

COMMUNITY COLLEGE

# COVID-19 IMPACT STUDY

CONDUCTED BY TARGETX

TARGET 



# TABLE OF CONTENTS

- FOREWORD.....2**
- SNAPSHOT OF FINDINGS.....3**
- METHODOLOGY.....4**
- STUDY FINDINGS.....5**
  - SUMMER 2020 .....5
  - FALL 2020 .....11
  - FUTURE OF COMMUNITY COLLEGES .....17
  - OVERALL MOOD OF INSTITUTIONS.....19
- STUDY DEMOGRAPHICS..... 20**
- ABOUT TARGETX..... 22**



# FOREWORD

TargetX conducted a community college impact survey to seek to understand how institutions are addressing the COVID-19 challenges facing two-year colleges in the United States.

**The study addresses the following questions:**

- What is the operational impact of COVID-19 on two-year institutions?
- How are two-year institutions preparing for the Summer 2020 and Fall 2020 courses?
- Are two-year institutions seeing an impact in overall enrollment for the Summer 2020 and Fall 2020 courses?
- What impact has the pandemic played in the overall mood of employees at two-year institutions?
- What do community college leaders believe are the long-term challenges now impacting their institutions?

# SNAPSHOT OF FINDINGS

## Findings from the TargetX “Community College COVID-19 Impact Study” include:

- A majority of community colleges (43 percent) indicated their campuses were planning to remain closed for Summer 2020, and offer all courses online.
- Institutions that were planning to reopen their campuses in Summer 2020 are planning to operate in a limited capacity, specifically opening the classroom environment for labs and Career and Technical Education courses requiring face-to-face interaction.
- Overwhelmingly, community colleges are seeing a decline in Summer 2020 enrollment when compared to Summer 2019, with 88 percent of respondents experiencing a decline - 29 percent stating their enrollment is down greater than 20 percent.
- For Fall 2020, 51 percent of respondents indicated they are still considering all options when determining overall operations of their institution. Only 4 percent of respondents stated their campuses will remain closed for Fall 2020 and all courses would remain online.
- There is great uncertainty on Fall 2020 enrollment (19 percent of respondents); however, 69 percent indicated they anticipated a decline in enrollment compared to Fall 2019.
- Operational practices and enrollment trends for Summer 2020 and Fall 2020 vary based on the geographical region of the institution within the United States. While many of the Northeast Region respondents (67 percent) indicated their institutions were still determining Fall 2020, 50 percent of respondents from the West Region and 40 percent of respondents from the South Region were planning for campuses to be open.
- The study found that 45 percent of respondents believed “no one truly knows what will happen right now” to the future of community colleges. Only 30 percent of respondents believed that community colleges will see an increase in overall enrollment, similar to the Great Recession.
- According to survey responses, 93 percent of respondents felt that the overall mood of their teams is “concerned, but engaged.” Some respondents indicated concerns over mass staffing cuts and fear of faculty departures, especially faculty near retirement.

# METHODOLOGY

Using a quantitative research method, this research study, conducted by TargetX, has the objective to understand how institutions are addressing the COVID-19 challenges facing two-year colleges in the United States.

To achieve this objective, TargetX sent invitations to 1,847 members of accredited, associate-degree institutions and sent numerous reminders through the April 30 - May 12, 2020 period. TargetX collected 64 completed or partially completed web surveys, yielding a 4 percent response rate. 465 institutions received the survey, with 64 having responded, yielding a 14 percent institutional response rate.

The results reported here are based on the subset of community college employees surveyed in a survey of 64 community colleges and technical colleges who responded using the most comprehensive sample information available. Utilizing the Integrated Postsecondary Education Data System (IPEDS) database, TargetX was able to statistically weigh the data to correct for non-responses by matching the obtained sample data to targets for all the community and technical colleges and in the United States.

TargetX ensured the weighted sample matched for all colleges on institutional control (including public, private, and nonprofit), specific to a two-year degree offering institution, geographical location, and overall student enrollment; thus, ensuring the weighted sample results are a true representation of community colleges and technical colleges across the United States.

The sections throughout the report present the findings from the survey conducted April 30 - May 12, 2020. In some instances, reported data may not add up to 100 percent due to rounding. Visual graphs represent the raw data as a full percentage without rounding. Region breakdowns were determined by respondents who identified the state their institution resides within and was verified through IPEDS. "Other" and "Refused" responses are excluded from the results.



# STUDY FINDINGS

## SUMMER 2020

At the time of the survey, many institutions were in the midst of Summer 2020 registration and determining the overall operations of their institutions. Decisions were being made if campuses would close and enrollment numbers were being watched to determine if a new trend would develop when compared to Summer 2019 enrollment numbers. The following sections highlight the overall Operations and Enrollment trends as well as breaking down the numbers by geographical regions.

### OPERATIONS

When focusing on the overall operation of the institutions and if they would remain open, partially open, or closed, 43 percent of the respondents indicated their institution was planning to remain closed and have all courses for Summer 2020 online. The survey showed that no institution was planning to fully go back to “operations as usual” for Summer 2020 and while 8 percent were still considering options at the time of the survey, 27 percent of respondents stated they were considering “something else.”

Focusing on Summer 2020: What are current plans for the overall operations of your institution?	
Response	Overall %
Operating as usual (Campus Open, In-Person Classes Being Held)	0%
Campus Opened and ALL Courses Online	16%
Campus Opened and SOME Courses Online/SOME In-Person	6%
Campus Closed and ALL Courses Online	43%
Still Considering All Options	8%
Something else (Please explain)	27%

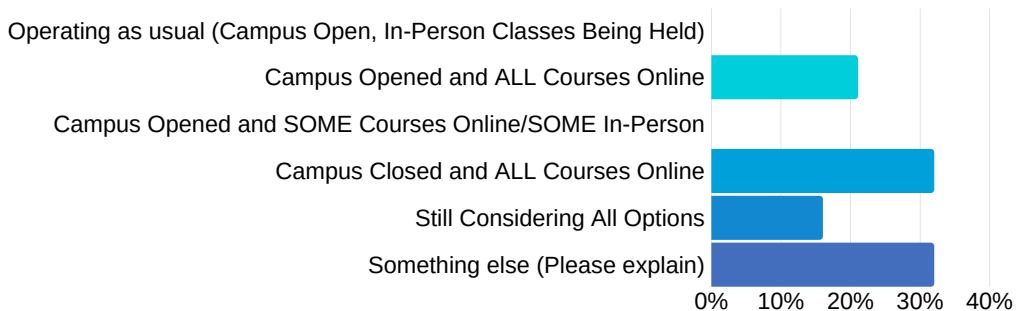
Respondents who selected “something else” were asked to provide additional details, which highlighted multiple themes such as:

- Labs being offered on campus, if possible.
- Campuses would remain closed and courses online, with the exception of labs and Career and Technical Education (CTE) courses requiring face-to-face interaction.
- First half of Summer 2020 courses would remain online and would reopen campus for the second half of the summer, if permitted by the Governor.

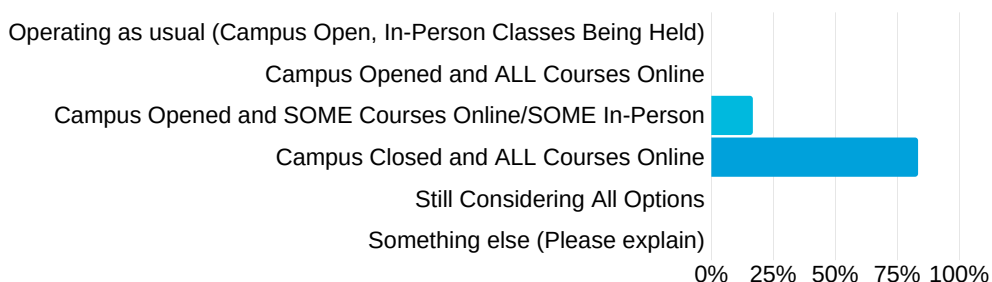
When focusing on respondents' geographical regions, at the time of the survey, 83 percent of institutions located in the Northeast Region of the United States already determined their campus would be “closed and all courses online.” This was reflective with institutions located in the West Region, where 40 percent already determined similar decisions. However, institutions located in the Midwest Region and South Region were either “still considering all options” or planning for “something else.”

### SUMMER 2020 OPERATIONS BY REGION:

#### MIDWEST REGION

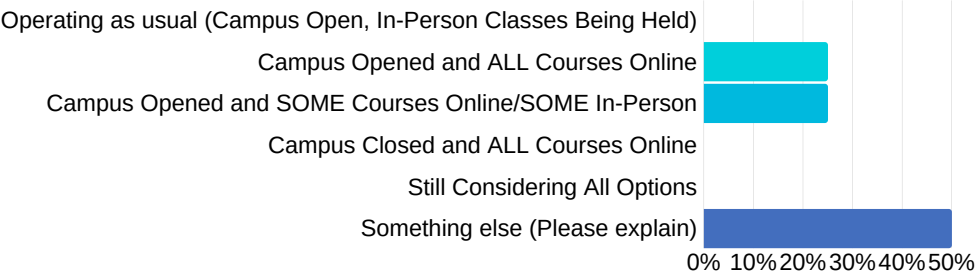


#### NORTHEAST REGION

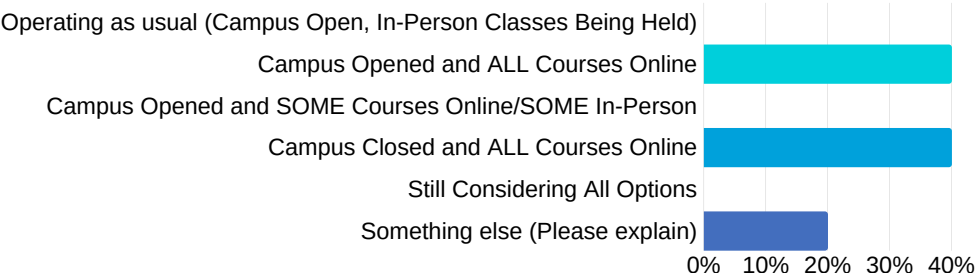


**SUMMER 2020 OPERATIONS BY REGION:**

**SOUTHERN REGION**



**WESTERN REGION**





# STUDY FINDINGS

## SUMMER 2020

### ENROLLMENT

Overwhelmingly, many community colleges are seeing a drastic decline in Summer 2020 enrollment when compared to Summer 2019. Of the institutions responding, 88 percent have indicated their overall enrollment is down, with 29 percent stating their enrollment is down greater than 20 percent when compared to the previous year. Only 12 percent of respondents noted they are seeing an increase in enrollment numbers with 5 percent indicating their enrollment increase is greater than 20 percent when compared to Summer 2019.

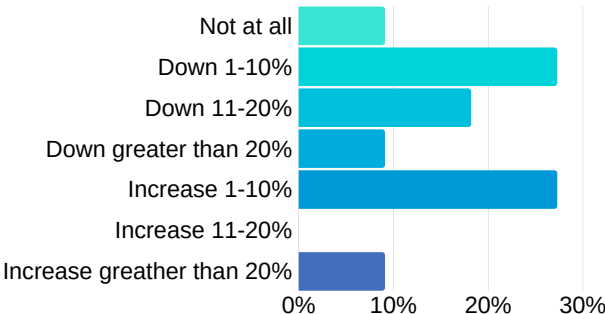
Focusing on Summer 2020: Compared to Summer 2019, how much has COVID-19 impacted your enrollment numbers?	
Response	Overall %
Not at all	2%
Down 1-10%	33%
Down 11-20%	24%
Down greater than 20%	29%
Increase 1-10%	5%
Increase 11-20%	2%
Increase greater than 20%	5%

The study finds that enrollment trends vary based on the region the institution is located. While 100 percent of the respondents in the Northeast Region indicated a decline in enrollment for Summer 2020 in comparison to Summer 2019, some institutions within the three remaining regions are seeing an increase in enrollment numbers.

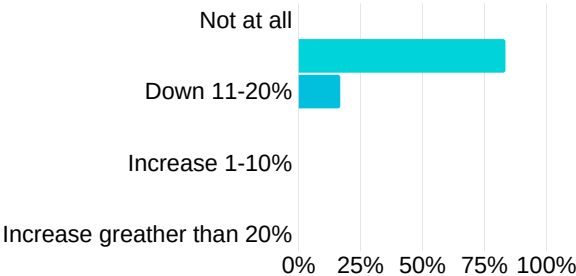
The Midwest and South Regions both had institutions reporting an increase in enrollment (9 percent and 25 percent, respectively) greater than 20 percent in comparison to the previous year. However, both regions had institutions that were notably seeing a decline in Summer 2020 enrollment greater than 20%. Though 75 percent of respondents in the West Region indicated their institutions are seeing a decline in enrollment, 25 percent reported an increase between 11 percent and 20 percent compared with Summer 2019.

**SUMMER 2020 ENROLLMENT BY REGION:**

**MIDWEST REGION**

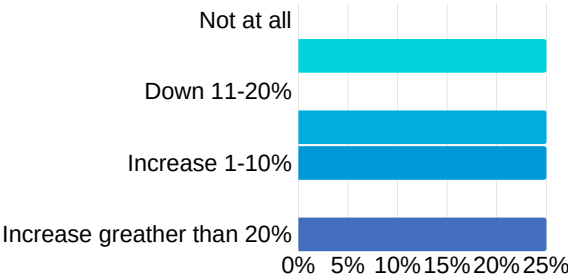


**NORTHEAST REGION**

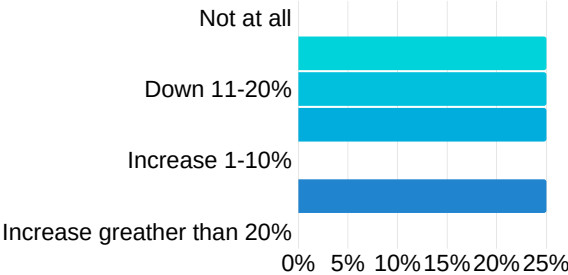


**SUMMER 2020 ENROLLMENT BY REGION:**

**SOUTHERN REGION**



**WESTERN REGION**



# STUDY FINDINGS

## FALL 2020

Several community colleges, such as Jackson College, in Jackson, Michigan (Midwest Region), announced they would be fully online for Fall 2020. They stated, “The College will continue to offer 100 percent online learning in the spring and fall semesters. Leadership Council has reached out to resources at the state and national level who advise that this situation may continue for a few months, so the plan is to continue online-only learning.” [1]

At the time of the survey, 51 percent of respondents indicated their institutions were “still considering all options” for the overall operations of their institutions for Fall 2020 and 69 percent were anticipating a decline in overall Fall enrollment. The following sections highlight the overall Operations and Enrollment trends for Fall 2020 as well as breaking down the numbers by geographical regions.

## OPERATIONS

Though the study found that 51 percent of respondents were “still considering all options,” 39 percent referenced they were planning for the campus to reopen and in some cases, go back to “operating as usual” (13 percent). Only 4 percent of the respondents referenced their campus would remain closed and all courses would continue online for Fall 2020.

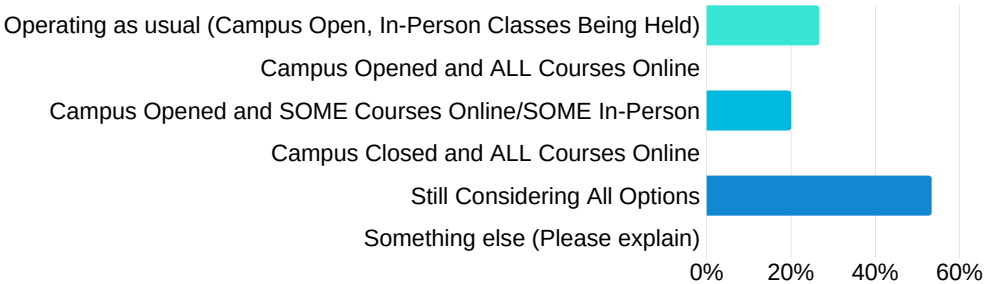
Focusing on Fall 2020: What are the plans for the overall operations of your institution?	
Response	Overall %
Operating as usual (Campus Open, In-Person Classes Being Held)	13%
Campus Opened and ALL Courses Online	2%
Campus Opened and SOME Courses Online/SOME In-Person	24%
Campus Closed and ALL Courses Online	4%
Still Considering All Options	51%
Something else (Please explain)	4%

[1] Source: [JCC COVID-19 Update](#); April 03, 2020

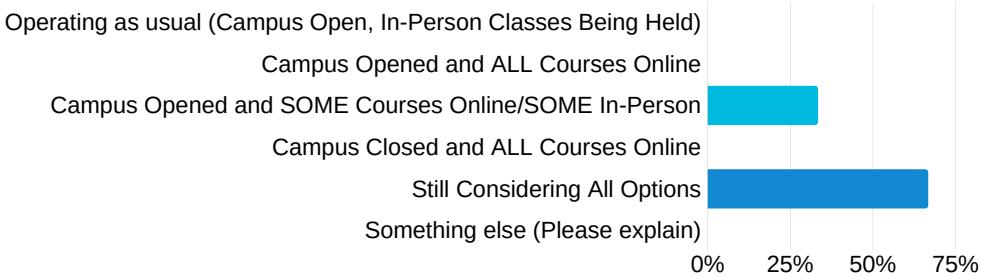
While a large percentage of respondents referenced they are “still considering all options,” for overall operations of their campus in Fall 2020, 50 percent of respondents in the West Region noted “campus closed and all courses online.”

**FALL 2020 OPERATIONS BY REGION:**

**MIDWEST REGION**

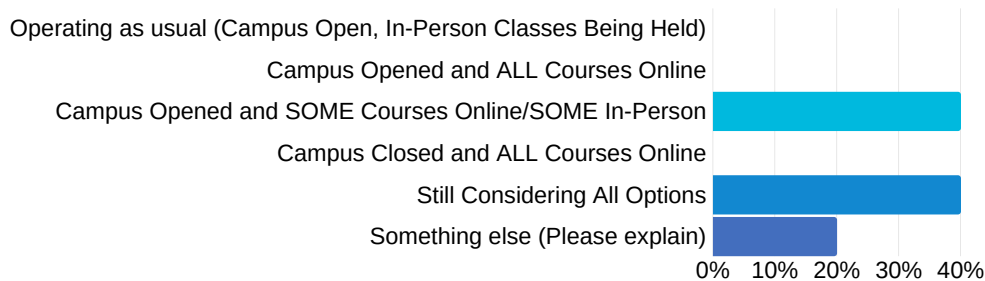


**NORTHEAST REGION**

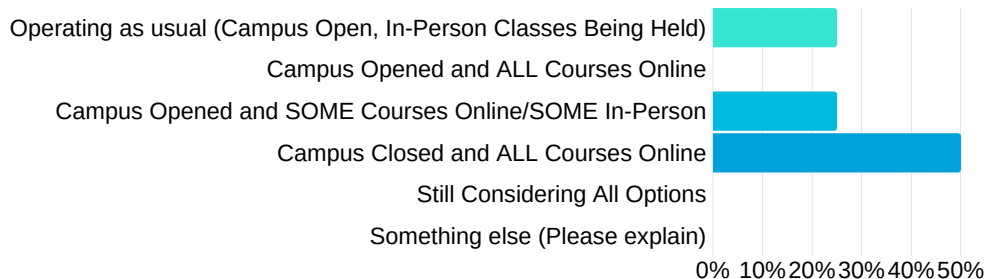


## FALL 2020 OPERATIONS BY REGION:

### SOUTHERN REGION



### WESTERN REGION



In some instances, respondents provided additional contextual information on their Fall 2020 operations noting similar themes:

- Institutional agreements were made with Faculty to create an online version of their Fall 2020 courses, in preparation for potential campus closure at the start of the semester, or if campuses open and there is a need to re-close the campus.
- Institutions have made a substantial investment in their Online course infrastructures if campuses are required to remain closed, or there is a need to re-close the campus.
- Institutions are preparing to open, but accommodating their classroom environments for continued social distancing, including lower faculty-to-student ratios in physical classroom environments.

# STUDY FINDINGS

## FALL 2020

### ENROLLMENT

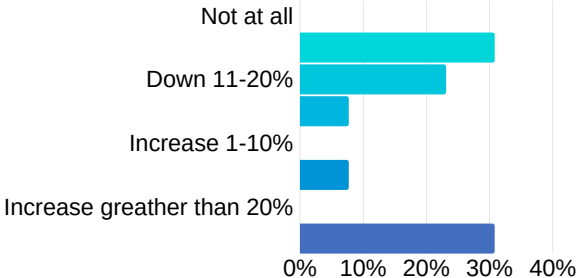
Some respondents (19 percent) noted there was an uncertainty on what Fall 2020 enrollment would look like at their institution. However, 69 percent indicated they anticipated a decline in enrollment compared to Fall 2019. Only 9 percent of respondents believed their institution would see an increase in enrollment in Fall 2020. Alarming, for many community colleges, 52 percent of respondents anticipated Fall 2020 enrollment would be down more than 10 percent.

Focusing on Fall 2020: Compared to Fall 2019, how do you anticipate COVID-19 will impact your enrollment numbers?	
Response	Overall %
Not at all	1%
Down 1-10%	17%
Down 11-20%	31%
Down greater than 20%	21%
Increase 1-10% <input type="checkbox"/>	2%
Increase 11-20%	5%
Increase greater than 20%	2%
I am not sure	19%

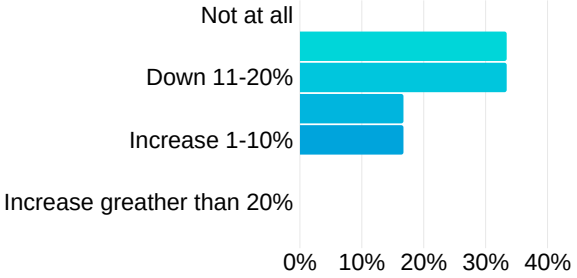
When broken down by regions, the study found that a majority of respondents, no matter the location of their institution, anticipated a decline in Fall 2020 enrollment when compared to Fall 2019. The study showed that 25 percent of respondents in the South and West Regions anticipated an enrollment decline greater than 20 percent, while only 17 percent of institutions in the Northeast Region, and 8 percent in the Midwest Region anticipated similar declines in Fall 2020 enrollment when compared to Fall 2019.

**FALL 2020 ENROLLMENT BY REGION:**

**MIDWEST REGION**



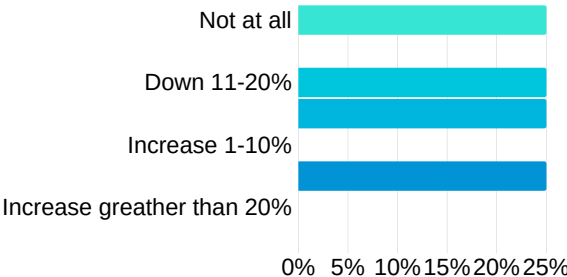
**NORTHEAST REGION**



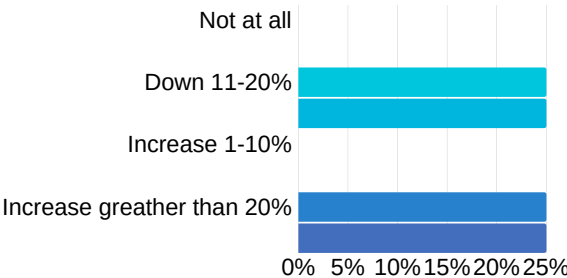


**FALL 2020 ENROLLMENT BY REGION:**

**SOUTHERN REGION**



**WESTERN REGION**



Overall, the study shows that respondents in the Midwest Region (62 percent) and Northeast Region (83 percent) have a greater concern that enrollment will decline in Fall 2020. The South Region (25 percent) and West Region (25 percent) believe they are likely to either have an increase in enrollment or as 25 percent of respondents in the South Region indicated, no impact at all for Fall 2020 enrollment when compared to Fall 2019 numbers.

# STUDY FINDINGS

## THE FUTURE OF COMMUNITY COLLEGES

Between 2007 and 2010, as the American economy collapsed, the share of full-time community college students increased from about 41 percent to 43 percent nationwide, according to data from the American Association of Community Colleges. By 2017, that number had fallen to about 37 percent. Charlene M. Dukes, president of Prince George’s Community College stated in a recent article enrollment went up, “somewhere between 10 and 15 percent’ after the Great Recession.” [2]

The survey asked respondents their personal thoughts on the impact COVID-19 would have on enrollment for community colleges. The study found that 45 percent of respondents believe “no one truly knows what will happen right now.” When asked to elaborate, many respondents noted there were too many variables that would provide any meaningful information.

What are your thoughts on the impact COVID-19 will have on Community Colleges in general?	
Response	Overall %
We will see an increase in overall enrollment, similar to the Great Recession.	30%
We will likely see declines in enrollment, unlike what we saw with the Great Recession.	26%
No one truly knows what will happen right now.	45%

[2] Source: [The Washington Post](#), Published: April 01, 2020

# STUDY FINDINGS

## THE FUTURE OF COMMUNITY COLLEGES

Respondents also noted that their institution gained valuable insight from the Great Recession, but as one respondent stated, “There’s nothing in recent history that really helps shape what this looks like and what the outcomes will look like.” Several of the respondents noted in their comments that their biggest take-a-way from the COVID-19 pandemic is to build out business continuity plans for any future (both short and long-term) incidents.

Overall, the study found that respondents believed that there are lessons being learned from COVID-19 that not only will prepare them for any future pandemics, but will also guide how they proceed with other types of forced closures, such as natural disasters or inclement weather. As one respondent noted, “I think it’s a changed world. I think there will be a lot of things that we will see over the course of the next 10 years that we’ll trace back to this situation.”

# STUDY FINDINGS

## THE OVERALL MOOD OF INSTITUTIONS

The survey found that 93 percent of respondents stated the overall mood of staff at their institutions was “concerned, but engaged.” “Business as usual” was noted by 5 percent of the respondents and 2 percent referenced “something else.”

In explaining their selection of “something else” respondents had a growing theme of concerns around:

- Massive staffing cuts and furloughs.
- Limited staffing causing disruption and delays to student services.
- Fear of faculty departure, especially faculty near retirement.

What is the overall mood of your team?	
Response	Overall %
Business as usual	5%
Concerned, but engaged	93%
Disengaged	0%
Something else (please explain)	2%

Respondents who provided additional content to their response also noted the forced “work from home” environment has prompted their institutions to consider changing institutional policies around the practice for their employees during winter and summer timeframes. Additionally, the study found that in some instances, respondents believe faculty who once were afraid to teach online courses, are now growing confidence in the process and learning environment.

# STUDY DEMOGRAPHICS

## REGIONS

In identifying survey respondents' Region of the United States for this study, TargetX utilized the Census Regions and Divisions of the United States mapping and confirmed through the Integrated Postsecondary Education Data System (IPEDS).

Region of participating institutions	% Overall
Region 1: Northeast	26%
Region 2: Midwest	41%
Region 3: South	18%
Region 4: West	15%

**Region 1: Northeast** - Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island, Vermont.

**Region 2: Midwest** - Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota, Wisconsin.

**Region 3: South** - Alabama, Arkansas, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, West Virginia.

**Region 4: West** - Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming.

# STUDY DEMOGRAPHICS

## PROFESSIONAL DEMOGRAPHICS

Institutional Role	Overall %
President/CEO	7%
Vice President/Executive Director	31%
Director/Assistant Director	42%
Academic Dean	4%
Advisor/Counselor	7%
Faculty	9%

## ABOUT US



TargetX is reimagining the student experience with CRM solutions that span the student lifecycle. Built on the Salesforce platform – the worldwide leader in customer relationship management – TargetX offers comprehensive solutions for recruitment, admissions, and student success. TargetX helps over 350 higher ed institutions meet and exceed their enrollment and retention goals and, with world-class implementation and support teams, is a true partner for success. With its 20+ years of innovative technology and higher education expertise, TargetX is the most trusted CRM provider in higher education. To learn more, visit [targetx.com](https://targetx.com).

---