Serving the Students of the Pandemic

Presidential Roundtable

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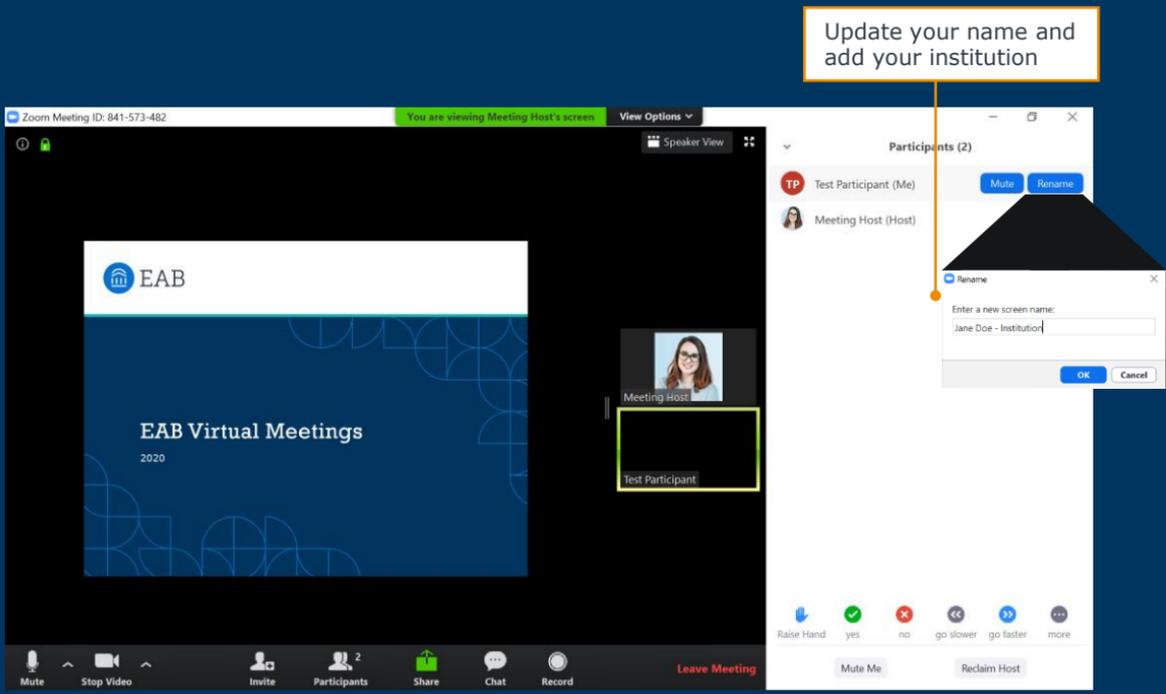
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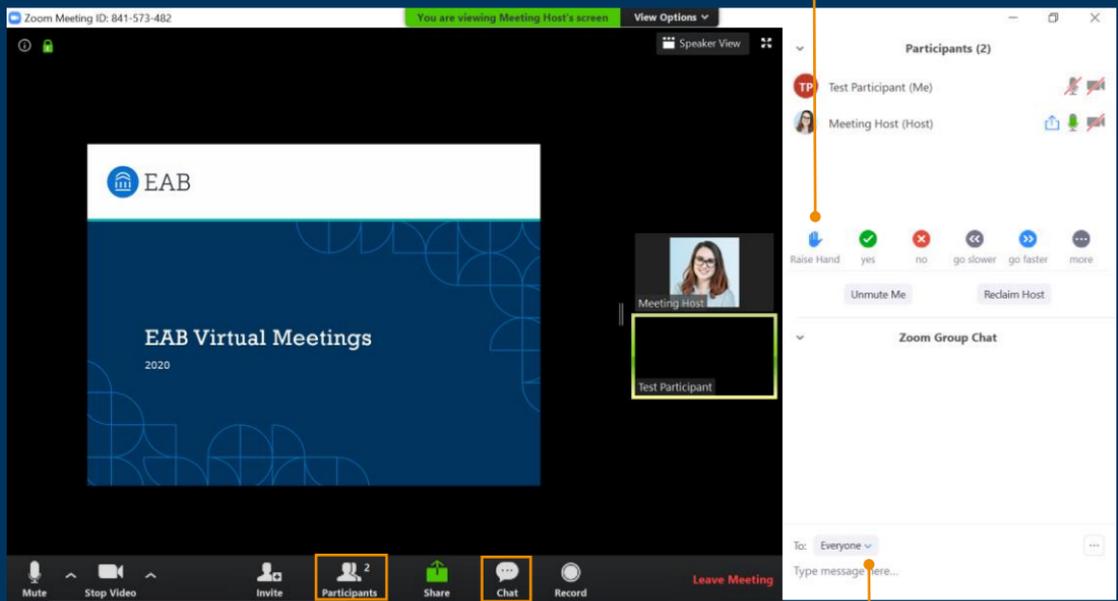
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Select whether you want to chat with everyone or a specific person

Introductions

If you could travel back to January, what is one piece of advice you'd give yourself for the coming year?

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1. **Strategic Leadership Through Crisis**

2. **What Presidents Need to Do to Serve the Students of the Pandemic**

3. **Entering the Covid-19 Era**

4. **Economic Recovery and Development**

5. **Final Thoughts and Takeaways**

2020: A Tumultuous Year for Higher Ed

Higher Education Faces Unprecedented Challenges Amidst Global Pandemic

January

Spring 2020 enrollment down 2.3% at two-years

February

COVID-19 outbreak spreads outside of China

March

WHO[1] declares COVID-19 global pandemic

Higher education institutions close campuses, move to virtual operations

June

Widespread indecision on Fall reopening plans

May

Over half of two-year students report housing, food insecurity

CARES[2] Act provides $14.25B for higher ed

April

Pandemic unemployment claims top 30M

July

U.S. reaches 4 million COVID cases

August

Community colleges down 5.5% in summer enrollment

September

Grim Fall enrollment figures

December
A third wave

November
Tumultuous election

October
Spiking cases

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

Sources: National Student Clearinghouse, CNN, 2020 Year in Review; National Conference of State Legislatures, Higher Education Responses to Coronavirus (COVID-19).; Philadelphia Tribune

Crisis Management Crowds Out Strategic Thinking Time

Delayed Fall Start

Simultaneous Online and F2F Instruction

Modularized "Mini-Mesters"

Full Return To On-Campus Operations

Postpone Fall Semester To Spring

Low-Residency Model

Early Summer Start With Mid-Fall Closure

100% Remote Instruction

Some Courses F2F, Some Online

Separate People by Age

Students on Campus, Faculty Remote

Staggered Fall Starts

> "Our executive team is managing the crisis day-to-day – hundreds of operational decisions. We're frankly exhausted. **But what worries me most is that the urgent is crowding out time for strategy – are we prioritizing the right things**? How do we survive at the end of this, or not end up being a shell of our former self."
>
> President
> *Large Research University*

Only Core and Lab Courses F2F

Only First-year Students Return

Students Live in Dorms, Learn Online

Only Grad Students Return

Crises Make Managers Out of Leaders, at the Expense of Strategic Growth

**Optimal Division of
Presidential Mindshare**
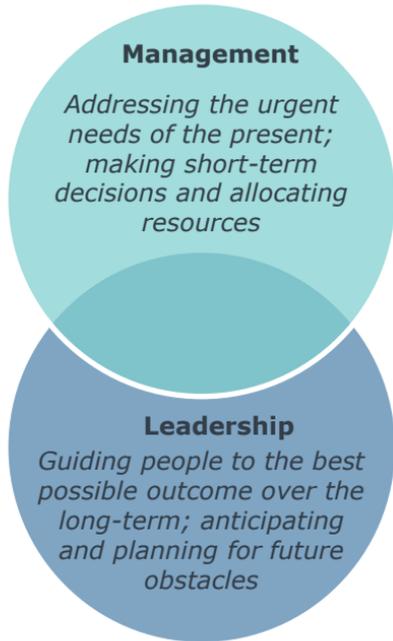
**Presidential Mindshare
During a Crisis**

Management

*Addressing the urgent
needs of the present;
making short-term
decisions and allocating
resources*

Leadership

*Guiding people to the best
possible outcome over the
long-term; anticipating
and planning for future
obstacles*

Management

Leadership
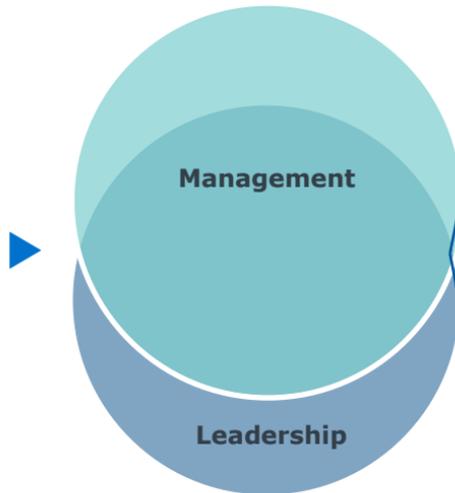
**Contributions to
Crisis Management
Creep**

Stakeholder
anxiety

No "playbook"
to reference

Irrelevant
urgency

EAB

What Presidents Need to Do to Serve the Students of the Pandemic

Community College Enrollment Changes At Recession Onset

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

Fall 2008   +4.8%
Fall 2009   +6.9%

-1.1%   Fall 2019
-9.5%   Fall 2020
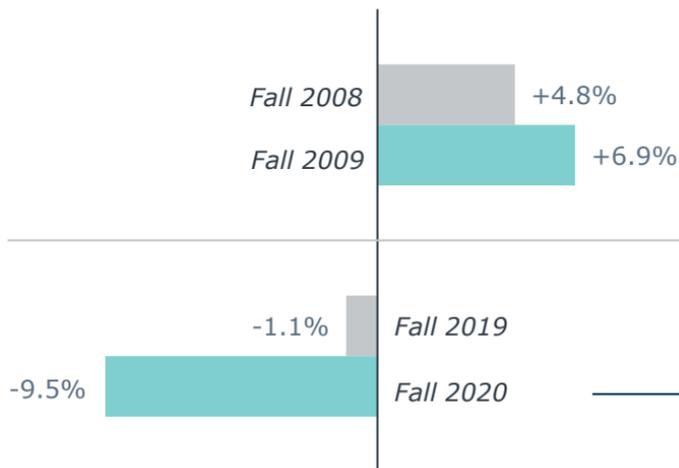
Eroding Core Student Populations

-19.1%   First-time students, 18-20

-12.8%   Black students

-9.6%   Part-time students

-10.6%   Hispanic students

Community Colleges Across the Country Experience Dramatic Declines

Michigan
27 of 28 community colleges reported enrollment declines

California
Projected 5-7% decline at state community colleges

New York
10% enrollment decline at SUNY community colleges

Colorado
9.8% statewide decline; only two colleges have seen increases

Arkansas
9.9% enrollment drop across the 22 public community colleges
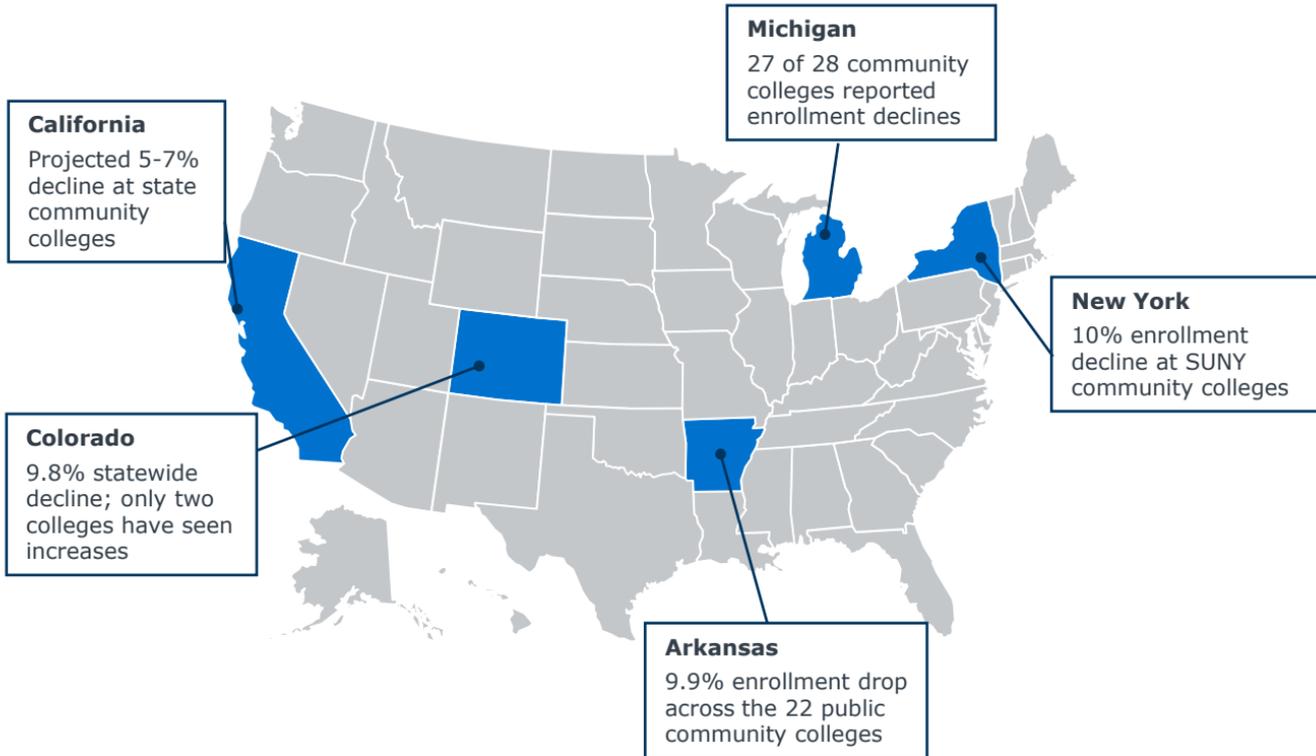
Source: CBS San Francisco; Coloradopolitics.com; Arkansas Democrat Gazette; Buffalo News; Upper Michigan Source; National Student Clearinghouse; EAB research and analysis.

First year retention rate[1], all two-year institutions, 2014-22, actual and projected

Actual figures (available to 2018) ▼

Pre-Covid-19 projection ▼

Estimated range of outcomes* ▼

6.7
percentage point **decline in course completion** due to shift to online instruction at Virginia community colleges
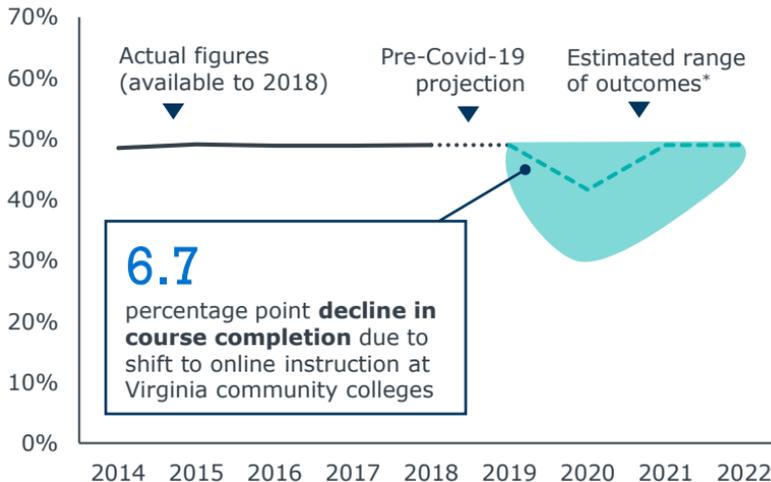
Estimated range of inputs informing outcome:

- 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.

Strategic Leadership Beyond the Walls of Campus

Serving the Students of the Pandemic Requires Investment in Institutional, Regional Sustainability

Student Success and Career Development

Institutional Health and Sustainability

Regional Development and Growth
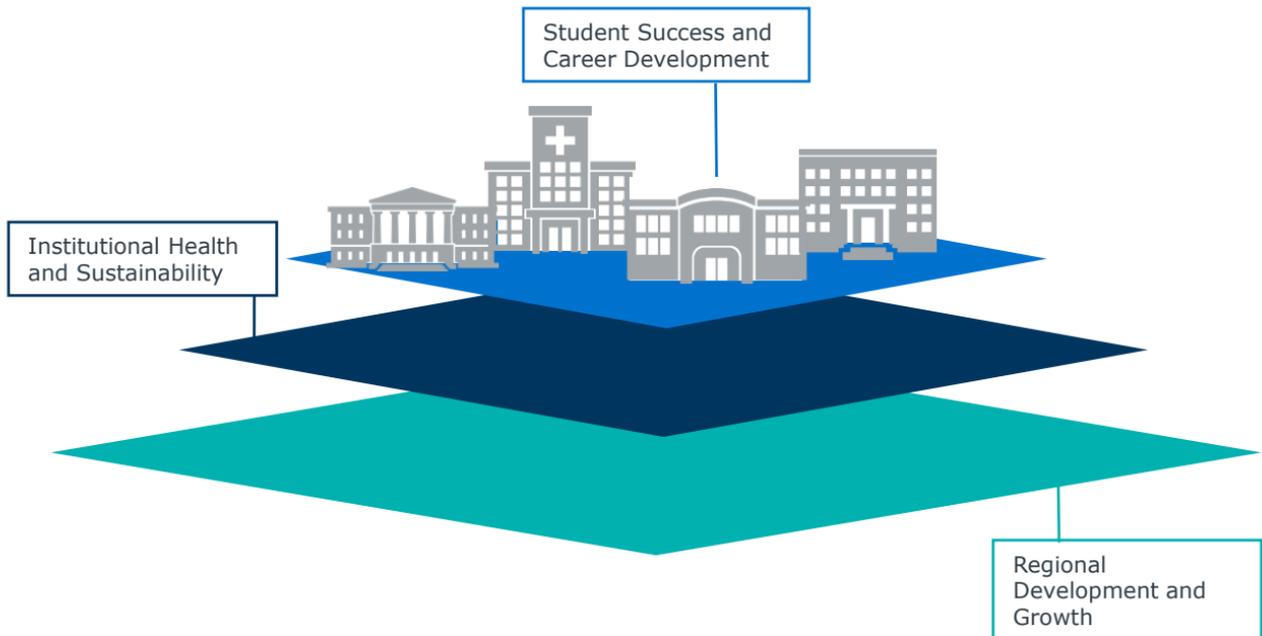
What Colleges Are Missing About the Students of the Pandemic

Prioritizing Financial Instead of Opportunity Cost

The outsized enrollment declines at community colleges and among low-income students eligible for significant aid have revealed that the cost of tuition may be irrelevant when compared to the opportunity cost of giving up subsistence-level work or dependent care.

Attributing Enrollment Drops Entirely to Virtual Learning

Primarily online institutions have experienced enrollment growth across all demographic groups, suggesting that students' migration away from the community college is not just about instructional modality.

Failing to Embrace the "Student as Customer"

Years of talking about students as customers has produced expected outcomes—students want to feel like they're "getting what they paid for," and in a world of remote learning and few perks, many feel that they're not.

Expecting Students, Faculty to Raise their Hands

Insufficient mental health infrastructure places burden on students and staff to self-identify, and counseling center traffic is an unreliable metric during a pandemic.

Trying to "Go Back to How Things Were"

The gaps in access, equity, and success that existed before the pandemic cannot be alleviated by returning to the status quo.

Not Prioritizing Removal of Existing Barriers

Compounding effects of learning loss, financial insecurity and mental health concerns means that existing institutional barriers are going to become even greater obstacles to students' success.

Poll and Chat-In

Poll: Which of these misassumptions are you seeing most often on your campus?

Chat in: What else are your teams failing to understand about the students of the pandemic?

Serve the Students of the Pandemic By Addressing Critical Challenges

Quantifying the Impact of Covid-19

- Understand how the pandemic and recession have shaped the higher ed landscape
- Enrollment, student success forecasts based on early data

Rethink Radical Accessibility

- Streamline on- and off-ramps
- Prepare for an increasingly virtual future
- Prioritize the part-time learner experience

Confront the Mental Health Crisis

- Educate and equip student-facing staff to identify mental health concerns
- Become a trusted source of information for holistic student needs

Dismantle Institutional Barriers

- Remove policy barriers to student progress
- Redefine what it means to be "college ready"

Materials Available Here

Entering the COVID-19 Era

Unpacking the Short- and Long-term Consequences of the Coronavirus Pandemic on Higher Education

- Michael Fischer, Associate Director, Research

Significant Uncertainty Challenges Higher Education Response to Covid-19

**Leaders Dealing with
Growing Campus Cases...**

**...and Unanswered Questions
Necessary for Planning...**

13.4M Total COVID-19 cases reported in US

When will cases peak? How long will current wave last?

321k Cases associated with US colleges and universities

How long will recession last? When will travel and conferences resume?

540+ US colleges reporting 100+ cases since repopulating

How much will state funding decline? How will Biden administration respond to crisis?

...All While Fundamental Pre-COVID Challenges to Higher Education Accelerate

Early arrival of the 2026 enrollment cliff

Worsening equity gaps

(Even more) aggressive competition

Accelerating closure risk

COMBAT COVID-19 SPREAD

Extensive testing is essential.

Overinvest in quarantine protocols.

Repopulate campus in waves.

Balance flexibility and rigidity in repopulation plan.

SUPPORT CAMPUS

Social distancing is harder for students than masking.

Students need an alternative campus experience.

Ease faculty safety and instructional concerns.

BUILD TRUST

Dashboards and websites provide needed transparency.

Proactively engage the local community.

Executives must lead by example.

For more information and case studies on each of these lessons, visit eab.com/covid19.

Source: EAB interviews and analysis.

Practice What You Preach

Executive Behavior Can Help (or Hinder) Community Buy-In

Students Condemn Double Standard After Leadership Flouts Rules...

AP

West Virginia Univ. president apologizes for maskless photo

University President "continued to invite two Harvard custodians to clean their home for four hours, twice a week, well into the first wave of the pandemic"

POLITICO

Students rebuke Notre Dame president for not wearing mask at White House

...While Solidarity with Students Promotes Buy-in for Safety Measures

Colgate President quarantined in campus residence hall for two weeks at the beginning of the semester alongside all students returning to campus

Example demonstrated community's commitment to health and safety

Allowed institution to review quality of quarantine and isolation experience through real time feedback from senior leadership

"If I'm asking you to do this, I'll do it, too. So whatever food you're eating, I'm gonna eat."

Brian Casey, President, Colgate University

Source: "Colgate University students – and president – lock down for 2 weeks to start semester," CBS, August, 2020; "Free Fall," The Harvard Crimson, November 2020; "Students rebuke Notre Dame president for not wearing mask at White House," Politico, October 2020; "West Virginia Univ. president apologizes for maskless photo," AP, September 2020; EAB interviews and analysis.

Compared to Fall, Spring Term Has Unique Repopulation Challenges…

Greater number and diversity of repopulating examples

Reduced vigilance after viable vaccine announced

Higher student, parent, and faculty expectations

Larger impact on 2021 enrollment and success

…While Also Raising Concerns about Long-term Pandemic Consequences

Gaps in the total student experience

Growing mental health crisis

Shift to permanent remote work

Widening digital divide

COVID-19 Exacerbating Preexisting Challenges

Before COVID-19		COVID-19 Impact

Student Services Ecosystem

Before COVID-19
- Student services expanding to meet evolving and diverse needs
- Improved data collection leading to new insights about student behaviors and inflection points

COVID-19 Impact
- In-person services no longer a given, requiring new approaches
- Digital divide exacerbated by unequal student access to technology, internet, quiet workspaces

Value for Money

Before COVID-19
- Greater attention to how students' out-of-classroom experiences contribute to their total experience
- Questions raised about post-graduate career outcomes

COVID-19 Impact
- Grave economic outlook across the globe exacerbating ROI concerns
- Increased student financial need, coupled with reduced familial support, raising interest in alternative pathways

Evolving Student Demographics

Before COVID-19
- Growing diversity of students accessing post-secondary education
- More acute concerns about debt, completion rates, basic needs security

COVID-19 Impact
- Global events compounding students' isolation, anxiety, and stress
- Underserved students (home and international) now even less likely to enroll/re-enroll

Source: EAB interviews and analysis.

Promising Trends After a Year of Virtual Advising

▶ Students making more appointments

▶ Students more likely to attend their appointments

▶ Appointments now shorter and more efficient

▶ Advisors becoming more proactive in communicating with students

▶ Students more likely to use online advising tools

25%

increase in students accepting Navigate appointment requests sent to their mobile apps

126%

increase in text messages sent via Navigate in spring 2020 compared to fall 2019

1) Navigate is EAB's student success platform.

Virtual Connections Beyond the Classroom

Building Affinity and Sense of Belonging

- Mascot chat or livestream
- Virtual campus jigsaw puzzles
- Campus Zoom backgrounds
- Instagram story templates

Driving Engagement with Academic Staff

- Video series spotlighting academic experiences
- Virtual library tour
- AMA with campus librarian
- "Meet an Academic" webinar

Engaging Parents and Family Members

- Phone campaign for parents
- Introduction to campus services for parents
- Orientation sessions hosted in multiple languages

Facilitating Virtual Campus Experiences

- Virtual a capella concert
- Esports intramural league
- TikTok dance competition
- Virtual art gallery showcase

Fostering Peer-to-Peer Connections

- Student-hosted chat box
- Hobby webinars
- Virtual board game meet-up
- Virtual book clubs

Volunteer and Service Opportunities

- Translators Without Borders
- 'Be My Eyes' service for visually impaired students
- Project Gutenberg
- Live-captioning

Review EAB's Compendium of 120+ Virtual Engagement Strategies to determine what strategies could best work on your campus.

Source: Active Minds Survey Details; EAB interviews and analysis.

COVID-19 Impact on College Student Mental Health

An Enduring Crisis Has Been Magnified By the Stress of the Pandemic

Recent Data Indicates Worrying Trends in Mental Health...

80% Of college students said the COVID-19 crisis has negatively impacted their mental health.

20% Of college students said their mental health during COVID-19 has significantly worsened.

63% Of college students find it challenging to stay connected with others

...And Concerns Staff on the Front Lines Unequipped to Address Student Needs

Skyrocketing Demand for Mental Health Support

7x Rate at which demand for counseling center appointments **outpaced enrollment growth** in 2018

Insufficient Time to Address All Requests

82% Of university leaders agree that instructors now spend **more time on student mental health concerns** compared to three years ago

Instructors Underprepared to Address Concerns

66% Of **instructors do not feel adequately prepared** to approach students and discuss concerns related to mental health

An Intensifying Mental Health Crisis

K-12 Trends Pose A Grave Challenge for Campuses Already Stretched Thin

Mental Health Concerns Continue to Escalate, Especially for Girls

30% Rate that major depressive episodes[1] have increased in adolescents between 2005-2015

2x Nearly twice as many females aged 10-24 were hospitalized due to self-injury in 2015 compared with 2009

Lack of Treatment in Youth Raises Concerns About College Transition

80% Of 3 to 17-year-olds with diagnosable mental health disorder go untreated

Feeling the Effects

Campus Impacts of Intensifying Mental Health Challenges

Sharp increase in requests for housing and learning accommodation overwhelm staff in multiple campus offices

Institutions will be expected to **prepare students to manage mental health in the workplace**

Students and their families **compare institutions' well-being resources** when assessing college options

1) A major depressive episode is characterized as suffering from a depressed mood for two weeks or more, and a loss of interest or pleasure in everyday activities, accompanied by other symptoms such as feelings of emptiness, hopelessness, anxiety, and worthlessness.

Source: Mercado, M. et al, "Trends in Emergency Department Visits for Nonfatal Self-inflicted Injuries Among Youth Aged 10 to 24…," *Journal of American Medical Association*, November 2017; National Institute of Mental Health, "Major Depression Among Adolescents,"; Olfson M et al, "Trends in Mental Health Care among Children and Adolescents," *The New England Journal of Medicine*, May 2015; EAB interviews and analysis.

The Year Everything Changed—Even Higher Ed

Successful Pandemic Ops Disprove Long-Held Beliefs About Remote Work

Administrative Divisions Undergo Unprecedented Change in 2020

Pre-Pandemic

- **Campus-centric**
  "Magic" of physical university can't be replicated elsewhere

- **Informal, spontaneous communication**
  Ability to have impromptu face-to-face interactions highly valued

- **Analogue**
  Many processes and technologies already outdated

- **Slow to change**
  Traditions and tight budgets slow progress

Pandemic

- **Location decoupled from work**
  Most admin staff continue to work successfully from home

- **Deliberate, formalized communication**
  Physical separation prompts new communication styles and channels

- **Digitized and automated**
  Remote operations force fast adoption of solutions like Zoom, Slack, and DocuSign

- **Capable of rapid, widescale change**
  Most admin departments shift to remote in the span of days

Post-Pandemic

- **Maintain gains of remote operations**
  Keep flexibility, efficiency, and redundancy provided by remote work capability

- **Reintegrate positive features of traditional higher ed modalities**
  Accommodate employees who don't want to or can't work remotely, and reinforce connections to campus and students

Source: EAB interviews and analysis.

As Goes the Workforce, So Goes The Workplace

Increasingly Strategic Workforce Expects Flexible, Strategic Work

Higher Ed Administrative Workforce Transforming from Transactional to Strategic

	Historical Characteristics	Modern Needs
Staff	• Transactional • Behind-the-scenes • Generalists	• Analytical • Customer-oriented • Specialists
Org Model	• Siloed • Department-centric	• Cross-functional • Customer-centric

The New Workforce Expects Flexibility

Strategic workers expect:

> Flexibility of schedule and location

> Competitive benefits with private sector

> Up-to-date processes and technology

> More diverse workforces

Sizing the Need if Remote Instruction and Operations Become the Norm

33M

Of US adults are not connected to the Internet

18%

Of US adults who make less than $30k annually are not connected to the Internet

9%

Percentage-point internet access gab between suburban and rural households in US

Where We Can (and Have Been) Helping

Establish "**drive-in" internet access** by redirecting signals outward towards parking lots, parks, and other outdoor spaces

Provide **emergency funding** to help students buy equipment, or implement a laptop loaner program of unused on-campus computers

Create **lo-fi and mobile-friendly** online courses and materials to accommodate those without high-tech streaming options

Coordinate a **single message and avenue** for students to get IT support in a timely manner, like a dedicated 311 email address

What's Our Role in the Long-Term?

▶ Lobby and partner with internet service providers to set up infrastructure in under-served communities

▶ Organize a fundraising campaign to address digital divide and basic needs insecurity issues

▶ Negotiate with local governments and service providers to expand access

▶ Train next generation of IT and computer science workers

Source: Cossick, Samantha. "Who's not using the Internet?" Allconnect, 19 June 2019; Kriston Capps, "Should Colleges Be Broadband Hubs for Their Communities?" *City Lab*, July 31, 2014; "About NCNGN," North Carolina Next Generation Network, accessed, April 1, 2020; EAB interviews and analysis.

For Virtual Peer Interaction, Start in the Classroom

Baseline	Intermediate	Exemplary
❑ Use **live polling** through Poll Everywhere, Top Hat, and institutional video conferencing technology. ❑ Integrate **asynchronous discussion and interaction** through LMS discussion boards, student-generated blogs, and peer review. ❑ Learning materials are **primarily static readings and presentations**.	❑ Encourage **in-class discussion** using backchannel communication platforms like Slack, Discord, and Microsoft Teams. ❑ Learning materials include **pre-recorded video or audio**, saving classroom time for discussion. ❑ Module **content is adapted to the current context** to keep students engaged. For example, an introductory statistics module can analyze COVID-19 infection data by race, ethnicity and gender.	❑ Encourage **tech-assisted, in-class group activities** through collaborative notetaking using Google Docs, Sheets, Slides or a virtual whiteboard like Padlet. ❑ Learning materials include **short multimedia presentations** and micro-lectures. ❑ Facilitate **experiential learning** by involving students in pedagogy by using practices like student-generated question banks and ungrading[1].
Ideal for **low priority** modules	Ideal for **medium priority** modules	Ideal for **high priority** modules

1) Students semi-regularly reflect independently, with peers, and academic staff on their learning and module performance

Source: EAB interviews and analysis.

Quick Discussion Question

Answer the Zoom Poll Prompt

Which of these four areas is the highest priority for you over the coming calendar year?

A. Total Student Experience

B. Mental Health

C. Remote Work

D. Digital Forward Investment

Pandemic Investments May Align (or Conflict) with Campus Strategic Plan

Spectrum of Coronavirus-induced Campus Changes

Lock-in   **Debatable**   **Sunset**

Quality digital instruction

Remote work flexibility

Student technology distribution

Digital advising

Flu-season masking

Outdoor teaching labs

Source: EAB interviews and analysis.

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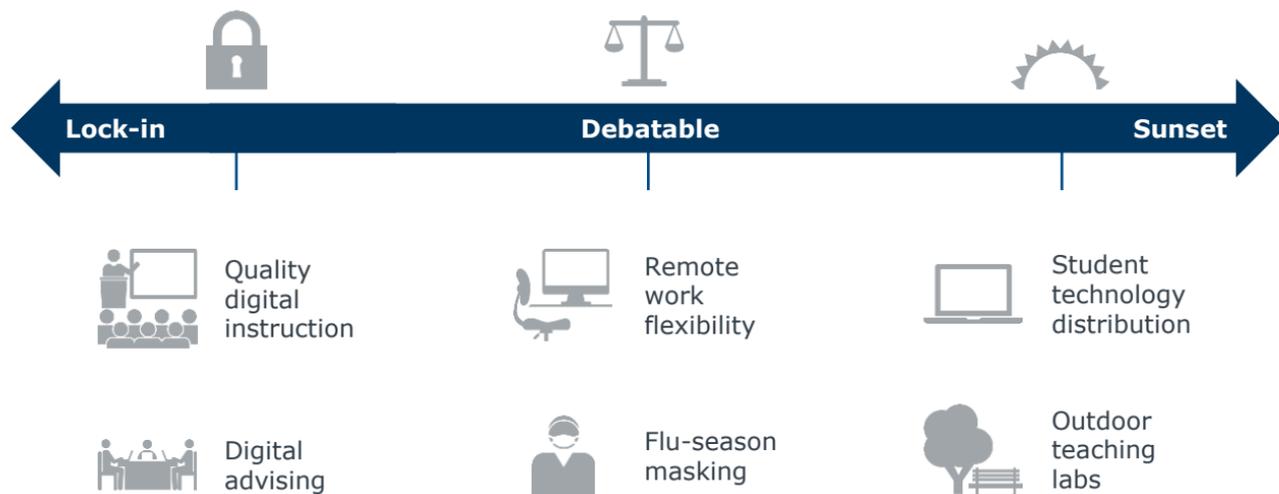
Breakout Discussions

- What were the major lessons learned from your Fall COVID operations?
- What Spring campus challenges do you need to plan for now?

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Economic Recovery and Development

Strategically Utilize Partnerships to Boost the Regional Economy

DISCUSSION

U.S. Economy Had a Better-than-Expected Q3, But Challenges Persist

	Higher Education	**Industry**	**Community**
Positive Outlooks	**$14B** To higher education institutions through CARES Act *Influx of federal, state funding for COVID related projects, R&D, training programs*	**$5T** Projected global revenue for information tech industry in 2021 **$1.5T** Projected value of pharma industry in 2021	**6.9%** Unemployment rate, down from 13.3% in May 2020 **638K** Jobs added in October 2020
Negative Impacts	**$120B** Estimated lost revenue and added costs as a result of COVID *Second federal stimulus package negotiations stalled*	**18%** Expected drop in energy investments over next year **$22B** Expected decrease in farm income by 2021	**11M** People remain unemployed **20%** Decrease in small business revenue

Sources: Brookings/The Hamilton Project, *Ten Facts about COVID-19 and the US Economy*; CompTIA, Industry Outlook 2021; IEA, World Energy Outlook 2020; The New York Times, Colleges Slash Budgets in the Pandemic; The New York Times, Jobs Report Shows Gains but Vulnerability to New Virus Surge; Orientation Marketing, Pharma Marketing Trends; U.S. Department of Agriculture, America's Farmers: Resilient Throughout the COVID Pandemic; U.S. Department of Education, CARES Act.

Potential Mid-to-Long-Term Impacts of a Delayed Second Stimulus

A Slippery Slope Without Federal Stimulus

State Cuts Mount

*State cuts to higher education expected between **15-20%** for 2021.*

+

Enrollment Declines

*Number of new students enrolled in 2020 dipped by **23%**, twice as much as decrease in four-year public institutions.*

→

Revenue Decreases

Downturn prompted by lower enrollment, reduced tuition and fees, less auxiliary income.

↓

Survival Mode

Market pressures and increased deficit mean institutions are stuck in survival mode, cannot grow

←

Consumer Confidence Dips

Families critically evaluate ROI of higher ed as family incomes stagnate, scholarship and aid funds diminish.

+

Debt Increases

Institutions forced to issue new bonds, take out emergency loans to cover operating costs.

Sources: The Hechinger Report, COVID has been bad for college enrollment — but awful for community college students; The New York Times, Colleges Slash Budgets in the Pandemic; EAB Interviews and Analysis

Zooming Out, Communities Struggle when Community Colleges Struggle

Higher education institutions

Shifting priorities and investments

Non-profit partners

Little strategic overlap

Industry partners

Uncertain/ inconsistent funding

Local and state government

Resource/need mismatch

Local businesses and entrepreneurs

No growth pipeline

Source: EAB interviews and analysis.
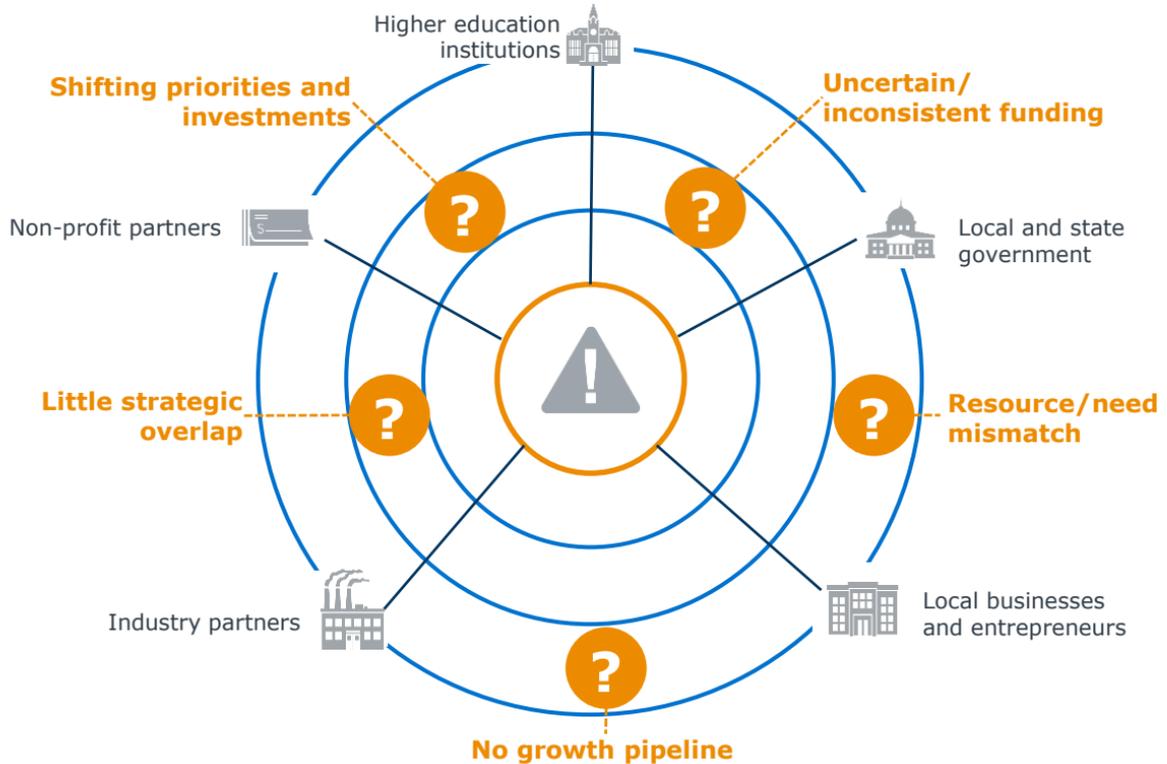
Charting a Renewed Path to Economic Prosperity

I

Talent

How do institutions attract, train, and retain talent through academic programming, market-aligned apprenticeships, and greater industry sector diversity?

II

Innovation

How can institutions transfer knowledge and technology to community partners that helps seed new businesses and grow existing ones?

III

Place

How do institutions identify and market what makes their region unique to attract new investors and employers?

IV

Partnerships

How can institutions better connect government, industry, education, and non-profit stakeholders to form stronger, more resilient communities?

Identifying Strategic Collaborations for Exponential Economic Growth

Other Education Institutions

- **K-12:** Identify and offer early opportunities to develop workforce skills and college credits
- **Four-Years:** Bridge curricular gaps and support pre-bachelors talent needs

Economic Impact

Engage Early, Support Often

K-12 partners require a partner to help their students navigate entering the workforce earlier than expected, while four-year institutions need help training and developing students that either need to find new jobs or feel more secure in their current positions

Industry Partners

- **Small Businesses:** Offer trainings, resources, equipment, and talent development programs
- **Mid-to-Large Businesses:** Scale talent at entry through management levels

Economic Impact

Foster Small, Attract Big

Industry partners are seeking support around core services (rather than new ideas), which entails expanding workforce training programs and identifying sustainable business models

Government Partners

- **Local Government:** Address short-term workforce challenges through trainings
- **State Government:** Identify and support mid-to-long term economic development initiatives and goals

Economic Impact

Think Statewide, Act Regional

Governmental partners will need support in deploying economic development resources to the industry sectors and regions in greatest of need of stimulus

Breakout Discussions

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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