

RESEARCH
BRIEF

Navigating Uncertainty and Building Resilient Colleges

How vulnerable institutions
can weather challenging times

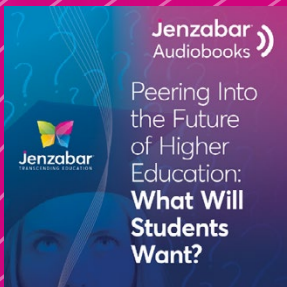
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Navigating Uncertainty and Building Resilient Colleges

How vulnerable institutions can weather challenging times

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Contact CI@chronicle.com with questions or comments.

“Navigating Uncertainty and Building Resilient Colleges: How vulnerable institutions can weather challenging times,” is based on a survey underwritten by Jenzabar and conducted by *The Chronicle*. This report was written by Alina Tugend. *Chronicle* cover image from iStock. *The Chronicle* is fully responsible for the report’s editorial content. ©2022 by The Chronicle of Higher Education Inc. This material may not be reproduced without prior written permission of *The Chronicle*. For permission requests, contact us at copyright@chronicle.com.

EXECUTIVE SUMMARY



Higher education is transitioning out of the pandemic era — and into a new reality. Enrollment losses are not going to bounce back easily. For selective private institutions or public flagship universities, these declines are concerning, but not overwhelming. But for smaller colleges, especially tuition-driven private institutions, that reality compounds the financial and enrollment challenges that preceded the pandemic. They must be scrappier and more resilient in this environment. What are these colleges doing to fill seats, secure new revenue streams, and plan strategically? What is their outlook for the future as student demographics shift dramatically and students have more choices about where they learn?

To understand how senior administrators view the state of their institution since March 2020 and what they see going forward, *The Chronicle of Higher Education* conducted a survey of 402 administrators of small and mid-sized four-year colleges in May 2022. About a third represented institutions of under 2,000 students, another third between 2,000 and 4,999, and a final third between 5,000 and 9,999. Sixty-nine percent of respondents were from private colleges; 31 percent from public ones. In addition, *The Chronicle* conducted numerous interviews of senior administrators.

In the *Chronicle* survey and in interviews, administrators expressed optimism but acknowledged that the issues they face can be daunting. But with a clear-eyed view of their institution's unique qualities and careful planning, they can better prepare for the challenges that lie ahead.

INTRODUCTION

After almost two years on high alert, as the pandemic waxed and waned and then waxed again, higher education now has a moment to step back and assess. And for many colleges — especially small and mid-sized ones — the outlook is bleak. Total college enrollment dropped 2.7 percent from a year earlier, a decline of 476,100 students. Some colleges

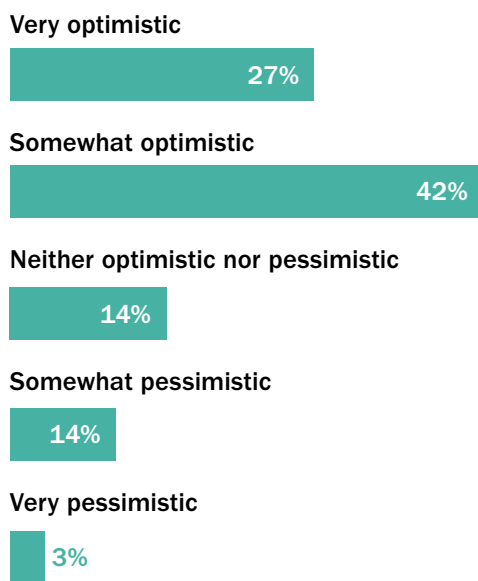
are seeing a bounce back for the fall of 2022, but many aren't. A quarter of respondents to the *Chronicle* survey said their student enrollment was down by more than 10 percent.

Yet there are institutions that are turning things around, and even some fortunate ones that are expecting record enrollment numbers this fall. Every college is different, but all of those that are looking at a more hopeful future have two things in common: They are attacking the problems, especially of enrollment and retention, in a multitude of ways. And they know they can't stop evaluating, strategizing, and innovating even when things appear to be going well.

Despite the many challenges colleges are facing, a majority of the respondents feel that since March 2020, their colleges have become more resilient and their teams more collaborative. They also are confident that they have developed sound enrollment and retention strategies. This may account for the 27 percent of the survey's respondents who reported being "very optimistic" and the 42 percent who were "somewhat optimistic" about their institution's future.

College presidents also know that part of their job is to be a cheerleader and rally the troops; nonetheless it has to be grounded in reality. Wim Wiewel, the recently retired president of Lewis & Clark College, puts it this way: "It's OK to be a Pollyanna, but not to be delusional."

How do you feel about your institution's future?



Source: *Chronicle of Higher Education* survey of 402 senior college administrators.

Facing the Challenges



As colleges — especially nonselective small and mid-sized ones that were struggling before the pandemic — scramble to position themselves for a future that looks increasingly unwelcoming, they are thinking far beyond traditional academics.

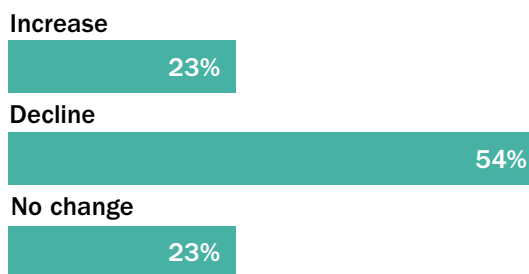
Work in a vineyard. Earn a degree in drones. Study aquaculture. That's the fun stuff. Less fun is the cost-cutting many have had to face: laying off staff and faculty, not filling empty positions, eliminating tenure, abolishing programs.

In a recent *Chronicle* survey, a little more than half (54 percent) of senior administrators of small and mid-sized four-year colleges said their institutions lost more than 5 percent of their enrollment and revenues since the start of the pandemic in March 2020. And 25 percent said their student enrollment was down by more than 10 percent.

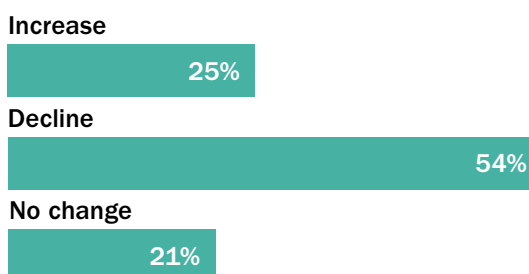
However, 23 percent saw a rise in revenue and a quarter reported an increase in student enrollment; of that 25 percent, 35 percent reported enrollment growth of more than five percent.

SINCE THE START OF THE PANDEMIC IN MARCH 2020

Has your institution experienced an increase or a decline in revenue?

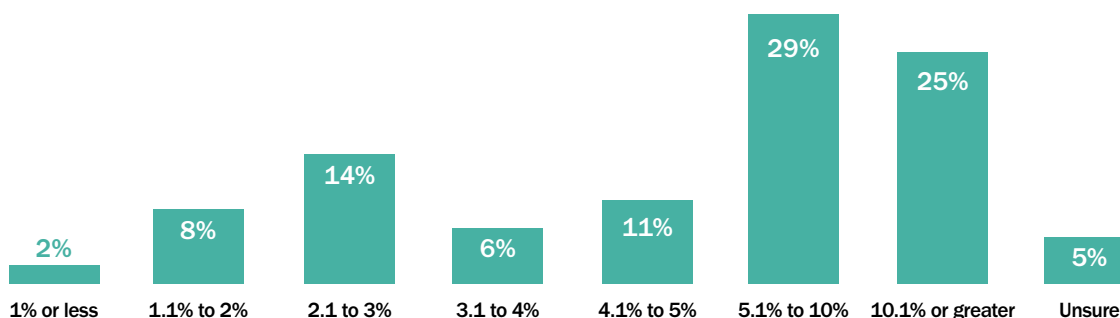


Has your institution experienced an increase or a decline in student enrollment?



Source: *Chronicle of Higher Education* survey of 402 senior college administrators.

How much of a decline in student enrollment have you experienced?



Source: *Chronicle of Higher Education* survey of 402 senior college administrators.

Given the overall experience of most, perhaps it's a little surprising that 69 percent of those responding to the survey said they were optimistic about their institution's future. And a little more than half of respondents felt they were doing about as well as their peer institutions in preparing for the future, 24 percent said they were doing better, and 22 percent said they were doing worse.

How would you rate where your college or university stands on being prepared for the future?

Ahead of our peer institutions

24%

About the same as our peer institutions

54%

Behind our peer institutions

22%

Source: *Chronicle of Higher Education* survey of 402 senior college administrators.

"It's our job as presidents to be cheerleaders-in-chief, to be the ones who tell a positive story and gain momentum," says James Herbert, president of the University of New England, Maine's largest private university. "But you have to be very careful not to drink your own Kool-Aid."

For Marjorie Hass, president of the Council of Independent Colleges, the question is where that optimism comes from. If it's because the institution has taken "realistic steps to match its business model to its culture in a way that's sustainable," then that makes sense. On the other hand, "if it's because everything has been fine up to now, that's not good."

On the positive side, she adds, there's now more willingness to acknowledge a middle ground — that the situation isn't dire, but there are problems. "It used to be everything's great or you're closing up shop."

For many institutions, the pandemic was not a wake-up call. That came years ago, with projections of the so-called demographic cliff — the shrinking number of high-school graduates. Their numbers are expected to peak in 2025 or 2026 and then drop over the next dozen years.

This comes on top of dwindling enrollment for other reasons, including the soaring cost of college and a loss of confidence in higher education; college enrollment has been decreasing since 2011. Much of that, but not all, is fueled by falling enrollment in community colleges. And in any case, such steep drops in two-year college enrollment are troubling, especially as many four-year colleges are banking on transfer students to replace some of their lost students.

"Our institutions have been talking about and preparing for this for more than a decade," Hass says. "Covid caught us by surprise, but not the demographic cliff."

When administrators were asked in the *Chronicle* survey where they see opportunities for enrollment at their institution (they wrote in their answers), adult, transfer, and international students were high on the list, as was online learning. So were first-generation students, although there is a general acknowledgement that many of those students need financial aid that may be difficult for a struggling institution to provide.

In addition, Mildred Garcia, president of the American Association of State Colleges and Universities, says a recurrent theme she's hearing is that many students want to go away to college — but not too far. Colleges, especially those that border other

“We’re all going to go after the same slice of the pie, and it’s going to be really rough.”

states, are increasingly looking for ways to attract those students and make it feasible for them to attend by lowering out-of-state tuition and working with high schools to align college credit and curriculum.

But “the problem is, it’s just like recruiting from the student pool of traditional students — we’re all going to go after the same slice of the pie, and it’s going to be really rough,” says John W. Mills, who retired as interim president of Northern Vermont University in

June.

While increased use of different types of virtual learning may help attract some students, according to the National Student Clearinghouse Research Center, the number of transfer students has dropped by 16 percent since 2020. The number of new international students decreased slightly every year since 2016 and plummeted during the pandemic.

To remain a viable player, administrators and boards of trustees need to face their situations squarely and do the research. Why aren’t students coming? Why are they dropping out? How can they shift that? What markets can they realistically pursue?

“The problems are national, but the solutions are very local,” Hass says. At smaller institutions, “You don’t need hundreds of students. Twelve students can make a difference.”



Finding and Keeping Students

In 2015 the University of Maryland-Eastern Shore had a stellar year, enrolling a little more than 1,000 full-time first-year students — the largest incoming class in years.

There was only one problem — nearly half of them didn't come back as sophomores and 140 more didn't return for their junior year.

“No one except the institutional research office was looking into it,” says Heidi Anderson, president of UMES, a historically Black institution within the University of Maryland system.

In the *Chronicle* survey, 51 percent of senior administrators agreed and 31 percent disagreed with the statement that their institution has “a strong enrollment plan as student demographics shift.” More — 63 percent — agreed that their college has a good plan to retain students, while 21 percent disagreed. The rest had no opinion.

Many senior administrators say that in the past, enrollment and retention strategies weren’t prioritized and too often no one was keeping track of why students came or left.

At UMES, enrollment of undergraduate, graduate, and professional students slid from 4,454 in 2012 to 2,385 in 2021. Retention also dropped precipitously.

When Anderson was hired in 2018, she consolidated the admissions team under one umbrella rather than scattered around campus. And she created the position of vice president for enrollment management and student experience.

“I wanted someone else to go to bed with nightmares about enrollment like me,” she says.

But for her, retention was even more of a concern, and she knew it was necessary to understand why students were dropping or stopping out to begin to tackle the problem. She hired a consulting group to look at the situation starting in January 2019.

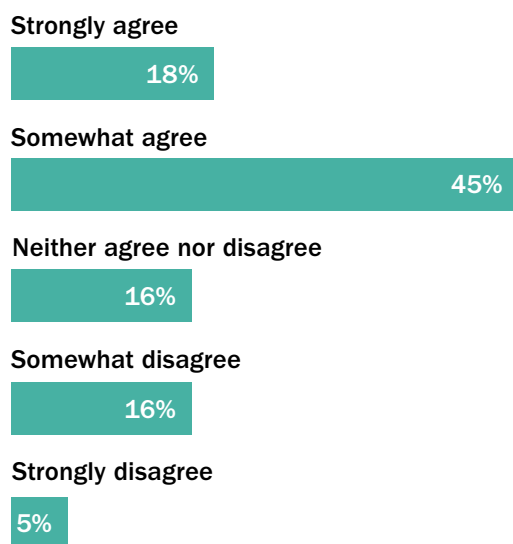
What the consultants found, not surprisingly, is that life gets in the way — money, ill family members, and other issues — problems that were intensified when the pandemic hit.

But what they also discovered is that often it’s the relatively small glitches — owing a back bill or wanting to change majors and not knowing how — that pushed students out of higher education.

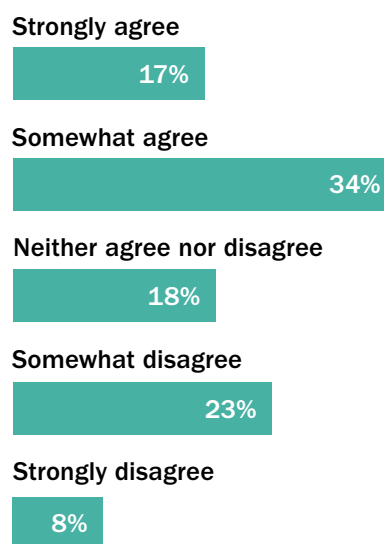
UMES now offers one-on-one counseling to help students plan their academic track and talk over their financial concerns. The university also holds campuswide monthly

TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENT:

“My institution has a good plan to retain students.”



“My institution has a good enrollment plan as student demographics shift.”



Source: *Chronicle of Higher Education* survey of 402 senior college administrators.

retention meetings, sometimes with guest speakers, to discuss the barriers students are facing and how to remove them.

“I’m acting with a sense of emergency, but I don’t feel that sense of emergency from other administrators.”

Since the consultants were hired, more than 80 students who had left before earning a degree have returned, Anderson says.

Northern Vermont University also had an enrollment and retention problem. For several years, the institution had a very high rate of students making deposits, then not showing up in the fall. But no one was looking at why that was happening, Mills says.

“You need to tell people that if we don’t correct this number, we might not be able to survive,” he says. “If you haven’t had a return from a student on their financial-aid questions in three weeks, you better get on the phone and keep calling until someone answers, because they are probably disappearing otherwise.”

There have been no big changes, he says, but he has seen incremental successes.

Not all colleges have found the luck with enrollment consultants that UMES did. St. Augustine College, in Chicago, has hired several such consultants, but they haven’t moved the needle much in bringing in new students, says Ana Gil Garcia, executive director of academic effectiveness. Enrollment dropped by about half during the pandemic, to 700 students from about 1,400.

She is also frustrated at the lack of collaboration at her college. “I don’t think the many changes at the institution have been communicated by top administrators. When offices close and faculty don’t know that, then we have a problem,” she says.

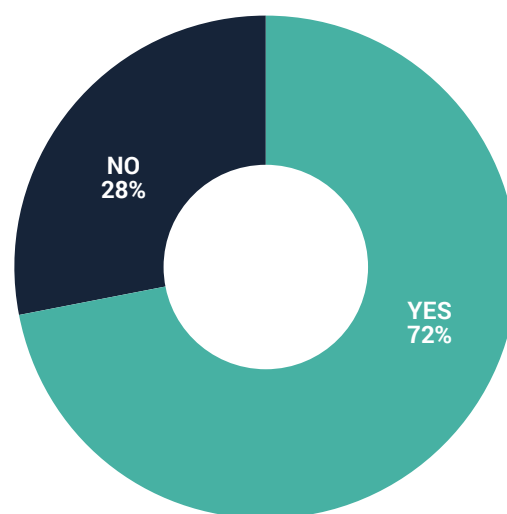
Gil Garcia was hired at St. Augustine in August 2020 and was scheduled to stay only six months to establish the office; she is still there. Her office, once three people, has shrunk to one and a half.

She says her frustration level is high, and she is worried how the college, which is tuition driven, will fare financially going forward. “I’m acting with a sense of emergency, but I don’t feel that sense of emergency from other administrators.”

In the *Chronicle* survey, 72 percent of respondents said their institution had become more collaborative during the pandemic; 28 percent said it hadn’t. Gil Garcia is in that latter category, while Wim

SINCE THE START OF THE PANDEMIC IN MARCH 2020

Have the offices and departments at your institution become more collaborative?



Source: *Chronicle of Higher Education* survey of 402 senior college administrators.

Wiewel of Lewis & Clark says the pandemic brought his people together. “It’s been the best time as a leader in terms of working with my executives. We had a common enemy and we all had to pull together. It’s like a marriage when facing an external threat — you either come out of it stronger or fall apart.”

For Hass, leadership at every institution is grounded in its mission, its culture, and its business model. Institutions flourish, she says, when those things are in alignment, and run into trouble when they’re not.

“The institutions I would be most worried about are the ones that have not found a language or a style with which to really face some fundamental shifts in the college-going population,” she says.

The University of New England seems to have hit all Hass’s marks. It is welcoming its largest first-year class ever; 856 students have made deposits for the fall,

compared with 735 for the fall of 2021. It is a nonselective school with a sizable share of first-generation students — about a third are the first in their family to go to college.

And it has accomplished that enrollment increase, Herbert says, by attacking the issue on all fronts. The university is differentiating itself by marketing something most schools don’t have: a coastline. It has five undergraduate majors in marine sciences that include entrepreneurship and policy — and this year added aquaculture — and has worked with industry partners who are investing in aquaculture in Maine.

It has expanded its graduate programs by creating a health-sciences campus at its Portland location, which will include

a newly built medical school. It is targeting students outside of New England — a decade ago, 70 percent of its students were from Maine, now it’s 30 percent. In particular, its marine-sciences program is beginning to attract students from around the country. “If you’re in the Midwest and you want to study marine sciences, you have to go either right or left,” Herbert says.

Despite his college’s successes so far, Herbert says, “I still don’t sleep at night. We have to be constantly on our toes — it’s far too easy to become complacent.”

Anderson, of UMES, feels the same way. Her institution has every reason to celebrate, including a \$20 million donation from

the philanthropist MacKenzie Scott in 2020, allowing the university to offer full-ride scholarships, which they could not before. And it is building up its endowment.

But that doesn’t mean Anderson can relax. Besides the

college’s other efforts, UMES is also recruiting students from abroad; its international enrollment, largely students from Africa, dropped from 156 in 2015 to 78 by 2020 and 58 during the pandemic. Last year, the college signed a partnership agreement with Romania’s Danubius University, whose rector is William B. Harvey, the first Black American to lead a European college. Anderson says she also plans to send UMES emissaries to Ghana and Nigeria as part of an effort to increase international enrollment.

Northern Vermont University is among a number of colleges that are planning to use their expanded online-learning infrastructure to woo new students. The university has been struggling for a long time; in 2016,

“I still don’t sleep at night. We have to be constantly on our toes — it’s far too easy to become complacent.”

two of the state's colleges, Johnson and Lyndon, first planned to close and then merged to become Northern Vermont University. Next year, in 2023, Northern Vermont will combine with Castleton University and Vermont Technical College to become one institution, Vermont State University.

"We were hurt by the pandemic, but even more by the announcement of the closure of Johnson and Lyndon," says Mills, who served for a year as Northern Vermont's interim president before retiring in June. "That sent a shock wave through the state system and that's where we lost an enormous number of our students."

Along with other initiatives, Vermont State University will focus on providing hybrid options — in courses as well as in student services, career counseling, and financial and academic advising.

"We believe this is the first example of an institution planning to deliver its entire academic program array — to a varying extent for each individual program depending on the learning requirements — with faculty and students in multiple locations all engaging together using different technology modalities," says Katherine Levasseur, director for external and government affairs for Vermont State Colleges system.

Mills says his campus can succeed because it has high-quality programs, but it will need to attract students through

the hybrid model and lower its tuition, which is high compared to public colleges in surrounding New England states. To do that means greater financial support from the state, which, he says, is beginning to come back after a long decline.

"People are aware, there's still challenges coming, there's real work to be done," Mills says. "But people have developed new attitudes and skills rather than giving up."

The changes institutions make don't all have to be huge or expensive. Lewis & Clark, in Portland, Ore., is in the enviable position of a 21 percent growth in applications this year, and it plans to enroll about 625 first-year students. Some of the changes the college made: streamlining financial aid, including offering financial aid earlier, and requiring the Free Application for Federal Student Aid (FAFSA) only and not the more complicated College Scholarship Service (CSS) profile.

Lewis & Clark also now accepts college credit from high-school students in the state of Washington, something it didn't do in the past. The result? Their applications from Washington jumped up.

"Who the heck knows why we weren't accepting Washington state credit," Wiewel says. "It's these things that faculty made a decision about years ago, and no one looked at again. And then we wonder why we're not getting more students from Washington."



Back From the Edge

While all colleges have to figure out how they will survive and thrive while facing an insecure future, they are not all starting from the same place. Some are in a position of strength, with relatively stable finances and enrollment that has returned to or exceeded their pre-pandemic numbers. Others are returning from a near-death experience through a varied combination of cost cutting, state and philanthropic help, marketing of specialized programs, partnering with industry — and sometimes a little luck.

That is the case for Midland University, in Nebraska, which almost shut its doors in 2010. Its enrollment was down to about 650 students when it hired Ben Sasse, now a Republican senator from the state, to take over the presidency. He slashed costs, laid off staff, and eliminated tenure.

“We had to be lean and mean in order to be sustainable,” says Jody Horner, who took over as president in 2014.

The closure of nearby Dana College in 2010 sent a number of students to Midland University and enrollment began to rebound. Over a decade the student population grew to about 1,600 — and 1,200 of those are undergraduates. It even increased enrollment during the pandemic.

For Horner, who spent 30 years in corporate America, the answer to sustaining and expanding is “to work from the marketplace back.” That means seeing what jobs are needed in the region and developing programs to train people. The bulk of Midland’s growth now, she says, is in graduate, certificate, and adult-learner programs.

The area needs junior coders, so in 2017 Midland started a nonaccredited coding academy. The Omaha public schools had a teacher shortage, so the college partnered with the system to start the Teacher Career Ladder degree program for paraprofessionals who want to become teachers.

“It’s about knowing your students, your institution, your competition, and knowing which levers to pull at the right time,” Horner says. “Our mission is to be relentlessly relevant.”

Sweet Briar, a women’s college in rural Virginia, came within a [hair’s breadth of closing](#) in 2015; it even sent its students to different institutions. Alumnae outcry and donations, along with a lawsuit, brought the institution back to life.

The college had that rare opportunity to start from the ground up, and “it was important for us to rebuild on a very different basis,” says its president, Meredith Woo.

It restructured the curriculum to focus on teaching women to be leaders. It lowered its tuition from \$37,155 in 2018 to \$21,000, to put in more in line with public colleges in the area. The full-time faculty was cut from 85 to about 40. That number’s now creeping back up.

Sweet Briar decided to take advantage of its 3,200 acres to focus on agriculture and sustainability. That included establishing 20 acres of vineyards (and selling the grapes to a local winemaker), and a 27,000-foot greenhouse, where vegetables are grown for the college’s meals, donated and sold, and used in teaching.

“We have a curriculum which honors our land and uses every acre of this to educate our women in the science of sustainability,” says Woo.

For Sweet Briar, the pandemic was not the blow it was to some other colleges. What could be seen as negatives — a very small student population in an isolated area — became a positive during a time of social distancing. Sweet Briar marketed its spacious campus to worried parents and students. In the fall of 2020, enrollment hovered at 350. By a year later it had risen to 457. At its height, in the 2010s, the college served about 650 to 700 students.

“It’s about knowing your students, your institution, your competition, and knowing which levers to pull at the right time, Our mission is to be relentlessly relevant.”

Elizabeth City State University, which is part of the University of North Carolina system, also faced an existential crisis; in 2013, its enrollment had dropped so much that the North Carolina General Assembly considered closing it. But public outcry to save the historically Black university saved it from being shuttered.

And it has turned itself around, in large part because of state help. In 2018, North Carolina began [NC Promise](#), which subsidizes students’ tuition at [Elizabeth](#)

[City State](#) and three other colleges representing different regions of the state.

Students at ECSU pay \$500 per semester for in-state tuition and \$2,500 for out-of-state tuition. The university's enrollment stood at 1,411 in 2017 and has steadily grown to 2,054 students in 2021, says Karrie G. Dixon, who became chancellor in 2018.

The college offered an aviation-science degree, but it wasn't being promoted properly. "When I came in as chancellor, people were talking about the relevancy of HBCUs, and I knew I had to come up with a niche," Dixon says. "One thing that stood out to me is that no one else in North Carolina has a four-year aviation-science degree. To me, that's low-hanging fruit that we didn't capitalize on."

The college now owns 13 aircraft, up from two — bought with money from the state — and enrollment in the aviation program has jumped from 50 students in 2015 to 153 this year. The university signed a partnership last year with United Airlines' pilot-recruitment program.

In 2019 ECSU also began a four-year degree program in drones, or as they're officially known, unmanned aircraft systems. And it is using part of a \$15-million donation — also from MacKenzie Scott — to build its own drone-training pavilion, which it hopes to lease out to generate revenue.

"I walked into an institution that was referred to as being on life support," Dixon says. "Having that investment from the state means I could do some of the things that were necessary to turn the ship."



Defining Resilience

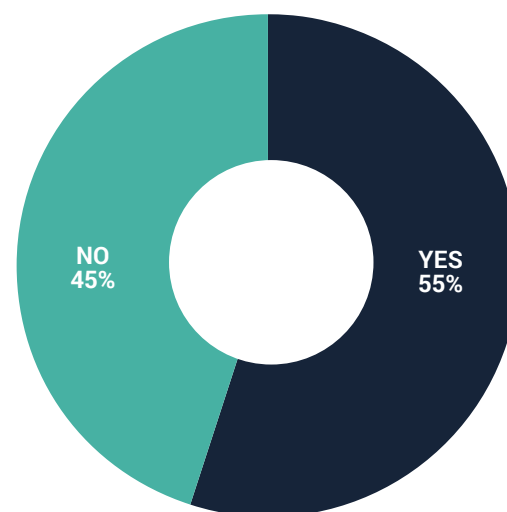
Those colleges that survived the pandemic and seem to be flourishing — or at least budding — often credit resilience for their successes. In the *Chronicle* survey, 55 percent of respondents felt their institution had become more resilient to enrollment and revenue changes since March 2020; 45 percent felt their institution had not.

But resilience can mean many things. Those who answered in the negative saw a lack of flexibility and strategic thinking, and an unwillingness to change. As one survey commenter wrote, “I think we’re still reacting to these challenges, rather than taking the time to reflect and actually make proactive changes to respond to the new realities.”

Respondents who viewed their institutions as more resilient cited forward planning and agile decision making, as well as federal funding and individual donations. Some

SINCE THE START OF THE PANDEMIC IN MARCH 2020

Has your institution become more resilient to revenue and enrollment challenges?



Source: *Chronicle of Higher Education* survey of 402 senior college administrators.

named specific initiatives such as a strong online presence; others talked about cutting expenses and being more nimble.

“Thanks to the pandemic, long overdue changes have happened, and we are better for it,” read one comment.

For Marjorie Hass, the president of the Council of Independent Colleges, resilience means “finding a way to support shared governance while still being able to make decisions in a timely and flexible manner.”

Wiewel sees it as “how much will you be able to keep operating in some reasonable shape and form, and, critically, will you be able to pay the bills without a mass layoff?”

For others, as several commenters note in the survey, there simply was no choice.

“I think there was no intentional resilience effort, there was just, you take the hits and you learn,” Mills says. We’ve had a hell of a lot of people take the hits and struggle and keep going.”

Why do you think your institution has become more resilient to revenue and enrollment challenges?

- Agile decision-making.
- Because we had the resources, the faculty expertise, and the technology to prepare in advance for these changes.
- Because we had to. We are still working through a future sustainable business model based on permanently lower enrollment.
- Clever debt restructuring; tuition reset.
- Creative ideas from admission, enrollment and finance has been able to withstand some of the challenges we have faced.
- Strategic usage of Covid funding.
- We already had a very strong online presence/programs.
- We have greatly increased support for students to focus on retention, not just first-year enrollment.

Why do you think your institution has not become more resilient to revenue and enrollment challenges?

- Ancient systems, old-school mind-sets, and fear of the unknown/change.
- Because we have not turned the corner on enrollment. Once HEERF money is gone, we expect multimillion dollar deficits.
- Underfunded by the state, and too slow to develop new programs of study.
- We haven't solved the retention issue which is particularly problematic for the 2020 and 2021 incoming classes.
- We don't understand the market we occupy. We don't offer scholarships or services to attract a nontraditional student population. Retention and progression goals aren't tied into our revenue model.
- We don't offer programs that are attractive and prepare students for the future.

CONCLUSION

Attract more students, but don't lose your identity. Invest in niche programs and cut costs. Watch what your competitors are doing but don't imitate them. The one thing everyone knows is that whatever shape they're in now, they have to be poised to change. The pandemic showed higher education, to its surprise and pride, that it could swiftly transform when it needed to. The question is whether that lesson will last.

The keys to success will be different for each college, but they should include: Thinking strategically in all areas; looking at every possible change, big and small; partnering with industry where possible; sharing best practices with peers; and leading positively but realistically are all keys. Nonetheless, as Wim Wiewal, the recently retired president of Lewis & Clark University notes, "with all the optimism and smart planning in the world, some won't be able to make it."

But some colleges have shown that they can revive institutions that are on their deathbeds; others understand that even if they emerged stronger from the last two years, they cannot rest.

It takes "good leadership, good planning, good business sense," says Jody Horner, the president of Midland University. "We have to navigate nimbly with empathy. Those are the ways forward."

METHODOLOGY

In May 2022, *The Chronicle* emailed surveys to 8,000 administrators at small and mid-sized institutions, and 402 responded. We defined small and mid-sized as institutions with 10,000 or fewer students.

Vice presidents made up the largest portion of respondents (46 percent), followed by associate, assistant, or vice provosts (12 percent) and presidents or chancellors (9 percent). Sixty-nine percent of respondents work at private four-year colleges or universities, and 31 percent at public institutions.

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