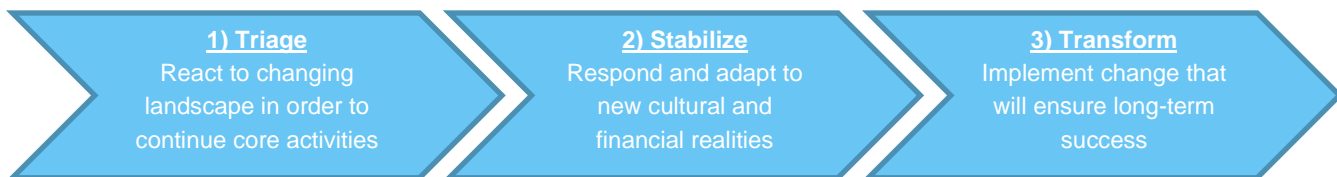# Higher Ed COVID-19 Tracking Initiative

## Findings Update – Thursday, March 26th

Huron continues to aggregate and track the "actions" taken by 158 universities. An updated summary of data captured to date will be provided in tomorrow's edition. Today's *Insights* include:

1. Updates and New Findings
2. Briefing – Rapid Client Analysis: Retirement Eligibility & Program Rationalization
3. Briefing – The College Search and COVID-19 Webinar
4. Webcast Registration – Inside Higher Ed's Responding to the COVID-19 Crisis
5. Coming Soon

## Updates and New Findings

| **1) Triage** | **2) Stabilize** | **3) Transform** |
|---|---|---|
| React to changing landscape in order to continue core activities | Respond and adapt to new cultural and financial realities | Implement change that will ensure long-term success |

A. Liberal arts faculty confront online learning despite long-standing skepticism

B. COVID closures create challenges for Title IX investigations

C. University of Buffalo extends Freshman housing deposit deadline

D. Virginia Tech decreases Slack fee to support remote communication

E. SNHU shares free virtual library on best practices for online learning

F. Creighton University demonstrates positive leadership communication

G. Stimulus primed to pass but higher ed leaders are left disappointed

H. Enrollment leaders are worried but already adapting their strategies

I. University System of Georgia strives to create stability for staff and students

## TRIAGE: React to changing landscape in order to continue core activities

**A. Liberal arts faculty confront online learning despite long-standing skepticism**

○ Liberal arts faculty members have been among the most vocal skeptics of online education and have been slow to adopt the quickly growing mode of instruction. The rapid shift to remote learning presents both challenges and opportunities for this group.

○ The unique circumstances around this change, essentially offering a hybrid half-semester, may provide the foundation for these faculty to more easily adapt to this digital environment. While this is an optimistic view, there is the potential for previously resistant faculty to help drive pedagogical innovation through this experience.

**B. COVID closures create challenges for Title IX investigations**

○ Title IX offices are faced with a difficult situation with widespread campus closures, as the inability to hold in-person meetings/hearings hampers ongoing investigations. Institutional leaders are trying to find a balance between offering

victims of alleged sexual misconduct a prompt investigation and the impact that remote hearings might have over impartiality.

○ Campuses have begun to turn to the Department of Education (DOE) for additional guidance on the best path forward, but the DOE has not formally commented at this time.

**C. University of Buffalo extends freshman housing deposit deadline**

○ Previously we have only heard about enrollment deadline extensions. The University of Buffalo has announced a housing deposit deadline extension from May 1 to June 1 for incoming freshman.

**D. Virginia Tech decreases Slack fee to support remote communication**

○ Virginia Tech dropped their Slack license fee from $90 to $5 to help remote workers instantly communicate in teams. Departments are provided the option of submitting a request for Slack licenses, establishing a valuable way of increasing remote productivity and communication.

**E. Southern New Hampshire University shares free virtual library on best practices for online learning**

○ SNHU's library includes resources for the academic community on instructional approaches (ex: 'Building an Online Class') as well as strategies for student engagement ('Discussion Boards Applied'). The offerings target faculty members and administrators who are actively adapting their in-face instruction to an online environment for the first time.

○ President LeBlanc wrote, "in the wake of COVID-19, working together is more important than ever. Uniting as one community to share critical resources and information is both a sign of solidarity and a sign of our collective commitment to the good and wellbeing of all people".

**F. Creighton University demonstrates positive leadership communication**

○ Institutional leaders are providing consistent communication to members of the community (students, faculty, and staff) and providing praise to employees such as facilities workers on the front lines.
▪ This video could be good to share with leaders who are asking for ways to communicate information and provide positive morale.

## STABILIZE: Respond and adapt to new cultural and financial realities

**G. Stimulus primed to pass but higher ed leaders are left disappointed**

○ The stimulus bill is expected to pass the House this week, but higher education leaders have already voiced their disappointment with the level of aid provided to both institutions and students. The current proposal includes $30.7 billion in aid for education, with 47% of this figure being specifically directed towards higher education (~$14 billion).

○ Ted Mitchell, president of the American Council on Education (ACE), remarked, "we cannot stress enough that overall, the assistance included in the measure for students and institutions is far below what is required to respond to the financial disaster". Advocates were particularly disappointed in the lack of traction that student loan forgiveness got on the Hill.

**H. Enrollment leaders are worried but are already adapting their strategies**

○ EAB surveyed 28 enrollment leaders around the Fall 2020 cycle, asking how concerned they were on a scale of 1 to 5. 43% of enrollment leaders reported a 5 (highest possible concern) and 32% reported 4 (second highest). A major

driver of this concern is the expectation that on-campus visits will significantly decrease in the future.

○ However, the surveyed leaders are adapting to this new reality as best they can by adding video conferences (62%), promoting virtual tours (54%), adding social media live events (46%), increasing the number of social media events (43%), or adding a new virtual tour (26%).


## TRANSFORM:  Implement change that will ensure long-term success

I.   **University System of Georgia strives to create stability for staff and students**

○ On March 25th, the University System of Georgia issued revised Emergency Leave Procedures that provided USG presidents the authority to allow 'Leave with Pay' in situations where the institution is open with greatly reduced operations. This move provides relief for USG employees who were not deemed essential for on-campus service and were otherwise unable to perform their job function in a telework/remote environment.

○ The news comes in a week where the University of Georgia has also made strides in providing emergency funding to students who were financially impacted by COVID-19 and campus closures.

## Rapid Client Analysis: Retirement Eligibility and Program Rationalization (Briefing)

All of our clients either have, or shortly, will begin some form of scenario planning to address the budgetary gap created by their response and market reactions to COVID-19. Below we've included two analyses that can be run fairly quickly with relatively standard file extract from HR and the registrar.

### Retirement Eligibility

Institutions looking to create savings through workforce reductions often look to retirement inducements as one tactic. To determine the magnitude of the opportunity, create a table that plots the employee population by common retirement criteria: years of service and age. Required data includes: unique identifier, birthdate, years of service or year of hire (proxy for most), annual compensation, and fringe rate. **Importantly, we recommend providing this analysis in aggregate form as line-by-line analysis tied to names may inadvertently facilitate age discrimination practices.**

Note this analysis only provides a "back of the napkin" analysis for the potential size of the opportunity. There are many considerations related to cash layouts, loss of critical talent, and the propensity to require backfill for many positions that should be considered.

### *Exhibit A*

| Employee Type |
| --- |
| ALL EMPLOYEES – incl. seasonal and temporary |

| KEY | |
| --- | --- |
| | Lowest Employee Count / Total Comp |
| | Highest Employee Count / Total Comp |

| EMPLOYEE COUNT | AGE AS OF JULY 1, 2020 | | | | | | | | | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Years of Service (Greater than or Equal to | Less | 55 | 56 | 57 | 58 | 59 | 60 | 61 | 62 | 63 | 64 | 65 | 66 | 67 | 68 | 69 | 70+ | Totals: |
| 0 | 1 | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX |
| 1 | 5 | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX |
| 5 | 10 | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX |
| 10 | 15 | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX |
| 15 | 20 | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX |
| 20 | + | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX |
| Totals: | | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XX | XXX |

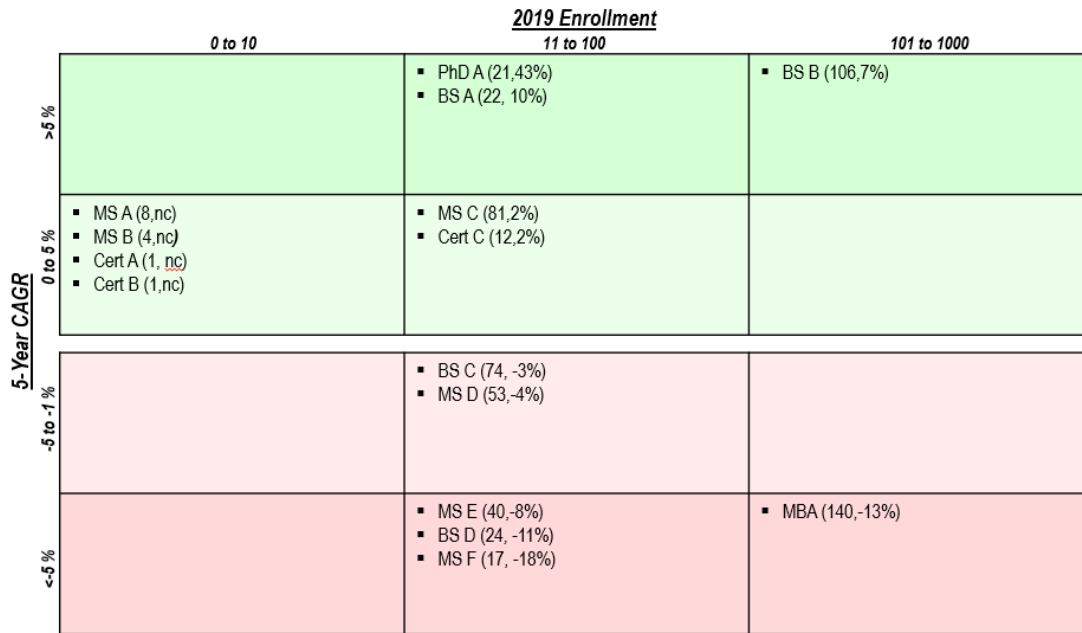| SALARY + BENEFITS ($K) | AGE AS OF JULY 1, 2020 | | | | | | | | | | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Years of Service (Greater than or Equal to | Less | 55 | 56 | 57 | 58 | 59 | 60 | 61 | 62 | 63 | 64 | 65 | 66 | 67 | 68 | 69 | 70+ | Totals: |
| 0 | 1 | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX |
| 1 | 5 | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX |
| 5 | 10 | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX |
| 10 | 15 | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX |
| 15 | 20 | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX |
| 20 | + | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX |
| Totals: | | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX | $XX |

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**Program Rationalization**

Academic programs are not likely where many institutions will turn, but some will have no choice. Before engaging in a rigorous portfolio review and detailed costing, an easier analysis to direct the opportunities is a review of enrollment trends. In Exhibit B below, we quickly reviewed the number growth rate (CAGR) of number of students in each major at a business school and the total number of students enrolled in 2019. This type of five-year extract should be facilitated by a registrar without material data manipulation or query development.

*Exhibit B*

# XYZ Business School: Program Growth

In AY2019, XYZ Business School offered 18 programs[1] and served 605 students, down from 705 in AY2015 representing a decrease of 4% per year over that time period.

| 5-Year CAGR | 2019 Enrollment | | |
|---|---|---|---|
| | **0 to 10** | **11 to 100** | **101 to 1000** |
| **>5 %** | | ▪ PhD A (21,43%)<br>▪ BS A (22, 10%) | ▪ BS B (106,7%) |
| **0 to 5 %** | ▪ MS A (8,nc)<br>▪ MS B (4,nc)<br>▪ Cert A (1, nc)<br>▪ Cert B (1,nc) | ▪ MS C (81,2%)<br>▪ Cert C (12,2%) | |
| **-5 to -1 %** | | ▪ BS C (74, -3%)<br>▪ MS D (53,-4%) | |
| **<-5 %** | | ▪ MS E (40,-8%)<br>▪ BS D (24, -11%)<br>▪ MS F (17, -18%) | ▪ MBA (140,-13%) |

1. Programs (1) without students are not included.

**Key: Program Name (2019 Enrollment, 5-Year CAGR)**

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## The College Search and COVID-19 Webinar (Briefing)

March and April are "busy season" for both colleges (who are in the swing of admitted students' days and campus visits) and students, with juniors beginning their searches and seniors making their final decisions. These activities have been dramatically interrupted in recent weeks: institutions have been forced to cancel in-person events, the College Board has postponed or canceled the SAT/ACT and transitioned Advanced Placement tests online, and students anxiously seek information about their acceptance and financial aid awards.

Jeff Selingo (higher education author/scholar/speaker), Rick Clark (Director of Undergraduate Admissions at Georgia Tech), Connie Betterton (Vice President of Strategy and New Product Development at the College Board), and Diane Campbell (Counselor at Liberty Common HS in CO) discussed the initial impacts they're seeing from the COVID-19 crisis on the testing/admissions cycles and the potential downstream effects. A link to the webinar recording can be found here.

Student and Family Impacts

This week, the Art & Science Group surveyed 487 prospective college students and found that COVID-19 may be significantly impacting their college-going plans.

- 63% of respondents weren't confident that they could choose their first-choice school
- 21% of those said their "first-choice school may no longer be affordable for my family" because of the coronavirus.
- 35% percent said that campuses "closer to home" were now a more realistic option than their first-choice college
- 1 in 6 said they're rethinking their decision to enroll in a Bachelor's program in the fall and are considering alternative options (shown in Figure 1)[1]

Figure 1: A Change of Plans[1]
What prospective students will do instead of attending FT 4-Year

| Plan | % |
|---|---|
| Take a "gap year" | 35% |
| Enroll part time in a 4-year college | 35% |
| Enroll in a 2-year college | 7% |
| Work full time | 6% |
| Enroll in a certificate/apprenticeship program | 4% |
| Don't Know | 13% |
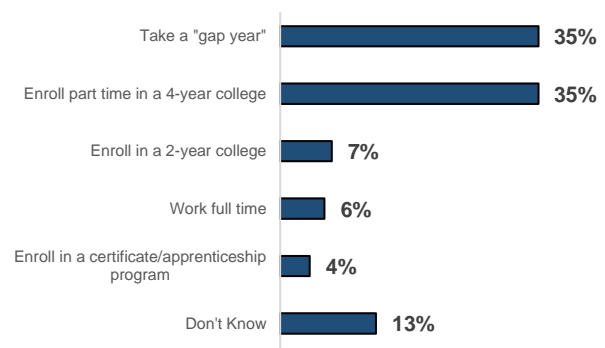
The panelists suggested that early conversations with students about cost and affordability will be more critical now than ever. They also expect, as the data suggests, that families may begin casting wider nets in their college searches.

Institutional Impacts

On the university side, enrollment managers are also bracing for impact - and already feeling them in many ways. The panelists predicted several trends that may be forthcoming as the spring admissions cycle concludes:

- A **tumultuous and prolonged financial aid season**, as some schools have already released aid packages and others have not, as families reevaluate their student's aid package and ability to pay, and as many students reconsider their decisions entirely.

- **Increased practice of holistic admissions**. Nearly every element of a traditional college application has changed (e.g., test scores, high school grading scales, quality of instruction) and will vary drastically among applicants as K-12 schools across the country respond differently to Covid-19 challenges. These fractured, inconsistent, and highly variable application datasets will force admissions offices - even those with more formulaic admissions models - to evaluate applications more holistically and with greater nuance.

- **Longer wait lists** going deep into the summer. While the DOJ's decision and changes to NACAC guidelines earlier this year already had many schools trending down this path, Covid-19 will likely exacerbate the growth of and reliance on wait lists. Wait lists are primarily a protective mechanism for schools that help combat summer melt, and as students

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[1] How is COVID-19 Changing Prospective Students' Plans?, The Chronicle of Higher Education.

increasingly reconsider their college-going plans, wait lists could become critical safety nets for institutions. "If there was ever a year to build a long wait list, it's this year."

- **Increasing ingenuity and innovation** in how colleges engage with their prospective students. As their main on-campus visit seasons are cut short, colleges are already being forced to get creative in how they reach students. For example, Colorado State University has already begun online meetings with admissions counselors, offering 1:1 FaceTime sessions with students, and are exploring other options to help families in their research and decision-making. The panelists noted that this could be an opportunity - not a threat or weakness - that dramatically changes how institutions think about recruitment and customer engagement in the long-term.

## Webcast Registration: Inside Higher Ed's Responding to the COVID-19 Crisis



Inside Higher Ed has partnered with Hanover Research to survey college presidents, collecting data on university actions but also capturing their perceptions and concerns. On **April 1st at 1:00PM CT/2:00 PM ET**, IHE is offering a free webcast where they will share insights and findings from this effort.

Some of the questions that will be addressed in this webcast include:

- How concerned presidents are about the mental and physical health of both students and employees.
- The actions presidents have taken at their institution in response to COVID-19.
- Remote learning challenges.
- When presidents expect to resume holding in-person classes

**If you are interested in attending or if you would like a recording of the webcast, please click here to register**