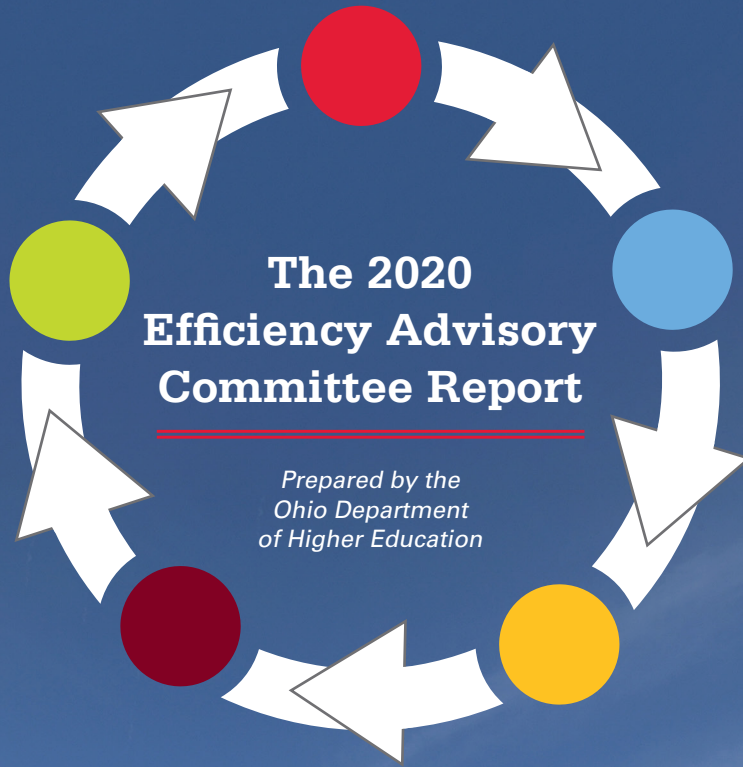




Department of  
Higher Education

Mike DeWine, Governor  
Randy Gardner, Chancellor

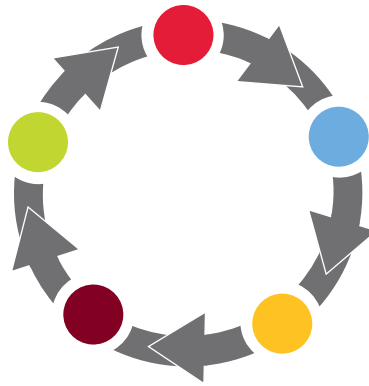


# The 2020 Efficiency Advisory Committee Report

*Prepared by the  
Ohio Department  
of Higher Education*







## Introduction

Ohio Revised Code section 3333.95 requires the Ohio Department of Higher Education (ODHE) to maintain an “Efficiency Advisory Committee” that includes an “efficiency officer” from each state institution of higher education (IHE). Each IHE must then provide an “**efficiency report**” updated annually to ODHE, which is compiled by the chancellor into a statewide report shared at year end with the Governor and legislature.

The Ohio Task Force on Affordability and Efficiency in Higher Education (Task Force) was created by Executive Order 2015-01K. The Task Force’s charge was to review and recommend ways in which our public campuses can be more efficient, offering an education of equal or higher quality while simultaneously decreasing costs for students. The Task Force issued its report, “Action Steps to Reduce College Costs,” on October 1, 2015.

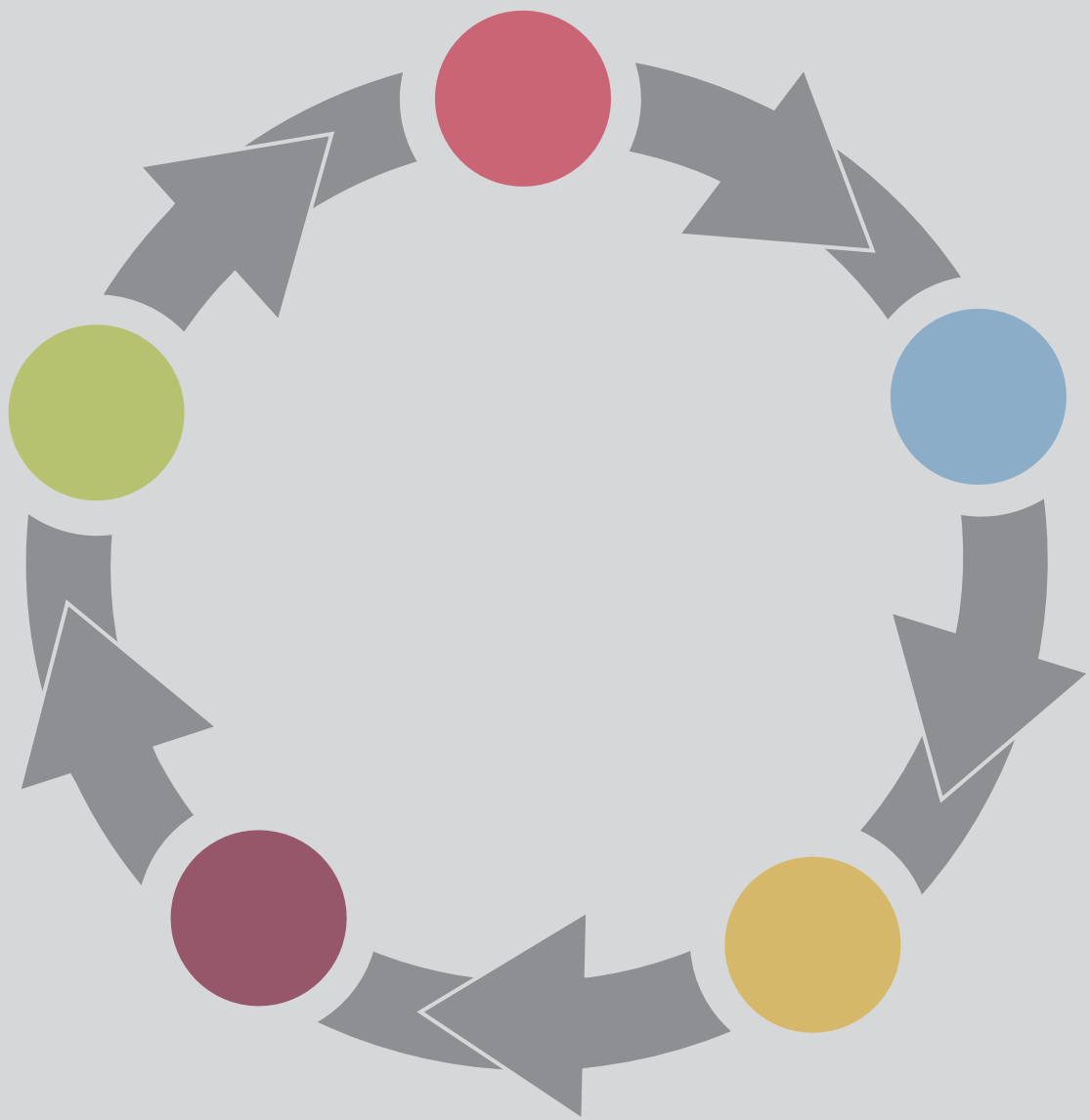
Even before the issuance of the Task Force’s report, higher education institutions in Ohio were being asked to develop and implement plans to reduce the cost to students of earning a degree. Since 2015 the institutions have also completed an annual efficiency review based on the recommendations of the Governor’s Task Force, and provided a report to the Chancellor that includes how each institution will implement the recommendations and other cost savings measures.

Starting last year, changes were made to the template utilized by the institutions to report their annual accomplishments and the status of institutional plans. Whereas the original template served as an inventory of the Task Force recommendations, the FY19 template focused on specific areas aligned with the priorities of the DeWine-Husted Administration. This allowed for a few new points of emphasis, such as information requests regarding online and/or competency-based delivery models for education, financial literacy efforts related to college debt, and student accounts collection practices.

In light of all that has happened in 2020, this year’s template added several questions related to the impacts of COVID-19 and how institutions are responding. Most of the initiatives that institutions have implemented over the last several years remain in place. Nonetheless, the immediate focus of all our

colleges and universities is on responding to COVID-19. Its impact is requiring a whole new level of fiscal management. IHEs are being forced to respond to declining revenues due to enrollment changes and how students attend. To the degree that the campuses are open, they need to ensure that they are providing a safe, clean environment. To the degree that students are attending remotely, they must transition their academic offerings to online or other remote applications, including the necessary investments in technology to deliver curriculum.

In addition to the information collected on how institutions are responding to the pandemic, this year's report also continued to track progress by institutions in selected areas. For instance, questions remained regarding textbook affordability and communication efforts with students related to managing the costs of a college education. In addition, institutions were asked to provide updates on the progress made within their Regional Compacts.



## COVID-19

2020 has been a unique and challenging year. COVID-19 has created significant disruption for all colleges and universities. By the middle of spring term, the Coronavirus pandemic was impacting all higher education institutions throughout the state. Its quick spread last spring required all campuses to quickly transition to remote learning – within one to two weeks. This generated significant, unanticipated costs for institutions. It also had significant revenue implications, especially for residential campuses that provided refunds for room and board to resident students that vacated the campus in the middle of the term. Many of the costs associated with residential campus operations are fixed or inelastic, so there was no significant savings realized to offset those refunds.

The revenue loss to public colleges and universities in Ohio is estimated to be more than \$312 million. In addition, at the time institutions submitted their efficiency reports they had identified nearly \$165 million in costs incurred responding to the pandemic.

Fortunately, external support has been provided to the institutions through the federal CARES Act. Ohio's public IHEs received \$143 million from the U.S. Department of Education (USDOE) through the Higher Education Emergency Relief Fund (HEERF) to address the financial impacts of COVID. This was in addition to a like amount that was passed through the institutions to students with demonstrated financial need. In FY21 institutions are also receiving Governor's Emergency Education Relief Funds (GEERF) from USDOE and Coronavirus Relief Funds (CRF) provided to the State of Ohio by the U.S. Department of Treasury. These funds are being used to further address unanticipated costs of COVID-19.

The various external sources have different limitations on how the funds can be used and the timeline in which the funds must be spent. The common requirements are that the funds must be used to address the impacts of COVID-19 and that such expenses could not have been already budgeted prior to March 2020.

- Common expenses for which these external resources are used include:
  - » COVID testing and personal protective equipment for students and staff that are on campus;
  - » Enhanced cleaning protocols and other measures to improve the safety of the campus;
  - » Reconfiguration of spaces and installation of barriers to provide adequate social distancing.
- Resources have also been utilized to convert curriculum to remote delivery. This may include redesigning courses as well as investing in additional technology to deliver courses remotely. In some cases, institutions are providing students with the equipment and internet access necessary to ensure that they have access to remote instruction.
- Many residential campuses are using institutional HEERF to offset revenue losses from refunds provided to students last spring.

- **Youngstown State University** developed and continues to execute a comprehensive response plan to provide continuous instructional delivery to all students, with fall 2020 courses being taught roughly one-third in-person, one-third online, and one-third hybrid. With the goal of ensuring a safe and healthy campus environment, YSU's comprehensive reopening strategy includes the distribution of \$3.8 million in student aid through the Penguins CARE Emergency Grant program. YSU has also distributed more than 15,000 Penguin Safety kits to students, faculty, staff and visitors. Other notable plan highlights include a laptop loaner program for students, the installation of Plexiglas and social distancing signage campus-wide, robust COVID testing and contact tracing protocols, the enhanced use of technology to enable virtual interaction among all members of the campus community, and full and complete compliance with all CDC and state and local health department guidelines.
- **Bowling Green State University** has primarily chosen to pursue a strategy of campus physical de-densification whenever and wherever possible while retaining as much in-person contact, engagement, and interaction as can be achieved safely. Every encounter, activity, and space (indoors and outdoors) has been assessed by a team with a focused attention on enforcing strict social distancing, face coverings, and limiting size of group meetings. All students (whether living on or off campus, or remote) receive a weekly email reminding them of their personal roles and responsibilities in achieving a safe campus environment for all. All faculty, staff, and students have been provided with reusable face coverings. Disposable face coverings along with sanitation supplies, gloves, and hand-washing stations are provided throughout campus facilities. Additionally, all faculty and graduate students were provided with plastic face shields. All classrooms were assessed to determine if adequate six-foot distancing was achievable. Where it was not achievable, those classrooms have been deactivated for the FY21 academic year. Furniture throughout campus (classrooms, public spaces, library, res halls, offices, conference rooms, etc.) has all been adjusted to ensure social distancing, or appropriate plexi-glass barriers have been installed to achieve distancing. Air filters and ventilation systems have been adjusted to assist in maximizing fresh air exchange. Temporary outdoor tents were used initially for student organization meeting spaces; tents were also used for surveillance testing before moving indoors due to cooler temperatures.

Again, not only did higher education institutions receive \$143 million from HEERF to address institutional expenses, but they also received another \$143 million to provide emergency relief to students.

- In order to disburse funds to students, roughly 67% of public colleges and universities required students to submit an application to receive the HEERF grants. Nearly 20% distributed funds based on a formula and an application process for needs beyond those provided by formula. The remaining institutions distributed the funds solely on a formula.

- To the degree a formula was used, it was based on Pell eligibility and expected family contribution (EFC). Some institutions provided similar amounts to all eligible students. Others used sliding scales based on EFC. Some also provided multiple awards for future terms. In other words, a student would receive an amount for being enrolled spring term but could get additional funding for attending summer and/or fall.
- To some degree, institutions that required an application to receive any funding seemed to use this process to determine which students had the most need. This approach seemed to best respond to the pandemic, to the degree students were required to provide information on its impacts on their immediate financial situation. Institutions using formulas for eligibility emphasized how quickly that allowed them to release money to students.
- The **Edison State Community College** President's Cabinet immediately established the internal CARES Act Committee to review all information released from the Department of Education on the governance of the CARES Act HEERF funds, student eligibility requirements, method and timeframe of disbursements. The Committee determined that a total of 808 students were eligible based on DOE specified criteria, with potentially 266 additional eligible students if their FAFSA was received. In April Edison State Community College issued the first disbursement of \$500 emergency grant funds to Tier 1 students (enrolled in all on-ground classes prior to COVID) and \$300 emergency grant funds to Tier 2 students (combination of on-ground and online classes prior to COVID). The ESCC CARES Act Committee notified all eligible students that they also had the option of submitting an internal CARES Grant Application to apply for additional CARES Act HEERF grant funds, if they had expenses in excess of their initial tier awards due to the disruption of campus operations due to the COVID crisis. Expenses such as assistance needed to cover housing, utilities, childcare, healthcare, etc.

Beyond the immediate impacts of COVID-19 in the second half of FY20, the uncertainty of the pandemic also compounded planning efforts for the IHEs regarding estimating future enrollments and revenues for FY21 budget development. Based on preliminary headcount data, the enrollment picture for FY 2021 is uncertain at best. Spring 2021 is likely to extend enrollment declines experienced in the Fall of 2020, even with COVID-19 vaccines beginning to be administered. Although sector and statewide preliminary headcount totals do not look that bad, indicating overall enrollment declined by less than 1%, they are distorted by the success of a very small number of institutions in greatly expanding online enrollment. Of the 23 community colleges, 18 lost enrollment. Seven of those colleges that lost enrollment had double-digit losses. On the university side, 10 of 14 main campuses and 19 of 24 regional campuses lost enrollment, with 4 of those 29 declines being double-digit losses.

Among common measures that were implemented to generate significant, immediate savings, several institutions provided incentives for voluntary separations of faculty and staff, salary reductions, employee furloughs, and – in some cases – layoffs and position eliminations. These were in addition to more common budget reduction tactics such as eliminating discretionary spending and eliminating vacant positions.



## Regional Compacts

Ohio Revised Code (ORC) Section 3345.59 required regional compacts of Ohio's public institutions, requiring them to collaborate more fully on shared operations and programs within their region. ODHE defined the regions in 2017 and assigned each IHE to a specific region. Each region was required to have an executed agreement in place by June 30, 2018. All IHEs participated and executed the required agreements by the end of FY18. Per ORC §3345.59 {E}, colleges and universities must report within their annual efficiency reports the efficiencies gained as a result of the compact. This year's template asked the institutions to "discuss efficiencies gained or opportunities for future partnerships as a result of each of the categories within the compact."

- The **Central Ohio Region Higher Education Compact (CORHEC)** includes Columbus State Community College, Central Ohio Technical College, Marion Technical College, North Central State College, and The Ohio State University. Each CORHEC member is also a member of the Central Ohio Compact that Columbus State has led since 2011. The Central Ohio Compact is a regional collaboration between government officials, education agencies, social service programs, and workforce/economic development professionals. The Compact has adopted a goal of 65 percent attainment of postsecondary degrees or certificates among Ohioans by 2025 and has seen collective regional gains in the following: The percentage of high school graduates who enrolled in at least one developmental course at an Ohio public post-secondary institution was ten percentage points lower in 2016-2017 (most recent data available) than in 2011-2012. The percentage of high school graduates with earned college credit increased by sixteen percentage points in the same period. Students who earned college credit while in high school made up a larger percentage of students entering higher education in 2017-2018 than in 2013-2014. This suggests that students who earn college credit while in high school are choosing to enroll in higher education after graduation. Eighty percent of the 2010-2011 graduating class who had earned college credit identified as white, compared to 65% of the 2017-2018 graduating class who did so indicating that the pool of graduates earning college credit in Central Ohio is becoming more diverse.
- Within the **Northeast Ohio Regional Compact**, Kent State in collaboration with Cleveland State developed the TeCK Fund—a technology validation and start-up fund supported by the Ohio Third Frontier Fund. This was the first state-funded prototyping accelerator involving two state universities. Now in its second round, Kent State has taken the role as principal investigator. The universities' technology transfer offices, sponsored programs staff, and legal teams continue working together to share the administrative load, as well as a common external review committee of technology commercialization experts from the region.
- Also within northeast Ohio, Lorain County, Cuyahoga, and Lakeland community colleges entered into an **IT Disaster Recovery Regional Collaboration** agreement in April 2019, in an effort to support IT efficiency and operations across all three Northeast Ohio community colleges. This partnership continued into FY20.

- Within the **Western Ohio Regional Compact**, Wright State and Central State universities, along with Clark State, Edison State and Sinclair community colleges, combined resources to create a crosswalk between the five schools for students seeking a degree in business within 120 hours using a combination of direct transfer agreements and/or adherence to the State's Guaranteed Transfer Pathways program. Crosswalks for other majors will be developed in the future.

## Academic Practices

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This section covers areas more directly related to instruction, such as the cost of textbooks, time-to-degree, and academic course and program reviews. Academic improvements provide an opportunity to reduce student costs and/or improve student outcomes such as graduation rates, time to degree, and student loan debt.

This year's report continued to collect information on textbook affordability. One of the most significant expenses beyond the cost of tuition that most students incur is the cost of textbooks and learning materials. Ohio Revised Code Section 3333.951(D) requires Ohio's public colleges and universities to annually conduct a study to determine the current cost of textbooks for students enrolled in the institution and submit the study to the Chancellor. This was a new requirement in last year's efficiency report. In turn, the institutions have submitted a second year of data to ODHE with their FY20 efficiency reports. The data provided implies that average textbooks costs decreased marginally in FY20. There is not yet enough data to definitively identify a trend. However, the likely long-term solution to the costs of textbooks is increased utilization of alternative resources and methods to provide learning materials to students.

In addition to requesting the cost data referenced above, institutions were also asked to report on their use of alternative methods of providing learning materials to students. Specifically, they were asked about their utilization of inclusive access and open educational resources (OER). Inclusive access refers to the practice of making digital texts available to the entire class for a fee. Since all or most students purchase the content, the cost is generally lower. Another advantage is that the material is normally available by the first day of class.

- In 2017, **Miami University** selected a provider of online textbooks and course materials, e-Campus, which signaled a shift away from the traditional brick-and-mortar-bookstore approach toward a virtual approach. The e-Campus bookstore not only lowers the overhead cost of running a physical bookstore, but it also provides faculty, at a glance, multiple textbook options so that they can ensure that they are selecting high-quality, affordable, and accessible course materials for their students. Because the virtual bookstore is linked to the Student Information System, students can easily purchase new, used, rental, and digital textbooks instantly upon registering for particular courses. Miami faculty are provided training (via workshops and online videos) on how to use the software platform as well as how to select appropriate and cost-effective textbooks.
- At **Ohio University**, the Office of Information Technology offers a Digital Content - Inclusive Access program. Inclusive Access gives students enrolled in participating courses access to their digital content on the first day of class at a significantly lower price than printed materials. Digital content is accessible and supports highlighting, copy/paste, printing, note sharing, and annotations. VitalSource reader content is available offline through downloadable mobile and desktop apps. Participating publishers include McGraw Hill, Cengage, Pearson, MacMillan, Norton, Sage, Human Kinetics, and Wiley.

The Inclusive Access program leverages discounts negotiated by OhioLINK for digital course materials. The program started in summer 2018 and has saved students a cumulative \$3,973,046 as of October 2020 (\$1,341,551 in FY20 savings for students).

- **Owens Community College** offers inclusive access in 10-15 percent of its courses. In addition, the college has transitioned from a physical bookstore to a virtual bookstore. Owens' provider uses internet dynamic pricing, which keeps book prices competitive at the virtual bookstore versus other online retailers. It is estimated that new textbook costs were reduced 11% from the prior year. In addition, the institution is expanding its use of OERs in humanities and social and behavioral sciences. These efforts lower book costs from approximately \$100 to \$0.

Open Educational Resources (OER) are freely accessible, openly licensed text, media, and other digital materials that can be utilized within course instruction in place of a traditional textbook. Faculty are increasingly developing and incorporating such methodology into their courses.

Nearly every institution is utilizing OER in some areas of their curriculum. OER has generally been implemented at the faculty level, so at this point there is limited accurate information on how much it is utilized institution wide. Nonetheless, several institutions are strategically investing resources to expand the use of OERs.

- The Michael Schwartz Library at **Cleveland State University**, in partnership with the Provost's Office, has been offering grants every semester to encourage faculty to adopt, adapt, or create OER materials. As of October 2020, 38 library Textbook Affordability Grants have been distributed totaling \$33,500. It is estimated that nearly 9,000 students are have been impacted by these grant projects. The CSU OER Committee offered its first Textbook Affordability Summer Symposium, funded by the Provost's Office, in August of 2020. Twenty faculty were accepted into the program, each provided with a \$600 stipend to complete a set of online learning modules about open education, review an OER, adopt at least one OER in a course, provide an advocacy plan for informing their peers, and provide a short presentation about their experience to the campus community. Of the participants in the course, 11 have decided to replace a commercial textbook with an open alternative.

- **Miami's Affordable & Open Educational Resources Committee**, which includes faculty representation from all academic divisions, has launched several programs and a set of resources designed to target faculty teaching courses with the highest-cost textbooks and largest enrollments:
  - » OER Explore is a two-hour workshop designed to help faculty better understand textbook affordability issues and possible solutions for addressing them.
  - » OER Adopt is a selective grant program that supports faculty in replacing their commercial textbook with an OER.
  - » OER Create grant program supports faculty who wish to write and publish their own OER textbook and learning materials. Faculty are provided professional development funds as well guidance and support for publishing the OER (e.g., editorial services, layout, and electronic publishing). To accomplish this, the university agreed to be an inaugural partner (with nine other higher education institutions) in the OTN Publishing Cooperative. OER published as part of this grant program will be published to the OER Collection in Miami's institutional repository, the Scholarly Commons, and in the Open Textbook Library (OTL). Several projects are currently being considered as a pilot for this program.
  - » Miami University projects that all of their efforts to reduce the cost of textbooks, including the utilization of Inclusive Access and expansion of OER, saved their students nearly \$2.6 million in FY 20.
- **Sinclair Community College** identified three high enrollment courses in which to introduce OER materials. The combined savings to students from replacing assigned textbooks to OER was \$850,000 last year. In addition, Sinclair recently contracted with a third-party textbook fulfillment vendor, eCampus, to provide lower cost options including rentals to its students. This virtual online bookstore model is projected to save students 20-30% in textbook costs (\$1.3 to \$2 million in the aggregate). The program went live in spring semester of 2020.
- Over the past several years, faculty at **Cuyahoga Community College** have driven the discovery of OER materials and have had access to a number of resources, including OpenStax, Barnes and Noble Courseware, Open Textbook Library, OhioLINK, OER Commons, MERLOT Open Textbooks, Saylor Academy, and Open Textbook Store to assist in the development of OER materials for various disciplines and courses. The expansion of the college's textbook affordability programs resulted in more than \$1.8 million in textbook savings to their students—the highest aggregate savings achieved since the college began tracking this metric in FY10.

## **Alternative Delivery**

Online delivery methods have been growing in acceptance and popularity over the last decade. Last year's template asked a number of questions about the availability of online courses and programs. Most of those questions were not repeated in this year's survey. Instead, institutions were asked to compare their online offerings from before the pandemic to today. Specifically, they were asked to compare the percentage of courses offered online, and percentage of students enrolled, at the beginning of last spring term versus fall 2020.

As expected, the share of courses and enrollments online this fall is dramatically higher than last spring prior to the impacts of COVID-19. At Ohio's public universities the share of courses offered online increased 500%. At community colleges, which already offered a higher share of courses online, the share doubled. Interestingly, the share of students attending online courses did not increase as dramatically as the offerings. The share of students attending online at the universities roughly tripled. At community colleges, it grew roughly 70%.

Obviously, much of this growth is the result of necessity in response to the global pandemic. This measure should be tracked over the next couple of years to determine the long-term impact of expanding remote offerings.

## Policy Reforms

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This section captures state IHE responses to suggested policy reforms originating in gubernatorial task force efforts, legislative joint committee reports, and student loan debt advisory group reports. In recent years, a number of stakeholder perspectives have been shared with institutions. Much of the information requested in this section was new last year. The emphasis in this section revolves around financial services to students ranging from improving student financial literacy to awarding of financial aid to collections of outstanding balances when necessary.

The Task Force recommended that institutions provide financial literacy as a standard part of students' education. In addition, the Ohio Attorney General's Student Loan Debt Advisory Group report of June 2017 made a similar recommendation as well as other proposals on how to improve processing of student accounts and debts.

Within the template, institutions were asked whether they provided a financial literacy course to incoming students. Most institutions include coursework on financial literacy within their First Year Experience course. Such a course is mandatory at most – but not all – institutions. In addition, many IHEs emphasized their outreach to students in assisting them with pursuing financial aid and helping them understand the differences between grants and student loans.

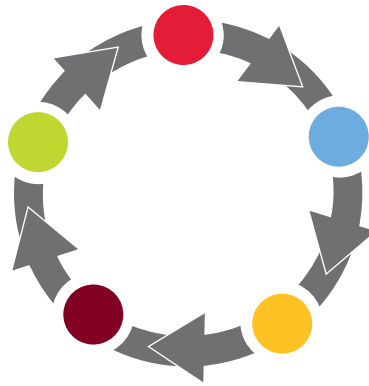
- **The University of Akron (UA)** offers a robust “Balancing on a Budget” program that includes workshops, webinars, monthly newsletters, and incentivized participation. UA received a Compass Award in September, 2020 from Ohio Treasurer Robert Sprague for its wraparound financial literacy support for students. Through a partnership with the United Way of Summit County, students have access to free high-quality, one-on-one financial counseling. This partnership provides the UA campus community access to professionally trained financial counselors employed by United Way of Summit County.
- The **University of Cincinnati** created the Money Management Task Force – an integrated support team focused on Financial Literacy education and programming for students. The flagship program is UC's Financial Literacy Training Program. In the 2019-20 academic year, more than 10,000 students were reached. In addition to sessions directed at new students, families, and students who submitted late payments, the strategy also includes classroom instruction, social media engagement, and online financial literacy tools. Also, students and families who are seeking student loans are encouraged to engage one-on-one with staff from the University's One Stop Center.
- **Lorain County Community College** includes Financial Literacy in its First Year Experience courses (SDEV 101 and 102) and secured a Title III grant during FY20 to enhance both this course and the College's online orientation. This redesign and enhanced content on financial literacy was informed by LCCC's student results from the Council for Adult and Experiential Learning Adult Learner 360 survey through ODHE's Finish for Your Future Initiative, which indicated a desire among adult learners to have additional financial information presented early on in their entry to college.

During FY20, LCCC's Financial Aid team also created video presentations on financial aid and overall financial literacy for the Online Orientation, set to launch in FY21. This enhanced financial literacy content is intended to further embed financial awareness into the student experience. Lastly, LCCC created a pilot through GradReady.com, a free pilot site to assist students with tips and information about money management and real-world finance. This site provides an additional resource for LCCC students to plan budgets, manage their tuition, and manage their personal finances.

ORC Section 131.02 requires state IHEs to certify their outstanding debt to the Ohio Attorney General's office (AGO) for collection either 45 days after the amount is due or within 10 days after the start of the next academic session, whichever is later. However, Ohio's institutions certify their outstanding debt pursuant to varying policies and practices. Institutions were also asked to provide a summary of the process they use to collect outstanding balances from students prior to sending them to the Attorney General's Office. Most institutions described the multiple attempts they make to contact students and make them aware of any outstanding balances, as well as the likelihood of being sent to the AGO for collections if the balance is not paid.

Based on the responses received on this topic, there is some variation in how institutions collect on fees and certify outstanding balances to the Attorney General. There is also growing awareness of this issue and that outstanding balances, if not managed correctly, can be a barrier to access to college. This is a topic that likely warrants more conversation and may provide an opportunity for institutions to share best practices to assure consistent treatment of students and perhaps even reduce some of the barriers to student access and success.





## Conclusion

In response to the ongoing pandemic, this year's template was shortened and at least partly focused on gathering information on how institutions are responding to the challenges of COVID-19. In turn, there were fewer requests for updates to the progress being made to the recommendations of the 2015 Ohio Task Force on Affordability and Efficiency. Nonetheless, many institutions reported ongoing efforts to generate savings from initiatives that have been implemented in previous years.

Section IV of the Template continues to provide institutions an opportunity to share any positive practices they have implemented that benefit student affordability, efficiency, and institutional effectiveness. In addition, institutions continue to track their progress in five-year plans that they have been submitting since 2017. The colleges and universities are to be commended not only for the work necessary to complete the annual reports, but also for all their efforts to be responsive to the need to reduce costs and better serve their students.

The institutional reports submitted this year provide increasing insight into the progress being made in areas that most directly impact students. There are significant opportunities to save students money in how colleges and universities manage the utilization of teaching materials, including textbooks and OERs. Future efficiency reports will continue to track progress in this area and evaluate the trend.

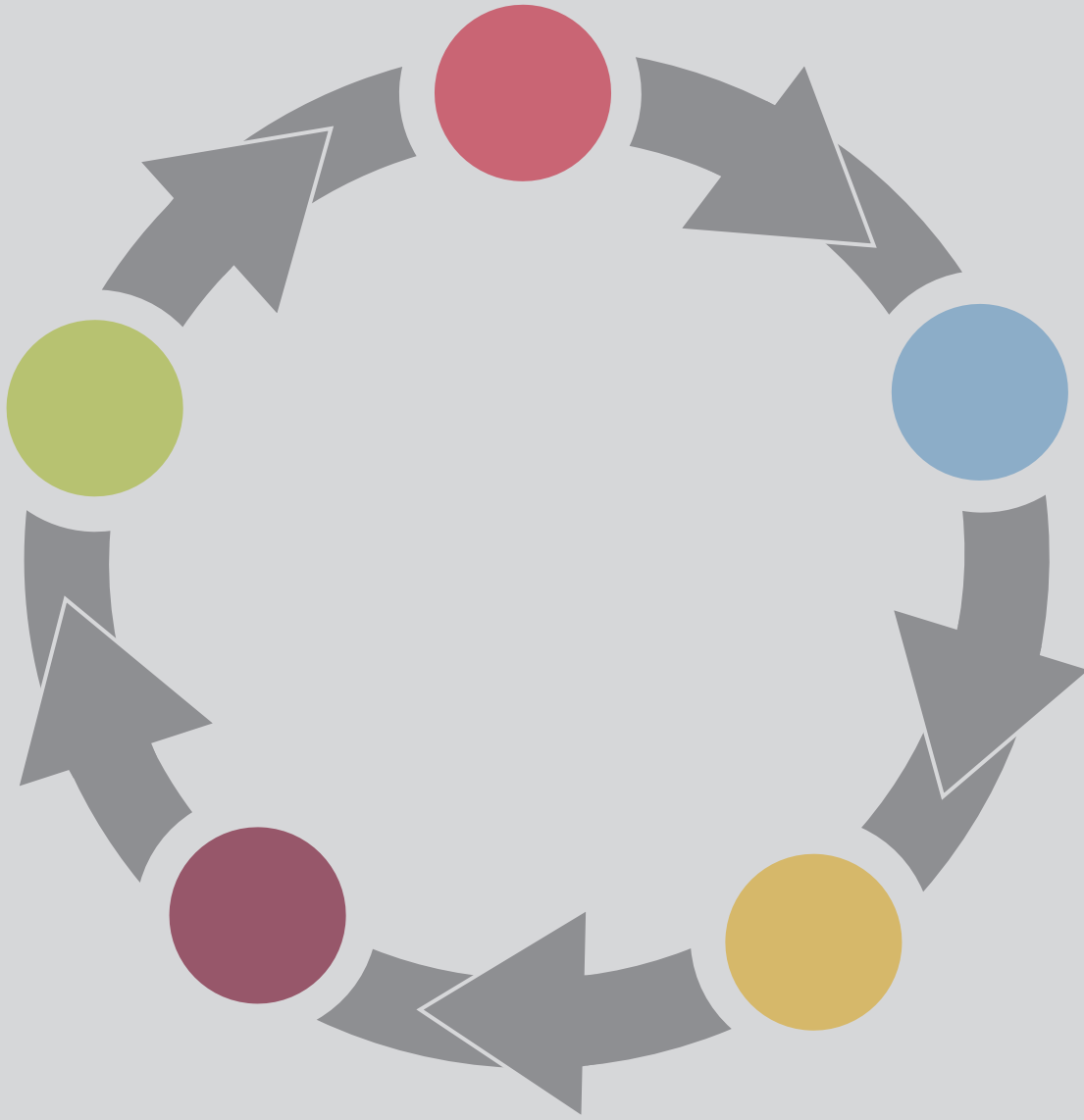
With the growing national concerns about student debt, institutions clearly have a role to play in ensuring that students have an adequate understanding of the financial implications of their decisions related to borrowing. Ohio's public institutions are increasingly aware of their role in helping Ohio students make informed decisions about the use of student loans to pay for college and the broader cost of attendance. In addition, most are aligning their collections practices with recommendations of the Attorney General's Office. This is another area in which they can expect more focus as increasing attention is paid to the relationship between student debt and access to higher education.

Finally, campuses need to continue to build partnerships to strengthen overall effectiveness. Plenty of examples have been provided of shared resources among IHEs as well as partnerships that include entities outside of higher education that have resources or expertise to share.

IHEs will continue to wrestle with COVID-19 and its impact on higher education. Uncertainty about future enrollment and its fiscal impact, concerns about student success and retention in the transition to remote delivery, and the challenges of successfully delivering instruction remotely will continue to drive institutional decisions for the near future.

Beyond this current year institutions will need to anticipate the long-term impacts of the pandemic. How much will instruction return to the traditional classroom versus online, remote, or hybrid delivery models? To the degree there is growing acceptance of these multiple delivery models, how will they impact student behavior? How will institutions respond to such changes in behavior? What are the most critical investments necessary to continue to serve students in this changing environment?

There has been substantial progress made over the last several years in both improving efficiencies and effectiveness at the institutional level. The level of uncertainty experienced today will continue and resources will continue to be restrained. The ongoing need to find efficiencies will continue, and the need to effectively deliver instruction in diverse and responsive ways to students will certainly grow.



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