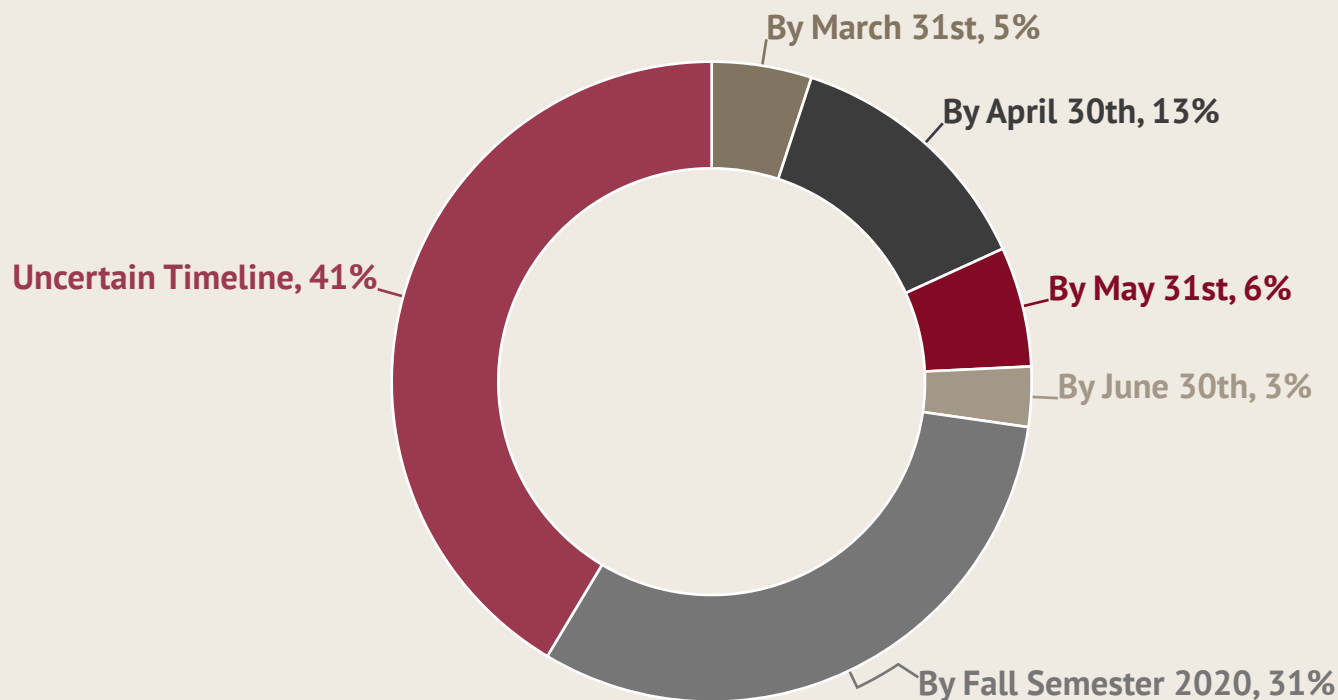
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RESUMPTION OF IN-PERSON CLASSES

About half of the institutions surveyed operate on an uncertain timeline for resuming in-person classes. In particular, presidents and chancellors at two-year institutions face an uncertain future.

When do you expect to resume holding in-person classes? (n=157)



Timeline	4-year Private (n=88)	4-year Public (n=28)	2-year Public (n=41)
By March 31st	2%	7%	10%
By April 30th	14%	4%	20%
By May 31st	6%	7%	7%
By June 30th	3%	4%	0%
By Fall Semester 2020*	40%	32%	12%
Uncertain timeline	35%	46%	51%

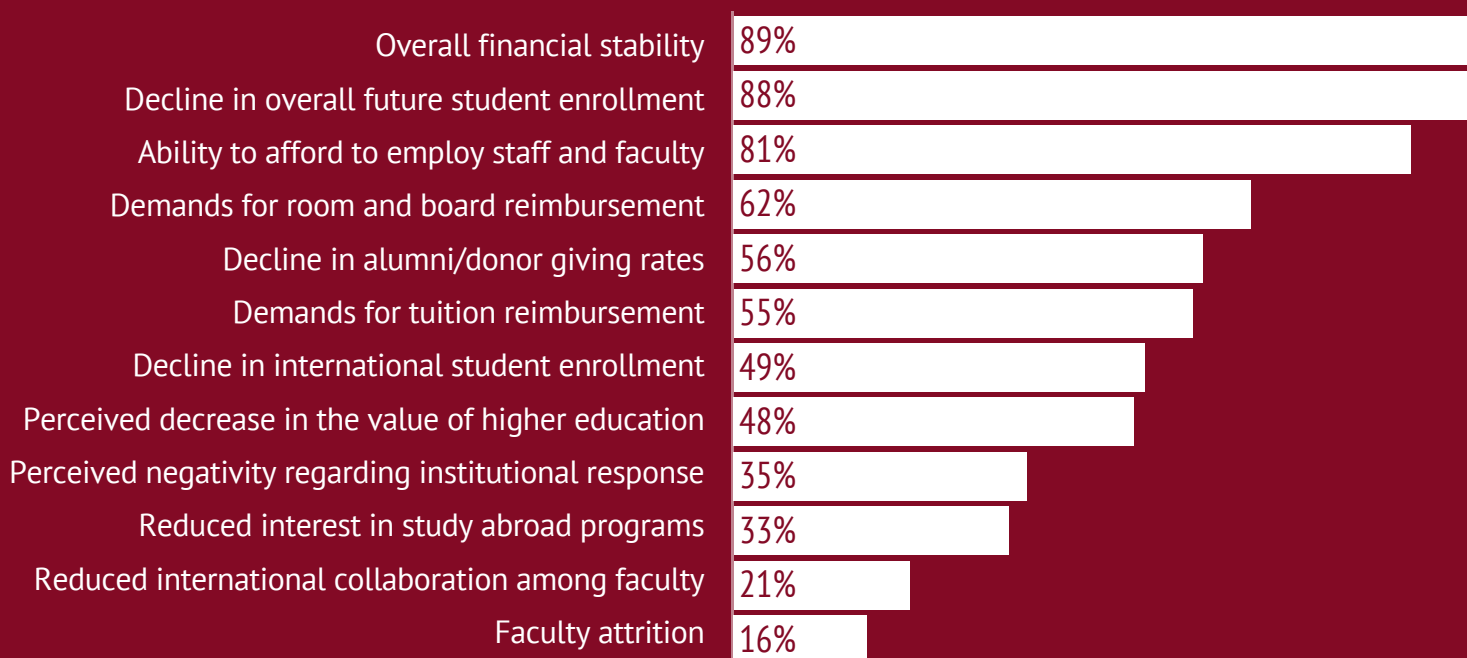
Note: An asterisk* indicates a statistically significant difference between respondent groups.

LONG-TERM ISSUES

Short-term student attrition and long-term enrollment drops present obstacles to maintaining stability. Eighty-eight percent of respondents are somewhat or very concerned about the long-term decline in future student enrollment.

How would you rate your level of concern with the following potential long-term issues at your institution in regard to COVID-19?

% Very Concerned + % Somewhat Concerned



How would you rate your level of concern with the following potential [immediate-term/long-term issues] at your institution in regard to COVID-19?

Top 5 Options: % Very Concerned + % Somewhat Concerned

Immediate-Term (n=164)		Long-Term (n=160)	
1	Mental health of students (92%)	Overall financial stability (89%)	
2	Mental health of employees (88%)	Decline in overall future student enrollment (88%)	
3	Short-term unbudgeted financial costs (87%)	Ability to afford to employ staff and faculty (81%)	
4	Accelerated rates of student attrition (85%)	Demands for room and board reimbursement (62%)	
5	Physical health of employees (85%)	Decline in alumni/donor giving rates (56%)	



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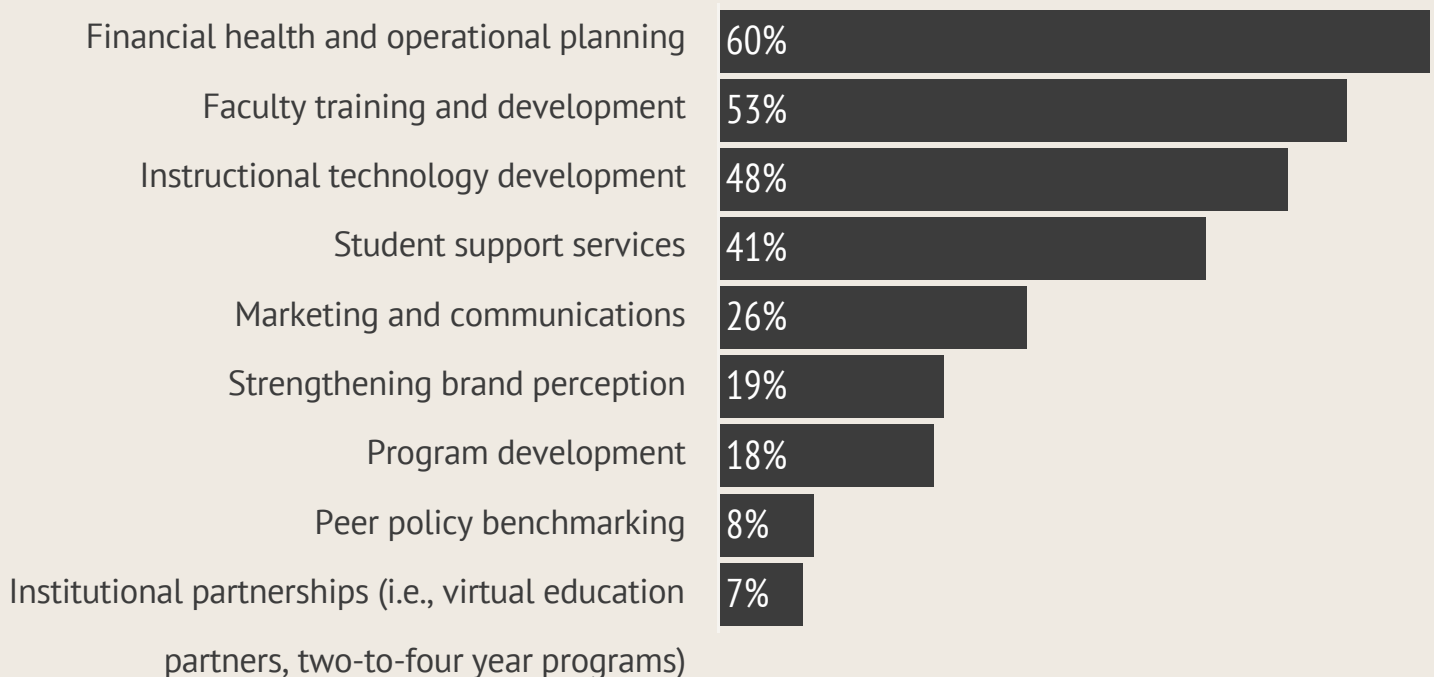
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OPERATIONAL SUPPORT

Respondents report needing the most support in navigating financial issues during the COVID-19 crisis. As noted earlier, among long-term issues, respondents are most likely to be concerned about their overall financial stability (89% somewhat or very concerned).

Of the following areas, where do you feel your institution needs the most additional operational support to successfully navigate beyond the COVID-19 crisis?

Select up to your top 3 options. (n=159)



STATE AND FEDERAL GOVERNMENT SUPPORT

Respondents primarily cite financial health and planning as their most needed operational support and a financial stimulus package to compensate for losses as their most needed government support, as shown in the graph below.

Of the following areas, where do you feel your institution needs the most additional support from state and federal governments to successfully navigate beyond the COVID-19 crisis? Select up to your top 3 options. (n=159)



89%

Financial stimulus package to compensate for losses



71%

Flexibility on regulatory limitations in providing remote learning (regular and substantive interaction, etc.)



37%

Easing of borrowing provisions to help colleges bridge short-term financial difficulties



33%

Mental health resource allocation for students



25%

Ability to leverage endowment funds without negatively impacting financial responsibility score



14%

Assistance with processing international student visas more efficiently

March 27, 2020

Dear Presidents and Chancellors,

The global impact of COVID-19 has confronted college and university leaders with sudden and complex challenges. You have responded quickly and shown impressive leadership during the emerging crisis. While no one could have predicted the intensity of the impact, this new frontier also presents opportunities for colleges and universities to engage in innovative ways to provide quality education and research. Most institutions will attempt to emerge stronger and more resilient, looking for new means to strengthen educational quality and services aligned with mission.

Today's context requires both the immediate and the sustained attention of senior leadership as it contemplates how best to respond to future challenges. We believe that a structured approach to coordinating your institution's response should consider the following three phases:

- **Triage:** Addressing the immediate issues, leaders react promptly, thoughtfully and with clear communications to a rapidly changing landscape to ensure the safety of their students, faculty and staff — and the integrity of critical mission-focused activities (education, research, and clinical).
- **Stabilization:** Assuming the crisis begins to ebb in the coming months, leaders assess the financial and cultural realities of COVID-19 and shift resources to prepare their institutions for the coming fall term.
- **Transformation:** Using a more informed lens as to how the environment has unfolded, leaders develop and implement their vision for mission-driven institutional change that will ensure the long-term success and growth of their institutions.



We are collaborating with you to focus on several core issues, such as:

- Providing **leadership** in a time of **unprecedented uncertainty**.
- Examining and **aligning the academic portfolio** in response to recent events.
- Evaluating the **strategic and financial impact** for the **research and clinical enterprise**.
- Clarifying the institutional **financial picture**, especially **liquidity exposures** on the balance sheet.
- Mitigating **impacts on student enrollment**, both prospective and continuing.
- Guiding strategic planning to strengthen core services and develop **innovative future offerings**.

We are privileged to work in support of over 500 of the best educational institutions in the world. It is through scholarship, education, medical and technological research and development, and community service that colleges and universities demonstrate their value to our economy and our democracy. Demonstrating leadership and a clear vision for the future in times of crisis requires a broad perspective and a strong sense of mission. Huron brings both deep experience in higher education and creative approaches, and we stand ready to support your leadership during this challenging time and beyond.

Sincerely,

Jim Roth
Huron CEO

Laura Yaeger
Huron Higher Education Client Services
Leader

STATE AND FEDERAL GOVERNMENT SUPPORT (cont.)

As a result of the uncertainties, nearly all respondents affiliated with two-year programs want flexibility from state/federal governments on regulatory limitations for remote learning (93%).

Of the following areas, where do you feel your institution needs the most additional [operational support/support from state and federal governments] to successfully navigate beyond the COVID-19 crisis? Select up to your top 3 options.

Top 3 Options

	Operational Support (n=159)	Support from State and Federal Governments (n=160)
1	Financial health and operational planning (60%)	Financial stimulus package to compensate for losses (81%)
2	Faculty training and development (53%)	Flexibility on regulatory limitations in providing remote learning (regular and substantive interaction, etc.) (71%)
3	Instructional technology development (48%)	Easing of borrowing provisions to help colleges bridge short-term financial difficulties (37%)

Of the following areas, where do you feel your institution needs the most additional support from state and federal governments to successfully navigate beyond the COVID-19 crisis? Select up to your top 3 options.

By Institution Type

	4-year Private (n=89)	4-year Public (n=27)	2-year Public (n=43)
1	Financial stimulus package to compensate for losses (93%)	Financial stimulus package to compensate for losses (93%)	Flexibility on regulatory limitations in providing remote learning (regular and substantive interaction, etc.) (93%)
2	Flexibility on regulatory limitations in providing remote learning (regular and substantive interaction, etc.) (57%)	Flexibility on regulatory limitations in providing remote learning (regular and substantive interaction, etc.) (79%)	Financial stimulus package to compensate for losses (79%)
3	Easing of borrowing provisions to help colleges bridge short-term financial difficulties (52%)	Mental health resource allocation for students (37%)	Mental health resource allocation for students (63%)

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