



Serving the Students of the Pandemic

Quantifying the Impact of COVID-19 on Students

We will begin at 2:02 p.m. Eastern
Time once everyone has joined!

Today's Presenters



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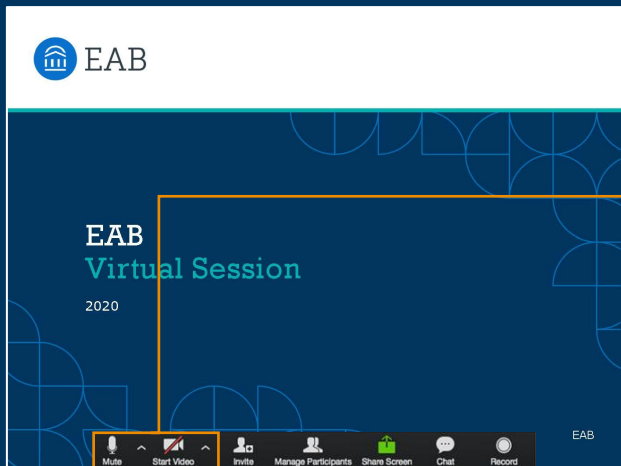
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Zoom Features and Settings

Audio Mute/Unmute & Video Stop/Start



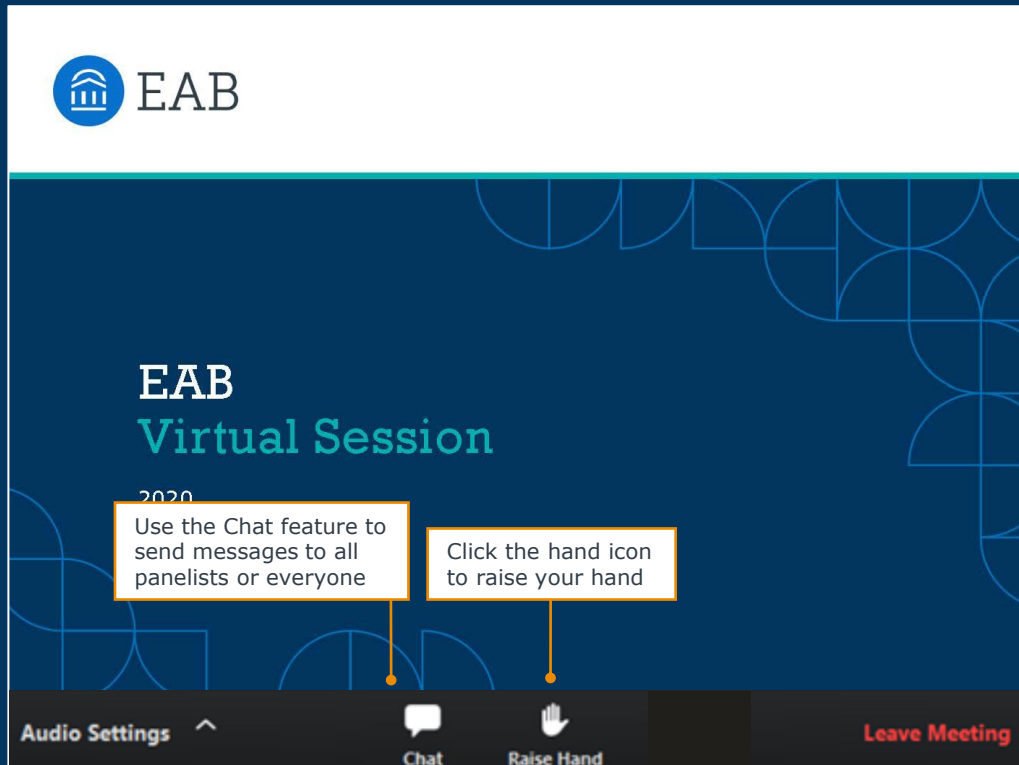
You are live.
Everyone can hear you.
Everyone can see you.



You are not live.
You are muted.
Your video is turned off.

Clicking the Up arrow next to the Mic and Camera icon at any time during the meeting will provide you with audio and video options.

Zoom Webinar Features



- 1 Sizing the Sector-Wide Impact of the Pandemic
- 2 Where Did All the Countercyclical Enrollments Go?
- 3 Are Students Behaving Differently Now?
- 4 Is it Possible to Grow in this Environment?

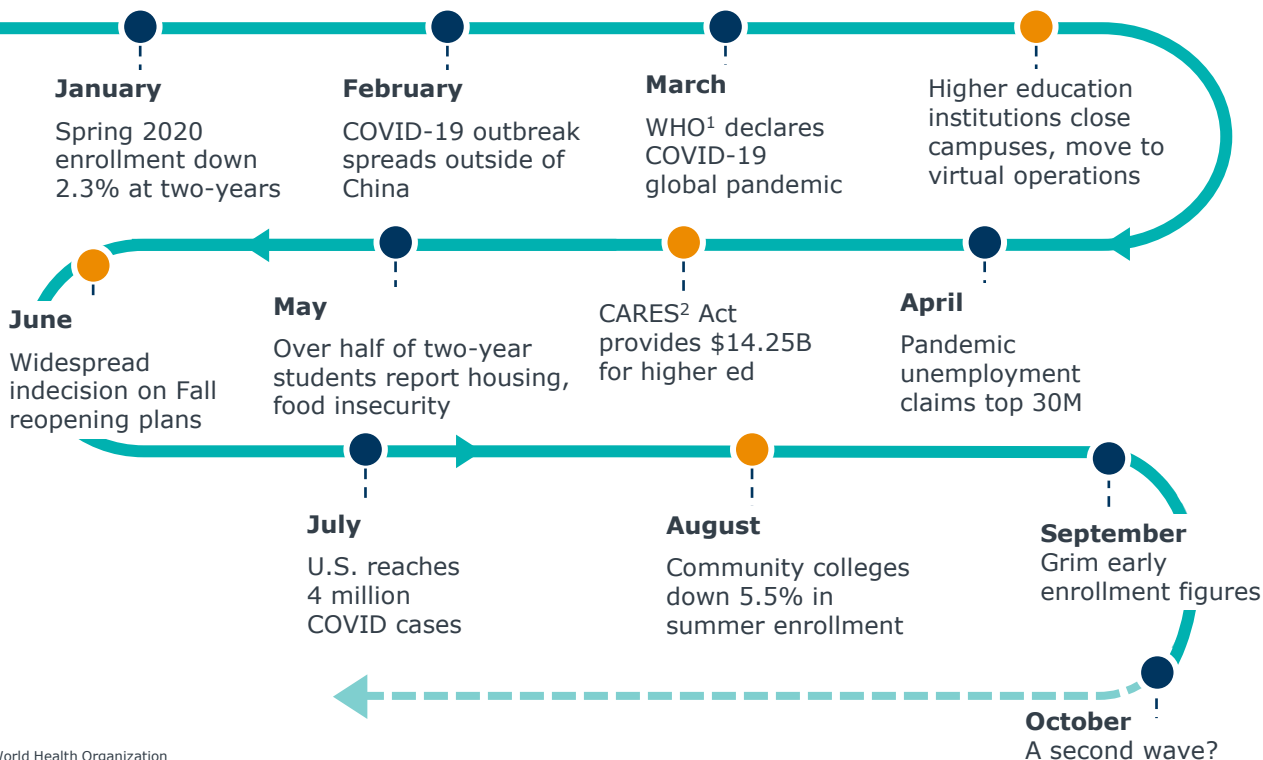


Sizing the Sector-Wide Impact of the Pandemic

1

2020: A Tumultuous Year for Higher Ed

Higher Education Faces Unprecedented Challenges Amidst Global Pandemic

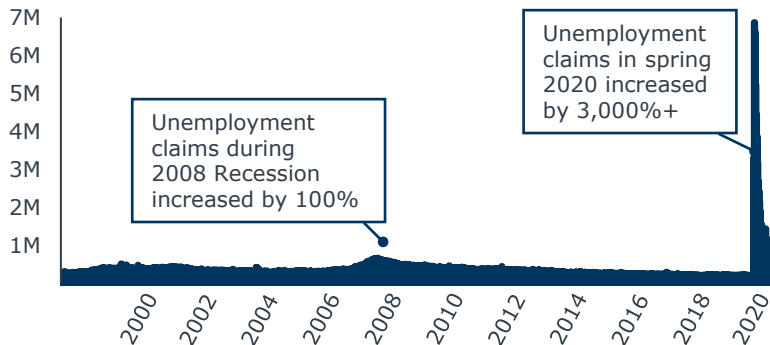


1) World Health Organization
2) Coronavirus Aid, Relief, and Economic Security Act

The Limits of the 2008 Playbook

8

Confronting the “Light Speed” Recession



13M+ Estimated unemployed Americans (Sept 2020)

46%

Share of unemployed workers with an associate's degree vs. 27% during 2008 recession

-4.9%

Predicted 2020 global economic contraction (vs. -0.1% during Great Recession)

A Categorically Different Downturn



Sudden-onset, external economic trigger



Simultaneous downturns in supply and demand



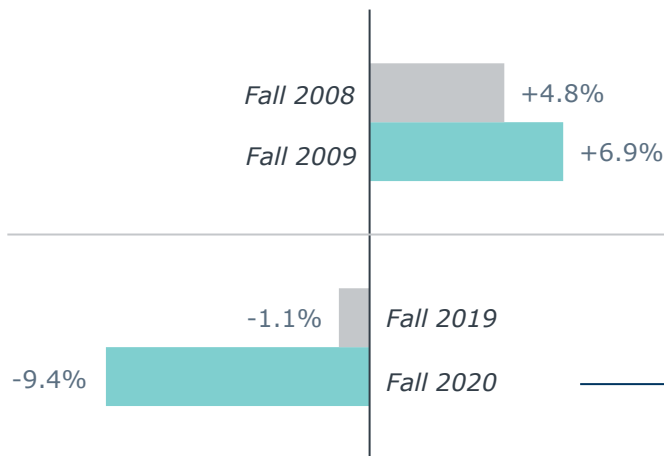
Unprecedented global supply chain disruption

History is Not Repeating Itself...



Community College Enrollment Changes At Recession Onset

Year-on-year change in total public two-year enrollments



Eroding Core Student Populations

-19.1% First-time students, 18-20

-14.2% Black students

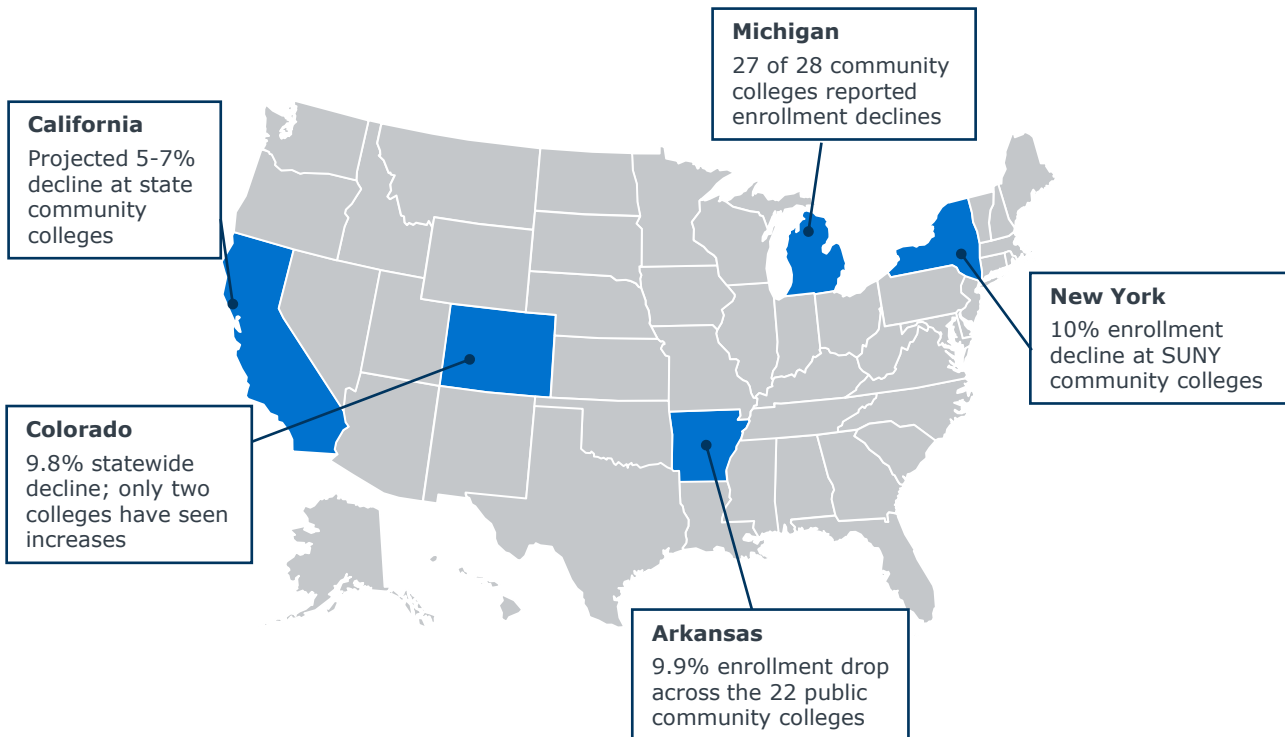
-10.1% Part-time students

-12.7% Hispanic students

...And the Impact is Being Felt Nationwide



Community Colleges Across the Country Experience Dramatic Declines



Source: [CBS San Francisco](#); [Coloradopolitics.com](#); [Arkansas Democrat Gazette](#); [Buffalo News](#); [Upper Michigan Source](#); [National Student Clearinghouse](#); EAB research and analysis.

Quick Poll

How has the pandemic impacted enrollment on your campus?

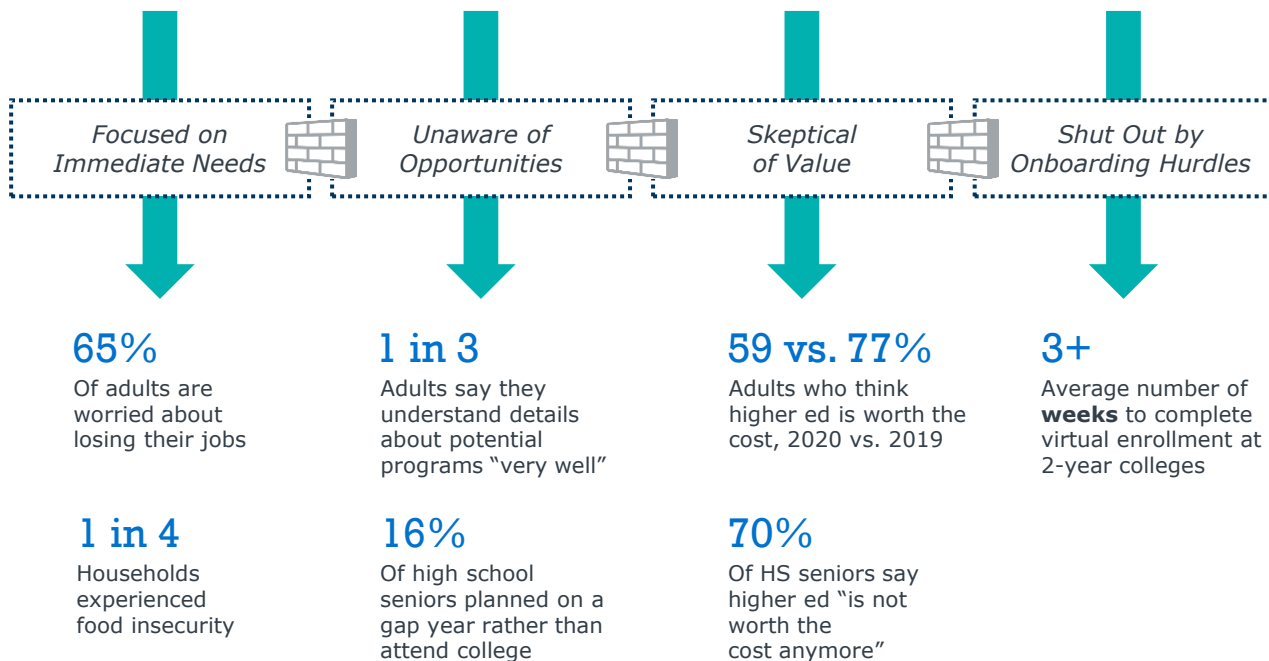


Where Did All the Countercyclical Enrollments Go?

2

Where is the Countercyclical Boom?

Prospective Students Encounter Multiple Barriers to Enrollment



Not All Unsolvable Problems

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EAB Can Help Reform Marketing, Onboarding Processes to Drive Enrollment

Unaware of Opportunities

1 in 3

Adults say they understand details about potential education programs "very well"

16%

Of high school seniors planned on a gap year rather than attend college

Skeptical of Value

59 vs. 77%

Adults who think higher ed is worth the cost, 2020 vs. 2019

70%

Of HS seniors say higher ed "is not worth the cost anymore"

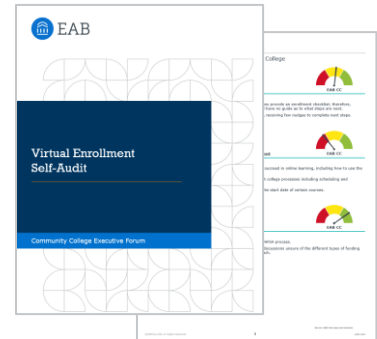
Shut Out By Onboarding Hurdles

3+

Average number of **weeks** to complete virtual enrollment at 2-year colleges

Custom Market Strategy Review

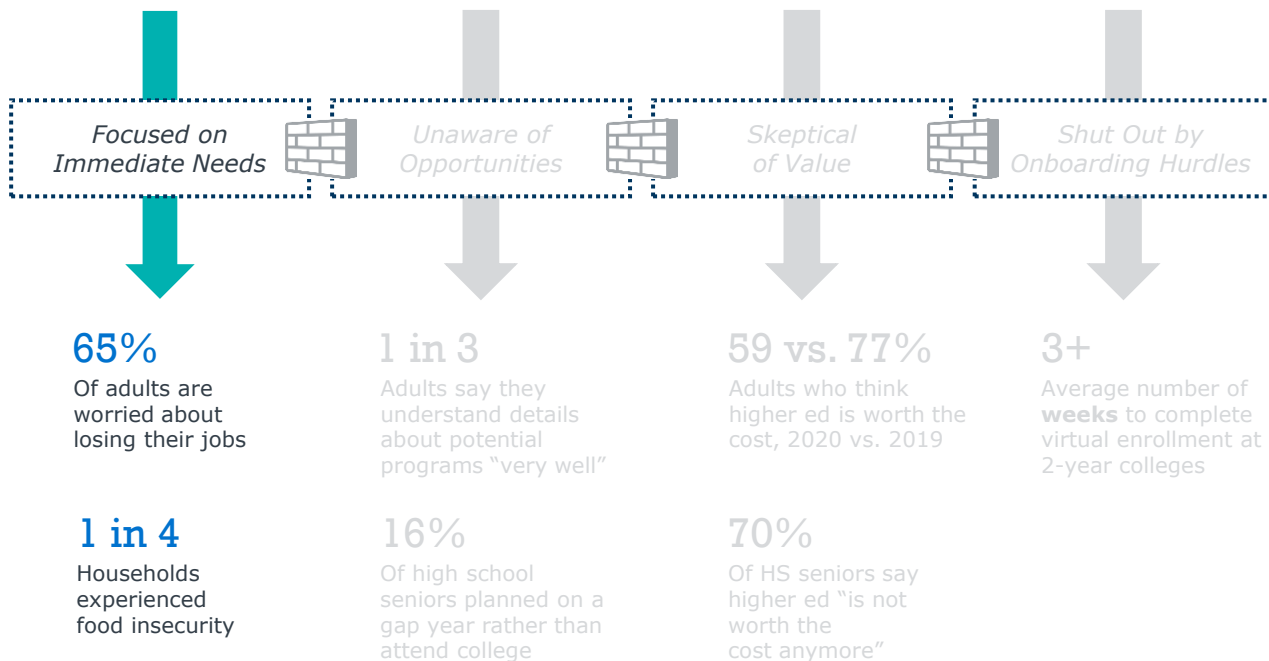
- In-depth assessment of prospective student markets
- Tailored messaging recommendations



Where is the Countercyclical Boom?

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Prospective Students Encounter Multiple Barriers to Enrollment



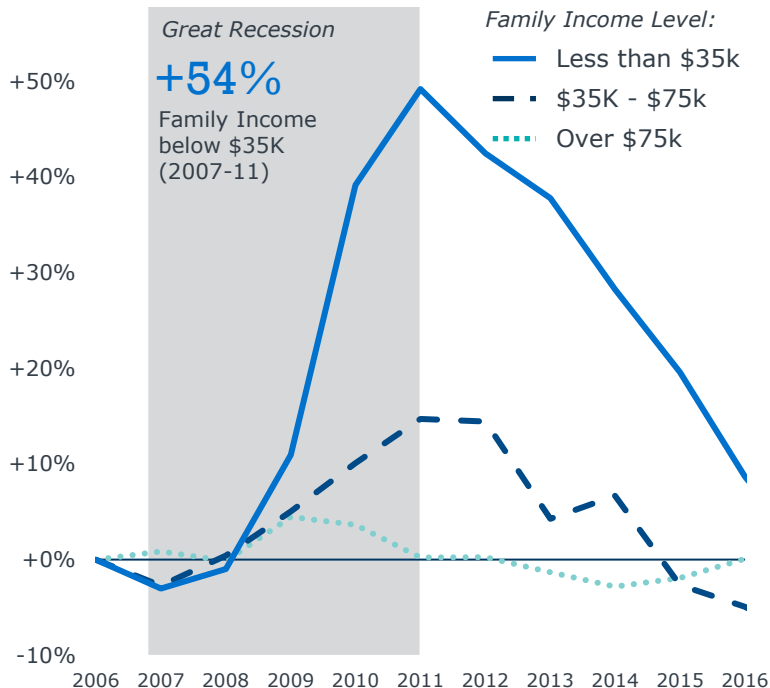
Source: [NPR](#); Strada Education, [Covid-19 Work and Education Survey](#), Sept 2020; Global Strategy Group, [New America Higher Ed Survey](#), Aug 2020; Art & Science Group, LLC, [How Covid-19 Continues to Influence the Choices of College-Going Students](#), Apr 2020; EAB interviews and analysis.

Financial Support Was Key to Countercyclical Bump

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Enrollment Growth Almost All Low-Income

Change in Adult¹ UG Enrollments Since 2006 by Family Income



2009 Pell Grant Expansion Increased Access

\$619

Increase in maximum Pell Grant from 2009 stimulus bill

800K

Additional students qualified for Pell funding

125%

Of average community college tuition and fees covered by Pell grant

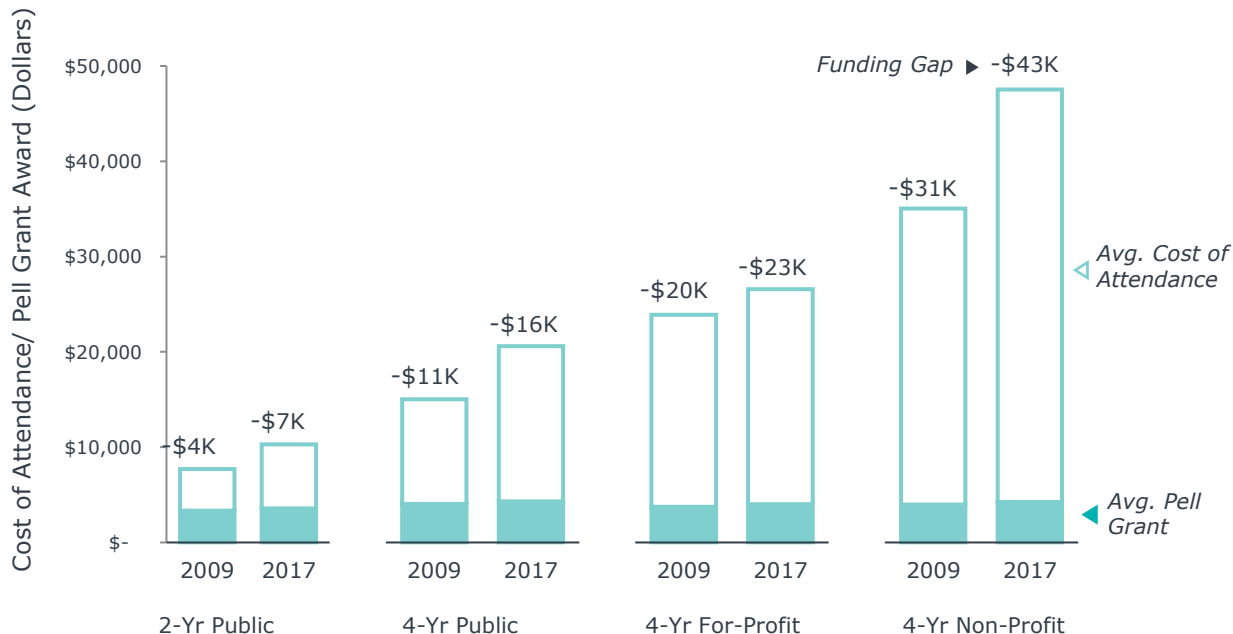
1) Defined as 25 years or older

Tougher To Bridge Pell Funding Gap Today

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Purchasing Power of Pell Declining Amidst Rapid Rise in Total Cost of Attending Higher Ed:

Average Total Tuition, Fees, Room and Board Costs, and Pell Grant Awards



Source: College Board Research, 'Trends in Student Aid 2019: Pell Grants'; Table 20-A, 2009-10 Federal Pell Grant End-of-Year Report, US Dept. of Ed.; Table 330.10, NCES Digest of Education Statistics; EAB interviews and analysis.

The Important Distinction Between Financial and Opportunity Cost

“In the context of economic desperation, **even free tuition can be too much**, because of the opportunity cost of subsistence-level work foregone.”

*Matt Reed, VP Academic Affairs
Brookdale Community College*

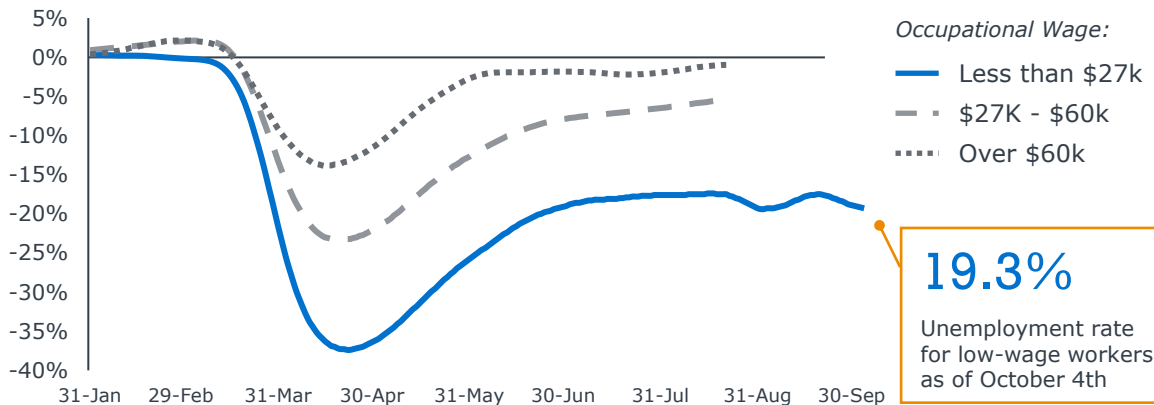
This Time, It's About More than Money

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High Opportunity Cost of Higher Ed Evident in Vulnerable Communities

Unemployment Crisis Persists for Low-Income Workers

Percent Change in Employment (from Jan. 2020) by Occupational Wage



Health, Educational Crises Speak to Enormity of Non-Financial Barriers

2.5x

Likelihood that NYC residents making <\$25K would die from Covid vs. those making >\$240K

12.4

Average months of learning loss for low-income K-12 students¹

Chat Question

How is your institution minimizing the opportunity cost of higher ed for students during the pandemic?

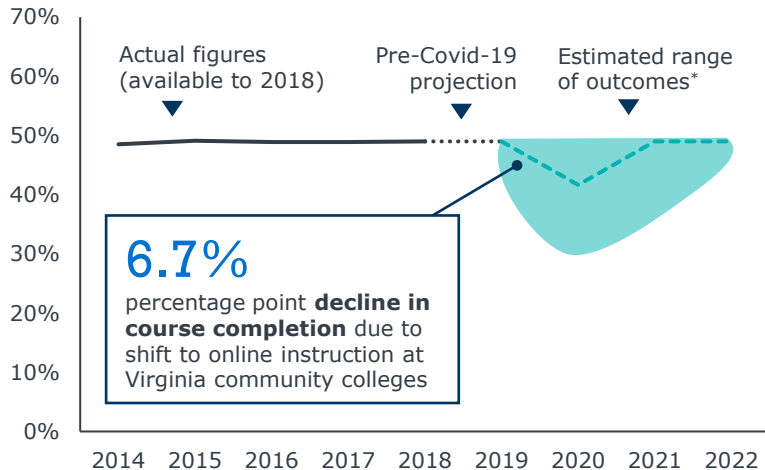


Are Students Behaving Differently Now?

3

Not Just an Enrollment Story

First year retention rate¹, all two-year institutions, 2014-22, actual and projected



Estimated range of inputs informing outcome:

- Transfer institutions or stop out: 0-20%
- Delaying education to care for ill family member: 0-2%
- Internet connection insufficient for remote instruction: 0-10%
- Duration of COVID-19 impacts: 0-2 years

*Range of possibilities is not a confidence interval.

Students Most At Risk:

- Marginalized populations
- Live in COVID-19 hotspots
- Working to fund education

Students Least At Risk:

- Live near college campus
- Multiple devices with broadband at home
- Financing education with family savings

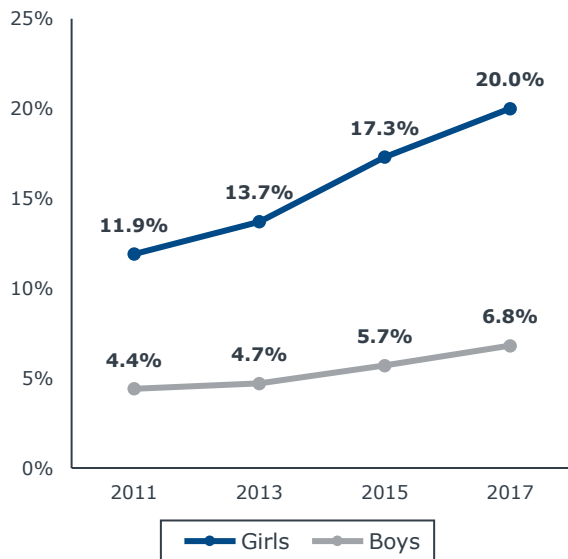
1) Measured as the percentage of first-time students returning to the same institution from the previous year.

Pre-Pandemic, Worries of an Impending Crisis



Escalating Rates of Depression

Past Year Major Depressive Episode Among Adolescents, By Gender (2011-2017)



Growing Mental Health Challenges Among Children and Teens

32% Of teens meet criteria for an **anxiety disorder**

8% Of children ages 7-16 have **attempted self-injury**

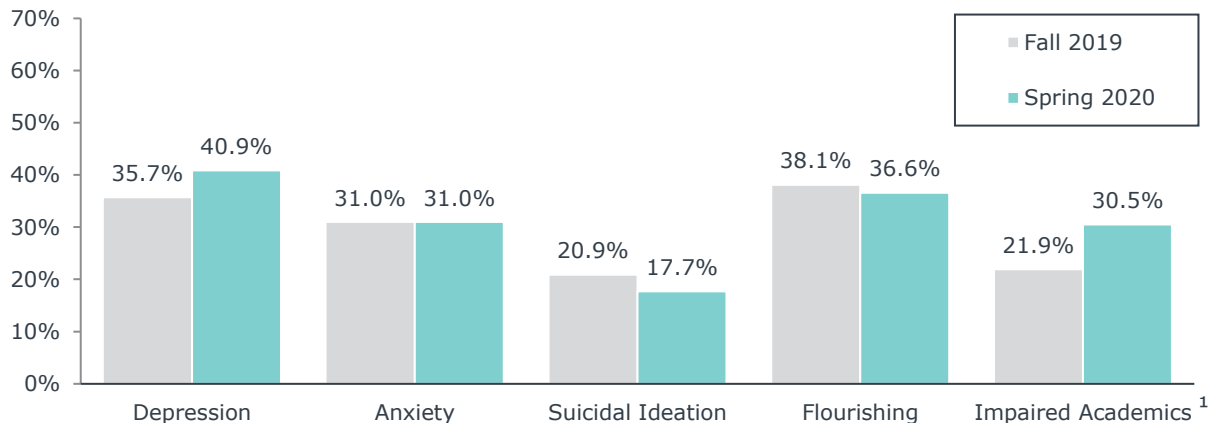
172% ↑ Increase in minors requiring **hospitalization for an eating disorder**, 2003 to 2014

Source: National Institute of Mental Health, "Major Depression Among Adolescents," <https://goo.gl/KSk7xT>; Olsson M et al, "Trends in Mental Health Care among Children and Adolescents," *The New England Journal of Medicine*, <https://goo.gl/3GjJFn>; Merikangas K et al, "Lifetime Prevalence of Mental Disorders in US Adolescents: Results from the National Comorbidity Survey Replication...", *Journal of the American Academy of Child & Adolescent Psychiatry*, <https://goo.gl/apDwDe>; EAB interviews and analysis.

The Mental Health Crisis is Here

College Students Report Worsening Mental Health Amid Pandemic

Self-reported instances of mental health concerns, Healthy Minds survey (n = 12,033)



Declines in Mental Health Evident Across the Board

22%

Of Chinese children reported clinically depressive symptoms after 33 days of lockdown

7.5x

Prevalence of severe depressive symptoms in adults during Covid-19 (vs. pre-Covid)

1) Impaired Academics is defined as >6 days in the prior 4 weeks when mental or emotional health negatively impacted academic performance
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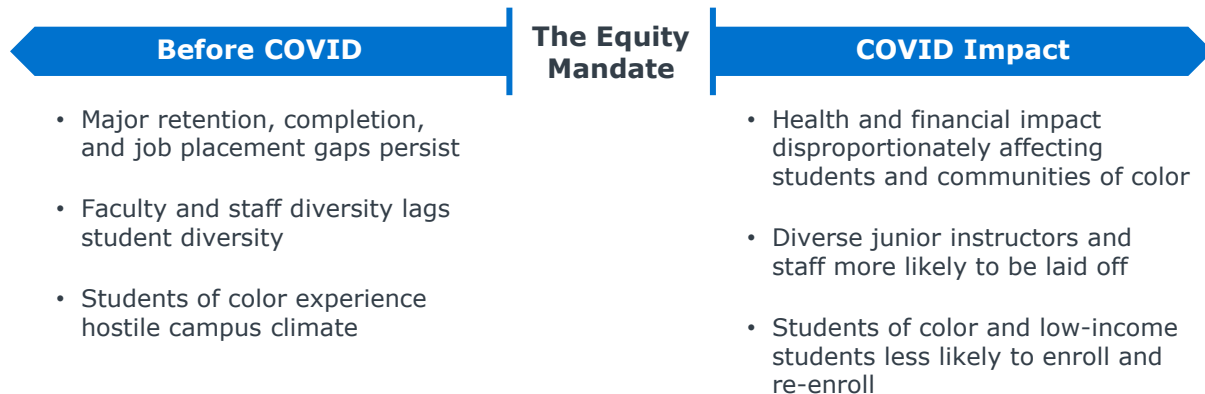
Quick Poll

*What are you most concerned about
when it comes to meeting students'
mental health needs?*

Are We Failing Our Equity Mission?



Pandemic Exposing Not Only Social and Economic, but Institutional Barriers



Disparities Only Expected to Get Worse

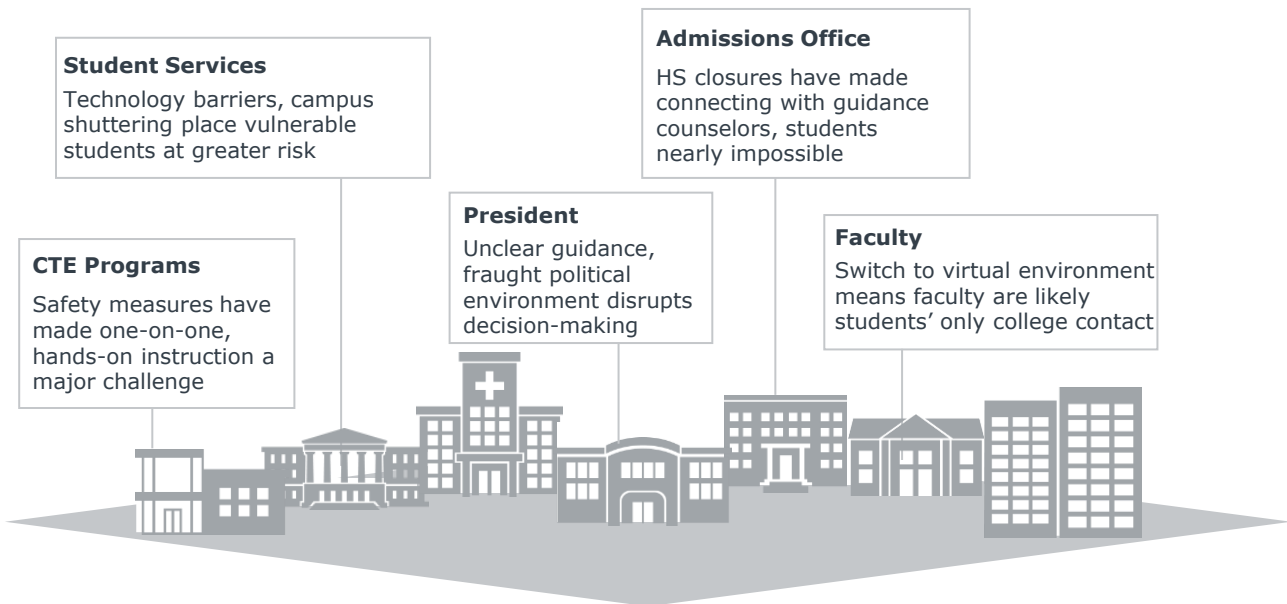
“The COVID-19 pandemic will take existing academic achievement differences between middle-class and low-income students and explode them.”

- Richard Rothstein, *Economic Policy Institute*



Every Corner of College Community Affected

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Flying Blind?

“Unfortunately, some of our knowledge is really just derived from anecdote. We **don’t have any good strategies to systematically collect the experience** across a swath of the US to actually be able to study the different approaches that have and, in some cases, not worked as well.”

Dr. Susan Coffin
Professor of Infectious Diseases
Children’s Hospital of Philadelphia



Is it Possible to Grow in this Environment?

4

Students of the Pandemic: What Colleges See



Seeing Into Students' Lives Has Broadened Our Perspective....Some



Received a
loaner laptop



Lost office
support job



Rarely turns
video on



Misses class
because of illness



Relied on
college childcare



Had culinary
courses cancelled



Started applying
but stopped



Never attends
synchronously

“Access” Transcends Cost, Hardware Concerns



“She spent hours in a McDonald’s parking lot using the fast-food chain’s Internet, but she kept getting kicked off her college’s virtual classes because the network wasn’t ‘safe.’ **Two weeks after starting** at Roane State Community College, **she gave up.**”



Unseen Barriers Often the Most Detrimental



"Everything came together and...blocked my mind from focusing on my education. It was **really difficult to deal with all those emotions.**"



Status Quo Practices Not Pandemic-Proof



“We surveyed our prospective students in the summer. **They didn’t know who to talk to or where to go.** They wanted to know would they be able to take classes when and where they wanted?”



Three Opportunities for Community Colleges

Maximize Enrollments By Addressing Critical Student Challenges

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Rethink Radical Accessibility



- Streamline on-off-on ramps
- Treat students as “lifelong learners”
- Prepare for an increasingly virtual future
- Prioritize the part-time learner experience

**Thursday, November 12
2:00PM ET**

Confront the Looming Mental Health Crisis



- Educate and equip student-facing staff to identify mental health concerns
- Develop strong relationships with community service providers
- Become a trusted source of information and reference for holistic student needs

**Thursday, November 19
12:00PM ET**

Dismantle Institutional Barriers



- Redefine what it means to be “college ready”
- Remove policy barriers to student progress
- Leverage environmental uncertainty to create partnerships that promote student and institutional success

**Tuesday, December 1
1:00PM ET**

[Register Here](#)

Final Thoughts

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We have shared a link to an online evaluation in the **Chat**. Thank you for taking a moment to provide feedback on your experience today.



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