

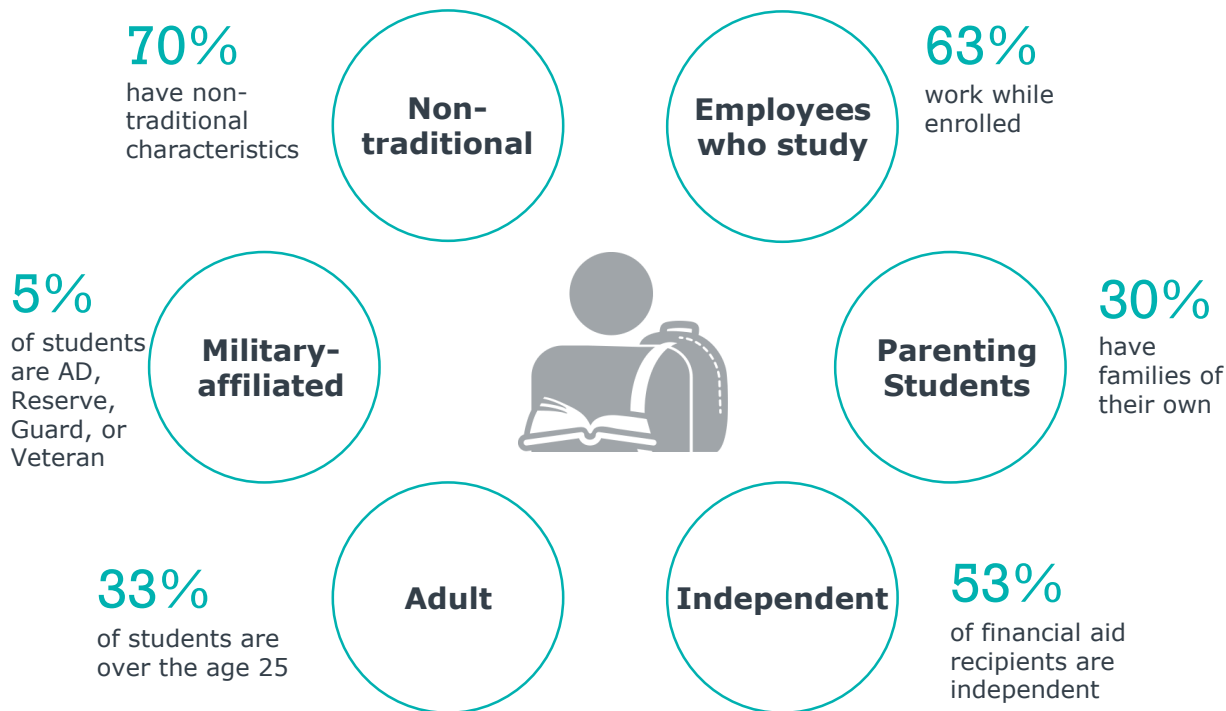


Market Pressures Inform New Strategies for Community Colleges

A Blueprint for Growth Analysis

Ill-fitting Labels for Today's Learners

2



Source: [National Center for Education Statistics](#) (NCES), [Institute for Women's Policy Research](#); EAB analysis of NCES 2017 data https://nces.ed.gov/programs/digest/d18/tables/dt18_503.40.asp and https://nces.ed.gov/programs/digest/d18/tables/dt18_303.50.asp?current=yes; ACENET

Gone are Dependent, On-campus, 17-21 Year-olds

3

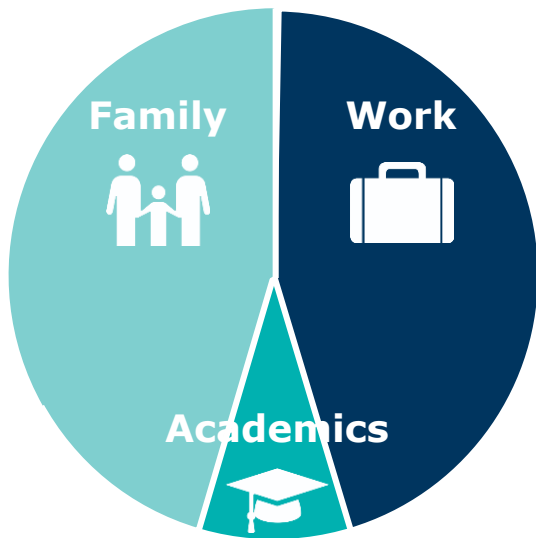


85%

of today's students
are post-traditional

Complex Lives Crowd Time for Academics

Success of Low-Income Adult Students is a Precarious Balance



! Spouse has a medical emergency

! Loss of childcare

! Food insecurity

! Shift change at work

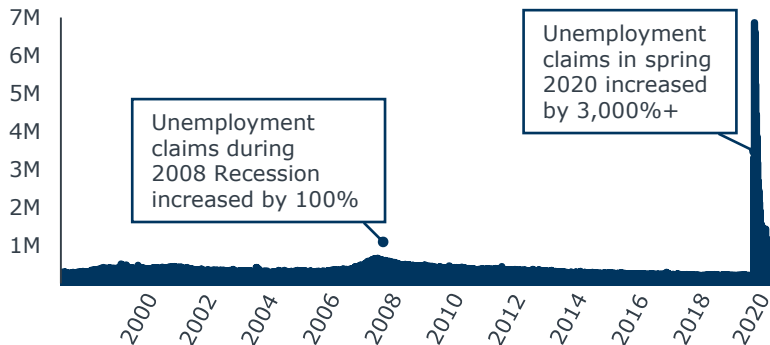
! Car breaks down

! Job loss

The Limits of the 2008 Playbook

5

Confronting the “Light Speed” Recession



10.7M+ Estimated unemployed Americans (Dec 2020)

46%

Share of unemployed workers with an associate's degree vs. 27% during 2008 recession

-4.9%

Predicted 2020 global economic contraction (vs. -0.1% during Great Recession)

A Categorically Different Downturn



Sudden-onset, external economic trigger



Simultaneous downturns in supply and demand



Unprecedented global supply chain disruption

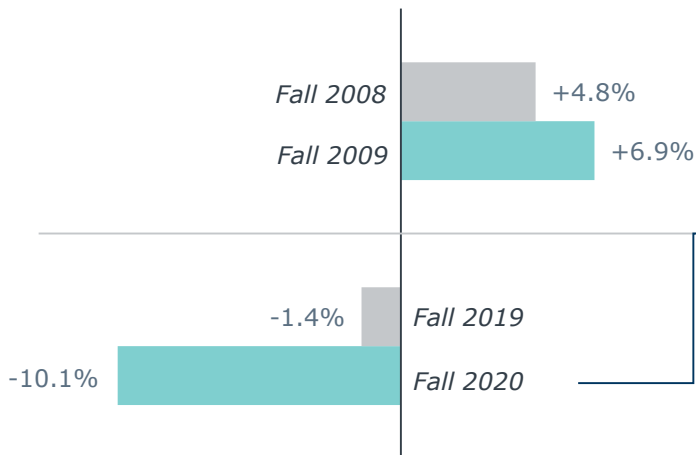
Source: [Initial Claims](#), FRED Economic Data; [Over 33 million Americans lost their job during the pandemic](#), Washington Post; [The Employment Situation](#), Bureau of Labor Statistics; IMF World Economic Outlook June 2020 ([Link](#)), Thomas McAndrew; [The Coronavirus Recession is Already Here](#), Vox; EAB interviews and analysis.

History is Not Repeating Itself...



Community College Enrollment Changes Amidst Recession

Year-on-year change in total public two-year enrollments



Eroding Core Student Populations

-21.0% First-time students

-14.2% Black students*

-9.9% Part-time students

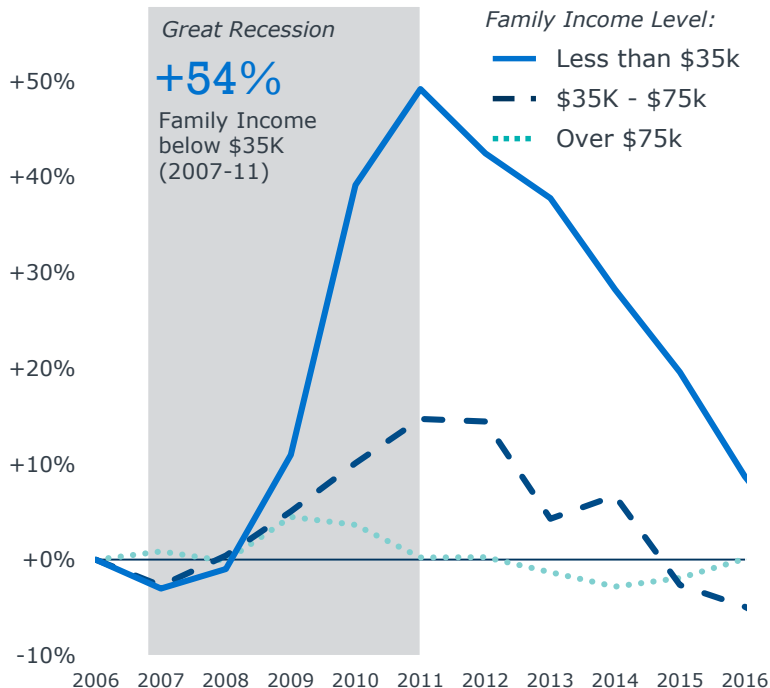
-12.7% Hispanic students*

1) * As of October 22.

Financial Support Was Key to Countercyclical Bump

Enrollment Growth Almost All Low-Income

Change in Adult¹ UG Enrollments Since 2006 by Family Income



2009 Pell Grant Expansion Increased Access

\$619

Increase in maximum Pell Grant from 2009 stimulus bill

800K

Additional students qualified for Pell funding

125%

Of average community college tuition and fees covered by Pell grant

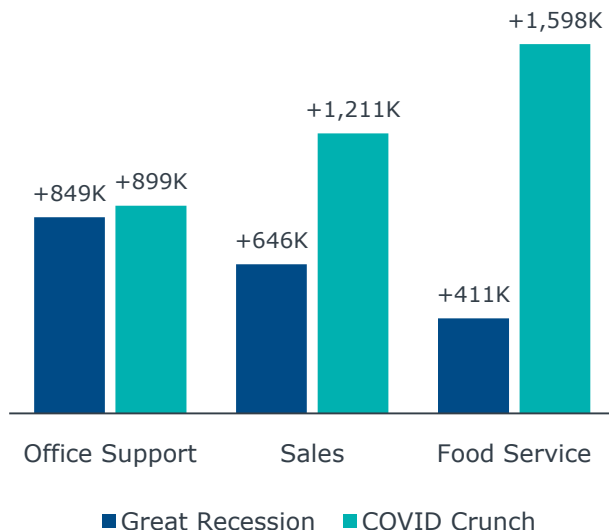
1) Defined as 25 years or older

Could a Post-2020 Boom be Even Bigger?



Occupations that Drove Great Recession Boost Have Even Higher Unemployment Today

Increase in unemployed workers by occupation¹



What Enrollment Increase Might We Expect in 2020?

Estimated² enrollment increase, if Great Recession trends repeat

Office support **+127K**

Sales **+194K**

Food service **+294K**



Will unemployed workers try to wait out Covid-19?

50%

of laid-off workers³ expect jobs to come back post-pandemic, or are already back at work

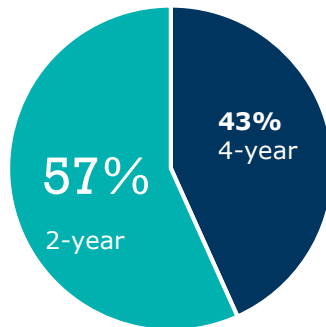
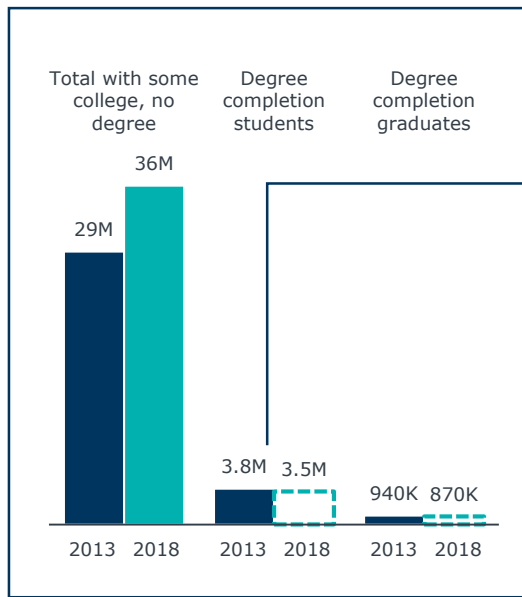
- 1) Great Recession (2011 vs 2007) & COVID Crunch (July 2020 vs 2019).
- 2) 90% prediction interval, linear regression of % change in unemployment and % change in adult undergraduate enrollment. Prediction intervals: office support: ±78K, sales: ±77K, food service: ±191K.
- 3) Or persons whose household includes someone who was laid off as a result of the pandemic. (n=232).

Source: Table 25: Unemployed Persons by Occupation and Sex, US Bureau of Labor Statistics; AP-NORC. "Economic Consequences of the Coronavirus Outbreak." August 25, 2020; EAB interviews and analysis.

Majority of Degree Completers are 2-Year

More than Half of “Degree Completers” Who Go Back to School Go to Community Colleges

Institution choices of 3.8M degree completion students, 2014-18



How Degree Completers Choose a Program

10

Program Characteristics Most Important to Degree Completers

n=1,010 U.S. degree completion prospects¹ ages 25-54

Enroll Students Like Them



Degree completers want evidence that programs and institutions cater to students like them.

67%

Seek a program designed "for someone in my situation"

Be Flexible and Customized



Degree completers seek flexible, customizable degree programs designed with their schedule and lifestyle in mind.

61%

Seek a customized plan or roadmap to help them complete their degree

Excel Online



Two-thirds of respondents intend to enroll in a program that allows them to complete some or all courses online.

91%

Will likely take courses that are offered online

1) Survey of American adults without a prior bachelor's degree but interest in pursuing one; may include adults with associate's degrees and/or certificates.



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REPORT FROM PRESIDENT AND ADMINISTRATION

RBC COMMITTEE, W&M BOARD OF VISITORS

FEBRUARY 23, 2021



Richard Bland College
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PRESIDENT'S REMARKS

DEBBIE SYDOW



Richard Bland College
of WILLIAM & MARY

EDUCATION ADVISORY BOARD

CHRISTINA HUBBARD

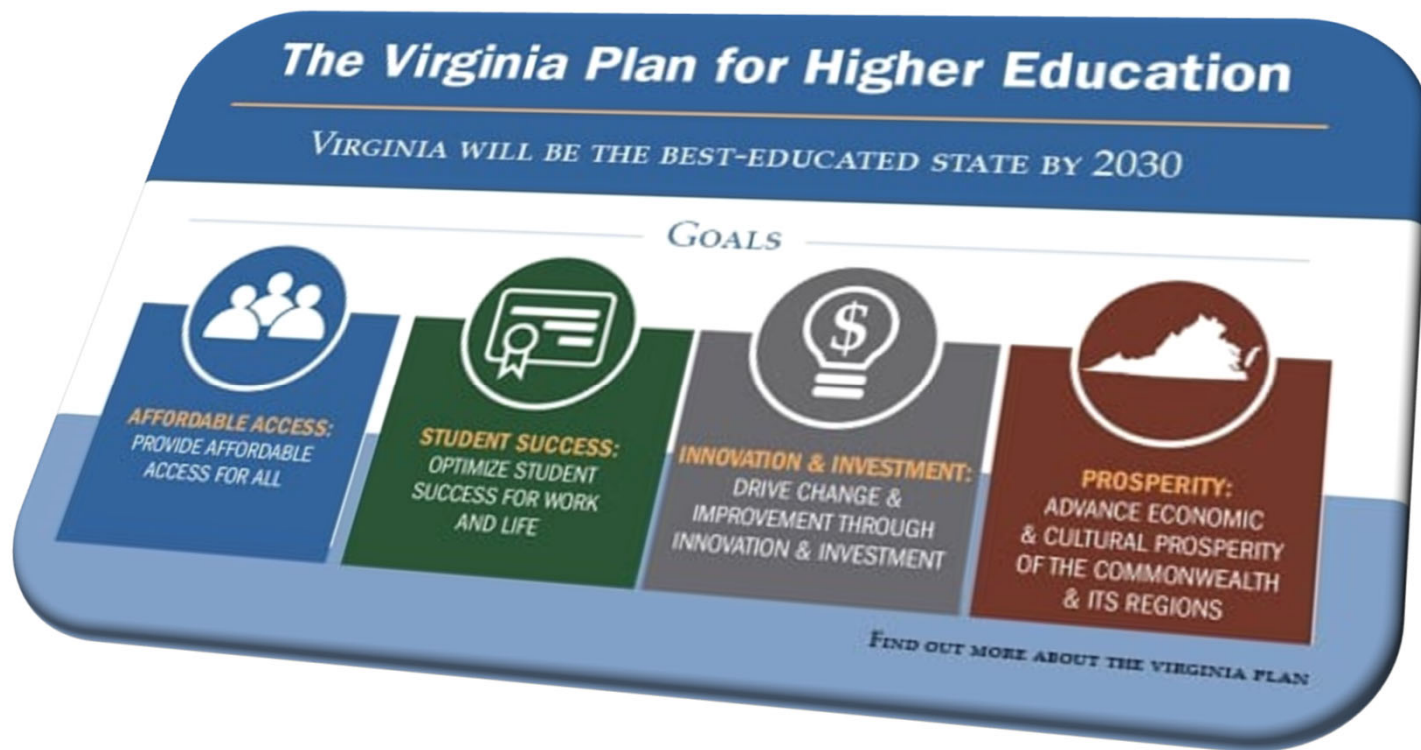
Senior Director, Strategic Research



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**COLLABORATIVE EDUCATIONAL PATHWAYS
&
INNOVATIVE EDUCATIONAL MODELS**

TYLER HART, Chief Administrative Officer





- Enable cost reduction and increased efficiencies for non-core business functions.
- Leverage best-in-class pricing model.
- Reduce overhead and capital expenses.
- Enable re-investment in core business.
- Realize significant economies of scale.





- Align academic programming with partner institution(s).
- Advance the credential and completion goals outlined in the Virginia Plan for Higher Education.





- Pilot and implement innovative approaches and technologies.
- Promote development, delivery and ongoing assessment of degree programs and stackable credentials.
- Align with educational and workforce development needs of traditional and non-traditional students.





- Expand opportunities for traditional and non-traditional students.
- Prepare students for high-demand fields.



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ACADEMIC INNOVATION CENTER

ERIC KONDZIELAWA

Director of Operations and Capital Assets

40% High Tech Classrooms

35% Collaborative Learning

15% Library Addition

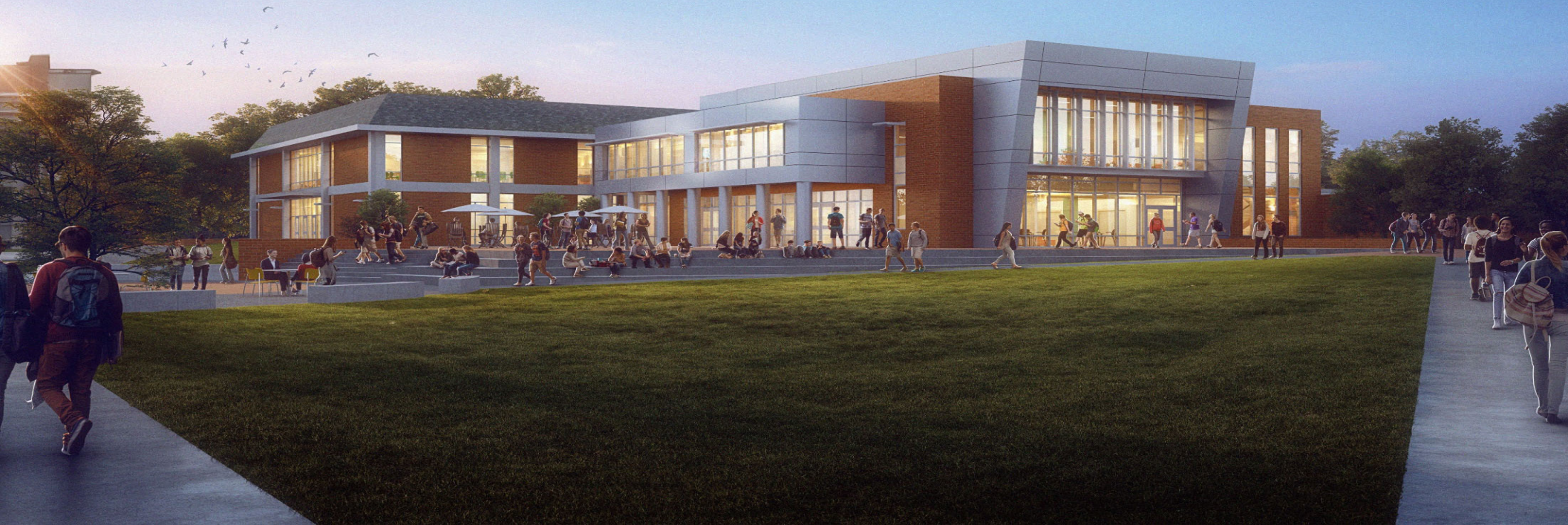
10% Offices





Building Exterior: Conceptual Rendering

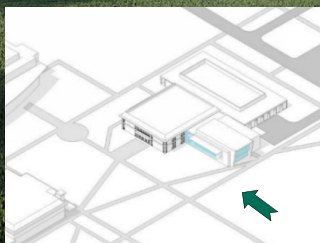
- Increased CR-2 by \$419,974, new total project cost \$15,694,606





Perspective View: New Main Entrance and Plaza

- Project consists of 14,840 sq. ft new construction and 10,125 of renovation





Perspective View: New Plaza and Addition

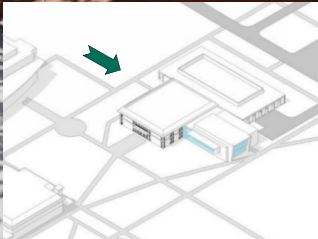
- Projected start date May 10, 2021





Perspective View: New West Entrance and Plaza

- Projected substantial completion August, 2022 (15 month Construction schedule)





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RACIAL JUSTICE & EQUITY TASK FORCE

EVANDA WATTS-MARTINEZ, Co-Chair
THOM ADDINGTON, Co-Chair

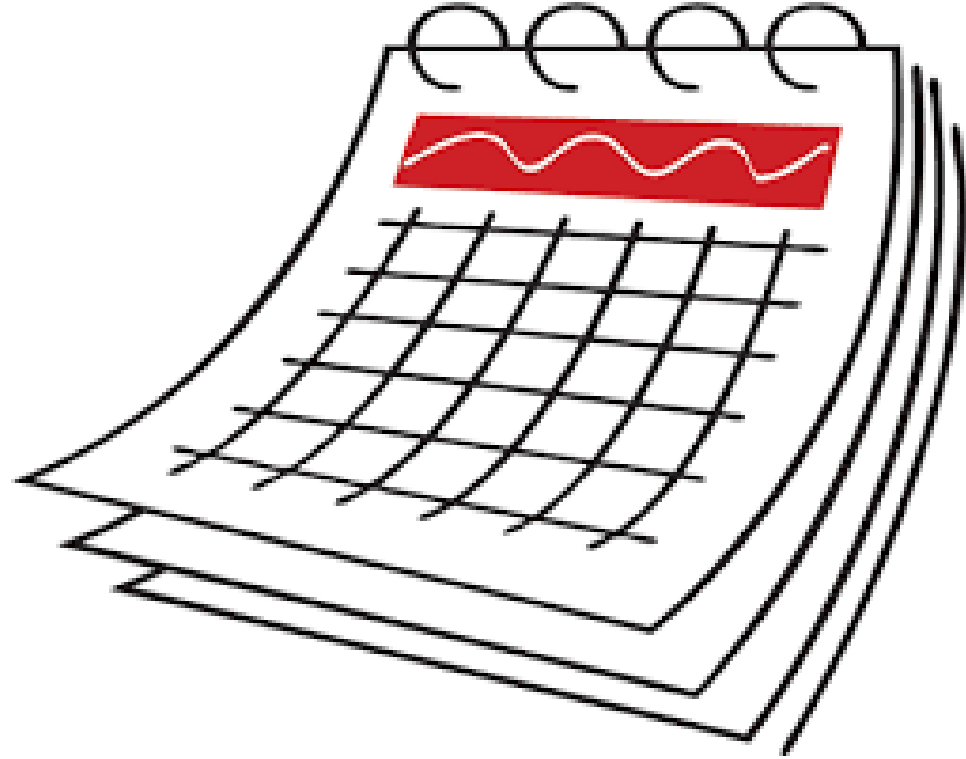


- **Spring Semester Processes**
- **Student Involvement**
- **Faculty Involvement**
- **Community Involvement**





- **Fall 2020 Report**
- **Spring 2021 Report**
- **Final Report**
- **Spring Semester Programming**





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STATESMAN SAFE & SECURE

JEFF BROWN

Director of Operations and Special Projects



- **Spring Semester '21**
 - Residence Halls Soft Opening (January 14 – 24)
 - Virtual Classes Start (January 25)
 - Virtual and Hybrid Class Format Pivot (February 1)
- **Virtual Commencement**





- **VSU**

- MOU - BinoxNOW Rapid Test

- **VCU**

- PCR Test for Students at VCU Health Clinics

- **VDH**

- Crater Health District Vaccination Administration Management System (VAMS)
 - Phase 1B (first responder) and 1C (faculty & staff)

