COVID-19: Understanding Changes to Postsecondary Student Enrollment Patterns

A report based on a study funded by the Bill and Melinda Gates Foundation

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Executive Summary

Purpose of Research
Postsecondary institutions in the US face many challenges, ranging from the demographic decline of high school graduates, competition amongst institutions, and the rising cost coupled with the rising skepticism of the value of a higher education degree. Further complicating the landscape is the advent of the COVID-19 pandemic, which significantly disrupted postsecondary institutions. Conceived from discussions among a few of the research team members early in the pandemic, this project was formulated in order to understand how students and postsecondary institutions were dealing with the effects of the pandemic. The Bill and Melinda Gates Foundation provided funding for this study. The following is a summary of the project, with complete findings provided in the main body of this report.

Methodology
The initial research team decided to employ a mixed methods research design, where qualitative and quantitative methods of data collection and analyses are used to examine the pandemic’s impacts on postsecondary enrollment and institutional responses to the pandemic. To support the research, additional team members were recruited from the University of Southern California’s Center for Enrollment Research, Policy and Practice (CERPP) and the University of Michigan’s Center for the Study of Higher and Postsecondary Education.

Over the course of the two-year research project, the qualitative portion of this work involved conducting focus groups and interviews with chief enrollment management officers at dozens of postsecondary institutions. A short survey of these individuals was also conducted. The postsecondary institutions represented were from all four US regions and ranged in admissions selectivity, spanning community colleges to highly selective four-year institutions. For the quantitative part of the project, data was provided by the National Student Clearinghouse from their Postsecondary Data Partnership (PDP) database. The PDP data was used to develop the sample of institutions to interview, provide information about student enrollments and persistence patterns, and complement the information ascertained from the qualitative part of the project.

Key Findings
The research team obtained the following key findings after analysis of the interview transcripts and the PDP data:

- Enrollment: Community colleges and less selective institutions faced declining enrollments, while highly selective institutions increased enrollments.
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- Recruitment: All institutions had to immediately change recruitment practices, with virtual tools and social media helping to both broaden outreach to new populations as well as hone in on targeted individuals to personalize approaches.
- Test-optional admissions: For many institutions, the shift to test-optional admissions was overnight and changed student recruitment, admissions, and financial aid practices. Many of the chief enrollment officers interviewed believed that test-optional admissions helped to improve diversity and equity in their recruited and admitted student pools.
- Financial aid: Institutions had to offer more financial aid and shift money from merit to need-based aid, as many students and families were negatively financially impacted by the pandemic. Federal stimulus funds were crucial for many postsecondary institutions in this regard.
- Retention: While student retention remained stable or increased initially with the onset of the pandemic, community colleges and less selective institutions faced issues with retention as the pandemic continued. For all institutions regardless of retention rates, academic preparation and socialization of its students were the largest concerns and highlighted the need for greater resources to meet the needs of incoming students. A closer look at retention among students attending PDP institutions revealed that the pandemic year (2020-21) resulted in equity gaps in educational progress when disaggregated by race/ethnicity, sex, enrollment intensity, college placement level, and degree-type sought.

Challenges and Limitations

There were a number of challenges during the research project, as postsecondary institutions were dynamic themselves during the various phases of the pandemic. For example, the research team had to adjust the initial design for institutional participation to exclude the mode of instruction (in-person/hybrid/online), as it proved to be a fluid designation that changed in real time. We also had difficulty initially finding an adequate sample of chief enrollment officers to participate in the individual interview stage. We did obtain an adequate community college sample with help from the Aspen Institute and the American Association of Community Colleges. Also, while likely true of all of the institutions in our study, given participation was voluntary, we believe there was some sample bias. In particular, we noted that the community colleges that participated in the study, while adversely impacted by the pandemic in terms of enrollment, were likely to be doing better than their peers. Finally, there were challenges with the PDP dataset, which limited the temporal analysis that we had hoped to conduct. The full report documents how these challenges were remedied.
Implications and Recommendations

The COVID-19 pandemic disrupted enrollment management in higher education, with many institutions experiencing declines in enrollment and uncertainty about the future. This research project was an attempt to better understand student and institutional responses to the impacts of COVID-19, but was also designed to provide utility to enrollment management leaders. During the focus groups, for example, the chief enrollment management officers were thrilled to be discussing the same issues in a group setting, and were eager to voice and share their concerns in a non-competitive forum with peers. We also met periodically throughout the research project with the National Student Clearinghouse and College Board, and informed their reports on the enrollment-related outcomes of the pandemic.

We also disseminated findings from the project at large conferences that would have chief enrollment officers and institutional leadership in attendance. Members of the research team presented at NACAC’s Chief Enrollment Officer’s Forum (CHIEF), the College Board Forum, AACRAO’s Strategic Enrollment Management Conference, the CERPP Conference 2023-Standing on Shaky Ground: Leading Enrollment Management in 2023, and the USC Rossier Research for Impact Conference. We plan to further disseminate this report to all institutional participants, through CERPP’s nearly 10,000-member newsletter list, through CERPP’s website and its social media platforms.

Enrollment managers must navigate an increasingly complex and challenging landscape. With the creativity and adaptability enrollment managers have shown in our research, we hope that our report will provide findings that enrollment managers and institutional leadership can use to inform their approaches in recruitment, test-optional admissions, financial aid and retention efforts that will serve their students well.
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Introduction

The University of Southern California’s (USC) Center for Enrollment Research, Policy and Practice has completed a two-year research study funded by the Bill and Melinda Gates Foundation (the Foundation): COVID-19: Understanding Changes to Postsecondary Student Enrollment Patterns. The purpose of this study was to understand how the COVID-19 pandemic changed student decision-making and to understand institutions’ admissions policies and strategies, institutional pricing, and financial aid practices. In order for policymakers and institutional leaders to better understand the effects of changes in students’ educational choices on enrollment and persistence, over the course of the project findings from the study were disseminated at multiple forums for enrollment management leaders. The complete findings are presented in this report.

The principal investigator for the project was Jerry Lucido, with other researchers from the University of Southern California (USC) included Emily Chung and Bob Massa. This study was a collaboration with the University of Michigan, with researchers Steve DesJardins, Reuben Kapp and Mike Bastedo.

Purpose

The purposes of this study were to:

1. Provide timely information and provide an understanding about enrollment trends for students (disaggregated by race/ethnicity, income, and first-generation status) and issues in the field in the wake of COVID-19's impacts on higher education. Issues examined included how the pandemic may have changed student decision-making, enrollment policies and strategies, institutional pricing, financial aid provision, and other adjutant practices and policies.

2. Leverage the information and insights gathered through both robust data analysis and institutional interviews to produce timely, relevant, and actionable knowledge for the field and for the Foundation.

3. Provide institutional leaders and the field with current, expert research and actionable knowledge to help them make proactive and more precise decisions about how student enrollment patterns are changing within an institution, community, or region.
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Research Questions

This was a mixed methods study, designed to understand enrollment and persistence trends nationally, and to better understand whether, and if so, how institutional behavior and practices shifted in response to COVID-19. For the qualitative part of the study, the following research questions guided the analysis:

1. How did the COVID-19 pandemic impact college enrollments?
2. How, if at all, did institutions change their enrollment management policies and practices in response to the pandemic?

Methods

In order to answer these questions, the qualitative portion of this work involved conducting focus groups, individual interviews and a short survey with chief enrollment management officers (CEMOS) of postsecondary institutions over two years. In 2021, individuals at 68 institutions were interviewed via the focus group method. Designed as a longitudinal study, the institutions representing the later individual interviews were largely drawn from the original pool of focus group participants, with a few new recruits selected for institutional sector and geographical diversity. We interviewed 38 CEMOS via the 2021 individual interviews, 36 via the 2022 individual interviews, and surveyed 32 via the 2022 survey to follow up on preliminary institutional enrollment and financial aid trends.

Participant Recruitment

CEMOS of postsecondary institutions were recruited as study participants to better understand the impact of COVID-19 on enrollment as well as institutional responses to the pandemic. Because we wanted to learn about the impact of the pandemic across different postsecondary institutions, we conducted purposeful sampling, aiming for an institutional sample reflecting:

1. Community colleges;
2. Public less selective four-year (Barron’s 3+ selectivity index);
3. Private less selective four-year (Barron’s 3+ selectivity index);
4. Public highly selective four-year (Barron’s 1 & 2 selectivity index);
5. Private highly selective four-year (Barron’s 1 & 2 selectivity index).

For the focus groups, via email we invited 260 prospects from the postsecondary sectors defined above, and aimed for representation by census region (West/South/Midwest/Northeast) and mode of instruction (in-person/hybrid/online). We
also attempted to include as many Postsecondary Data Partnership (PDP) institutions as possible in hopes that the qualitative sample would overlap with the quantitative work conducted as part of the project (see later section on Additional Retention Data Analysis). Information about changes in instructional methods during the pandemic was obtained from Davidson College’s College Crisis Initiative (CCI). In examining mode of instruction, initially our hypothesis was that it would be key to understanding enrollment trends. However, this measure proved to be a moving target as the mode of instruction frequently shifted within and across institutions and over time, even changing during a semester in some instances. Realizing these problems, mode of instruction was abandoned during the continuing selection of individual interview participants.

At the individual interview stage, we invited participants from the focus groups and made every effort to maintain sector and regional representation. We did have difficulties recruiting community college participants from the initial CCI list, and received help from the Aspen Institute and the American Association of Community Colleges in reaching out to their community college contacts to generate additional participants.

To incentivize participation, focus group and individual interview participants were each offered $100 gift cards. Participants could receive up to $300 in gift cards if they participated in all three interviews: a focus group, the fall 2021 interview, and the spring 2022 interview.

Data Collection

Focus group interviews were conducted in the summer of 2021, with follow-up individual interviews in the fall of 2021 and spring of 2022. All interviews were recorded and transcribed for data analysis. A short survey of chief enrollment officers from the five postsecondary sectors noted above was also done during the summer of 2022.

Focus Group Interviews

From May-June 2021, the research team interviewed 68 CEMOs by conducting a set of 19 focus group interviews via Zoom. These focus groups consisted of 2-5 participants and were grouped by institutional sector. Each focus group was led by two researchers, interviews were semi-structured, with a protocol, and lasted approximately 90 minutes. Participants were informed that the interviews were confidential and informed consent was obtained. All interviews were recorded and later transcribed as part of the data analysis process.

Below is a summary of the sector breakdown of the 68 focus group participants who were interviewed via the 19 focus groups conducted:

- Community college: 11 participants via 4 focus groups
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- Public less selective: 10 participants via 3 focus groups
- Private less selective: 17 participants via 4 focus groups
- Public highly selective: 17 participants via 5 focus groups
- Private highly selective: 13 participants via 3 focus groups

Of the 68 postsecondary education institutions represented, 6 were PDP institutions. Additionally, 13 were Minority-Serving Institutions (MSI) including:
- 7 Hispanic-Serving Institutions (HSI)
- 4 Historically Black Colleges and Universities (HBCU)
- 1 Asian American and Native American Pacific Islander-serving Institution (AANAPISI)
- 1 Native American-Serving, Nontribal Institution (NASNTI)

Individual Interviews

During the fall of 2021 and the spring of 2022, the research team conducted two sets of follow-up individual interviews with CEMOs across the five postsecondary education sectors identified above. Most of the individual interview participants were also focus group participants, but there were a few others recruited to ensure a relatively equal representation across all five sectors and census regions. These interviews were conducted by one researcher via Zoom. The interviews were semi structured with a protocol and lasted 45-60 minutes. Participants were instructed that the interviews were confidential and informed consent was obtained. All interviews were recorded and later transcribed for data analysis.

Fall 2021 Individual Interviews

From September-May 2021, the research team interviewed 38 CEMOs. Below is a summary of the sector distribution of the 38 individuals interviewed:
- Community college: 7 participants
- Public less selective: 8 participants
- Private less selective: 7 participants
- Public highly selective: 8 participants
- Private highly selective: 8 participants

Of the 38 institutions represented, three were PDP institutions. Additionally, six were Minority-Serving Institutions (MSI). Please note that one institution had two MSI designations.
- 3 Hispanic-Serving Institutions (HSI)
- 2 Historically Black Colleges and Universities (HBCU)
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- 1 Asian American and Native American Pacific Islander-serving Institution (AANAPISI)
- 1 Native American-Serving, Nontribal Institution (NASNTI)

Spring 2022 Individual Interviews

From March-April 2022, the research team interviewed 36 CEMOs. This was the last set of individual interviews. In an effort to collect longitudinal data, participants were invited from the list of 38 CEMO officers who were interviewed in the fall of 2021. Two community colleges included in the fall 2021 interviews did not participate in the spring 2022 interviews. Below is a sector breakdown of the 36 participants who were interviewed:

- Community college: 5 participants
- Public less selective: 8 participants
- Private less selective: 7 participants
- Public highly selective: 8 participants
- Private highly selective: 8 participants

Participants from the 38 institutions represented included three PDP institutions, as well as six Minority-Serving Institutions (MSI). Please note that one institution had two MSI designations.

- 3 Hispanic-Serving Institutions (HSI)
- 2 Historically Black Colleges and Universities (HBCU)
- 1 Asian American and Native American Pacific Islander-serving Institution (AANAPISI)
- 1 Native American-Serving, Nontribal Institution (NASNTI)

Fall 2022 Survey

The final part of the data collection included a survey of the CEMOs who participated in the spring 2022 individual interviews. This survey included follow-up questions to ascertain more timely or accurate information about institutional enrollments and financial aid trends discussed in the spring 2022 interviews. There were no research incentives for these respondents. Below is a sector breakdown of the 32 respondents:

- Community college: 3 participants
- Public less selective: 7 participants
- Private less selective: 7 participants
- Public highly selective: 8 participants
- Private highly selective: 7 participants
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Of the 32 institutions represented, three were PDP institutions and six were Minority-Serving Institutions (MSI). Please note that one institution had two MSI designations.

- 3 Hispanic-Serving Institutions (HSI)
- 2 Historically Black Colleges and Universities (HBCU)
- 1 Asian American and Native American Pacific Islander-serving Institution (AANAPISI)
- 1 Native American-Serving, Nontribal Institution (NASNTI)

Coding and Analysis

The research team coded and analyzed the interview transcripts to answer the two research questions focused on the impact of the pandemic on enrollment, as well as changes to institutional enrollment management policies and practices. In doing so, we developed five broad themes related to recruitment, admission, financial aid, enrollment, and retention. Using ATLAS.ti, a qualitative data analysis software, interview transcripts were coded into broad themes. The coding process was iterative, adding/deleting codes and developing subcodes to further organize these larger themes. For example, given how often test optional admission policies were mentioned, and the depth of discussion regarding these policies, this emerged as an important code to add.

The research team met regularly to discuss this process and group the findings by institutional type, student income/ethnicity, and changes over time in the 2020, 2021, and 2022 cohorts. The team noted any recurring or impactful findings, including anomalies in the data or counterintuitive findings. These findings are distilled in the following sections, organized by five broad themes:

- Enrollment trends
- Recruitment
- Test-Optional Admissions
- Financial Aid
- Retention

Enrollment Trends During the COVID-19 Pandemic

The COVID-19 pandemic put postsecondary institutions in a precarious position in terms of managing enrollment issues, but what is less commonly understood is that for many institutions, enrollments had already been declining. The College Board’s [Trends in College Pricing and Student Aid Report 2022](https://www.collegeboard.org/research/reports/trends-college-pricing-student-aid-report-2022) shows that American postsecondary enrollment peaked in 2011, after which a slow enrollment contraction occurred. This places the pandemic in context. COVID-19 did not create the overall condition of enrollment decline, but its effect was to deepen an already downward trend, particularly
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among undergraduate students. Indeed, the years of the pandemic produced a 3.7% decline in undergraduates (in 2020), followed by another 3.5% drop in the 2021 academic year. This pattern of enrollment retrenchment leveled off in 2022, with undergraduate enrollment declining only 0.7%.

This backdrop provides some context about how to examine COVID era-related enrollment trends. Simply put, different postsecondary sectors were differentially impacted. This finding is echoed across the different institutions involved in our study. Our research spanned four-year highly selective public and private institutions, four-year less selective public and private institutions, and community colleges. The data we collected demonstrate the experiences of these institutions as well as how they responded to the challenges faced.

Highly Selective: Enrollment Increases

The highly selective public institutions in our sample reported that they achieved or surpassed enrollment goals during the pandemic period. They generally described large increases in applications for admission and reported having the resources and inclination to increase student diversity, the number of Pell-eligible students, as well as enrollments of first-generation students. The quotes below are representative of the responses of enrollment leaders from this sector:

20% of our confirms came from out-of-state markets where we've never had applicants from before...the Common App and being test-optional really expanded who could apply.

We've had our highest enrollments of Black students, of Latinx, of Pell, and our highest enrollments of first-gen students.

Similarly, highly selective private institutions also bucked the enrollment declines that occurred in postsecondary education overall. Like their highly selective public counterparts, they described large increases in applications for admission, and they reported enough resources to increase campus diversity, first-generation and Pell-eligible student enrollments. While some institutions in this sector did increase the racial/ethnic diversity of entering classes, others chose revenue protection models, which were strategies that relied on admitting more students than usual, given the unpredictability of yield rates with the onset of the pandemic. In their words:

We took more [incoming freshmen because]...we didn't know with continuing students, who would take a leave of absence, who would come back, and so it was a revenue protection model.
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I think the surprise of the year for the fall of 2021 was that we overperformed with non-binding full-pay students. The yield went up 4%.

Less Selective: Enrollment Declines and Intense Competition

In contrast to the highly selective institutions across the nation, public and private less selective institutions faced enrollment declines, intense competitive pressure, and tended to tweak their marketing methods and communications.

Less selective four-year public respondents reported enrollment losses to state flagship institutions, while also reporting upticks in graduate student enrollments. Their responses revealed an intensely competitive market, the need to enrich existing markets, and to open new markets such as for non-resident and transfer students. They also noted the institution of new approaches in terms of student support, in particular to attempt to retain already enrolled students. Comments from this group included:

I think that we don't operate inside a vacuum. We are often at the mercy of what other schools around us do…

We see our transfer population as a revenue and enrollment opportunity to stabilize things.

We expanded more on our national outreach especially California, Texas, New York, New Jersey…to replace the international population that wasn't going to be there.

Less competitive private institutions reported enrollment and recruitment challenges that were similar to those of their less-selective public counterparts. However, they also reported even deeper enrollment pressures due to an expanded set of competitors and losses in traditional student groups. Losses included those to more affordable public schools, “trickle up” to more selective schools in the marketplace, increases in gap years taken, and the loss of students from their early decision pools. In response, these institutions worked to expand their prospective pool of students and increased admit rates to improve yield. Respondents noted:

If I look at where we lose our students to--in our top ten, probably eight of those are public schools.

We've taken a pretty significant hit this fall in our applicant pool and in our deposited student groups with low-income Pell students.
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We lost specifically in early decision; a lot of the students that melted probably have the means to do so because they could pursue other opportunities.

Community Colleges: Severe Enrollment Declines

The most dramatic impacts of the pandemic occurred at the community college level. Respondents reported dramatic declines in enrollments, which they attributed to students taking jobs, providing necessary family support, concerns about an uncertain economic future, and the “Amazon effect”—being able to obtain well-paying jobs that did not require a postsecondary credential. Comments included:

We were down roughly 10%, just as the national norm was for community colleges.

[Students] were getting pretty good-paying jobs and thinking maybe… I don't need to go to school. We’re calling that the Amazon effect over here because it just blew up so quickly.

Observations

It is clear that the institutions that serve the overwhelming majority of low-to-middle income and historically marginalized students took the brunt of the enrollment blows during the pandemic. One observation from CEMOs commentary is that when students chose to go to college during this period, they chose institutions that they perceived to be more stable or institutions that they thought might secure their future. Otherwise, acknowledging the 7.2 percent decline in undergraduate enrollment over two years, our respondents suggest that those students often chose to work, help their families, or otherwise delay their educational goals. Finally, the quotes above are representative of what our respondents reported but are only a small selection of those we collected.

Recruitment

Enrollment management officers in our study acknowledged challenges the pandemic posed to their recruitment efforts. For example, as postsecondary institutions shut down their campuses, many in-person activities, including recruitment, were postponed indefinitely, thereby leading enrollment management units to consider other (innovative) recruitment approaches.
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Overall, we found enrollment managers recognizing the need and urgency to adopt new recruitment practices in response to the constraints brought forth by the COVID-19 pandemic. In their words:

But when the pandemic hit lots of the in-person events that we used to have, we had to really think about pivoting that. It really has allowed us to take pause and redirect some of our energies to maybe leveraging different technologies to interact with students in a different way.

Are we going back to in-person recruitment? Are we doing in-person portfolio days? What is the competition doing and what are we doing? Those are the conversations we have because remember, we put it all on hold. The world of admissions and recruitment went online and everyone was doing it. Now the playing field has changed.

Virtual Tools to Broaden and Target Outreach

One prominent change was the shift from in-person recruitment to virtual programming. Enrollment managers expressed initial doubts about virtual programs; although, once implemented they praised the versatility and ease in organizing virtual recruitment activities. For example, institutions tailored virtual sessions to specific college-related themes (e.g., financial aid, housing, diversity, equity, and inclusion, and student life), thereby offering flexibility and additional opportunities to connect with prospective students and their families in ways that had not been done before. Comments about this included:

We have provided far more opportunities for students, not only to have on-demand content, but also live content and opportunities to connect with faculty, with key staff members and partners across campus, and most importantly students. That has been a significant change in how we operate…

At some level, the additional flexibility of doing, not just in person, but virtual has, I actually think it's broadened our ability to connect in ways that we were not taking full advantage of. We almost needed to be forced into it at some level to actually learn and believe that it could work…

In addition to implementing new recruitment practices, the COVID-19 pandemic offered enrollment leaders an opportunity to closely examine the utility of these activities. By-and-large enrollment managers found success in their new recruitment efforts. In reflecting on the application of non-traditional recruitment activities, enrollment
Managers described their efforts as successful. Representative of these were the following:

I think there are a bunch of places that found out they can be really, really successful with very different ways of recruiting. Maybe that's all because everyone was in the same boat and everything is going to flip back to the way it was. I don't know, but I think there are real opportunities to shift the thinking about what is required for recruitment and how it needs to be done best. I think that's one of the opportunities. If you asked me to identify the greatest threat, I think that there are--There's a phrase, ‘Don't let a good crisis go to waste.’

The main things we had learned is we never really made use of virtual visits and virtual events. It's so easy to throw together a virtual event. I think that's one thing that we'll take with us. Even though we know the importance of having the human in-person stuff, our virtual events have been pretty successful, we can have more of them.

More importantly, virtual activities broadened their outreach to students outside of their typical market, particularly underrepresented students. The capability to reach out to more students via virtual tools had many implications for advancing diversity, equity, and inclusion. On the other hand, institutions with more resources leveraged their wide-reaching virtual capacity to recruit students from regions outside of their typical market. This was evident for a number of institutions who reported an increase of applications from regions where they had not seen many applicants before, noting that:

The other thing that really helped with Zoom is we could reach, we did, we're able to target more specific audiences.

I think the colleges are going to be looking both at the equity aspect of virtual recruitment, which is you can reach a much broader swath of people, you can level the playing field, that area a little bit with virtual recruitment.

**Utility of Social Media**

Enrollment managers and their staff also found social media to be an effective recruitment tool and acknowledged its continued use as part of their recruitment efforts. In employing the use of social media, enrollment managers explained that their marketing teams had to find creative ways to engage with students. This presented a learning curve for many staff members; however, enrollment managers largely saw social media as an effective tool to recruit students during the pandemic. Respondents mentioned:
The idea of recruitment, I think in this last season, was completely turned on its head. I think and in turning on its head, one of the bright spots to this was that we actually went to where the students were already, instead of the students coming to us. That's on the social media avenues.

We had to get creative, ramped up things like TikTok and other things that we knew high school students were using. The most significant thing that we did with regards to purchasing was a text platform that has some artificial intelligence linked to it. You could actually ask students questions, and they could respond, and it appeared like you were speaking with a college professional. It also gave them direct access to services or action items that we needed them to do.

**Hybrid Recruitment is Here to Stay**

Similarly, enrollment managers suggested that other practices implemented during the COVID-19 pandemic had a future in admissions, particularly hybrid recruitment. As institutions began to move back to in-person events, many maintained hybrid recruitment activities. Enrollment managers reported that a hybrid approach was ideal as it facilitated a variety of avenues to connect with prospective students and vice versa. Many enrollment managers reported hybrid recruitment continuing well into the future.

Example responses included:

Virtual recruitment is here to stay. It's probably going to be a hybrid approach of how do we do that and still do in-person because students are wanting that one-on-one contact? What we learned was for appointments and advising, the virtual, nothing beats it. Because they can meet with an advisor on their phone in their car. They don't have to commute to campus. They don't have to fight for parking, pay for parking.

Well, I think the thing that surprised me the most was how successful the virtual visits had been….The comment I made to my director of admissions was: shame on us, why weren't we doing this before we had to?

**Staff Burnout**

Despite the benefits of virtual recruitment, as in-person events began to return, some enrollment managers acknowledged the challenges that hybrid recruitment created for their staff, and its contribution to burnout.
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We know this virtual world works, we have a bigger and wider reach, which is great. It also means juggling more, and it doesn't mean that we're going to get more staff. It just means you're going to be on the road, and at nighttime, you're going to be in a hotel doing virtual events.

I really sense that everybody I talked with, that my role, admissions, they're just having more turnover. I think people are just saying, I'm not in it anymore….

Admissions is just 24/7.

Test-Optional Admissions

Enrollment managers explained how the COVID-19 pandemic elicited a quick transition to test-free and test-optional policies. Immediately, enrollment managers recognized the need to switch to test-optional or test-free. The pandemic also justified this switch for a few institutions that considered the move to test-optional/test-free prior to the pandemic. In making this decision, enrollment managers received little pushback from their superiors. In their words:

When we went test-optional, it was a very quick decision. We announced this on March 24th, 2020. This was just as the pandemic was starting and that was my decision in consultation with the Deans of the Schools, and with the President, and Provost. They were all on board immediately….

Then COVID happened…Very quickly [the leadership] jumped on board and said, ‘This can't be a barrier anymore.’

Changes to Student Recruitment Practices

Taking these new test policies into consideration, and how it might affect their applicant pool, enrollment managers employed a variety of marketing efforts towards prospective students. Enrollment managers explained the importance of communicating these new policies to applicants and their families. In some cases, institutions purchased test scores outside of their typical applicant pool. Two comments representing these issues included:

We did a specific campaign for students who had a GPA above 3.7 and sent repeated messages about being test-optional.
We were able to buy certain names because we were test-optional... 1300 SAT student names we would've never bought in the past or 1200 SATs for that matter. Now we bought names that are not usually in our average test score ranks.

Changes in Admissions and Financial Aid Processes

Enrollment managers also explained how the absence of standardized test scores affected both the admissions and financial aid processes. For some leaders, there was concern regarding the evaluation process for admissions and financial aid purposes. Others explained that the move to test-optional/test-free would require additional training for their staff.

We had to reevaluate the process for admissions completely, as well as the process for awarding scholarships because that was also intertwined with the test score. A heavy lift there in retraining the staff and then also re-envisioning the process.

Then it becomes hard work over the last year and a half, of trying to solve for a more comprehensive review process that doesn't necessarily require a national examination.

Some went as far as adding new indexes or algorithms to compensate for the lack of standardized test scores. In taking these approaches, enrollment managers attempted to predict students' standardized test scores based on either data from previous cohorts or other factors in an applicant's file. This method also added additional work for units responsible for evaluating applicants. Representative responses included:

Our first reaction was to take all of our data for the last couple of years and try and predict the test score that a student would have had using algorithms.

We created an index... based on the CEEB, the GPA, the evaluation of the file. We try to predict an SAT range and then incorporate that into the overall admissions rating score. We needed something as an input to replace the SAT. We took the information that we had and tried to predict it as best we could.

Diversity and Equity Implications

On the other hand, some enrollment managers suggested that the absence of test scores contributed to a more holistic approach to their admissions process. This created a fundamental shift in how these units reviewed applicants' profiles. The enrollment managers who transitioned to a more holistic approach explained the importance of
ensuring their process was equitable and supported by data deriving from previous applicant pools.

For us, we went from a highly automated admission process that was primarily based on test score, and high school GPA, and core course requirement, to a holistic evaluation.

We did something that made some, in preparation for being test optional for fall 2021, we spent last summer looking at all the high schools that sent us students, or applicants for the five years prior, and made sure that we had a really good understanding and actually did some sort of calculation about numbers of advanced-level courses that students were in, and tried to park some of that information into our application review system so that we, during our holistic application file review process, we could use the system.

There were also many discussions on how to evaluate students who did not submit test scores versus students who did. For example, the process varied for evaluating students who submitted test scores versus those who did not. This also brought up many questions related to equity in the admissions process and additional concerns related to training staff. By-in-large, the shift to test-optional and test-free policies induced two separate evaluation processes. Comments about this issue included:

We're going to have two rating systems. One for people with testing, and one for people without testing. For people without testing, here's how we're going to weight things. We're going to have to weight these things more heavily, these other things less. For people with testing, we're going to weight things in this proportion.

We literally have to run a parallel universe of a two admission system that is equitably run for that population only, which resulted in enough of a commonality except for the test score. One had test scores, one didn't--you wiped the stuff away, so you look at the GPA, curricular activities, their aspiration, other attributes that we look for in a holistic way of looking at them as a student. All of them panned out to be equitable and fair.

Many enrollment managers were convinced that the move to test-optional increased diversity and equity at their institutions. They explained that standardized tests created a barrier for underrepresented students and that the removal of these requirements encouraged students from diverse backgrounds to apply to their institution. In some
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cases, this perception reinforced their belief that test-optional and test-free policies were advantageous and therefore needed to remain in the future.

We saw a nice bump, certainly numerically and percentage-wise in our underrepresented...[student] population. I think part of that was, we like many other schools went test-optional for this entering class.

Test optional increased the number of students of color. We have a record percentage of students of color this year. We got the second-highest number of Black students, we saw a big spike in Latino students as well.

Assessment and Future Research

Finally, enrollment managers expected more research to come from the test-optional and test-free movement. Some explained that additional research would be instrumental in determining whether these policies were effective and if they will continue into the future. Although, it was noted that it would take a number of years before they could report on the effects of testing policies on student performance, retention, and graduation. They noted:

As a research university, we think it's important to do a lot of research to reach our conclusions, and then look at the effects of that and try to figure out the pros and cons...

We are actively considering right now whether we will continue to be test-optional for 2023. I am recommending that we continue the practice. We don't really have outcome data yet after two years. You really need specific eight years of practice to actually know retention and graduation rates in any meaningful way.

Financial Aid

To fully understand the impact of the COVID 19 pandemic on institutional financial aid practices, it is useful to observe the rapid acceleration in price competition. The latest 2021 NACUBO Tuition Discounting Study shows that among nonprofit, private four-year institutions, the average tuition discount rate rose from 44.8 percent to 54.5 percent in ten years. That means that on average, almost 55 cents of every tuition dollar charged to students, went back to students in the form of financial aid.

The College Board’s Trends in College Pricing and Student Aid 2022 shows that students are actually paying less in private college tuition, fees room and board on average in 2022 dollars than they paid in 2006-07 ($32,800 v. $34,250). Thus, private
colleges are netting less money per student on average. In fact, between 2006-07 and 2022-23, the average grant aid grew from $14,420 (in 2022 dollars) to an estimated $24,770, an increase of over 70 percent. Similar trends, though not as pronounced, are found at the nation’s public universities: institutionally funded grant aid increased by 82.6 percent in 2022 dollars, while the average tuition and fees charged increased by 29.6 percent, again suggesting that institutions were taking in less revenue per student over that 16-year period.

Decreasing net revenue per student and increasing financial aid was occurring before COVID threw higher education (and the entire country) a major curve ball. In light of this, what happened after March 2020 can be seen as an acceleration of an existing trend. Colleges were now in a more intense competition with one another for student enrollments, and financial aid played an important role in enrolling the number, quality and distribution of students they sought. This was particularly true of less selective institutions, though many selective colleges also became more aggressive with financial aid, not only to protect yield but also to assist those students whose families were hit hard by the economic aftershocks of COVID.

**More Aid Offered**

Private, less selective colleges were providing more aid through a variety of methods—e.g. $2,000 for filing a FAFSA, a new diversity scholarship, providing a small scholarship to everyone. On the other hand, private selective colleges seemed to increase their total financial aid budgets through on-going endowment campaigns and by ever higher discount rates. While this practice decreases average net revenue per student, some colleges (notably among the wealthiest) can increase enrollments and thereby increase total net tuition revenue (NTR) in spite of netting less per student on average. But for many colleges and universities, a higher discount rate means lower net revenues. Public less selective colleges focused their modest aid increases on Pell recipients while the more selective public colleges targeted their aid increases to the neediest students, including but not limited to Pell-eligible students. These issues were reflected in the following comment:

I’m worried about NTR and discount rates…it seems to be no matter how we set our awards and what percentage of need we set out to meet, increasingly, it’s never enough. -**Private Less Selective**

**Moving Merit Dollars to Needy Students**

Most four-year institutions were moving merit money into meeting need, except for private selective colleges that likely had a small “non-need merit scholarship”
population. This was made possible by the elimination of standardized test scores in scholarship awarding matrices. Students who would have received only need-based aid pre-COVID were now having more of their need met by qualifying for a merit scholarship based on their high school curricula and grades. Similarly, more than a few institutions mentioned an attempt to reduce unmet need. This was a goal for all sectors except the highly selective privates who were likely already meeting full or nearly full need. Comments included:

[Merit dollars are] going to support more students with need because we're providing merit to students who've never received it in the past, who have the high school academic performance that's equally high, but no tests. **-Public Highly Selective**

Over the last few years, we have been providing more grant or scholarship aid to support low income students and we continue to shift that gradually. I am a little concerned that I'm reaching a breakpoint where I'm taking too much merit away from the people who don't need it, but aren't going to come if they don't get it. **-Private Less Selective**

Targeting Aid

Regardless of selectivity, private four-year institutions tended to focus their institutional aid on middle and higher income families impacted by COVID, since they were already devoting significant aid to lower income students. Some referred to the additional funds as “COVID response grants.” Many selective private colleges in our sample targeted middle income students and families who narrowly missed qualifying for need-based aid, recognizing that these families would need some financial incentive to send their children off to college in uncertain times.

Public less selective four-year institutions focused their financial assistance on the lowest income students while the more selective public four-year institutions targeted first generation and low income students, but also used aid leveraging more than in pre-pandemic times, particularly for out-of-state students. Even with this aid, out-of-state students would bring in more net tuition revenue for these schools than would the lower tuition in-state students. Most of the chief enrollment officers interviewed thought these practices would continue for the next few years.

We added an extra award for families who were impacted by COVID. It was meeting a band of students that we weren't giving additional aid to because they really don't have need. According to the federal government, they're the higher
middle-income families. We added a financial aid element there for those families because they were directly impacted by COVID. -Private Less Selective

For us, it was setting aside more financial aid for exceptional circumstances, and just preparing for that on the front end, knowing that families were just going to be hit differently this year. -Private Highly Selective

Stimulus Money

No matter public or private, selective or less so, all institutions in our study used stimulus money to assist students. With the exception of the private selective universities that primarily credited stimulus money to student accounts to pay off debit balances, the other institutions in our study articulated plans for distributing stimulus money that involved giving money directly to students to pay off external bills or to use for living and personal expenses. Some less selective private colleges gave stimulus funds directly to students even if their bills were not paid, as students needed help with living expenses when COVID kept them (and/or their parents) from working. Public less selective colleges did so as well, paying particular attention to international and undocumented Deferred Action for Childhood Arrivals (DACA) students. Public selective institutions awarded stimulus funds to students to help reduce the balances on their accounts. Community colleges also tended to use stimulus money for campus debt relief; some gave an automatic stimulus payment to all enrolled students.

All institutions expressed concerns about what students would come to expect once the stimulus funds were no longer available. Some schools were looking for ways to set aside institutional aid dollars for use in the next year in order to “average out” the impact of disappearing federal stimulus funds. Representative comments included:

We did a debt relief for our returning students of $2.5 million. We forgave all debt to students who wanted to return, which was well over the 2,300 students…so they could have all returned. We only got about 500 of those returning after we forgave the debt. -Community College

HEERF and CARES were just dramatic for our ability to respond to the students…we're building an expectation for students to have this kind of money and resources, and it's going to dry up. I think the question to ask is, can we defer some institutional money at some point for years two and three if we have to use all the HEERF 3 money now. -Public Highly Selective

Student welfare is really on our minds. We're seeing much more mental health issues. Isolation. We were fortunate to be able to distribute close to $74 million in
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CARES funding to students last year. We paid a lot of rent. We bought a lot of food. We bought computers, all things for students, but those funds are gone now. I think students are still struggling a bit to get the sense of normalcy back. -Public

Highly Selective

Pell Grants

Pell grants are an important form of financial aid for many students. In general, the percentage of Pell recipients an institution enrolls is inversely proportional to the selectivity of the institution; that is, the more selective an institution, the lower the percentage of Pell recipients in terms of the total enrollment. Because highly selective institutions had a lower percentage of Pell students to begin with, Pell enrollments were up in selective institutions—private and public—and down in the less selective institutions. Respondents noted:

We had gone down a little bit in Pell (in 2021) because (we) over enrolled with a lot of (“majority-pay”) students. We were at 18% last year on Pell, which is low for us—we average around 20% per class). We were 23.4% this year, so went way up in Pell. -Private Highly Selective

We definitely have had an under showing of FAFSA filers. We did not see this drop in Fall of ’20, but we are seeing a drop in low-income students in Fall of ’21.

-Public Less Selective

Communications

Private selective institutions took additional time to explain awards and to keep in touch with their students to gauge their needs. Some institutions encouraged financial aid appeals, a process for students and their families to ask the institution for more aid. Public selective schools typically extended aid deadlines and conducted extra outreach asking students if they needed help. In both the public and private sectors, the selective institutions spoke about how important it was to be transparent and communicate with their students, but the less selective schools did not mention this.

Observations

The following points are the main takeaways gleaned from the interviews regarding financial aid:

- As students’ financial needs increase, institutions must find ways to meet those needs. Redistributing some merit aid, especially when needy students were newly
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qualified based on grades rather than test scores, is one alternative shared by a number of enrollment leaders,

- Analyzing student demographics, and identifying those who are struggling financially, is key to developing a strategy of targeting aid where it will have the greatest impact on enrollment, retention and revenue.
- Stimulus money will end. Having a plan for how to handle that will ease the transition back to institutionally funded financial aid.
- Given mission, resources and competing demands, institutions identify their optimal Pell enrollment and pursue that goal strategically.
- Transparency is important in communications to students and families on price and aid. In stressful times, an open and understanding staff can help students and families cope with economic uncertainties.

Retention

In the years prior to the pandemic, retention was relatively stable in all postsecondary sectors. While four year institutions had a higher retention rate than community colleges, nationally the retention rate essentially stayed the same across all sectors for the four years prior to the pandemic (College Board, 2021; National Student Clearinghouse, 2021). However, the College Board report shows that for the 2019 cohort of students (who experienced the outbreak of the pandemic in early 2020), retention rates declined compared to their 2018 cohort peers by almost 5% in the community college sector, whereas the four-year sector rates remained stable. Thus, similar to enrollment trends, the pandemic took a higher toll on retention among community colleges compared to their four-year peers. As community colleges enroll more underrepresented and lower-income students than four-year institutions, this means their students were disadvantaged in terms of making progress toward a degree, relative to their peers.

Drawing from our own qualitative data, the initial impact of the pandemic on retention appears to have been slightly positive, with some institutions reporting historic highs in retention rates. Across all postsecondary sectors, including community colleges, institutions reported stable retention trends immediately after the pandemic, with this pattern bucking the national trend. This finding may reflect some self-selection bias, as the CEMOs interviewed from the most negatively affected sector (i.e. community colleges), were likely from institutions that were doing relatively well in terms of enrollments and retention compared to their national peers. However, this overall positive pattern in retention changed over the course of the study. By 2021-22, we noticed divergent trends in retention rates, as community colleges and less selective four year institutions, both public and private, increasingly had issues with retention compared to their highly selective peers. This was largely in line with national retention trends.
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Academic Preparation and Socialization

The level of academic preparation and socialization of students as a result of the pandemic shutdown was the largest retention-related concern to institutions across all sectors. Almost every institution voiced concerns about the long-term implications of COVID, including issues about academic preparation and the socioemotional needs of students, both highlighting the necessity of providing more resources to meet student needs. In their words:

[Students were] robbed of many other things too that come with that—social development, their learning, the level of curriculum that is typical in a senior year.

-Private Highly Selective

That kind of opened that conversation—what kind of [interventions and services] should we be creating for the students so that they can be successful? -Public Less Selective

Proactive Outreach

To address pandemic-related retention issues, many institutions implemented dramatic changes in practices to keep their students enrolled. Many CEMOs noted new retention efforts by staff and faculty in terms of keeping students engaged with the institution. For example, rather than waiting for students to re-enroll for the semester or year, many institutions took a proactive approach with current students, contacting them in a myriad of ways (e.g., texting, emailing, calling) in order to resolve any issues students had about registering for classes.

We adopted a new approach with persistence. We…repurposed to make scripted calls to students, and it had a dramatic impact. Just a more aggressive effort on retention than in the past, but also something we will keep intact from this point forward…Retention has been our savior. -Community College

For returning students, if they missed their registration appointment, we immediately called them to try to figure out why they missed the registration appointment—if they had a financial hold, or if they had a block, or if they were struggling with something. We tried to connect them to the right place on campus to get them registered. -Public Highly Selective
Integration Across Campus Units

Multiple institutions also discussed structural changes to address student retention and graduation issues. Throughout these discussions, there was an emphasis on greater collaboration—if not actual integration—across traditionally separate campus units. CEMOs noted:

It's no longer, “Bring me a new student to replace the new student I lost”; it’s, “How can we keep the current student we have on campus as well as replicate what we brought last year?”...It's a collaborative approach. -Public Less Selective

We revamped our services completely, we've gone away from individual offices. There's no more Financial Aid, or Student Accounting, or cashiers, or registers. You just see one person now, empowered to make decisions in Financial Aid, and Records, and Registrations, and Student Accounting. -Public Less Selective

Increased Need-based Financial Aid

Many institutions highlighted their special efforts to increase need-based financial aid to retain their students. For example, many private four-year institutions, both less and highly selective, mentioned the unprecedented number of financial aid appeals from returning students. These appeals were often due to families encountering sudden pandemic-related financial difficulties with their jobs or businesses. Overall, community colleges and less selective four-year institutions raised the importance of the Higher Education Emergency Relief (HEERF) funds provided to them to meet their students’ needs. About $14 billion in HEERF funds were distributed by the federal Office of Postsecondary Education to institutions across the nation. Although there were some stipulations on the use of these funds, many institutions mentioned using this money to address students’ financial aid, housing and other needs that were critical to address in order to retain students. For a more robust discussion on financial aid in relation to student enrollment, please see the earlier section on Financial Aid. Otherwise, comments included:

Part of my moving more merit to need is very much a retention strategy—because those are the people who can't persist, the people who have too large of a need gap. -Private Less Selective

HEERF money let us leverage emergency aid like we never had before. If a student had some barrier to getting to class or some financial challenge preventing
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them from continuing, we could typically address those acute things, and at least get the student through the eight-week term. -Community College

Additional Retention Data Analysis

Complementing the information provided by the qualitative part of the project, the research team also engaged in the analysis of extant data in order to promote the goals of the project: to provide a better understanding of college enrollment and retention trends in the wake of the COVID-19 pandemic. To that end, the project team was tasked with using data provided by National Student Clearinghouse (NSC) to provide insights into changes in these important educational outcomes pre- and post-pandemic. Given the Gates Foundation’s knowledge and support in the creation of NSCs Postsecondary Data Partnership (PDP) database, the project team chose to use this database to analyze enrollment trends.

Not to be confused with NSC’s Student Tracker (Tracker) database, PDP focuses on a smaller set of institutions and contains an overrepresentation of postsecondary institutions that tend to serve underrepresented students. PDP data is updated more frequently than Tracker and includes details such as whether students are college ready, grade point average (GPA) at the end of the first term and year, course-level data (which was not accessed by us), and the degree and/or credential sought. At the outset of the project, the quicker update of the PDP database, additional detail it contained, and knowledge of the database by Foundation staff made it the preferred choice relative to the Tracker data.

In early 2021, our team worked closely with NSC staff to develop a data sharing agreement and statement of work to govern the use of data and to describe the purposes of the project. Over the course of the project, NSC staff provided multiple extracts from the PDP data to the project team. Each data file provided to our team was extracted from PDP by NSC staff and downloaded (via secure file transfer protocol) by the project team to a secure server for analysis. Each file provided was scrubbed of personally identifiable information by NSC staff and contained data elements in raw form, as well as some derived variables constructed by NSC personnel.

In the data construction process, our team gained knowledge of the PDP structure and content, cleaned each extract, ran descriptive statistics to delve into the extent of data coverage and variable missingness across time for important institutional and student characteristics, and prepared the data for analysis. This process also allowed the team to document the strengths and limitations of the PDP data and share this knowledge with our partners at NSC, the Foundation, and with other parties using the PDP data for other projects.

During monthly project team meetings, we shared updates with our Foundation colleagues on the status of the data collection efforts, provided detailed explanations
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about the data challenges experienced, and provided preliminary descriptive analyses of enrollment and persistence trends. Over the course of the project, our team also worked closely with colleagues from NSC and the College Board, who were also engaged in studying the effects of the pandemic on enrollment-related outcomes, resulting in a report by the College Board and another by NSC.

Utility of PDP for Studying Effects of Pandemic on Enrollments

At the start of the project, our team felt the size, longitudinal nature, and years covered by the PDP provided the potential for it to be used to study student and institutional enrollment and completion behavior over time. Launched in 2017, and updated each year since, PDP was designed to provide participating institutions with a source of detailed and comprehensive data to help them understand student progress and education outcomes. Since its establishment, over 500 colleges and universities have participated in PDP with more than five million students included in the database. For our project, our initial intention was to use the PDP to study enrollment, persistence, transfer, and completion trends pre- and post-COVID-19.

Numerous data issues arose over the course of the project, making the pursuit of studying the temporal aspects of the pandemic problematic. Below we provide the main problem encountered while working with the PDP data; recommendations for how to improve the database are provided in Appendix 2. PDPs strengths and limitations have been previously reported to the Foundation as well as NSC colleagues over the life of the project.

Participation in the PDP is voluntary; institutions choose whether and if so when to provide data to the database. The voluntary nature of participation is highly consequential in terms of data coverage across years because institutions may participate in some years and not others. It also causes issues with data coverage within years, because sometimes institutions provide information on all elements in PDP, and in other years they do not. Voluntary participation also induces problems with data accessibility within a reporting year, as each year institutions can choose when to submit their data. These issues result in the PDP not being representative of even the group of participating postsecondary institutions, and these limitations create serious sample selection problems for those interested in using the data to study institutional and student behavior over time. For example, although there is at least partial data in our data for 407 institutions from 2017 on, more than 30% of institutions did not report at all in 2020-21, and an even smaller fraction provided complete data for all elements in that year. These coverage problems also vary by institutional sector (two- vs, four-year) and other institutional and student-level characteristics. These data coverage issues made our goal of building a data set to make valid and defensible inferences about the effect of the pandemic on institutional and student behavior unattainable.
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Notwithstanding the data limitations in terms of examining education process and outcomes over multiple years, we constructed a sample for the academic year during the pandemic and provide descriptive analyses below. This cohort includes first-time, degree seeking students matriculating to a PDP institution in the fall of 2020 who were followed for one full academic year (until the fall term of 2021), during which the brunt of pandemic-related enrollment changes were likely to have occurred. PDP defines first-time as the first time a student enrolled at any PDP institution. For example, a student can be considered a first-time freshman and/or first-time transfer student in any given cohort term and year. In other words, a student may be a first-time ever in college or new transfer student at the cohort institution. Given that course-taking decisions for transfer students may be different from first-time college students (i.e., freshman), we report on the outcomes of non-transfer first-time, degree seeking students whose first term of enrollment was fall 2020. Included in the cohort are 314,644 students seeking an undergraduate certificate, associate degree, or bachelor’s degree at one of the 263 unique PDP institutions with complete data. Appendix 3 provides additional details about our methodological approach in constructing this sample. Worth emphasizing is the select nature of these institutions and students relative to all potentially includable PDP institutions/students during that year, or of all institutions that have participated in PDP since 2017.

PDP Retention Results

PDP defines retention as either continued enrollment at the cohort institution (i.e., the institution where a student first enrolled) in their second academic year or completion of any credential at the initial institution in the first or second academic year. In other words, retention is measured as whether a student continued their enrollment at their cohort institution in the following academic year or whether the student earned a credential at their cohort institution during that year. This measure of student success is important as it provides insight on students’ progression towards degree completion.

We examined retention across student demographics, including race/ethnicity, sex, age, enrollment intensity (i.e., full-time & part-time), indicators of students’ college readiness, and degree sought, and institution type. The latter includes institutional level (e.g., two-year public, four-year public, and four-year private). Key findings are:

- 61% of first-time, degree-seeking students enrolled in participating PDP schools for fall 2020-21 either continued enrollment at their cohort institution in their second academic year or completed the credential they initially sought in their first or second academic year.
- Students who identified as American Indian or Alaska Native (46%), Native Hawaiian or Other Pacific Islander (48%), Black/African American (49%), Two
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or More Races (55%), and Hispanic/Latinx (60%) had retention percentages lower than their White (64%), nonresident (76%), and Asian peers (75%).

- Students entering college who were less than 20 years of age were retained at much higher percentages (65%) compared to their older peers (42%).
- The retention rate for first-time full-time students (68%) was 28 percentage points (pp) higher than that of their first-time part-time colleagues (40%).
- College ready students were retained at higher percentages compared to students who were not college ready in math or English (nearly 18 pp and 14 pp higher, respectively).
- Bachelor’s degree-seeking students were retained at a much higher percentage (74%) compared to students who pursued an associate degree (51%) or an undergraduate certificate (between 52% and 43% depending on certificate duration).
- Students who attended four-year public institutions were retained at higher percentages (72%) compared to students who attended a private, four-year institution (63%). Only half of the first-time, fall-entering students enrolled in a PDP community college during the 2020-21 academic year were retained.

Additional details and graphs of these results are provided in Appendix 1.

PDP Data Analysis Summary

The PDP offers opportunities to examine, as we did above, equity gaps in students’ educational progress by race/ethnicity, sex, age, enrollment intensity, college placement level, and degree-type sought. We found substantial gaps in retention across these groups, with the results varying by across these groups. For example, compared to their peers, retention was lowest among first-time underrepresented groups, for older and part-time students, for those not deemed college ready, and for students attending the two-year PDP institutions during 2020-21.

The data in this report included 314,644 students across 263 institutions, but our sample is not representative of U.S. postsecondary institutions in general nor even the population of all PDP institutions who have ever submitted data. As such, the findings reported above may not align with studies done using nationally representative data for students and/or institutions. Nonetheless, much can be gathered from our results. For example, using PDP metrics, our results highlight inequities related to student progress among students enrolled in college during the 2020-21 academic year—thereby providing useful information for postsecondary institutions to focus their attention on institutions and student groups most affected by the pandemic. Also, our results align with reports produced by our NSC and College Board colleagues indicating lower enrollment and
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retention of students during the 2020-21 academic year, with variations by institution type and student group, and indications of rebounds in these rates post-pandemic.

Conclusions

This report described changes in enrollment patterns and institutional responses to enrollment challenges during the COVID-19 pandemic. We organized our findings into five areas including enrollment trends, student recruitment, test-optional admission policies, financial aid, and student retention, and each can be examined above. Here we provide a global or summary view of the observations of the research team.

Enrollment

First, it is clear that the impact of the pandemic varied according to institutional type and circumstances. Highly selective public and private four-year institutions weathered the crisis well. They experienced increases in applications for admission that permitted them a degree of self-determination that was not available to other sectors of higher education. Less selective public and private four-year institutions fared less well. They lost students to the highly selective sector, to public flagships, and to each other in an intensely competitive market, driven by the health and economic concerns of their student populations. Finally, community colleges were hit with large drops in enrollment. They described students opting out of higher education entirely for the security of jobs and the need to come to the aid of their families.

Institutions Embraced Change

In contrast to their reputations for being slow to change, colleges and universities embraced rapid and substantial changes to address the external challenge of the pandemic. These included the following:

- Converting classes to an online environment
- Conducting virtual student recruitment inclusive of personal contacts and events
- Establishing test-optional practices quickly and with little debate
- Collaborating with federal assistance to deliver financial aid to students
- Extending services to provide food, WiFi hotspots and equipment to students in need

Beyond these episodic observations, some institutions advanced pandemic related changes to deeper levels. While many institutions adopted practices such as test-optional admission with a wait-and-see approach, the University of California system and others moved to an entirely test-free admission environment and also went test-free for
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scholarships. This is an example that suggests that philosophical changes accompanied practical changes at some institutions.

Federal Assistance Played a Critical Role

Our respondents universally reported that federal financial aid and partnership was a large factor in student retention and recruitment. Indeed, toward the latter stages of our study, institutional respondents began to lament how they will continue to provide financial assistance at the levels that were possible when the federal bridge funds are depleted.

Overall Lessons Learned

Finally, one benefit of conducting a project of this duration and complexity is that researchers are able to identify overarching themes and trends that span functional areas and further illuminate the results. Here we highlight findings that we did not seek but were illuminated by the data. Our interviews were rich with lessons learned and speculations about the future. Among these, we believe the following are most salient.

First, the enrollment crisis precipitated by COVID-19 highlighted the centrality of enrollment management and enrollment managers to institutional health. Many of the colleges and universities in our sample were confronted with loss of students and revenue that threatened their financial and educational viability. It became clear to our respondents that they, as institutional officers charged with meeting the enrollment goals of the institution, have a new and visible opportunity to influence how their organizations contribute to and shape the student experience. This response is illustrative:

We have got to have a different conversation other than one class at a time—how much money you can make—the discount rate—the bean counting business—to what is the paradigm we want to be? How do we want to engage students?

In other words, enrollment leaders may now have the organizational leverage to lead campuswide conversations about the nature of the student body, how current and prospective students engage with the campus, and how the campus provides care and service throughout the student life cycle—from outreach to recruitment to admission to student aid, to student retention services to career and life outcomes.

Next, it was clear to our respondents that the burdens and disadvantages experienced by low-income and other marginalized students were exacerbated during the pandemic. Some institutions with the wherewithal to further diversify their classes did so, but many either did not or were unable to do so. Our respondents told us that they must
move from a passive model where equity is a by-product to one that is strategic and with equity built in from the beginning. A comment representative of this issue was:

A good lesson for future enrollment managers is not to wait for the external pressure, to continually reinvent yourself. To really focus on: how do I reach those low-socioeconomic kids and make it more of a level playing field?

Turning to the shifting workplace, enrollment leaders spoke often about the pressures on them and their teams to adapt to turbulent and changing times, to handle the pressure of high expectations and long hours, and to stave off staff burnout and resignations. The lesson they articulated repeatedly was that they cannot function without dedicated and well-trained staff members. Associated with this realization, chief enrollment officers reported the need to be flexible in how they prepare, engage, retain and reward their personnel. In their words:

It will be important for enrollment managers to think about how they train their teams to become more nimble, more agile, become people broadly respected across the academy, across their organization.

This commentary suggests a developing professionalization in the field, with earlier training and engagement of staff across enrollment functions and education for future leadership, encouraging staff to advance in the field rather than to leave higher education for other opportunities.

Finally, the research team noted substantial reports of educational and humanitarian care for the student body that extended beyond the usual advising and service functions. Without prompting, institutional enrollment leaders spoke about campus-wide efforts to care for students during the pandemic. Their examples included offering online classes and adapting technology to reach new populations, which were ubiquitous and laudable accomplishments in the face of the pandemic. Enrollment leaders were concerned about the academic preparedness of new students enrolling after missing in-person instruction in high school. They also spoke about student mental health issues and recognized the need for institutions to devote more resources to help students cope with life on campus. Beyond these, however, they remarked on the establishment of food distribution stations, the provision of wifi hotspots, and in some cases, offering computers or tablets free of charge to students. These latter points highlight the fact that higher education, while often viewed as slow to change, could and in fact did act swiftly when faced with the crisis of the pandemic.
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References


National Student Clearinghouse. (Various Years). Postsecondary Data Partnership [Data set]. https://www.studentclearinghouse.org/colleges/pdp/
Appendix 1: Additional Narrative About PDP Retention Results

The mean retention percentage among first-time, degree-seeking students enrolled in the fall term at participating PDP institutions for the 2020-21 cohort was about 61%. In other words, on average, among the 314,644 first-time degree seeking students in PDP’s fall 2020-21 cohort, more than 6 out of 10 ten students either (1) continued their enrollment at their cohort institution in year two or (2) completed the credential they initially sought at their cohort institution. On the other hand, among the same group of students, about 39% were not retained given the PDP definition. When possible, herein we supplement our results with information from a recent NSC retention report on the 2020 entering cohort. For example, the retention rate reported above is slightly lower than the 66% overall retention rate in a recent NSC report.

Retention Variations by Student Demographics

Race/Ethnicity

Retention ranged across racial/ethnic groups for first-time, degree-seeking students in PDP’s fall 2020-21 cohort. For example, retention was highest among Nonresident students and Asian students at 76.24% and 74.57% respectively, whereas American Indian or Alaska Native (45.71%), Native Hawaiian or Other Pacific Islander (48.01%), Black/African American (49.46%), Two or More Races (54.92%), and Hispanic/Latinx (59.91%) students had the lowest retention percentages. All these percentages are slightly lower than those offered for the 2020 cohort in a recent NSC report.
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Sex

Women in the 2020-21 PDP cohort were retained at a higher percentage compared to men (62.61% to 60.71% respectively). These rates are slightly lower than those reported in a recent NSC report, where 67% of females were retained and 65% of their male peers met the PDP retention definition.

Age

Among first-time, degree-seeking students in PDP’s fall 2020-21 cohort, there was some variation in retention among age groups. For example, the youngest group of students (age 20 and younger) were retained at 64.92% compared to 42.19% for students older than 24 (the lowest among the three groups). Students in the middle group (over 20 years old and up to 24 years old) were retained at 42.89%. These percentages are slightly lower than those in the recent NSC report.
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Enrollment Intensity

First-time, degree-seeking students entering the fall 2020-21 PDP cohort were retained at a higher percentage (68.18%) compared to those who enrolled part-time (40.36%). These rates are lower than the full-time (72%) and part-time (44%) rates provided in a recent NSC report.

College Readiness

PDP schools report students’ college readiness based on their math and English placement institutional policies. In PDP’s fall 2020-21 cohort, “college ready” first-time, degree-seeking students in both math (71.5%) and English (68.27%) were retained at higher percentages compared to “not college ready” first-time, degree-seeking students in both math (53.55%) and English (54.50%).
Degree Type Sought

Among first-time, degree-seeking students in PDP’s fall 2020-21 cohort, those enrolled in bachelor’s degree programs had the highest retention rate (74.22%) followed by students seeking a two- or four-year certificate (51.72%), students pursuing an associate degree (51.40%), and students seeking a one- or two-year certificate (43.19%). Students enrolled in a less than one-year certificate program had the lowest retention rate (43.88%).

Retention Variations by Institution Type

Retention was highest for first-time, degree-seeking students who attended public, four-year PDP institutions in the fall 2020 (71.89%). On the other hand, only 50.25% of first-time, degree-seeking students at public, two-year PDP institutions were retained in the same academic year. In other words, slightly more than half of the first-time, degree-seeking students attending community college in PDP’s fall 2020-21 cohort
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continued their education at their cohort institution or earned their academic credentials in the following academic year. The average retention rate for first-time, degree-seeking students at private, four-year PDP institutions in 2020-21 was 62.95%. The public, four-year rate displayed here is slightly lower than reported in the aforementioned NSC report.

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**Supplemental Information**

Information gleaned from recent CB and NSC reports noted in the main body of the report, and from focus group/interview results support some of the results noted in the graphs and narrative above. The CB and NSC reports, as well as our qualitative findings, provide some indication that students from underrepresented groups, particularly those who would normally attend community colleges, opted for the workforce during this period. Community college interviewees and focus group participants often cited students choosing to enter the labor force as a major reason for their lower enrollments.

There may be, however, at least one other mechanism at work to explain lower any two-year enrollments. The stakeholders interviewed speculated that four-year schools dipped more deeply into their applicant pools to mitigate anticipated student losses and minimize the risk of low yield, and in doing so admitted and matriculated students who historically would have started or remained enrolled in a community college. There is some evidence in the CB and NSC reports that this happened.

Our interview and focus group respondents from community colleges noted that their enrollment losses were likely due to losses to the labor market and to four-year institutions. These respondents noted that some students joined the labor market during the pandemic due to higher-than-normal wages and signing bonuses provided by some firms. Conceptually, state and duration dependence mechanisms suggest that students who opted for employment rather than college may be less likely to ever leave a state of employment, and the longer they remain in that “state,” the less likely they are to ever
leave or return to college. Our respondents also noted that some students who otherwise would begin at a two-year were enrolling directly into four-year institutions, and some speculate that they may have been encouraged to do so by test-optional admissions policies being used more during the pandemic at some four-year institutions. Mitigating some of these trends, the NSC report indicates that some students who did not enroll in the four-years in 2020 did so later, but this pattern varies by institutional selectivity and sector.
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Appendix 2: Recommendations About PDP

Over the life of this project, memos were provided to the Foundation as well as NSC documenting the strengths and limitations of the PDP data (copies are available on request). We also provided recommendations to improve its future use. Herein we will not repeat the strengths and limitations but will provide an overview of the recommendations that may help improve the PDP and make it more utilitarian for practitioners and researchers.

1. **Reconsider data reporting processes by PDP institutions to NSC**

   Missingness among many variables and across data extracts were common and posed many challenges. Much of the missingness or lack of data coverage is due to the voluntary reporting structure of PDP institutions. Incentivizing PDP institutions to report complete data and do so by the pre-specified deadlines could address many of these issues and improve the utility of the PDP data.

2. **Provide additional data elements**

   As discussed in our report above, PDP’s student-level data has potential for future reporting and research. However, we encountered several limitations due to not being able to link to extant state- or institutional-level variables. PDP could be strengthened by including such data as derived variables or providing a variable that could link records to extant data such as that provided by the Census Bureau and/or the U.S. Department of Education’s IPEDs and other National Center for Education Statistics data. Adding these data could enhance geographical and institutional coverage and improve PDP’s overall capabilities.

3. **Improve term-to-term data coverage**

   Whereas most of the PDP measures we received were limited to a student’s first academic year, our aim in using term-to-term GPA and credits attempted and credits earned by year was to understand student enrollment behavior beyond their first academic year. However, as noted elsewhere in our final report, there was substantial missingness with both measures and instances where they did not align with other derived measures (e.g., retention/persistence). These limitations are likely due to reporting issues highlighted in our first recommendation; however, a more reliable measurement indicating students’ enrollment status within and across years would be a substantial improvement to the database.
Appendix 3: Methodological Notes About PDP Sample Used

To be considered in the analytic sample that produced the descriptive statistics presented in the body of this final report, students had to be enrolled in a PDP institution that reported complete data for the 2020-21 cohort. Institutions that did not report this information for the 2020-21 academic year were excluded from the sample. After excluding non-reporting institutions, the analytic sample contained 314,644 students studying at 263 unique postsecondary institutions. The PDP database is constructed at the student-level, and includes mostly first-year variables (e.g., first-year retention, persistence, attendance status, credential sought, GPA). Complicating the structure, a student may be represented in multiple institutions if they attended more than one PDP school in each academic period.

The analysis conducted was limited by the data issues discussed in the main body of this report, but also by additional problems. For example, studying credit production was not possible because about one-half of the student-institution-academic year observations had zeros for credits attempted and credits earned. When we examined missingness in these variables by institution-academic year, more than three quarters of the institutions had zeros for credits attempted/earned for all students in at least one academic year.

This missingness in credits was also problematic in studying outcomes beyond the first year. Because most of the elements in the 2020-21 data contained information only for each student’s first academic year, analysis of subsequent years (e.g., years two, three…) was not possible. We attempted to remedy this problem by using credits in each year to determine a student’s enrollment status over time, however, given the extent of missingness for the credit variables that was not possible. There were also numerous instances where the course credit information that was available for a student’s first year, was not congruent with the derived retention indicator variable provided. We also attempted to examine term-by-term changes in grades over the 2020-21 academic year, but the GPA variable provided had missing cases for too many students to be used with any degree of confidence.

We also found frequent disagreement in the retention and persistence variables provided. We found peculiar patterns regarding the proportion of observations that showed up as retained compared to persisted (analysis available on request). In addition, there were students categorized as retained, yet they had zeros for credits attempted or earned in 2020-21. In other words, there were many instances where the credit information included in year one did not align with the retention/not derived variable provided (evidence available on request).

We also found many cases where a student was enrolled in multiple institutions for a given academic year, yet credits attempted/earned across these schools was zero. We also encountered inconsistencies with students' first term of enrollment. An example of
this is students who enrolled at multiple institutions in the same academic year, thereby having multiple (and different) first terms of enrollment. Dealing with these complexities makes it difficult when using the PDP data, and beyond the capabilities of users who do not have the kind of data skills our team had.

All said, after concluding that our credits attempted and credits earned variables were problematic and could not be used to construct enrollment status beyond year one, we decided to focus our analysis for only the 2020-21 year and for one year only. We also limited the observations to fall only to simplifying the construction of our sample. The PDP includes students seeking a variety of credentials, but to align our data analysis with the qualitative part of the project, we also limited our sample to students in the 2020-21 cohort pursuing an undergraduate certificate, associate degree, or bachelor’s degree.