

OFFICE OF INSTITUTIONAL RESEARCH AND PLANNING

BRENAU UNIVERSITY 2020 ENVIRONMENTAL SCAN

Environmental Scanning is a process of identifying trends in the surrounding environment. These changes can be societal, technological, environmental, economical, or political. This environmental scan is created with the intent of stimulating discussion for strategic planning by examining external and internal factors affecting potential opportunities and possible threats to long and short term plans.



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EXECUTIVE SUMMARY



An environmental scan follows the STEEP process focusing on Societal, Technological, Economical, Environmental, Political topics and other current trends relevant to Higher Education.

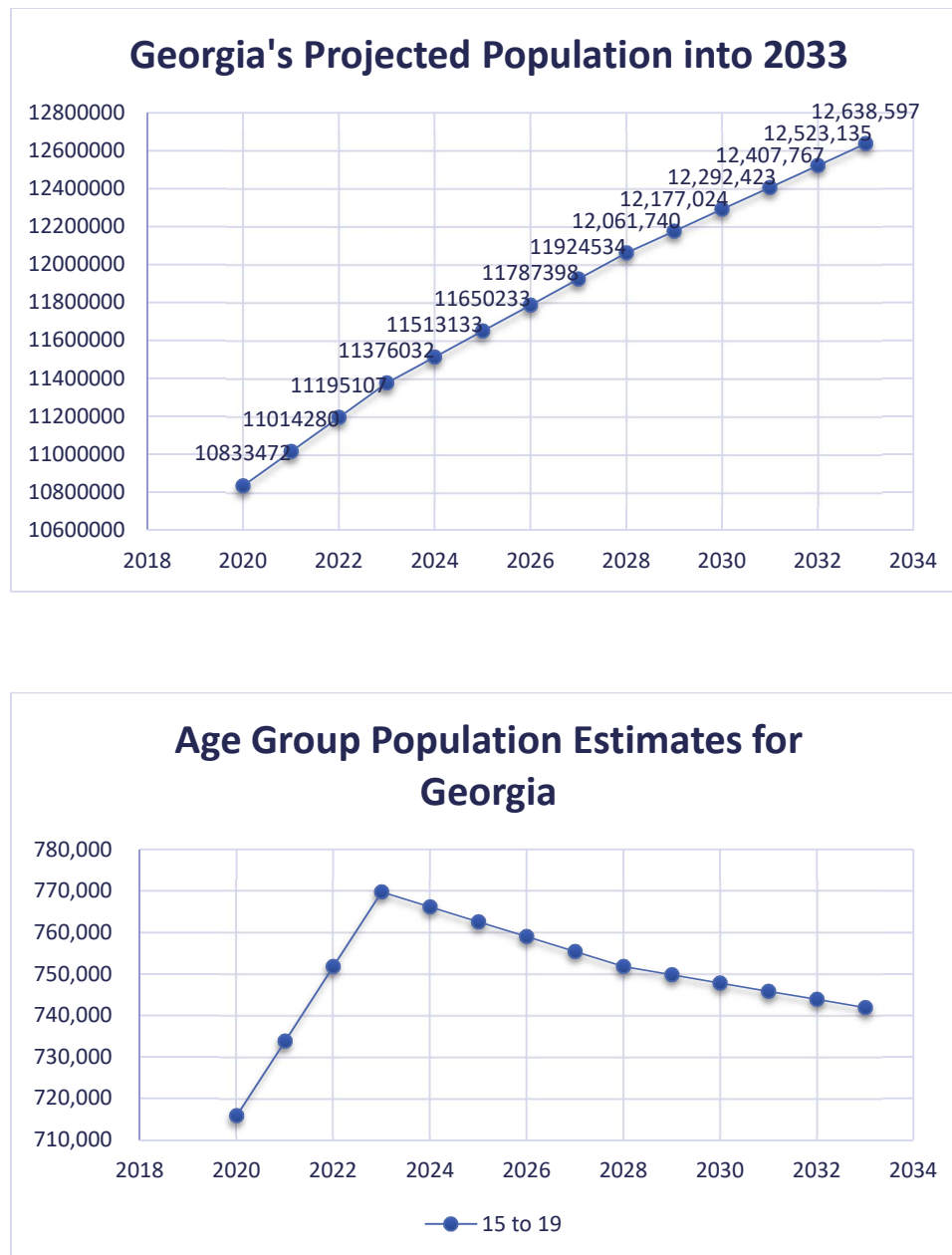
- **Societal**– Total population growth remains constant moving forward in Georgia, but enrollments may face a decline due to COVID-19, students of color facing increased challenges and lower income, and declining populations among 15 to 19 year olds. Minority Group changes in Georgia are reflected in undergraduate enrollments, less so in graduate enrollments.
- **Technological** – Faculty, staff and students pivoted from on campus face-to-face environments to working completely or partially online. Limitations to access and reliable internet services presented the biggest challenges for students and staff in higher education.
- **Economical** – Unemployment spiked as the coronavirus spread. This affected low income and minority populations most directly. Postal rate increases planned for 2021. Government warns of ties to Chinese investments. Private colleges struggling before, during, and likely after the pandemic. Shortage of mental health providers in Georgia and increasing healthcare costs.
- **Environmental** – Environmental Concerns Survey from 2019 results indicate major concerns of students and perception that colleges and universities could be doing more regarding the environment. The level of interest in environmental concerns is rising among all university populations.
- **Political** – Federal: Course taking activity and assignments will present Chinese students with adverse learning conditions in China. International student enrollments will be impacted by U.S. elections, social unrest and COVID-19 conditions. Confucius cultural centers at U.S. campuses are under investigation. State: Georgia Student Finance Commission implements new dual enrollment policy changes and funding cap on total credit hours any student can complete.

SOCIETY (DEMOGRAPHICS)

POPULATION

Estimates from the Governor's Office of Planning and Budget show Georgia total population exceeding 12,600,000 by 2033. Of that population, however, those between the age of 15 and 19 will continue to decline in numbers well beyond 2033. Positive population growth trends for that age group will not improve until 2054. (*Population Projections*, 2020)

FIGURE 1 – GOVERNORS OFFICE OF PLANNING AND BUDGET GEORGIA POPULATION ESTIMATES



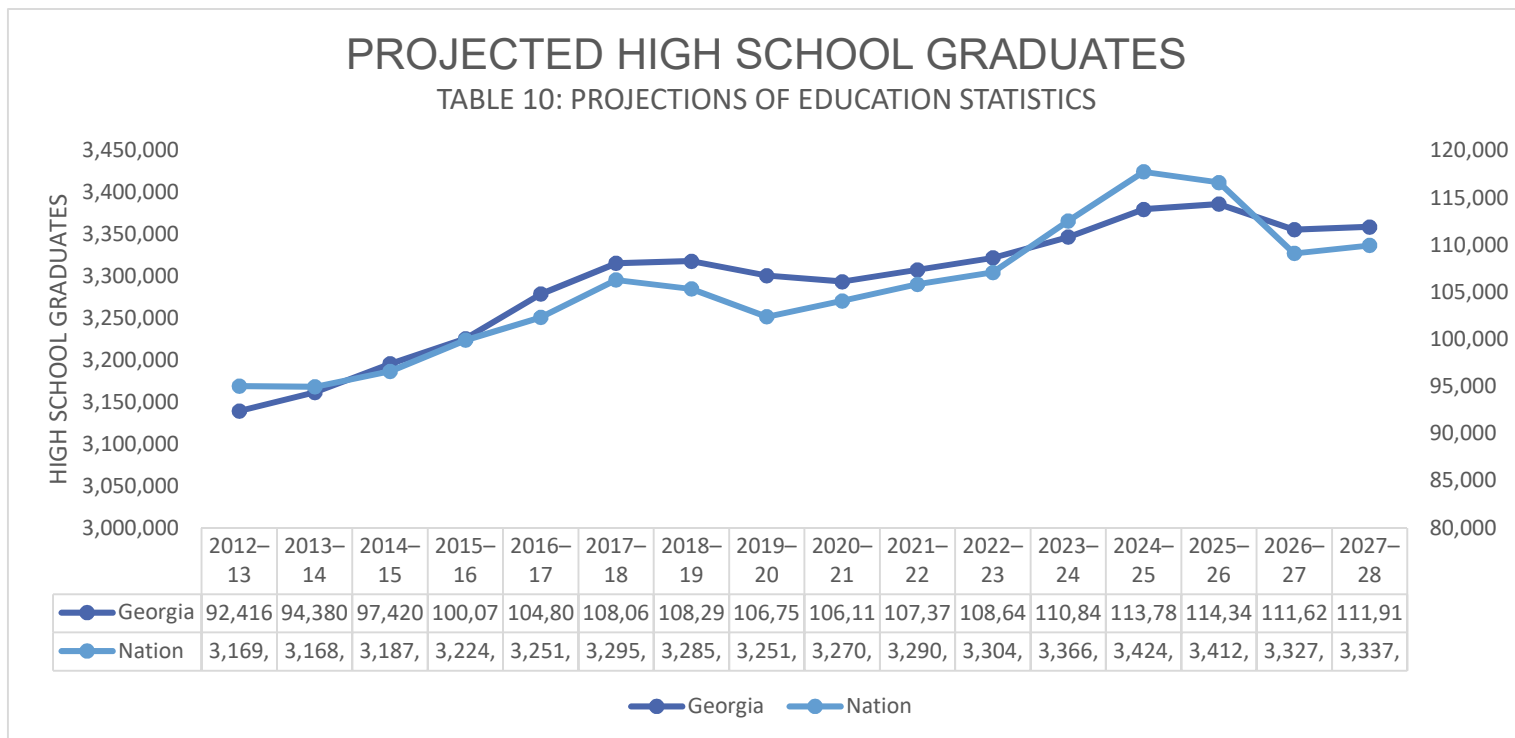
(2020, Charts derived from the Governor's Office of Planning & Budget: Population Projections website)

TRENDS IN COLLEGE READY POPULATION

POPULATION TRENDS

Although the college-ready population in the southeast will continue to increase by as much as 17 percent through 2027-28, Georgia will experience a decline in high school graduates beginning in 2020 going forward.

FIGURE 2 – PROJECTED HIGH SCHOOL GRADUATES



Projections of Education Statistics, (Hussar, William J & Bailey, Tabitha, 2019).

COVID TRENDS

Given these population trends, one would expect steady or higher enrollments between 2020 and 2025, but challenges brought on by the COVID-19 pandemic have increased the likelihood of lower enrollments, especially among students of color combined with rippling effects on the economy for several years to come.

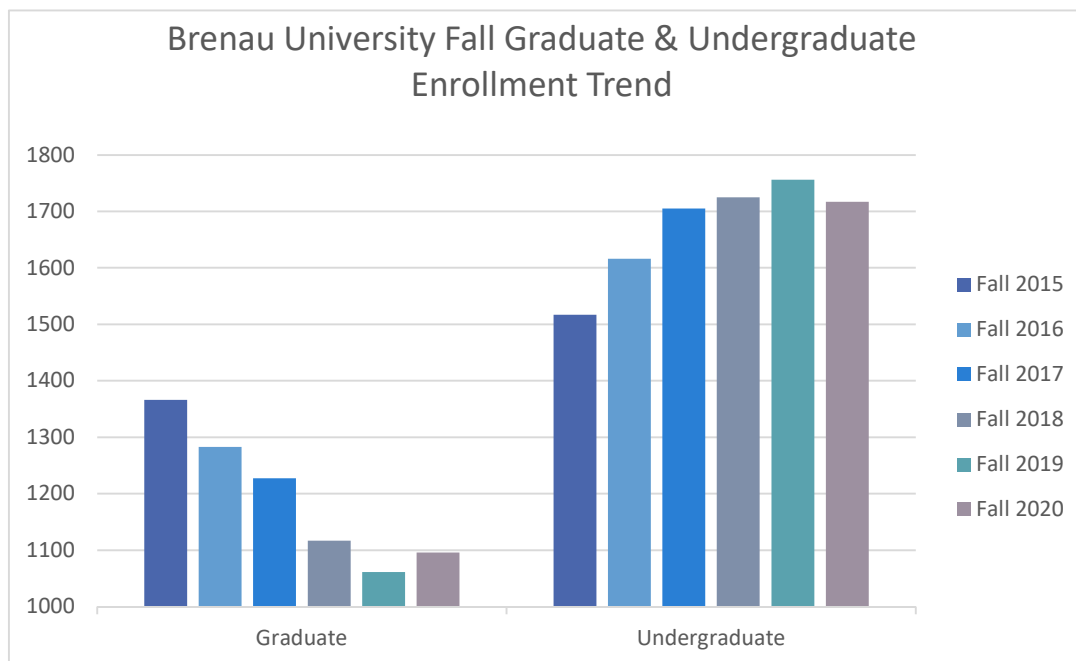
The largest impact on enrollment appears to have been borne by community colleges. The Borough of Manhattan Community College indicated that 70 percent of survey responding students had either lost jobs or were seeking employment. In addition, they noted students are not eager to commit to 15 week semesters due to uncertainties related to public health and the economy, so the college is offering shorter compressed seven-week formats (*The Edge*, 2020).

The most recent decisions about committing to college enrollment were based on different factors. A study by Carnegie Dartlet indicated that senior Fall 2020 enrollment decisions were largely affected by the format schools used and how early they announced their format scenarios. Students indicated they would most likely defer their enrollment if online classes were the only option and were less likely to commit to a school which delayed for too long making an announcement of its course taking scenario plans (*Senior Fall Decision*, 2020).

Brenau’s transition to online instruction in April during the first response to the pandemic experienced negligible disruption. Approximately 40 percent of Brenau’s instruction is delivered in an online learning environment, and many of the traditional day and residential students participate in at least one online course per year. For Fall 2020, Brenau was able to adapt and successfully plan to allow residential students to live on campus and for all student populations to be able to attend courses in person in a socially distanced classroom or attend asynchronous online courses or synchronously-taught courses via Zoom as well as a combination of all three options. Student can continue to choose from a variety of class modalities even on a day-to-day basis.

Nationally, total enrollment at postsecondary institutions is down 2.5 percent. According to the Chronicle (2020), this decline represents 97 percent of the nation’s enrollments in degree granting colleges and universities. In general, the decrease is highest among undergraduates, at 3.6 percent less than Fall 2019. In contrast, graduate enrollment increased by 3.6 percent this Fall (Berrett, 2020). As representative in Figure 3 the downward trend in graduate programs is primarily the result of graduate enrollment declines in the College of Business. The increase in enrollment in undergraduate programs can be attributed to the health sciences programs.

FIGURE 3 – BRENAU GRADUATE & UNDERGRADUATE ENROLLMENT TREND



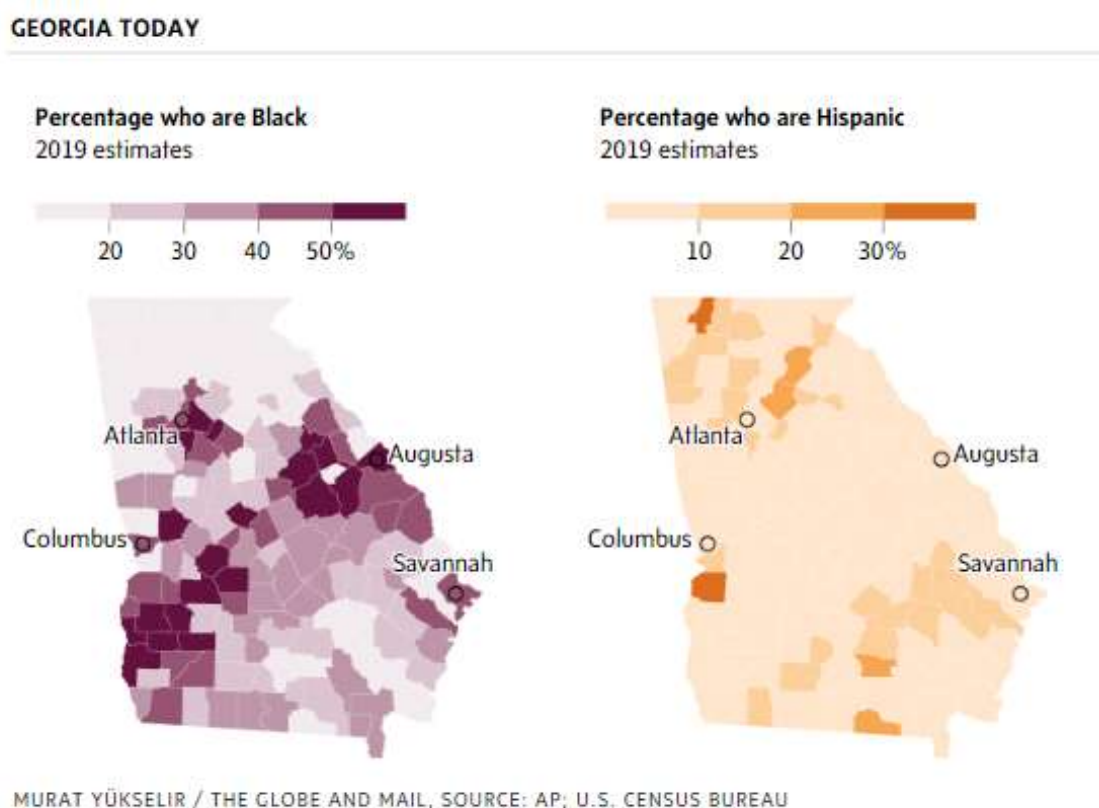
ETHNICITY TRENDS

At Brenau, both the graduate and undergraduate Hispanic/Latino populations decreased between Fall 19 and Fall 20 by over ten percent. Conversely, the Black/African American population increased slightly between Fall 19 and Fall 20 in both the graduate and undergraduate populations in contrast to a previous 5-year downward trend. As you can see in the trend lines the populations for these ethnic groups have been moving upward for the Hispanic/Latino population and remaining constant for the Black/African American population at the undergraduate level. The growth in Hispanic/Latino enrollment is in part due to the growth of that demographic in Georgia. Gwinnett County was 90 percent white in 1990. Now it is home to 22 percent Hispanic/Latinos and 30 percent Black/African Americans with the remaining 13 percent being Asian. These demographic changes are evident in surrounding counties. Population estimates indicate a higher

percentage of Hispanic/Latinos live in Northeast Georgia while more Black/African Americans live closer to Atlanta or central portions of Georgia (Morrow, 2020).

Continued housing and business park developments north of Gwinnett county will introduce new populations seeking jobs locally. According to DataUSA run by Deloitte and Datawheel, employment in Georgia grew at a rate of 2.45 percent from 2017 to 2018 and some of the most common jobs in Georgia through 2018 included elementary and middle school teachers, management positions as well as driver/sales workers and truck drivers. Georgia also has an uncommonly high population which is employed as textile machine setters, operators and tenders, and other miscellaneous textile and apparel work (Georgia / Data USA, n.d.).

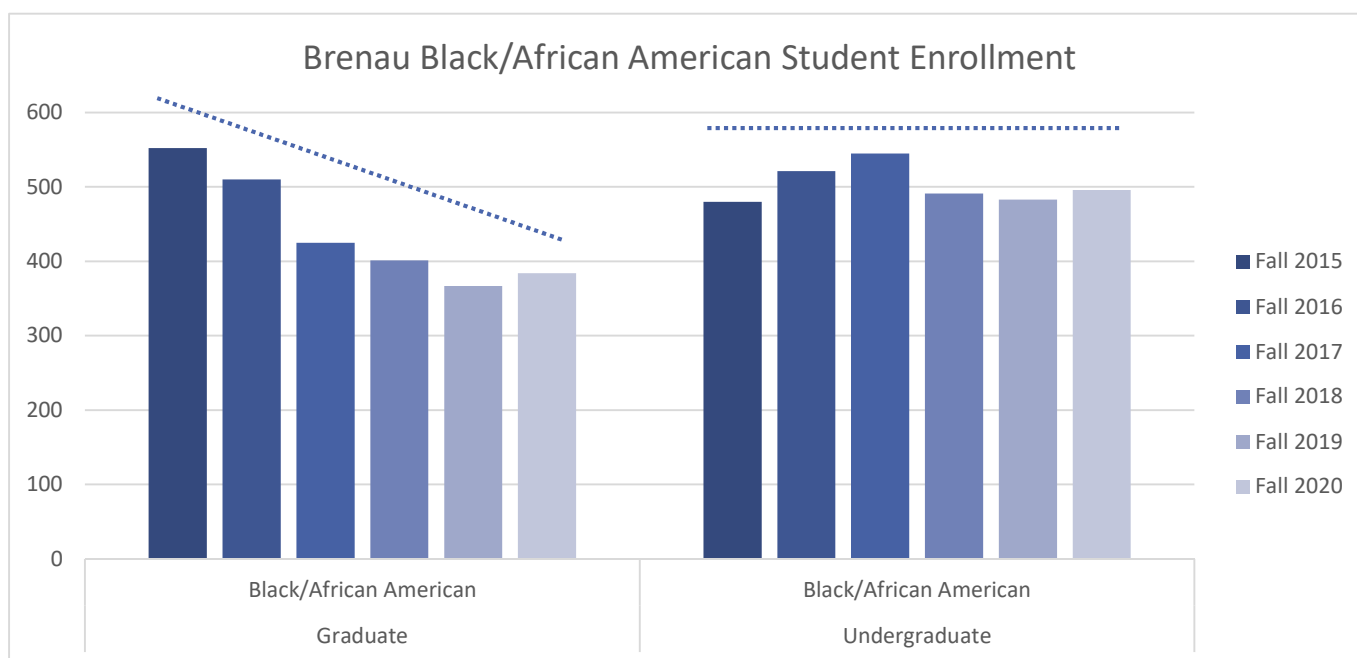
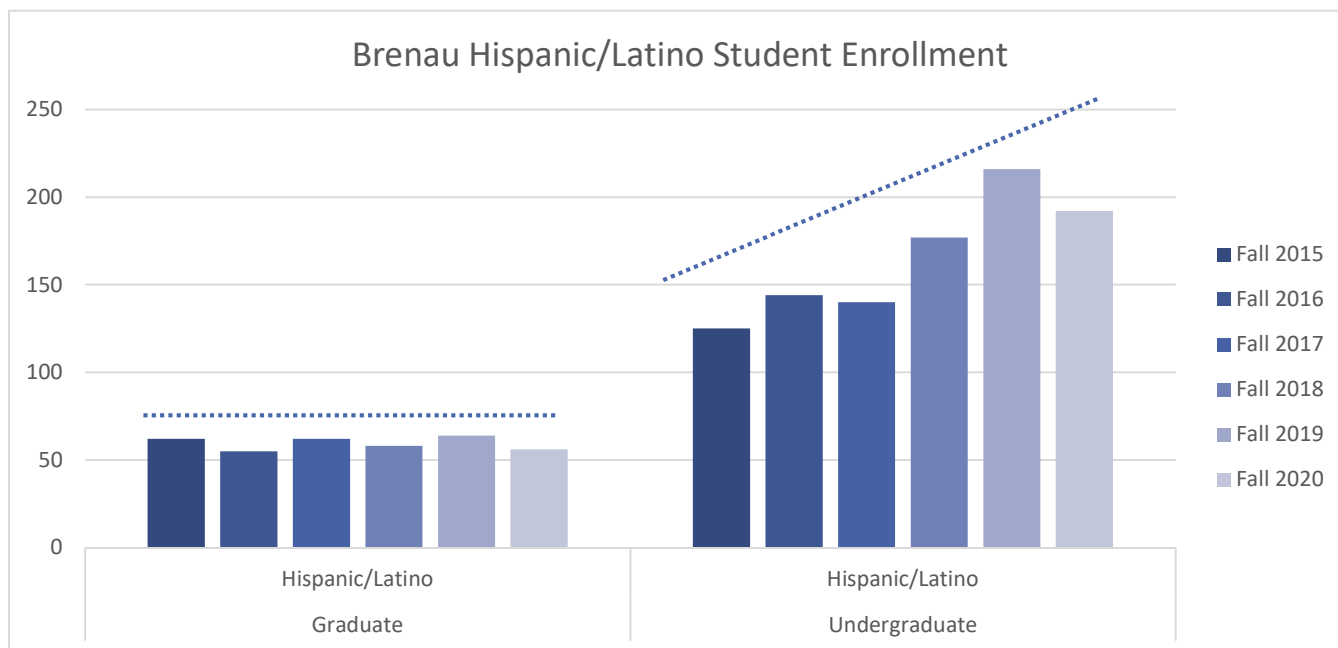
FIGURE 4 –HISPANIC/LATINO AND BLACK/AMERICAN POPULATION ESTIMATES IN GEORGIA



Georgia's Shifting Demographics, Georgia Today, (Morrow, 2020)

The enrollment trends in Figure 5 are representative of all Hispanic/Latino and Black/African American undergraduate and graduate student populations both new and returning. In contrast to that trend in Figure 6, First Time Freshmen show a marked decrease in enrollment of Hispanic/Latino and Black/African American First Time Freshmen students from Fall 2019 to Fall 2020. Nationally, minority enrollment experienced a surge in enrollment between 2000 and 2018. Hispanic/Latino enrollment had increased by 150 percent and Black/African American enrollment had increased by 40 percent (*This May Be the Worst Season of Summer Melt in Memory. Here's How Some Colleges Are Fighting It.*, 2020).

FIGURE 5 – HISPANIC/LATINO AND BLACK/AFRICAN AMERICAN ENROLLMENT TRENDS

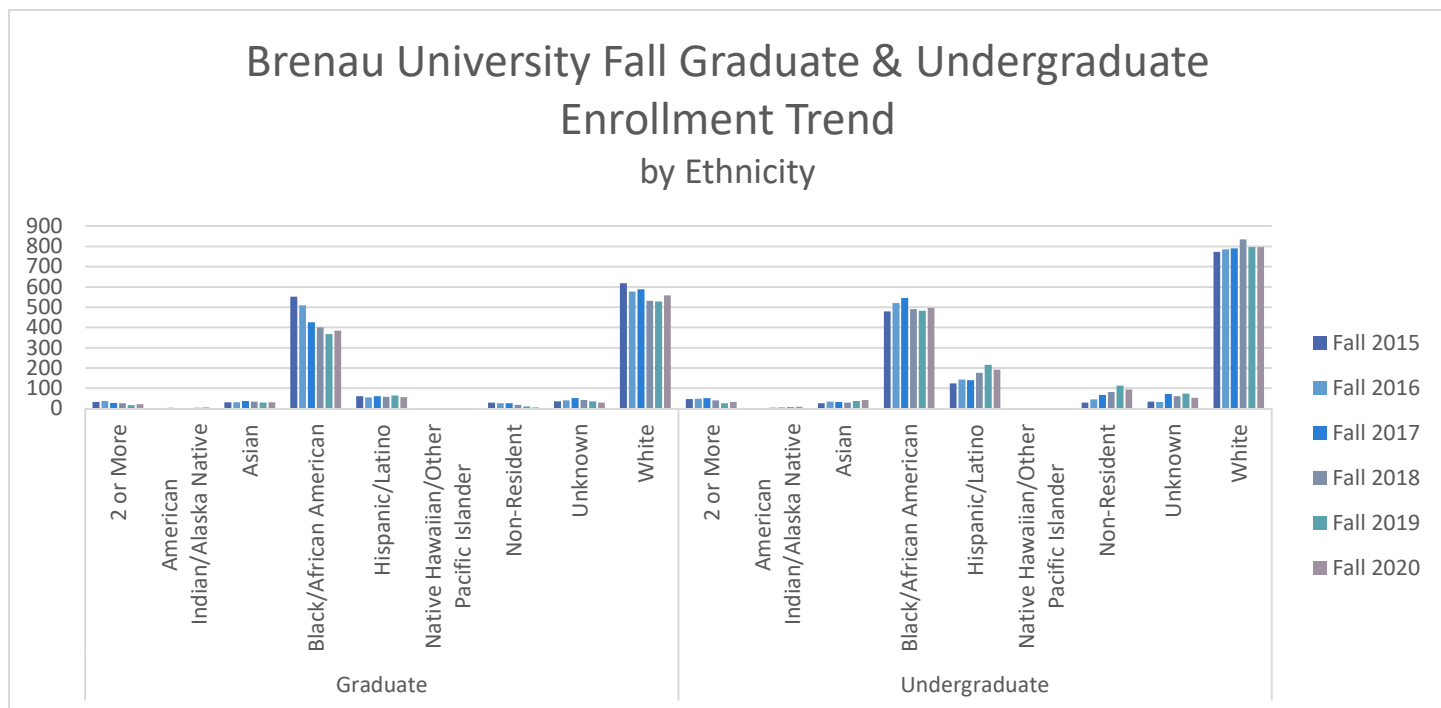
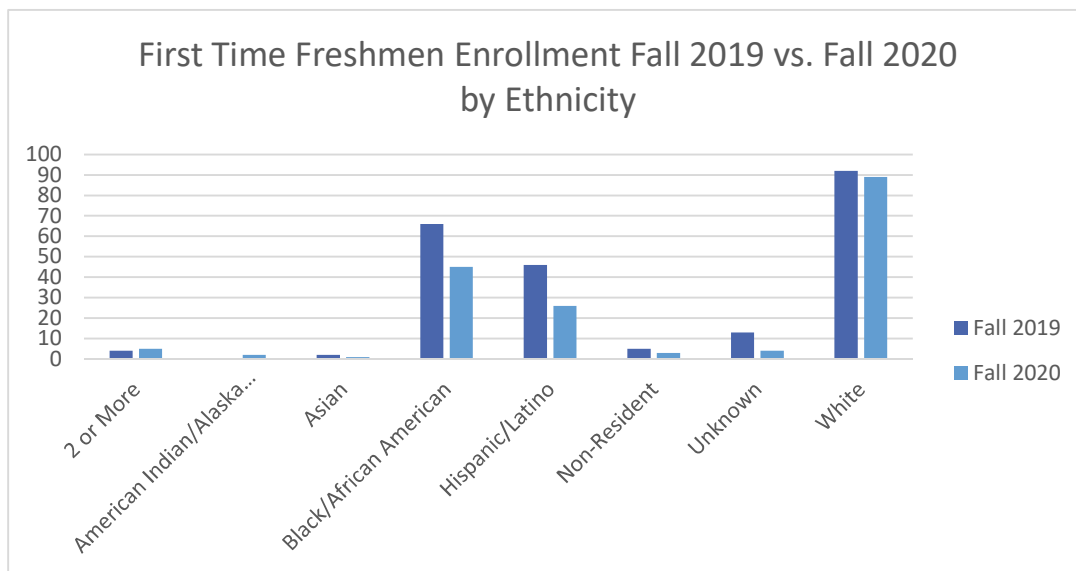


On a national level, Freshman enrollments are down 13.1 percent. This is not a result of decreased number of high school graduates (Berrett, 2020).

This trend is most likely the result of the economic downturn due to COVID-19. Many middle and low income families are facing job losses, lack of childcare, and having to care for and teach young children at home. Many young high school and college age people are now being depended on to assist with childcare or to take on jobs themselves to help make up income losses when a parent loses a job. According to The Chronicle of Higher Education, people of color are facing the

worst of the pandemic. While 24 percent of White seniors indicated they were not sure about their college decisions at the publishing of the cited article, more than 40 percent of minority high school seniors said they would likely not go to college in the Fall 2020. Students who delay or opt for part-time enrollment are less likely to graduate than those who enroll in college right after high school (*This May Be the Worst Season of Summer Melt in Memory. Here's How Some Colleges Are Fighting It.*, 2020). Many minority students who had not changed their enrollment plans would likely end up taking less classes and ultimately stay closer to home rather than living on campus at a preferred school. It is expected that this cohort of students will take longer to complete their programs (*An Analysis of Data from a National Survey on the Impact of the Pandemic on Higher Ed (Opinion)* | Inside Higher Ed, 2020).

FIGURE 6 – ENROLLMENT FALL 2019 VS. FALL 2020 BY ETHNICITY



Another indicator enrollment would be lower in the Fall for incoming Freshmen was the decrease in filed FAFSAs by high school seniors. For the 2020-21 filing submission cycle, the decline in the percent was -14.9 percent. However, five states had positive increases as noted: Georgia up 25.2 percent, Nevada up 21.0 percent, Arkansas up 16.2 percent, California up 14.3 percent and Hawaii up 14.2 percent from the prior submission cycle (Brown, 2020). This increase in Georgia when compared to national trends aligns with high school graduation rate trends shown earlier in Figure 2, but does not align with minority student trends at Brenau.

TECHNOLOGY

THE PIVOT TO VIRTUAL LEARNING

Many challenges were encountered during Spring 2020 when courses had to quickly move to an online modality. Those challenges continued to affect many students who had to return home to complete their Spring, Summer and Fall semesters online. Studying from home presented various challenges for students especially if studying competed with a large family, limited space, lack of privacy, and shared resources. Having a single computer in one household with multiple students trying to do online course work and parents also working from home is not an ideal learning environment.

Lower-income students faced multiple challenges that were far more difficult than shared access to a computer. Many could not afford or did not have access to high speed internet or a computer at home. With so many physical locations like libraries closing to the public, other alternatives were limited or not available at all. The continuing of distanced education for many institutions all but promises the exclusion of the most vulnerable student populations.



Many new and returning students have had the option to continue their education, whether that is online or on campus, depends on the options given to them by their institutions. Many schools across the nation planned to have completely distanced/online teaching modalities even before the Fall semester started due to the prospect of on campus outbreaks of COVID-19. Some institutions gave students the option to take their courses face-to-face, hybridized or completely online or a combination of all three. Other schools decided a complete face-to-face Fall semester was doable, but found themselves having to return to a completely online Fall semester after outbreaks of the virus on their campuses.

There have been more than 50,000 on campus infections across the United States (Pandey, 2020), but many schools like Wesleyan University in Connecticut, Colby College in Waterville, Maine and Middlebury College in Middlebury, Vermont have managed to minimize the spread. This may be in part due to their smaller rural locations and for some institutions the adoption of aggressive testing (Pandey, 2020).

Zoom became one of the popular online tools to connect with students. Faculty had to quickly learn how to adapt their coursework to have both on campus lectures and an online component for those choosing to or needing to do distanced/quarantined education. This presented schools with various challenges especial if faculty had never taught an

online course and/or were not very technically savvy.

Virtual learning will continue to have major role in higher education while the nation waits on vaccine rollouts and herd immunity is reached. According to Harvard Business Review, two-thirds of college students attend traditional campus-based lectures. Higher education is a people focused sector of the economy with high risk for technology-driven disruption to occur (Gallagher & Palmer, 2020). A recent survey, conducted by network services company Infoblox and research firm Zogby Analytics, show that 70 percent of IT leaders reported more than half their companies' employees are working remotely due to COVID-19. Though 68 percent of respondents felt they needed better threat detection like visibility into devices on the network, cloud applications being used and compromised devices, 46 percent opted to shift IT resources to cybersecurity and setting up remote workers (Kelly, 2020). Work force productivity efforts are not the only adaptation higher education institutions have to contend with to make remote learning and working possible. Many are loaning out technology to students in the form of laptops or hot spots. An Educause poll found that 81 percent are loans of devices for free or at very low cost, 50 percent are loaning hot spots and 40 percent are helping students purchase equipment (O'Brien, 2020).

Higher education has invested \$4.5 billion into education technology within the first half of 2020 alone. Experts are predicting this will continue over the next 10 years and the amount invested in that time could be well over \$87 billion (Stoltz-Loike, 2020). According to Forbes (2020), a letter from educational leaders from two- and four-year colleges was sent to the House of Representatives requesting at least \$120 billion of aid to help mitigate some of the financial challenges faced both by students and colleges. In the letter they indicate that the impact is from revenue losses and net costs from the financial impact of the pandemic which are in large part from testing, contact tracing, quarantine, treatment and learning technology. Congress appropriated funds available to higher education through the CARES Coronavirus Aid, Relief, and Economic Security Act passed and signed into law in March of 2020 and through Coronavirus Response and Relief Supplemental Appropriations Act in December 2020. These funds will assist the colleges and universities but fall well short of the resources needed (Nietzel, 2020).

ECONOMIC

UNEMPLOYMENT RATES

In the first two weeks of December 2020, new unemployment benefits applications increased to 885,000 nationally, due to the resurgence of COVID-19. This is now the highest total since September and an increase from 862,000 in the first week of December 2020. Business restrictions coupled with less consumer activity is forcing employers to reduce their workforce numbers. Prior to the pandemic, new claim numbers were under 230,000 weekly (Wiseman, 2020). With increased COVID-19 infections going into the winter months this will only increase business closures and attract less consumers weary of contracting the virus which will in turn be adding to the unemployment growth.

There are currently 20.6 million people receiving unemployment aid. The percent increase in unemployment from a year ago in Georgia is 506%. It is one of the highest among U.S. states, Kansas is highest with a 910% increase since last year. In the first week of December, Georgia's new unemployment claims were at just under 160,000 (Wiseman, 2020).

In April the JP Morgan Institute had published a report called the "Racial Gaps in Financial Outcome: Big Data Evidence" in which they show how different racial groups manage income fluctuations during the COVID-19 economic downturn. Based on their data findings from 2013 to 2018, the institute found that Black and Hispanic families are far more affected



by short-term income changes than White families. For every dollar held by White families, Black and Hispanic families have somewhere between 30 to 40 cents in liquid assets. Typically, Black and Hispanic families have lower incomes than White families. This translates to about 70 cents for every dollar earned by White families. Therefore, a job loss by each racial group would reduce their spending at different rates. The study further showed that a loss of \$500 in income would translate to a drop in monthly spending of about \$230 by Black families and \$215 by Hispanic families. For a White family the drop in monthly spending would be roughly \$140. Similarly, spending among Black and Hispanic families is higher after receipt of a tax refund. While White families tended to have only spent 38 percent of a tax refund thirty days after receipt, Black and Hispanic families would have spent 52 percent and 49 percent respectively. The study finds that when all racial groups have the same levels of liquid assets spending responses to income changes tend to disappear (*How COVID-19 Could Widen Racial Gaps in Financial Outcomes*, 2020). The challenges faced by Black and Hispanic families will affect income levels and available assets of a percentage of Brenau students within these populations.

Extended unemployment benefits, loans for small business and stimulus checks came to fruition as congressional leaders agreed on a \$900 billion relief package. Federal officials are hopeful that the economy will rebound next year with the availability of vaccines. However, the next three to six months will be the most challenging for unemployment, evictions, and small businesses until spikes in COVID cases are flattened (*Fed Keeps Rate near Zero and Sees Brighter Economy in 2021*, 2020).

POSTAL RATE INCREASES

Postal rate increases will begin in January 2021. Initial new year increases will rise by 2 percent. However, according to The Non Profit Times, the Postal Rate Commission may likely increase the rate by about 7 percent towards summer. This is an amount that goes above inflation by 5 percent or more. Compensatory products such as First-Class mail and Marketing Mail letters could see an increase of 5.6 percent, while non-compensatory items like periodicals and Marketing Mail flats will see an increase of 7.6 percent above the Consumer Price Index (*Postage Rates Could Jump 7.6% During 2021*, 2020). Communication costs increasing during periods of needed communication flow for recruitment and external relations campaigns will increase the costs to produce the same on lower returns.

ENDOWMENTS – CHINA TIES

The U.S. government and state departments are issuing warnings to governing boards of American Institutions of Higher Education and Affiliates on China ties related to investment strategies for their endowments. They are being encouraged to divest from Chinese holdings that may be part of their endowment portfolios. This comes at the heeding of Keith Krach, undersecretary of state for economic growth, energy and the environment. A letter shared with Karin Fischer, writer for *latitude(s)* weekly newsletter, stated that the People's Republic of China firm's stocks may be delisted from U.S. exchanges some time at the end of next year (Fischer, 2020b).

Divesting could be pose a major challenge as about 90 percent of U.S. foundations and endowments have investments in China. Many of these investments are through broad emerging markets and these investments are made through index-linked funds that only allocate part of their money in China. Very few U.S. institutions have equity solely dedicated to China (Banjo et al., 2019).

PRIVATE HIGHER EDUCATION STABILITY

At the onset of the pandemic some schools were already struggling, but now more than ever due to the pandemic it appears more colleges and universities are facing closures or mergers. Hampshire College announced in January 2019 that it was facing financial challenges and seeking to merge with another institution. However, Hampshire College managed to remain independent and in Fall 2019 their first year enrollment was a mere 13 students. Many other private colleges missed their Fall 2019 enrollment targets. Earlier in Spring 2019, College of Holy Cross ended its need-blind admissions policy due to unsustainable spending on financial aid (Gray, 2019). Founding director of the Academy for Innovative Higher Education Leadership Jeffrey J. Selingo says “colleges need to better understand the students they serve” and that schools need to connect program offerings to the quickly changing employment landscape and create partnerships to help modernize their approach (*The Trends Report 2020*, 2020).

In spite of the truth in those statements, there are challenges in higher education right now which highlight existing financial inadequacies and the need to adapt. Since April, at the early stages of the pandemic, many colleges and universities have had to reduce their work force. In addition, enrollment of freshmen students has fallen 13 percent overall, with 22 percent or more affecting community colleges. According to the National Student Clearinghouse Research center, this Fall there were 21.7 percent fewer public high school graduates who went straight to college compared to 2019. For private colleges that was a 28.6 percent drop compared to Fall 2019 (Hoover, 2020).

Enrollment drops reduced tuition revenue while operating expenses have increased on most campuses. Over 85 percent report loss of tuition and revenues while 93 percent report loss in room and board revenue. Additionally, 87 percent lost revenue from auxiliary services and 90 percent lost revenue from summer programs (Whitford, 2020). Increased expenses came from COVID testing, building modifications, dedicated quarantine space, face coverings, contact tracing, and social distancing efforts. Information released by the National Association of Independent College and Universities indicated that most institutions agreed that federal aid relief from the CARES Act in the first half of the year was not enough to cover the pandemic-related revenue losses and all additional expense incurred (Kelderman, 2020).

McMurray College, a small liberal arts college in Central Illinois could not survive the pandemic. Before COVID, they were struggling with decreased enrollment and increasing operating costs. Their endowment was not enough to get them through their financial struggles and they hoped borrowing would keep them afloat but as the pandemic worsened lenders were not willing to increase funding. Another private college which was at risk at the onset of the pandemic is Wells

College in the New York Finger Lakes Region. President Jonathan Gibraltar stated in May that the school would not be able to get by with only remote learners. They depend too heavily on room and board to operate the campus successfully. The campus appears to be moving forward with classes Spring 2021. They are delaying class start dates until February and cancelling spring break (Aslanian, 2020).

Currently under investigation by the U.S. Department of Justice, is the sudden closure of another private institution, Concordia University in Portland, Oregon (Kabbaz, 2020). Concordia University opened in 1905 and was a private non-profit school affiliated with the Lutheran-Synod Church. It ceased operation after the Spring 2020 semester. The institution partnered with a third-party service provider with expertise in marketing and recruitment which helped them double enrollment between 2012 and 2014 (Seltzer, 2020). A change in Board focus to only Lutheran students diminished their current and projected enrollment and finances made it unlikely they could continue their educational mission (*CONCORDIA UNIVERSITY - PORTLAND CEASES OPERATIONS AFTER SPRING 2020 SEMESTER*, 2020).

For many small private institutions, the problem of decreased enrollments and increased operating costs is compounded not only by the challenges brought on by the pandemic but by existing tuition discount practices. A survey conducted by *The Chronicle* in collaboration with Ad Astra and Davidson's College Crisis Initiative, between October 20 and November 11, revealed some troubling vulnerabilities among private institutions. Many private baccalaureate and master's institutions have discount rates that are higher than 50 percent. In each category about a quarter set their discount rates above 62 percent. In the last three years, private colleges collectively surpassed 50 percent discount rates for first-time full-time freshmen (Carlson, 2020).

According to the Money article, *Before Choosing a College, Make Sure It Will Exist in 10 Years*, the best bet for families looking for a stable college is to look at areas with growing populations like California, Oregon, Colorado, Florida and Texas. Colleges with declining population in locations like the Northeast are at higher risk of closures (Kabbaz, 2020). Economist, Nathan Grawe, predicts that available college-ready student populations will drop by 280,000 per entering class starting 2026. The year 2026 is commonly referred to in higher education as "the Apocalypse". This is due to the expected decline in youth populations resulting from low birth rates during the 2008 Great Recession (Gray, 2019). Forecasted growth among private institutions not in the top 100 of U.S. News and World report is trending negative near -20 percent in some cases (Carlson, 2018).

The pandemic is another stressor on the mounting financial pressures which have already been an issue for many institutions. Colleges face growing expenses like salary increases and benefits for new hires, existing employees and those who are close to retirement. Cost of tuition is overtaking the rate of inflation and colleges are not able to depend on state funded revenue streams as they once did. Competition is growing among colleges as demand for higher education lags behind the increasing availability of colleges, largely in part because of already declining or stagnating family incomes and more recently from job losses due to the pandemic (Carlson, 2018).

Despite existing problems and emerging challenges, institutions can work on improving inefficiencies by focusing on various activities. The most problematic areas tend to be financial stewardship in the following areas such as personnel management, aging physical plant, underutilized space and program management. Higher education's complex structure makes it challenging to track sources of revenue and expense. This can be compounded by decentralized budgets and a lack of financial proficiency. Kent Chabotar, a former president of Guilford College with expertise in higher-education finance, states that it is important for all levels of leadership at an institution to understand how to apply basic metrics like student-to-faculty and faculty-to-staff ratios. Leaning out the administrative workforce bloat can be done by realigning divisions or redefining staff positions with an eye on improving services, strategic priorities, savings reinvestment, and maximizing resources. Determining which majors can be expanded or shuttered and acting on those findings is another way to evaluate and rein in costs created by program sprawl or programs which are no longer aligned

with current demand. Institutions should consider tuition discounts in under-enrolled programs, review programs that generate a surplus or run a deficit and take into account implications for larger enrollment numbers which will impact costs in instruction and academic support. A healthy balance of part-time faculty and full-time faculty should be maintained. Even though colleges can leverage how much they spend by hiring more part-time or adjunct instructors, a study by the American Institutes for Research noted that colleges with more part-time faculty often have lower graduation rates. Full-time faculty who are provided more access to professional development are able improve student engagement and performance. This translates to higher graduation rates, more alumni giving, and better employment outcomes because improved faculty involvement can build and maintain close relationships with students and alumni (Carlson, 2018).

Colleges that invest in campus amenities to attract students are also contending with additional maintenance, operations, and utilities costs for these facilities as well as added sanitation needs due to the pandemic. Institutions need to consider where funds will come from to operate and maintain any new construction on campus or face a backlog of deferred maintenance especially if older buildings require major renovations. In place of new construction, colleges can find creative ways to design more flexible office layouts and space sharing across locations on campus that will increase active learning and increase engagement between faculty, staff and interaction with the student population (Carlson, 2018). Some of these physical space limitations and needs are at the forefront of campus activity due to the COVID-19 pandemic.

College should compare expenses to peer institutions to get insight into areas where overspending is happening or where investment may be necessary. It is not a time to wait for things to get better. Schools should be looking for sources of revenue streams, consider additional public-private partnerships, and invest in areas that are representative of the culture of the institution (*KEY TAKEAWAYS: New Budget Models To Meet a Crisis*, 2020).

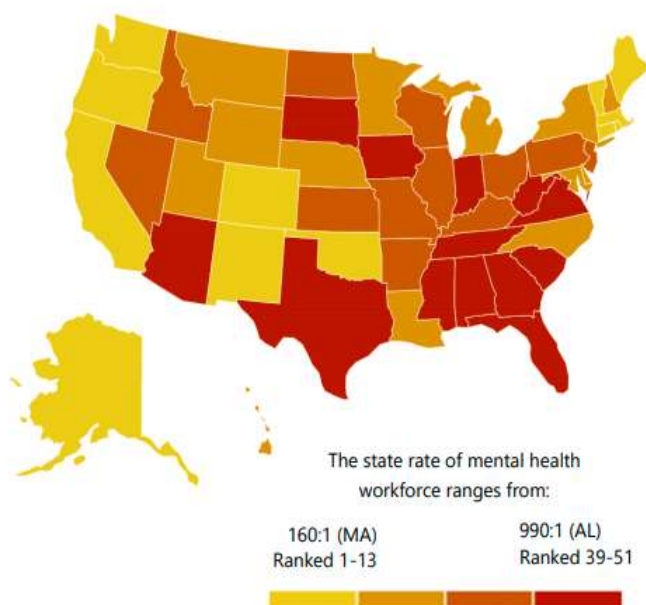
COST OF MENTAL HEALTH IN GEORGIA

There is a shortage of mental health providers, according to Mental Health America of Georgia. Currently Georgia ranks 47 of 51 states with a ratio of 750pp to 1 mental health care provider. The state that ranked number one was Massachusetts with a ratio of 160pp to 1 mental health care provider (*Mental Health in America - Printed Reports*, n.d.).

FIGURE 7 – MENTAL HEALTH WORKFORCE AVAILABILITY

Chart source (2021 *The State of Mental Health in America*, n.d.)

Mental Health Workforce Availability



Higher education should be poised to help support this shortage by providing academic programs that will fill these job needs. Mental health care providers include psychiatrists, psychologists, licensed clinical social workers, counselors, marriage and family therapists, and advanced practice nurses specializing in mental health care. With the increase of depression, anxiety, continued social unrest and mental health concerns due to the coronavirus pandemic it is necessary to help address these workforce shortages.

In addition to the opportunity to admit and educate this future workforce, Brenau needs to address the financial costs of providing mental health services to both its employees and students as these costs will increase in the area of employee benefits and support services for students throughout the pandemic.

ENVIRONMENT

IMPORTANCE OF ENVIRONMENTAL ISSUES AMONG STUDENTS

Survey results from the Environmental Concerns Survey 2019 published on September 2019 highlight the concerns and perspective of college students as it pertains to climate change. The research shows that students think universities need to do more to be environmentally sustainable. Of the 3,500 respondents from all over the world, over 90 percent agreed that universities need to do more to be environmentally sustainable and take more action to reduce their environmental impact. Over 75 percent of students stated they are interested in a program of study if the content educated them on reducing their environmental footprint. One area that was specifically mentioned was the desire to be more informed on using resources more efficiently (“Universities Have a Responsibility to Tackle Environmental Issues,” 2019).

Many schools, particularly K-12 schools across the U.S. have already been making efforts to promote environmental sustainability education. In Colorado, the Boulder Valley School District is tackling this by using a sustainability management system which tracks their anticipated energy spend and spend goals. They have linked that sustainability system to their master facility plan and their education strategic plan. Their efforts are focused on translating this work into designing a curriculum that prepares students to understand and tackle local and global issues related to environmental impacts (*Green, Healthy, Sustainable Schools | Jennifer Seydel | Tedx Talks*, 2016).

Some K-12 schools across the nation are taking old parking or old playground areas in their schools and converting them into outdoor classrooms, raingardens, tracks and other community spaces. Kansas schools in the Blue Valley district have comprehensive environmental health programs. These programs removed toxins and pollutants from their schools. The efforts have shown a decrease in cost and less asthma related absences which in turn have improved academic achievement. In Encinitas, California, the superintendent developed a DREAMS program. The students are placed in teams and work with local experts that were formerly hired by the schools for audits. Now the students work and learn from those experts and collect and analyze data and report back to the board suggestions on how their school and school systems need to be improved environmentally. In turn those recommendations are brought back to the classroom and the students work to create programs and solutions to the issues they were able to detect with their data and analysis (*Green, Healthy, Sustainable Schools | Jennifer Seydel | Tedx Talks*, 2016).

In Michigan, students from the Tech Academy in Albion, Michigan working in their Center for a Sustainable Future are learning about biology and chemistry and through a partnership with Michigan State University Extension Bureau they are learning to take canola oil and converting it into biodiesel and in addition learning how to make ethanol from agricultural waste. These efforts are resulting in providing fuel for their buses (*Green, Healthy, Sustainable Schools | Jennifer Seydel | Tedx Talks*, 2016).

In California, 98 percent of the students who attend an environmental charter school earn the educational requirements necessary to attend a four-year college and 63 percent of those students are first generation students (*Green, Healthy, Sustainable Schools | Jennifer Seydel | Tedx Talks*, 2016). As school budgets are cut it has become more evident that schools which focus on stewardship and sustainability are better prepared to face funding challenges. Their curriculum is very adaptable to the virtual learning needs we face today. Students in these sustainable courses can take what would have been an assignment meant to be a school cafeteria audit and adapt it to develop a waste reduction plan for their own households; preserving that learning opportunity regardless of the non-face-to-face experience (Baird, 2020).

The work being done to prepare students for a sustainable future does not end at their last year in K-12 educational experience. There should be a path to further educational programs, careers and efforts towards greener more

sustainable living, learning and working beyond that point. President-elect Joe Biden had a vision for a sustainable future which included a \$2 trillion investment in his first term towards climate progress. The plan includes, green spaces and homes, building retrofits, weatherization, next generation building materials, zero-emissions, and carbon pollution-free power. This ambitious plan hopes to reduce the carbon footprint of U.S. buildings 50 percent by 2035, upgrading 4 million buildings, and focusing on constructing 1.5 million sustainable homes and housing units (Beardsley, 2020). Educational programs in new majors or concentrations in sustainable industries provide opportunities.

Universities are seen as having access to a vast degree of intellectual resources in settings with people willing to collaborate and address environmental and sustainability opportunities. Interdisciplinary departments have a pool of talent and the intellect available to tackle climate change and are also able to educate future leaders who will be the ones to push action for ongoing sustainability (Segaren, 2019).

POLITICAL

NATIONAL SOCIAL UNREST, DIVERSITY, EQUITY & INCLUSION TRAINING

One of the major social impacts that has spurred action towards more diversity, equity and inclusion training is the Black Lives Matter movement and police incidents that have occurred over the last few years. This year the situation escalated when George Floyd was killed. All officers involved were charged in his death (Hill et al., 2020). Several more unarmed black individuals lost their lives at the hands of police officers in 2020 including Breonna Taylor.

Diversity discussions online peaked in June, but have since seen a decline in activity. Job seekers and employees engaged companies who posted about diversity topics at a higher rate than those who did not according to a LinkedIn Business Talent Blog. In fact, diversity content had 1.8 times more engagement than most posts made by any particular organization and employers who discussed diversity issues received 26 percent more applications from women (Lewis, 2020).

Regardless of the engagement created by those discussions and planned trainings, federal agencies were directed not to spend tax payer dollars on these types of training sessions. The Office of Management and Budget (OMB) prevented any federal agency related contracts which included training sessions with words like “white privilege” or “critical race theory” from moving forward (Dawsey & Stein, 2020). However, M.E. Hart, an attorney, who conducts diversity training sessions for the federal government, indicated that racial sensitivity training is effective at improving overall efficiency in the work place, as it helps improve cooperation (Dawsey & Stein, 2020).

The NCSL or National Conference of State Legislatures uses this definition to articulate what DEI (Diversity Equity and Inclusion) means to them:

“Diversity includes all the ways in which people differ, encompassing the different characteristics that make one individual or group different from another. While diversity is often used in reference to race, ethnicity, and gender; it also includes other differences such as age, national origin, religion, disability, sexual orientation, gender identity, socioeconomic status, geographic location, education, marital status, language and dialect, and physical appearance.

Equity involves striving to identify and eliminate barriers that have prevented the full participation of some groups. It is the fair treatment, access, opportunity, and opportunity for advancement for all people. Improving equity involves increasing justice and fairness

within the procedures and processes of institutions or systems, as well as in their distribution of resources. Tackling equity issues requires an understanding of the root causes of outcome disparities within our society.

Inclusion is the intentional act of creating environments in which any individual or group can on an ongoing basis be welcomed, respected, supported, and valued to fully participate with their voices being heard. ... It's important to note that while an inclusive group is by definition diverse, a diverse group isn't always inclusive... (*Raising Awareness About Diversity, Equity and Inclusion*, 2020)"

What does this mean for higher education? For many institutions, it means delaying or setting aside the diversity, equity and inclusion programs they had planned or risk penalties for non-compliance leading to a loss of federal funding. Many institutions, like the University of Iowa paused training initiatives. John A. Logan College suspended a Hispanic Heritage month talk they planned in October 2020. Others found it to be a time to fully recommit to their diversity, equity and inclusion work. Amid all this, there is still some confusion as to whom this order applies. Since the order mentions federal employees, agencies and contractors even higher education, government relations experts are not sure of its scope (Flaherty, 2020). This could potentially change under new administrative leadership.



INTERNATIONAL STUDENTS

Chinese students are facing several challenges while pursuing their education internationally and especially in the United States, where anti-Chinese sentiment is stirred by the COVID-19 pandemic. A San Francisco State policy institute determined there have been about 1,500 hate crimes and discrimination directed at Asians within a two-month span (*What Equity and Student Support Mean at Colleges That Have Been at It for Generations*, 2020).

Many Chinese students are also facing pressure from their country. Chinese students have to be concerned about their course and non-course taking activity as well as assignments they submit in case any of their work indicates they have a dissenting opinion of China. This has an impact on Chinese students within and outside of China. According to the Wall Street Journal (Craymer, 2020), universities like Princeton and

Harvard are taking care to indicate which courses may cover politically sensitive material with labels that read, "This course may cover material considered politically sensitive by China" (Al-Arshani, 2020).

Due to the pro-Democracy movement in Hong Kong, China has created a new national-security law which allows China to find and prosecute anyone it deems has been involved with acts of "sedition, subversion, terrorism, and colluding with foreign-forces", which could include course taking activity, assignments and any affiliation to campus political groups. How this could impact professors who teach political topics comes into question as it relates to their safety outside of the US, and how this might impact course content, but most importantly how it affects students and their studies.

International undergraduate student enrollment dropped about 15 percent and 8 percent for graduate international students according to the National Student Clearinghouse across all American higher education campuses in Fall 2020 (Sedmak, 2020). The doubts of how well the pandemic being managed in the next few months may also impact

international students' decision whether to consider Fall 2021 enrollment in the United States, especially if that American college experience will be confined to a dorm or completely online. The promise of the availability of a vaccine may change this.

FIGURE 8 – INTERNATIONAL STUDENTS OUTSIDE THE US: CONCERNS ABOUT COVID-19

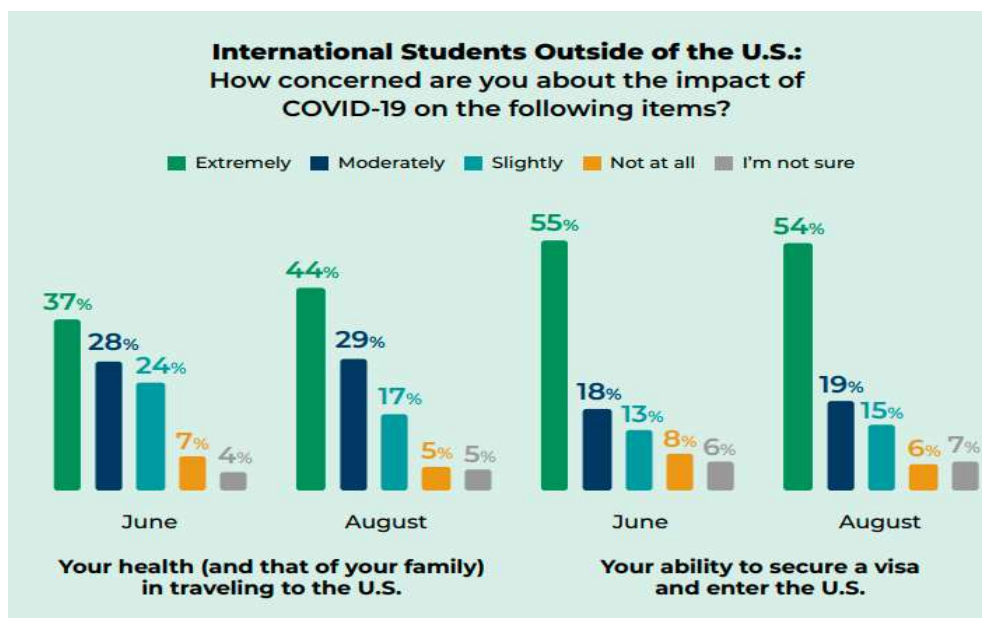


Chart source: (COVID-19 and Fall 2020, Impact on U.S. International Higher Education: A WES Survey of Prospective Students, 2020)

Responses to a World Education Services survey indicate that nearly 40 percent of prospective international students are looking to alternate countries other than the U.S. for their international studies, mainly Canada and Britain. Over 70 percent are concerned about the health risks of the virus if they travel to the United States and 40 percent indicated that the highly publicized incidents of racial violence, protests and demonstrations related to racial injustice and the divisive election have made them less interested in the United States (*COVID-19 and Fall 2020, Impact on U.S. International Higher Education: A WES Survey of Prospective Students, 2020*). Some students have expressed concern for their own safety in the U.S. after the killing of George Floyd, particularly students whose skin color is any shade of brown, while some feel the social unrest is instilling national solidarity and learned mutual respect and still intend to pursue their education in the United States (Fischer, 2020a).

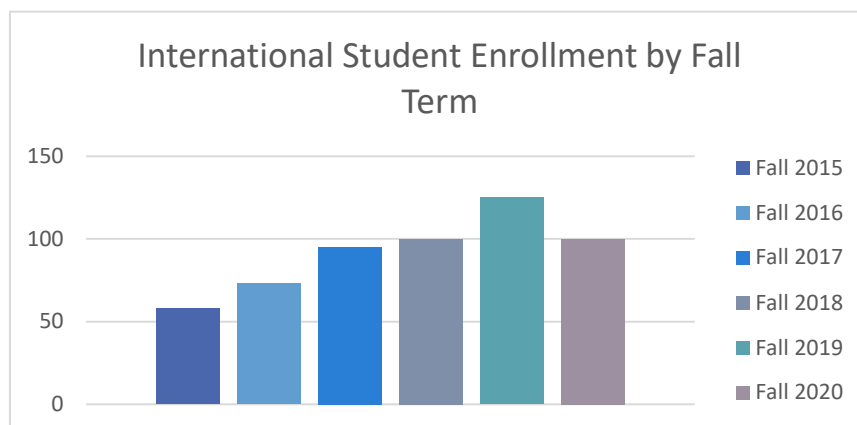
International student enrollment in the United States has steadily decreased over the last three years. It's possible the transition of presidential leadership may see a change in this trend since it appears there has been an uptick in searches for American colleges in international college-search websites. Some institutions are partnering with other colleges to hold virtual recruitment fairs and tapping alumni for support in attracting students to their campuses. (*The Pandemic May Have Changed International Recruiting Forever, 2020*).

At Brenau, international student enrollment is down 20 percent this Fall 2020 compared to Fall 2019. Prior enrollment had increased each Fall.

In addition to the presidential transition, a factor that may ease international student stress is that the U.S. Department of Homeland Security has stated it will maintain policy changes permitting international students to take remote and/or hybrid classes into Spring 2021 as was stipulated by emergency pandemic guidance. This guidance had stipulated that international students could enroll in all or some online classes. This stipulation however is only available to students of

nonimmigrant status who were already actively enrolled at a school in the U.S. on March 9, 2020 even if their enrollment was within the U.S. or while abroad (Fischer, 2020c).

FIGURE 9 – INTERNATIONAL STUDENT ENROLLMENT TRENDS



FOREIGN TIES AND HIGHER EDUCATION

Mounting scrutiny over Chinese investments in U.S. campuses led to an eight-month investigation into Chinese Confucius learning centers located in U.S. campuses and resulted in proposed legislation that would give greater authority to U.S. federal agencies to monitor and take action to pursue punishment of those groups allegedly targeting and stealing research from U.S. campuses used to improve China’s military and technological competitiveness (O’Keeffe, 2020). At the hearing for this investigation, Chairman Portman had stated that U.S. Officials had expressed concerns that these learning centers were not just cultural institutes but were beholden to the Chinese government. Other groups including the American Council of Education all recommended changing how they manage these institutions or discontinue them all together (*Chinese Investment in U.S. Education System | C-SPAN.Org*, 2019).

Since investigations started, ten U.S. schools stated that they would be discontinuing their Confucius institutes. In reviewing internal documents and interviewing U.S. school officials, it was found that contractual agreements stipulated that Chinese instructors at U.S. schools would follow Chinese laws and safeguard China’s national interests. Needless to say, this compromises academic freedom on U.S. campuses and also means U.S. schools agree to comply with Chinese laws. Further, the investigation found that about 70 percent of schools receiving funding or foreign gifts from China for Confucius Institutes did not report those funds as required by law. China has roughly 100 Confucius cultural centers on U.S. campuses, but American Cultural Centers in China number less than 22 and have all met with great difficulty; effectively stifled by China’s lack of reciprocity (*Chinese Investment in U.S. Education System | C-SPAN.Org*, 2019).

LOCAL – CHANGES TO DUAL ENROLLMENT

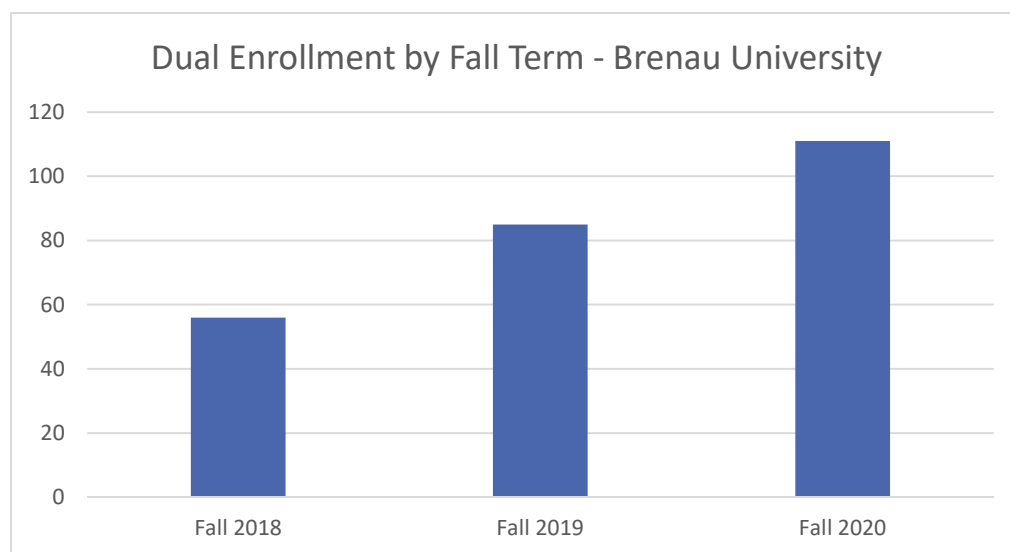
Dual enrollment allows students in high school to enroll in college courses. The courses can be taken without paying for tuition, fees, or books. In 2020, the state budget allocated \$101 million for dual enrollment. This is an increase of \$49 million since 2016. In Fall 2018, 5,000 students enrolled in Dual Enrollment courses in private colleges. Technical and University System of Georgia schools saw enrollments of 37,000 students combined (Lee, 2019).

The Georgia Student Finance Commission Board of Commissioners made and approved several policy changes which impact Dual Enrollment on May 1st with the passage of House Bill 444. The bill focused on curbing the cost of the Dual Enrollment program. The house bill was signed on April 28th. (“State Agency Approves New Dual Enrollment Caps, Grade-Level Restrictions and SAT/ACT Deadlines for HOPE,” 2020). The changes to the dual enrollment program created a 30-semester-hour funding cap for state funding. An exemption exists for students seeking to pursue the “Options B/SB 2.” Path. The funding limit stipulates that students with fewer than 19 credit hours are subject to the 30-hour cap and students with more than 19 credit hours will be able to take 12 more credit hours. When a student meets the 30-hour cap they may continue, if they choose, to take courses in an approved high-demand area. The funding will not include course re-takes and after two course withdrawals a student can no longer participate in Dual Enrollment. Courses eligible for Dual Enrollment are restricted to core academic, career and technical and agricultural education. Students must meet HOPE residency requirements and credit hours earned through Dual Enrollment are included in the 63-hour HOPE Grant lifetime award cap (“State Agency Approves New Dual Enrollment Caps, Grade-Level Restrictions and SAT/ACT Deadlines for HOPE,” 2020).

The current Hope GPA calculation is based on grades earned in core subject areas only. These include English, mathematics, science, social studies and foreign language. Grades earned during 9th through 12th grade can be used to satisfy core curriculum graduation requirements. Letter grades are converted to a 4.0 scale and any weighting added by the high school is removed. A half point is added back for Advanced Placement (AP), Advanced Baccalaureate (IB), and Dual Enrollment (DE) degree level core courses. A half point is only added to grades of B, C, D, and F with a maximum of four points per grade. Honors course work is not weighted and the High School HOPE Scholarship calculation will count all attempts of the same course, if taken more than once (*HOPE GPA Calculation | Georgia Student Finance Commission, n.d.*).

Brenau Participates in Hall County School’s Howard E. Ivester Early College program along with the University of North Georgia and Lanier Technical College. In Fall 2020, 111 student enrolled in dual enrollment classes at Brenau. The limits on this program funding may lead to decreases in total enrollments. At Brenau, dual enrollment reached its highest level during Fall 2020.

FIGURE 10 – DUAL ENROLLENT TREND



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