

CSM Enrollment Planning During a Pandemic Recession

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Presentation Overview

- Unemployment due to the pandemic recession
- Higher education context
- Workforce context
- CSM Enrollment Data
- Our Call to Action
- Next Steps

Unemployment

Job loss and uncertainty during COVID-19

A Coronavirus Induced Recession

- Over 30 million people joined the jobless ranks in the last 6 weeks
- 50 percent more people than counted as filing claims in a recent four-week period may have qualified for benefits but were stymied in applying or didn't even try because they found the process too formidable.

[4.30.20 NYTimes](#)

- 52 percent of low-income households — below \$37,500 a year for a family of three — said someone in the household had lost a job because of the virus, compared with 32 percent of upper-income families (with earnings over \$112,600). Forty-two percent of families in the middle have been affected as well.

[Pew Research Center 4.21.20](#)

Unemployment by Ethnicity and Education level

More than four-in-ten adults say they or someone in their household has lost a job or taken a pay cut due to COVID-19

% saying this has happened to them or someone in their household because of the coronavirus outbreak

	Been laid off/lost job	Had to take a cut in pay	Net either/both
All adults	28	33	43
White	24	29	38
Black	32	34	44
Hispanic	41	51	61
Ages 18-29	35	45	54
30-49	30	39	49
50-64	28	32	42
65+	17	18	25
Bachelor's+	21	29	37
Some college	30	37	46
HS or less	32	35	45
Upper income	18	26	32
Middle income	26	32	42
Lower income	39	41	52

Coronavirus Economic Inequalities

- Those who are lower paid, less educated and employed in jobs where teleworking is not an option face a bleak choice if states lift restrictive orders and employers order them back to work: expose themselves to the pandemic or lose their jobs.
- The virus has only exacerbated that inequality, with minorities suffering both higher death rates and more financial harm.
- That disempowered group is heavily black and Latino, though it includes lower-income white workers as well.

[NYTimes 4.30.20](#)

CA Unemployment rates

- An estimated 3.7 million Californians applied for unemployment
- California is the first state to borrow from Federal Government to make unemployment payments

[WSJ 5.4.20](#)

- Nearly 43 percent of Californians are at high risk of unemployment

Source: NYTimes 4.16.20

- Roughly 1 in 7 Californians are out of work

[Other and Belonging Institute](#)

State of Uncertainty

- How long the State and Country will be shut down?
- How long we will cycle in and out of Shelter in Place?
- When and How we will “re-open” the economy?
- What will the “new normal” will be in Bay Area in terms of the economy and job market?
- What sectors and businesses will be hiring back workers first, when we do return?
- How many small businesses will never reopen?

Higher Education Context

How might COVID 19 alter our enrollment?

National Relief

- Although Congress provided \$14 billion for higher education in the \$2 trillion rescue bill signed by President Trump last month, a large chunk of that, \$6 billion, was in the form of emergency cash grants for students in financial distress.
- The rest of the bailout amounts to just 1 percent of total university expenses. [College presidents say that won't be enough](#) to protect some institutions from slashing staff and programs, cutting back scholarships or perhaps even going under. They are asking for at least \$46.6 billion in aid, to be divided equally between institutions and students, in the next stimulus package.

[NY Times 4.15.20](#)

CA Relief

- The US Department of Education CARES Act provides education emergency relief funds where a minimum of 50% of formula grant funds (the “advance funds”) must be reserved for emergency financial aid grants to students to help cover expenses related to the disruption of campus operations due to Coronavirus, such as food, housing, course materials, technology, health care, child care.
- Institutions are encouraged to prioritize students with the greatest need and may develop their own systems and processes for determining how to allocate these funds.

CARES Funding

CARES Funding	Total Allocation
Canada	\$1,098,544
College of San Mateo	\$2,042,860
Skyline	\$2,491,971
Total	\$5,633,375

Declining Enrollment Outlook for Universities

- American Council on Education estimates the number of students on campus will decline by 15%, leading to \$23 billion in lost revenue.

[WSJ, 4.21.20](#)

- Administrators anticipate that students grappling with the financial and psychological impacts of the virus could choose to stay closer to home, go to less expensive schools, take a year off or not go to college at all.

[NYTimes 4.15.20](#)

- About 12 percent of such students who have already made deposits no longer plan to attend a four-year college full-time.

[Art and Science Group Survey](#)

Higher Ed and COVID-19 National Student Survey

Survey of students who planned to go to a 4-year institution

- 53% say their family's financial situation has been affected
- 34% of undecided HS seniors say COVID-19 is influencing their college choice
- 8% decided not attend a 4-year due to COVID-19
- 24% of decided HS seniors say they may change their mind about the college they want to attend due to COVID-19

[Higher Ed and COVID-19 National Student Survey from SimpsonScarborough, a marketing and research firm.](#)

The COVID 19 Higher Ed Game Changer

- Were only 5% current college students to go on and decide to complete their degrees online and/or at a geographically closer, less expensive institution, the world of higher education would be changed forever

<https://www.forbes.com/sites/tomlindsay/2020/03/26/the-disease-that-could-topple-traditional-higher-education/#132afef45cb7>

Opportunities for Community College

Freshman and Sophomore University Students may ask,

- *“What are we doing this for? What of real substance are we acquiring by paying for the ‘on-campus experience?’ Is it really worth the cost?”*

High School Students

- *One out of every six high school seniors is beginning to entertain parallel doubts about the efficacy of traditional higher education models*

<https://www.forbes.com/sites/tomlindsay/2020/03/26/the-disease-that-could-topple-traditional-higher-education/#132afef45cb7>

National [survey conducted by Art & Science Group](#)

The Workforce Context

Job loss and uncertainty during Coronavirus

Outlook for Work & Education

National COVID-19 Work and Education Survey

- 1 in 3 Americans (34%) believe they would need more education or training to replace a lost job with one that pays a similar wage or salary.

Of those who believe they need more education or training:

- 64% would look to change careers
- 66% are confident they know where to find the education or training they need
- 54% are looking to online instruction – preference seen at all education levels

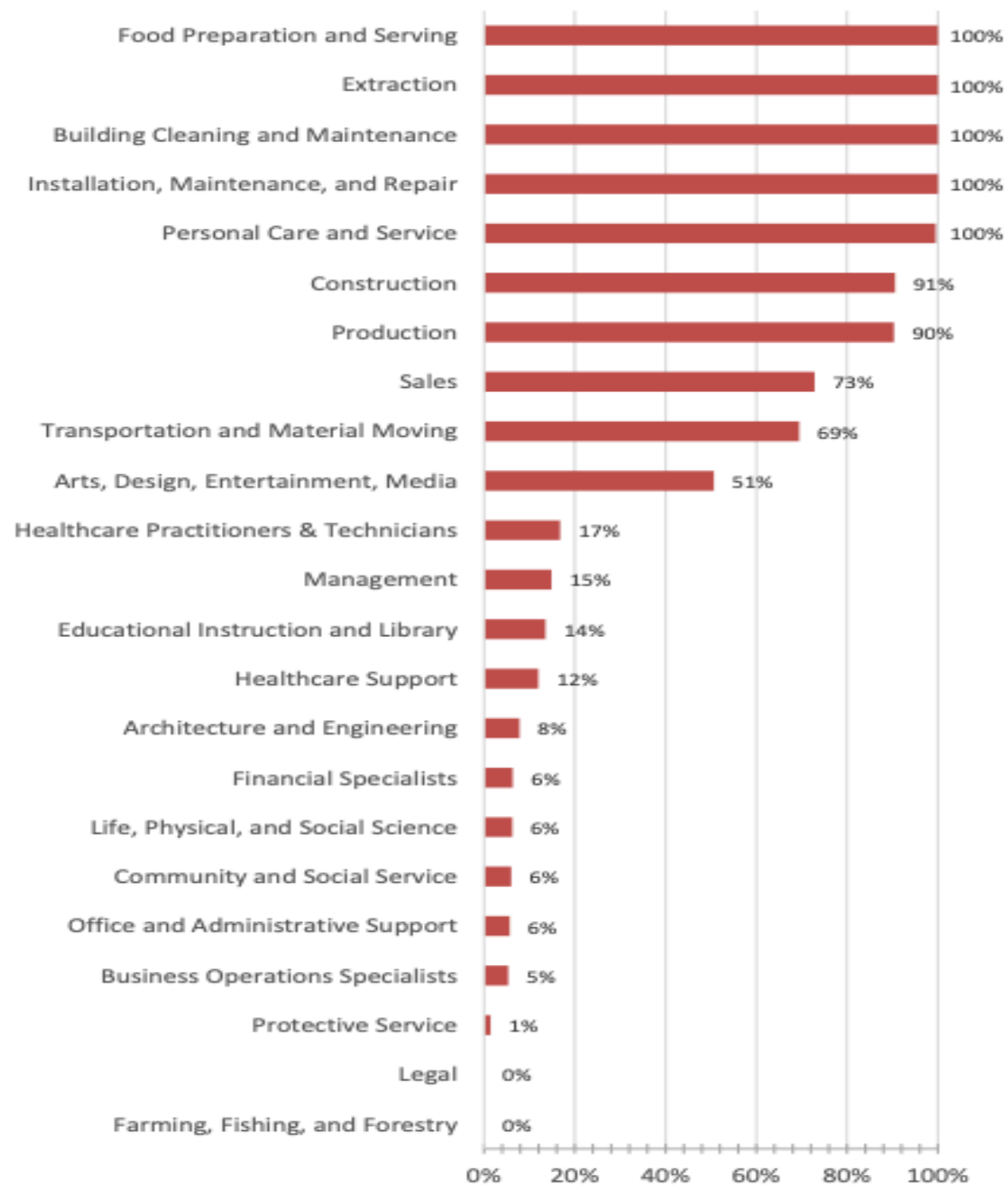
COVID-19 Work and Education Survey from [Strada Education Network](#), a nonprofit that researches and funds education and employment pathways.

Hardest hit Industry Sectors

1. Hospitality & Leisure (including Airlines, Entertainment)
2. Restaurants/Food Service
3. Retail (except Grocery)
4. Construction
5. Small Businesses
6. Self-employed/Gig workers

Source: Center for Excellence

National Risk of Unemployment by Occupation

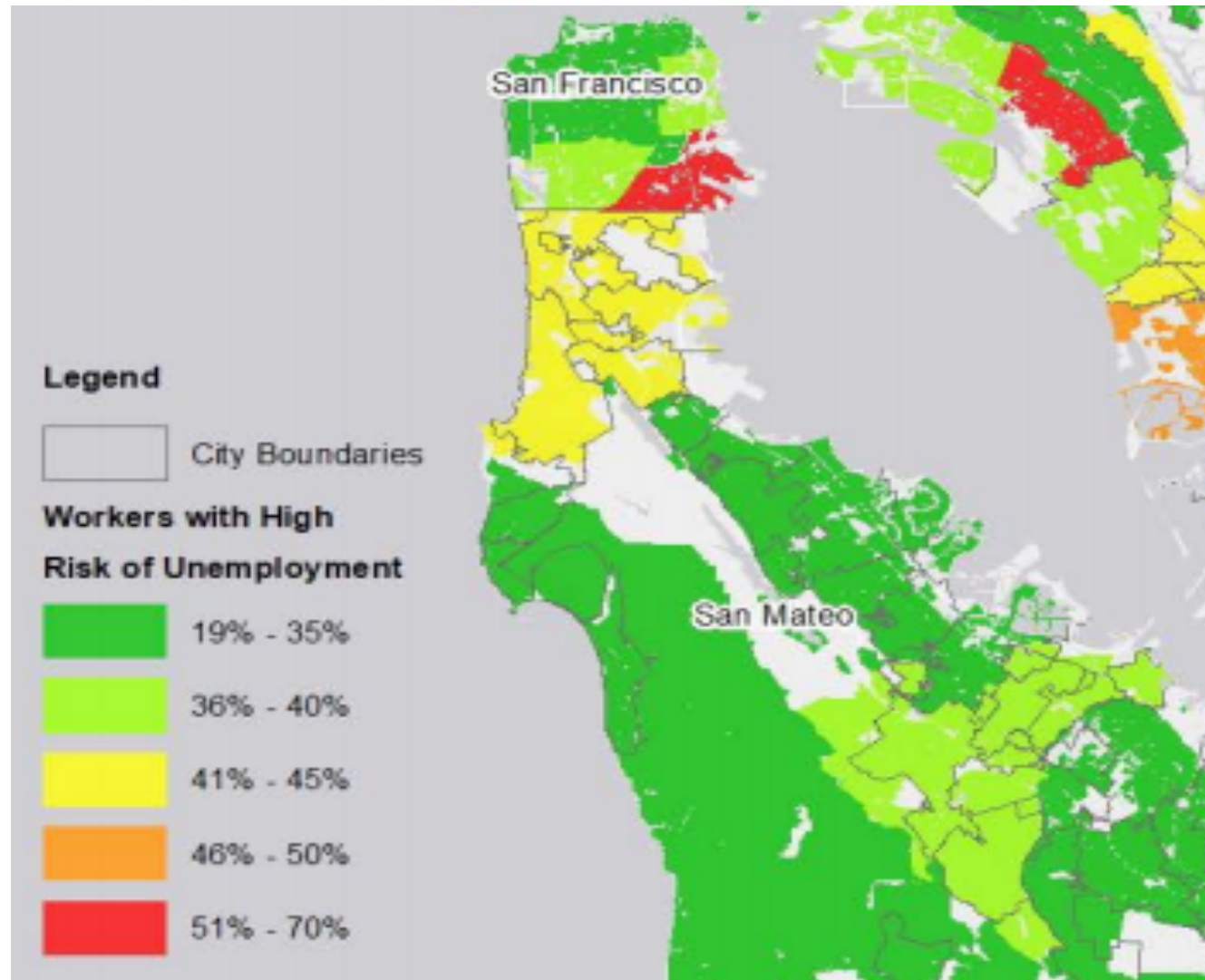


Sources: Federal Reserve Bank of St. Louis, California ACS PUMS 2014 to 2018, Economic Roundtable

Sectors in CA with High Risk of Unemployment

Industry Sector	Percent of Total Labor Force	Percent with High Risk of Unemployment
Retail Trade	11%	68%
Food Services and Drinking Places	7%	93%
Construction	6%	69%
Other Services	5%	73%
Temp Agencies, Guards, Janitorial	5%	56%
Transportation and Warehousing	4%	55%
Arts, Entertainment, and Recreation	3%	61%
Nondurable Manufacturing	3%	50%
Traveler Accommodation	1%	80%
Mining, Quarrying, Oil and Gas	0.2%	56%

Percent of San Mateo Workers at High Risk of Unemployment 19-35%



<https://economicrt.org/wp-content/uploads/2020/04/In-Harms-Way.pdf>

Risk of Unemployment in our Region

CA County	Total Workers	High Risk of Unemployment	Non Essential Workers	No flexibility to Work from Home	Not Salaried
San Mateo	411,096	37%	86%	58%	37%
San Francisco	514,234	33%	87%	53%	33%
Santa Clara	986,586	35%	87%	54%	35%
Alameda	846,496	37%	86%	58%	37%

California needs to take direct action to address the COVID-19 economic emergency that is causing widespread business closures and extremely high unemployment. Forty-three percent of California workers have a high risk of unemployment.

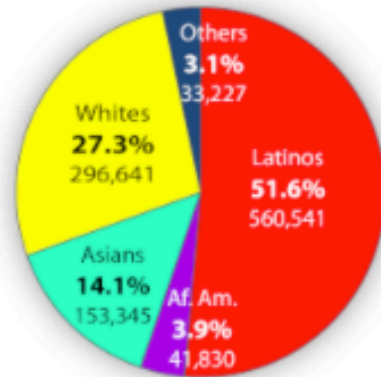
Non-Essential Occupations by Race

"NON-ESSENTIAL" OCCUPATIONS DURING COVID-19 OUTBREAK IN CALIFORNIA

People Employed by Race

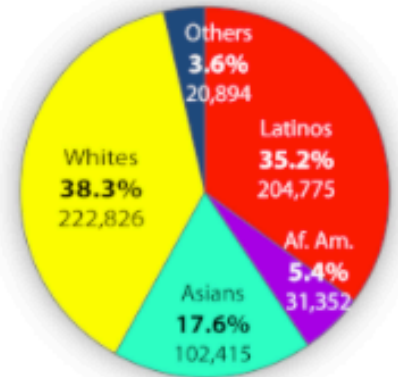
Source: ACS 1-yr Estimates 2018

Food preparation and serving related occupations

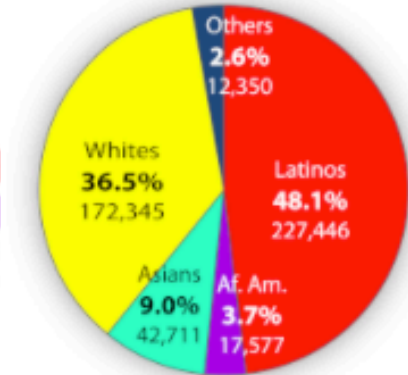


7.9%
4.2%
of all employed work in this occupation

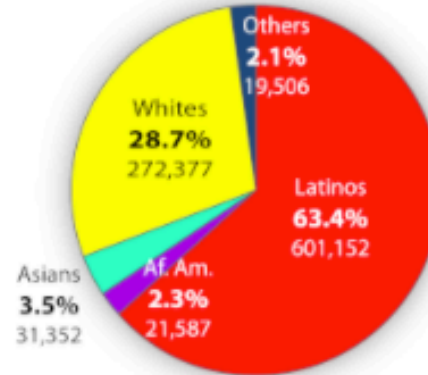
Personal care and service occupations



2.9%
3.1%
of all employed work in this occupation



3.1%
1.8%
of all employed work in this occupation



7.9%
2.2%
of all employed work in this occupation

Installation, maintenance, and repair occupations

Construction and extraction occupations



Othering & Belonging Institute

Heaviest Burden of Unemployment

- Young adults
 - Particularly those who are graduating from school and attempting to enter the job market face extremely difficult challenges
- Latinx
- Restaurant workers
- Hotel workers
- Personal care workers such as fitness instructors
- Janitorial workers

Essential Critical Infrastructure Workforce

- Health Care/Public Health
- Law Enforcement, Public Safety, and Other First Responders
- Food and Agriculture
- Energy
- Water & Wastewater
- Transportation and Logistics
- Public Works and Infrastructure Support Services
- Communications and IT
- Other Community –or Government-Based Operations and Essential Functions
- Critical Manufacturing
- Hazardous Materials
- Financial Services
- Chemical
- Defense Industrial Base
- Commercial Facilities (Supply chain of building materials)
- Residential/Shelter Facilities and Services
- Hygiene Products and Services

Top 10 Most In-Demand Jobs in the U.S. from March 15-21

- [Store Associate](#)
- [System Operator](#)
- [Certified Public Accountant](#)
- [Healthcare Specialist](#)
- [Construction Worker](#)
- [Warehouse Manager](#)
- [Psychologist](#)
- [Vehicle Mechanic](#)
- [Academic Advisor](#)
- [Delivery Driver](#)

Based on LinkedIn job posting data in the U.S. between March 15 - 21, 2020

Projected Growth Industries

1. Remote work & educational support
2. Direct to consumer brands
3. Physical and mental health apps
4. Games, toys, and projects
5. Food delivery
6. Streaming media
7. Audio and ebooks
8. Gaming and esports
9. Virtual and video tools
10. Video health services

<https://www.linkedin.com/pulse/were-entering-stay-home-economy-here-10-industries-winners-glazer/?trackingId=66cp43%2F5Rn2Ki8wMVIZhDQ%3D%3D>

From Context to CSM Data



Speculations are Based on Assumptions

- There will be a COVID 19 vaccine that will end the pandemic within a year
- Immunity to COVID 19 will allow for a return to classrooms
- There will be an enrollment surge in fall in response to a recession
- The pandemic will not interfere with potential enrollment surge
- Education will remain important in a recession regardless of the pandemic
- Financial aid will be widely available for students
- Food and housing insecurity will not overshadow education
- Community colleges are well positioned to move classes online
- CSM can be agile enough to move between in person and online instruction
- Online course quality matters as there is now competition
- Once students take their first class, they acclimate to online classes
- Anticipated workforce shifts are accurate
- Students will want to go to the least expensive college while online education is required
- Some lab classes can be migrated to online platforms

Potential Challenges

- Will basic needs (employment, food and housing insecurities) deepen and overshadow educational goals?
- The way we support students academically and emotionally needs to shift
- Build it and they won't come (new programs, courses, distance education)
- Uneven quality of online education
- Competition among distance education providers
- Sample before you enroll mentality
- Accredited vs. non accredited courses
- Not all students will acclimate to online courses
- Lack of curriculum coordination of online courses in SMCCCD
- Budget and staffing limitations

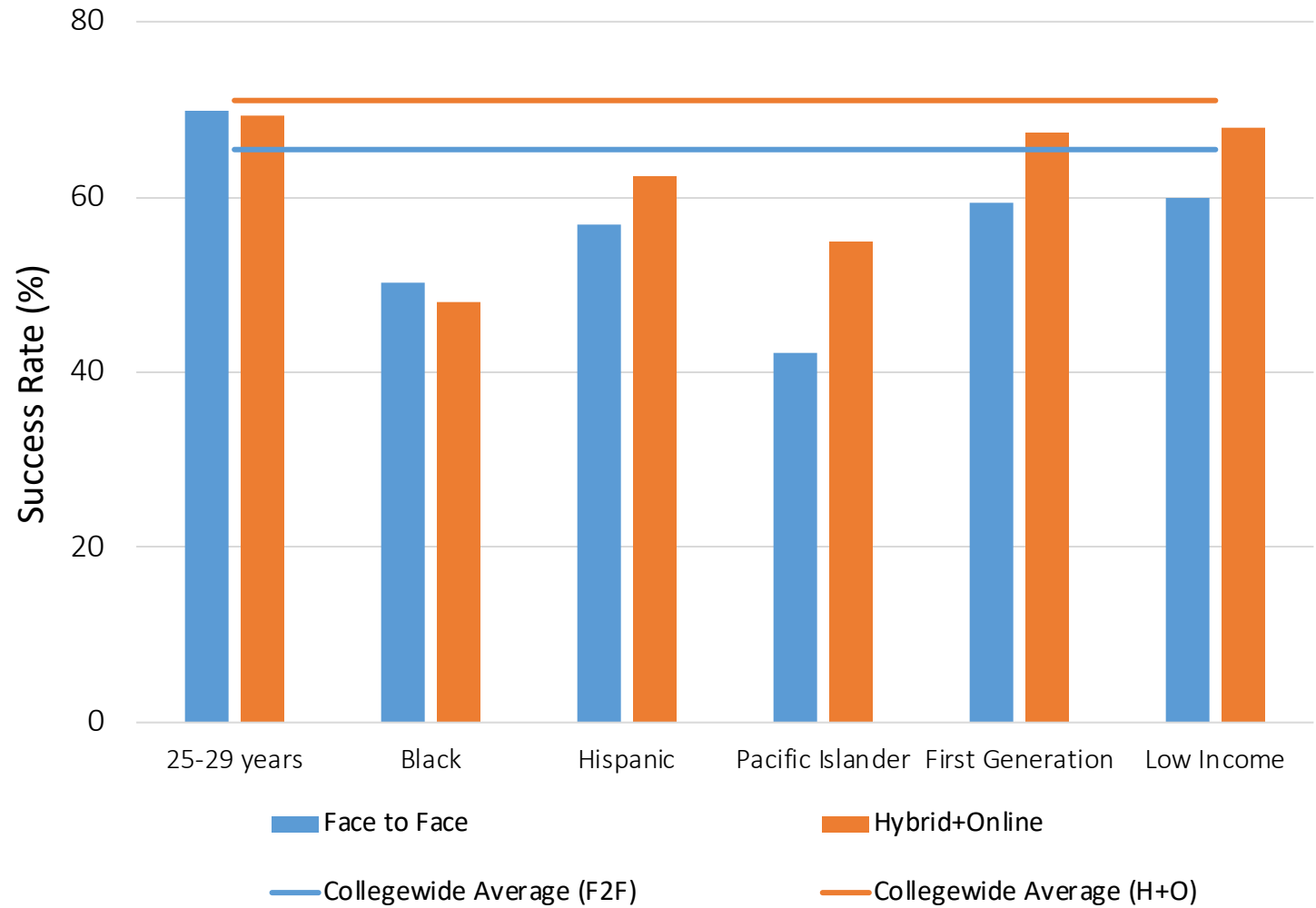
CSM Data

- Student Headcount by Online Enrollment by Enrollment Status
- Success Rate by Mode of Instruction, Fall Terms 2016-2018
- FTES Comparison for a pandemic inspired recession
- Headcount 1996-Fall 2019
- FTES Comparison
- CSM Headcount (AY 96/97-AY 18/19)
- Headcount % Change
- International Students
- High Enrollment Courses post Recession

Student Headcount by Online Enrollment by Enrollment Status

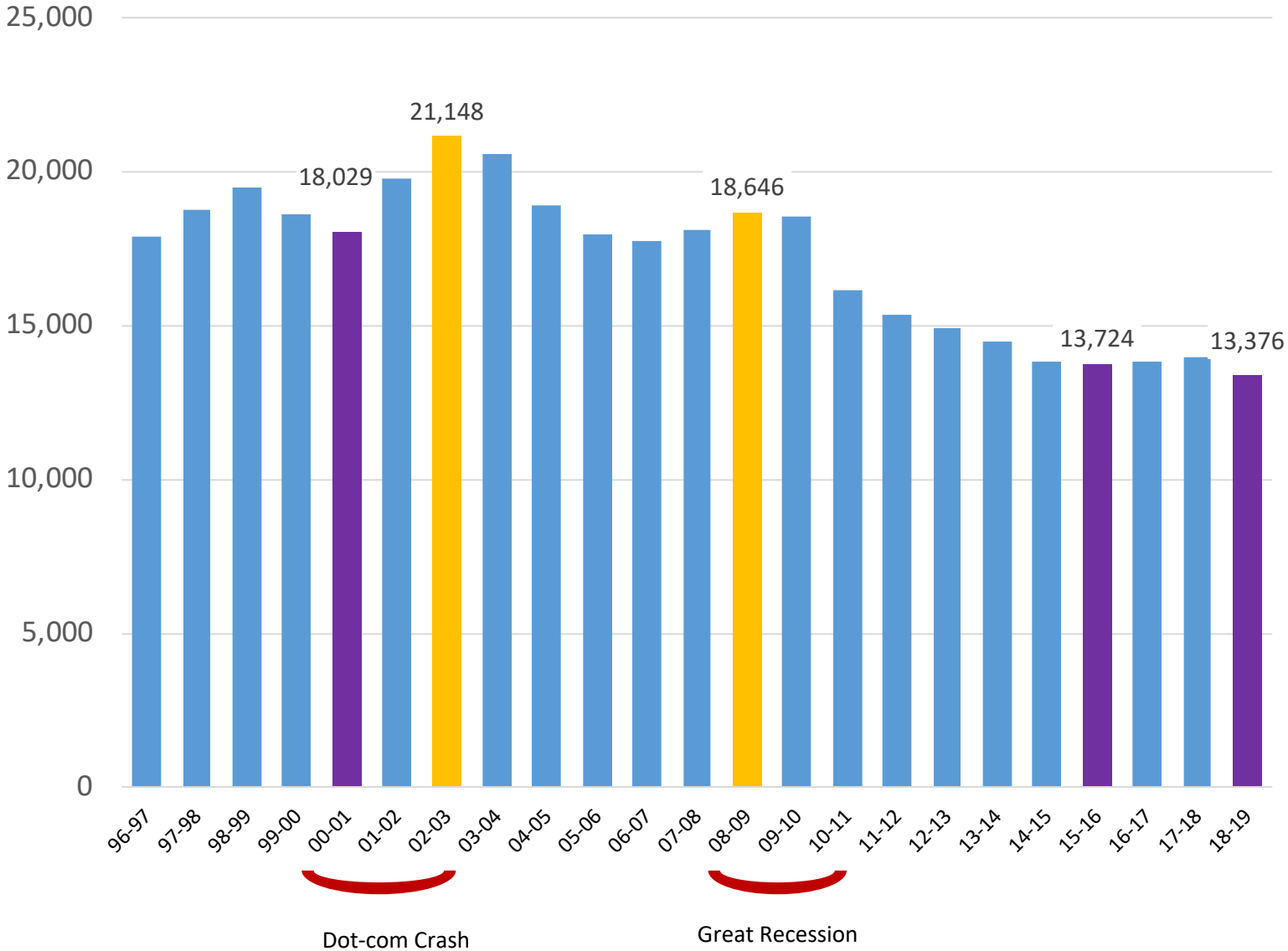
	Fall 2019			Spring 2020		
	Unduplicated Headcount	% Enrolled in at least 1 fully online section	% Enrolled in at least 1 hybrid or online section	Unduplicated Headcount	% Enrolled in at least 1 fully online section	% Enrolled in at least 1 hybrid or online section
Fall 2019						
First-time student	1399	21.4	23.9	224	26.3	28.6
First-time transfer	652	35.1	37.0	463	42.3	45.8
Returning transfer	382	37.4	39.0	320	40.3	44.1
Returning student	474	34.6	35.9	446	40.6	43.3
Continuing student	4669	35.6	38.4	5874	38.2	41.5
International student	597	53.9	58.3	589	50.1	56.9
Concurrent high school	574	30.7	32.2	593	36.6	38.8
Total	8747	34.3	36.8	8509	39.0	42.5

Success Rate by Mode of Instruction, Fall Terms 2016-2018

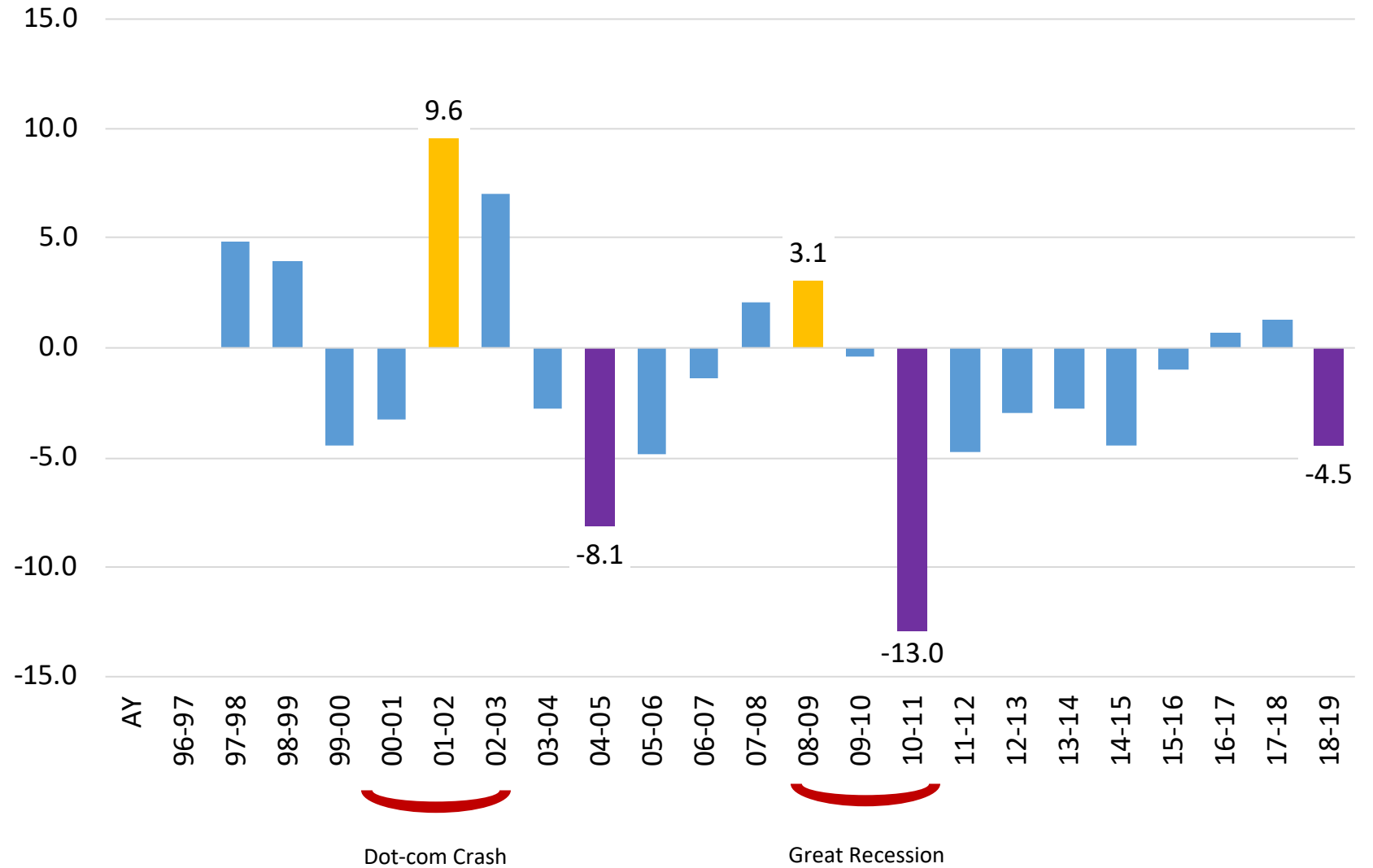


Source: Distance education mode comparison, fall 2019 cycle

CSM Headcount (AY 96/97-AY 18/19)



CSM Headcount % Change from Prior Year



For projections, how do we treat a pandemic inspired recession?

International Students

- Survey distributed by District 4/13/20
- Response rate currently at 5%
 - Based on those who completed the survey, the majority still intend to return to CSM for fall
 - There might be slightly more students who would choose to stay in their home country if the classes are going to offered online for fall
- Many are waiting for a decision for fall

High Enrollment Courses Post Recession

Top 20 Enrolled Subjects during the Great Recession (AYo6o7-AYo91o)

by percent of total enrollment

Collegewide N=253,628		Certificate/ Degree/Transfer N=149,446		Skill Builders N=26,310	
MATH	8.9%	MATH	10.8%	ACTG	9.9%
ENGL	7.0	ENGL	9.0	AJPS	6.2
PSYC	4.1	PSYC	4.7	ESL	4.3
FITN	4.1	BIOL	4.6	R.E.	3.9
BIOL	4.0	FITN	3.8	CIS	3.7
MUS.	3.9	ETHN	3.6	BUSW	3.5
ACTG	3.5	SPCH	3.1	MATH	3.1
ART	3.1	HIST	2.8	ART	3.0
ESL	3.1	MUS.	2.8	BIOL	2.8
ETHN	2.7	ACTG	2.7	FITN	2.7
SPCH	2.5	PLSC	2.6	PSYC	2.5
HIST	2.3	ESL	2.5	FIRE	2.5
CRER	2.1	NURS	2.3	BLDG	2.4
BUS.	2.1	SOCI	2.2	SPFI	2.3
PLSC	2.0	BUS.	2.2	COSM	2.3
NURS	2.0	ASTR	2.1	BUS.	2.2
SOCI	1.9	ART	2.1	ENGL	2.2
ASTR	1.7	CRER	2.0	MULT	2.1
ECON	1.7	ECON	1.9	NURS	2.0
CHEM	1.6	PHIL	1.8	CRER	2.0

Note: SPCH succeeded by COMM AY1112.

Speculations

- Based on the Dot.com Crash and Great Recession data, we might see enrollment increase between 3 and 9%
- International enrollment could decline 27-50%
 - We have already seen a 27% drop due to political climate
 - International Student Survey is still open
 - Fall decision will impact decision
- Transfer Preparation with Guided Pathways will be increasingly important
- Workforce shifts may lead to programmatic/curricular changes in all career education programs
 - Business and Technical Education
 - Health Care related fields
 - Computer Science
 - Digital Media
 - Kinesiology/Athletics

From Speculation to Action

Implications for our campus

- EMP Implementation for key initiatives will be revisited
 - Workforce Development
 - Guided Pathways
 - Equity
- Distance Education efforts will need to increase
 - Professional Development
 - Technology
 - Quality & Agility
- Marketing of programs for special populations is needed
 - Transfer Preparation (Math, ENG, Speech, BIO, etc.) and Guided Pathways
 - Reverse Transfer
 - High School pipeline
 - Career Education

Key Insights for CSM's Collective Call to Action

- Increase distance education quality and agility
 - Professional development
 - Lab classes for critical occupations (medical)
- Focus on workforce development/retraining
 - Career Education programs and certificates in growth industries
 - Upskilling
- Actively recruit reverse transfer students
 - Accessibility, outreach and marketing
 - Defined transfer pathway
- Recruit and streamline programs for regional high schools
 - Accessibility, outreach and marketing
 - Defined opportunities and pathways
- Increase services for our disproportionately impacted students
 - Basic needs, counseling, educational supports
 - Learning communities

Discussion

Thank you