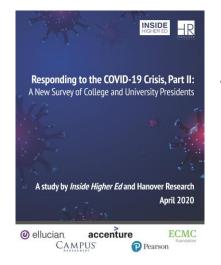




#### Responding to the Covid-19 Crisis: a Survey of Presidents, Part II



An *Inside Higher Ed* webcast April 30, 2020 2 p.m. Eastern

#### Presenters

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#### The Survey's Goals

- Inside Higher Ed's mission: keep higher ed professionals informed so they can help institutions fulfill *their* missions. Needed most of all in turbulent times.
- Do this every day on our website, but also with surveys, special reports, events, etc.
- This is second "flash" survey we've done of presidents' perspectives and actions re: COVID-19. First was in mid-March.



## Methodology

- Questions prepared by *Inside Higher Ed,* in collaboration with Hanover Research.
- Polling conducted by Hanover April 17-19, 1 month after first survey.
- 187 presidents responded; 109 public 2- and 4year, 78 private nonprofit.
- Complete anonymity for respondents, but answers coded to allow for breakdown by sector, etc.



#### What's Happened So Far



Credit: James Madison U.



#### Short-Term Concerns: Mental Health, Finances, and Low-Income Students

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

Mental health of students

Disproportionate impact on students from low-income backgrounds †

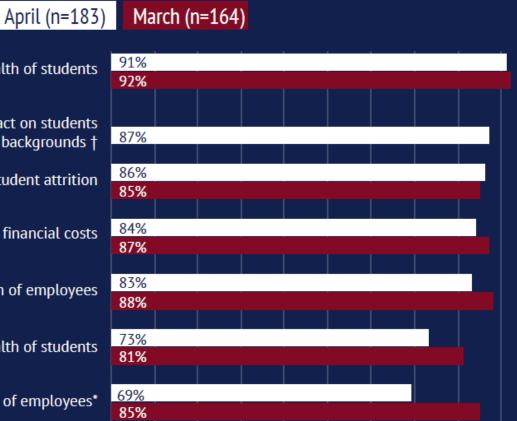
Accelerated rates of student attrition

Short-term unbudgeted financial costs

Mental health of employees

Physical health of students

Physical health of employees\*





#### Longer-Term Concerns

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 April (n=179) March (n=0-160)					
Inequitable impact on underrepresented students †	90%				
Decline in overall future student enrollment	90% 88%				
Overall financial stability	88% 89%				
Ability to afford to employ staff and faculty	83% 81%				
Decline in alumni/donor giving rates	64% 56%				
Perceived decrease in the value of higher education*	60% 48%				

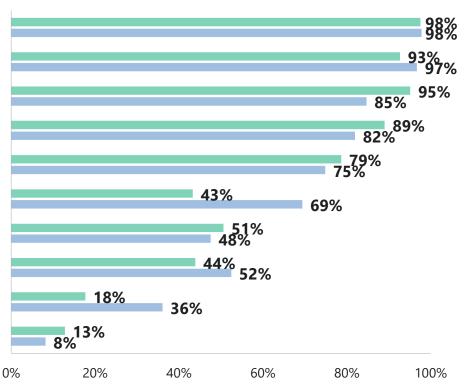


#### How Colleges Have Responded

#### Which of the following actions have you already taken at your institution in response to COVID-19?

■ March (n=164) ■ April (n=183)

Moved the majority of all in-person classes online Implemented work-remote policies for staff Suspended international travel for faculty/staff\* Suspended international travel for students Suspended athletic programs Invested in new, online learning resources\* Closed residential halls Invested in emergency response resources Invested in additional physical or mental health resources\* Suspended administrative operations





#### How Colleges Have Responded (cont.)

Admissions Changes		<b>Financial Actions</b>				
Moved campus tours online	82%	Reduced workforce	19%			
Moved admissions online	80%	Furloughed employees	10%			
Delayed deadlines	39%	Froze/reduced benefits	9%			
Revised standards	36%	Instituted salary reductions	5%			



## Looking Ahead



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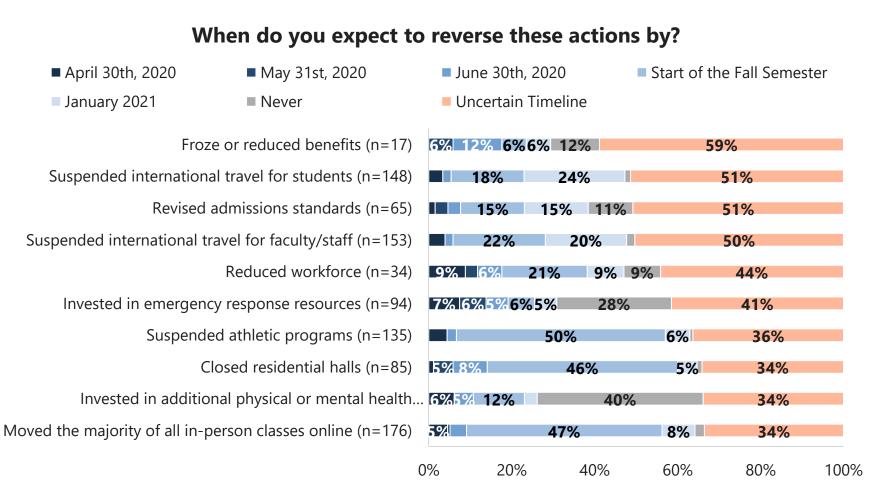


#### The Outlook for Fall

#### When do you expect to reverse the move of the majority of all in-person classes online)? 100% 80% 60% 47% 34% 40% 20% 8% 5% 4% 2% 1% 0% April 30th, May 31st, June 31st, Start of Uncertain January Never 2020 2020 2020 the Fall 2021 Timeline Semester



#### **Reversing Other Actions Already Taken**





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#### Reversing Other Actions Already Taken (cont.)

#### When do you expect to reverse these actions by?

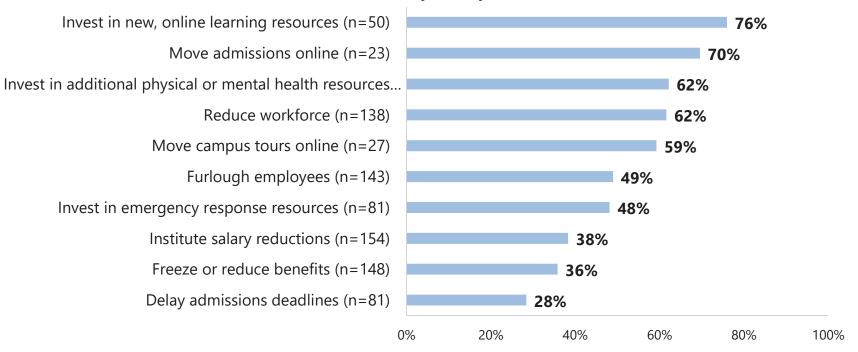
Implemented work-remote policies for staff (n=174)	6% 1	3%	18%	18%	10%	)	33%	
Closed administrative offices (n=126)	6%	21%		25%	12%		33%	
Delayed admissions deadlines (n=71)	14	1%	21%	23	%		32%	
Moved campus tours online (n=148)	5% 7%	15%		30%	5% 7	%	31%	
Closed academic buildings/faculty offices (n=154)	<b>6%</b> <sup>-</sup>	16%	23%	6	22%		30%	
Moved admissions online (n=145)	<b>6% 1</b> 1	1% 1	7%	21%	12	%	30%	
Invested in new, online learning resources (n=127)	8%	9%		50%	I		27%	
Closed dining halls (n=109)	7%	9%		48%		6%	25%	
Suspended administrative operations (n=14)	7%	3	6%		<b>29%</b>	7%	21%	
Furloughed employees (n=19)	5%	21%		32%		21%	21%	
Instituted salary reductions (n=9)	11%		33%		22%	11%	11% 11	%
	0%	20%		40%	60%	0	0%	100%



#### **Possible New Actions**

#### How likely is your institution to take the following actions in the future?

% Very Likely





# Other Actions Presidents Might (and Might Not) Take

Possible Action	% Very/ Somewhat Likely
Cultivate new donor bases	87%
Request/lobby for more state aid	85%
Optimize academic portfolio	85%
Increase financial aid	72%
Allow deferred tuition payments	56%
Start capital campaign	49%
Increase tuition rates	33%
Lower tuition rates	9%



#### Help From Elsewhere: Governments

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?

March (n=160) April (n=174)

Financial stimulus package to compensate for losses

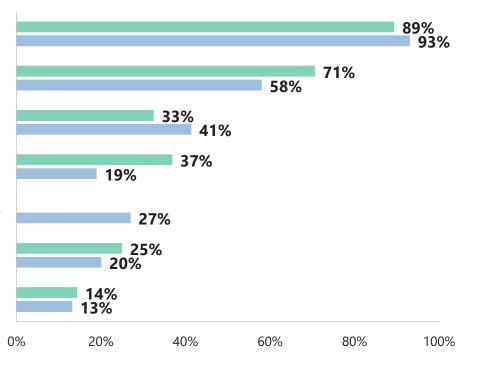
Flexibility on regulatory limitations in providing remote learning (regular and substantive interaction, etc.)\*

Mental health resource allocation for students

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

Delay on new regulatory commissions +

Ability to leverage endowment funds without negatively impacting financial responsibility score Assistance with processing international student visas more efficiently





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#### Help From Elsewhere: Operational Support

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.

April (n=173)

March (n=159)

**60%** Financial health and operational planning 50% Faculty training and development **53%** 43% Instructional technology development **41%** 38% Student support services 19% Strengthening brand perception\* 37% Marketing and communications 26% 7% Institutional partnerships (i.e., virtual education partners,... 26% 14% Program development <mark>3%</mark>8% Peer policy benchmarking\* 0% 20% 40% 60% 80% 100%



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#### **Questions and Resources**

News Article:

https://www.insidehighered.com/news/survey/p residents-biggest-covid-19-worries-low-incomestudents-and-colleges-financial-strain

Survey report:

http://www.insidehighered.com/booklet/respon ding-covid-19-crisis-part-ii-new-survey-collegeand-university-presidents



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