

# Leadership Responses to COVID-19

A Global Survey of College and University Leadership

An Executive Summary

by

International Association of University Presidents  
and

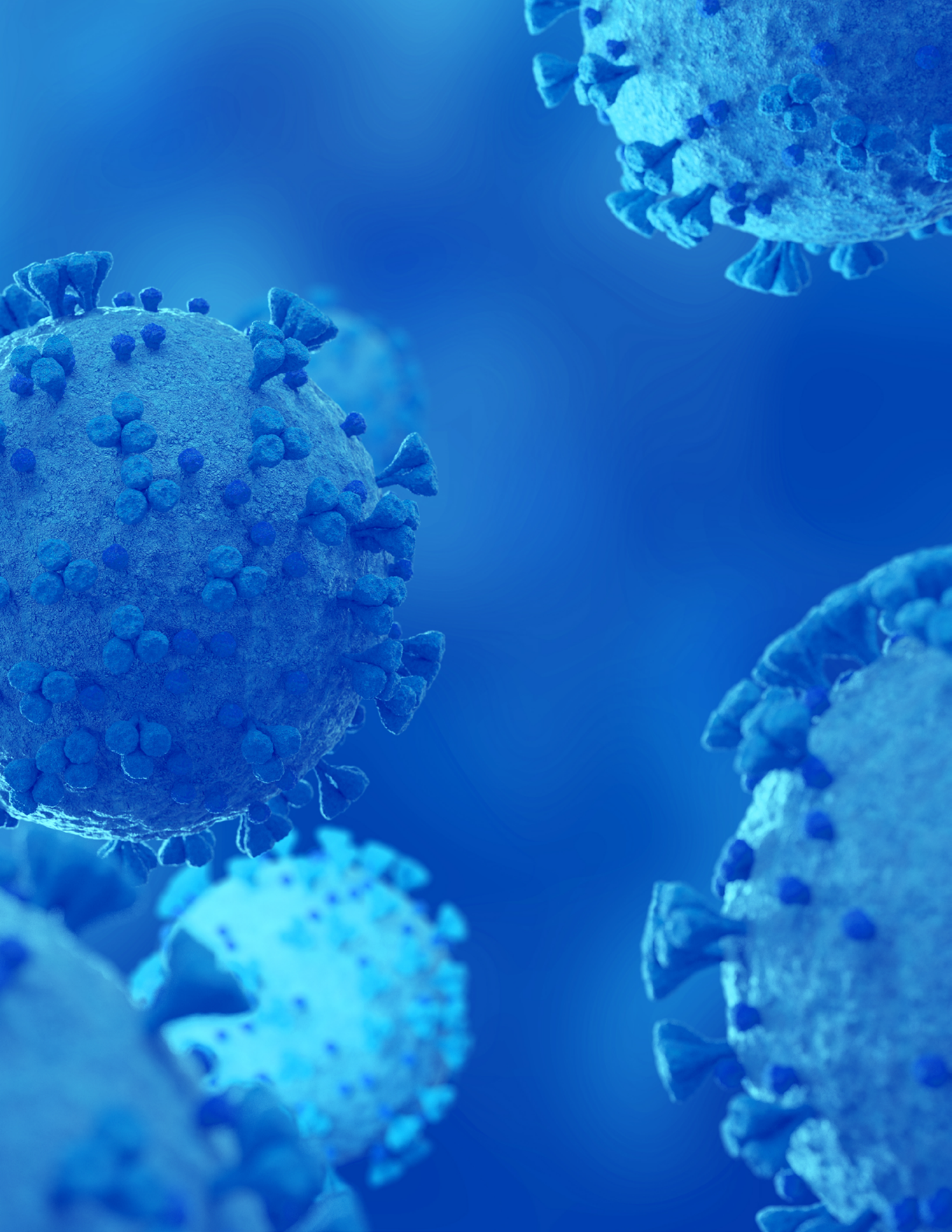
Santander Universidades



November 2020

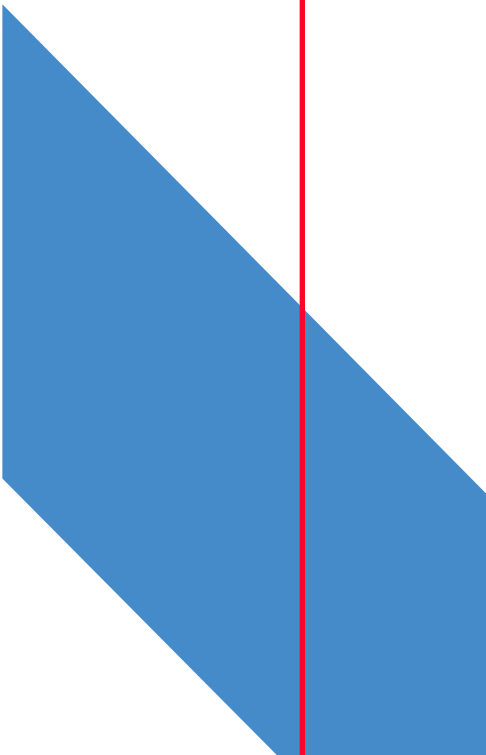
Leadership Responses to COVID-19: A Global Survey of College and University Leadership by  
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# Table of Contents

Introduction.....	05
Information on Respondents.....	07
Summary of Findings.....	09
Initial Institutional Reaction.....	10
Preparing for 2020-2021.....	12
Looking Forward.....	23





# Introduction

The International Association of University Presidents (IAUP) and Santander Universidades designed, developed, and implemented a Global Survey of College and University Leadership (IAUP Survey) to learn about Leadership Responses to COVID-19. In order to broaden the scope and geographical reach of the survey, IAUP and Santander Universidades received collaboration from the Hispanic Association of Colleges and Universities (HACU), the Consortium for North American Higher Education (CONAHEC), the Mexican Federation of Private Universities (FIMPES), the National Association of Universities and Institutions of Higher Education of Mexico (ANUIES), and the Association of Indian Universities (AIU).

We have benefited from and acknowledge previous surveys undertaken by higher education related organizations throughout 2020 in different regions. These include:

- “Responding to the COVID-19 Crisis: A Survey of College and University Presidents”, Inside Higher Education and Hanover Research, March 2020.
- The IAU Global Survey Report, International Association of Universities, May 2020.
- “Decision-Making for an Unprecedented Fall Semester”, The Chronicle of Higher Education, June 9, 2020.
- THE Leaders Survey: “Will Covid-19 leave universities in intensive care?”, Times Higher Education, June 25, 2020.
- College and University Presidents Respond to COVID-19: July 2020 Survey, American Council on Education.

In relation to COVID-19, the IAUP Survey focused on Initial Institutional Reaction, Preparing for 2020-2021, and Looking Forward. Initial Institutional Reactions refers essentially to the first half of 2020. Preparing for 2020-2021 comprises the period immediately before the start of and for some the Fall academic period in progress. Looking Forward concerns what leaders envision three or more years from now.

While the document reports more fully on the responses of higher education leaders from around the world, the following are some highlights concerning readiness to face the pandemic, most important actions that institutions had to set in motion, areas where decreases and

increases were anticipated, the impact on internationalization, and the focus and whether institutions have been responding to the pandemic as something temporary that will pass or some phenomenon that will require more dramatic and substantive changes and adaptations.

- Just 37% of respondents considered their institution ready for COVID-19.
- Most important for institutions have been faculty training, technology needs, maintaining academic standards, emergency financial assistance for students, and mental health support.
- Leaders indicated that they expected decreases in institutional revenues, student enrollment, projects with business and industry, investment in infrastructure, and fund raising. On the other hand, they anticipated increases in financial support for students, investment in infrastructure, continuing education, programs supporting student employability, and programs supporting entrepreneurship.
- In terms of internationalization, respondents commented that their focus during this year would be partnerships, e-mobility or virtual mobility, internationalization at home. There appears to be an emerging broader perspective on internationalization.
- A higher number of institutions indicated that they were focusing on addressing temporary needs rather than restructuring or reinventing. A focus on short term and superficial appears to be above long term and substance.

A more extensive report will be forthcoming over the next couple of weeks. It will include more comparisons by regions, as well as data for a select group of countries. Our hope is that the results will further inform and better prepare leaders to not only face the challenges of the continuation of COVID-19 but also to begin to address major transformational needs in higher education.

**Dr. Fernando León García**

President Elect, International Association  
of University Presidents  
President, CETYS University

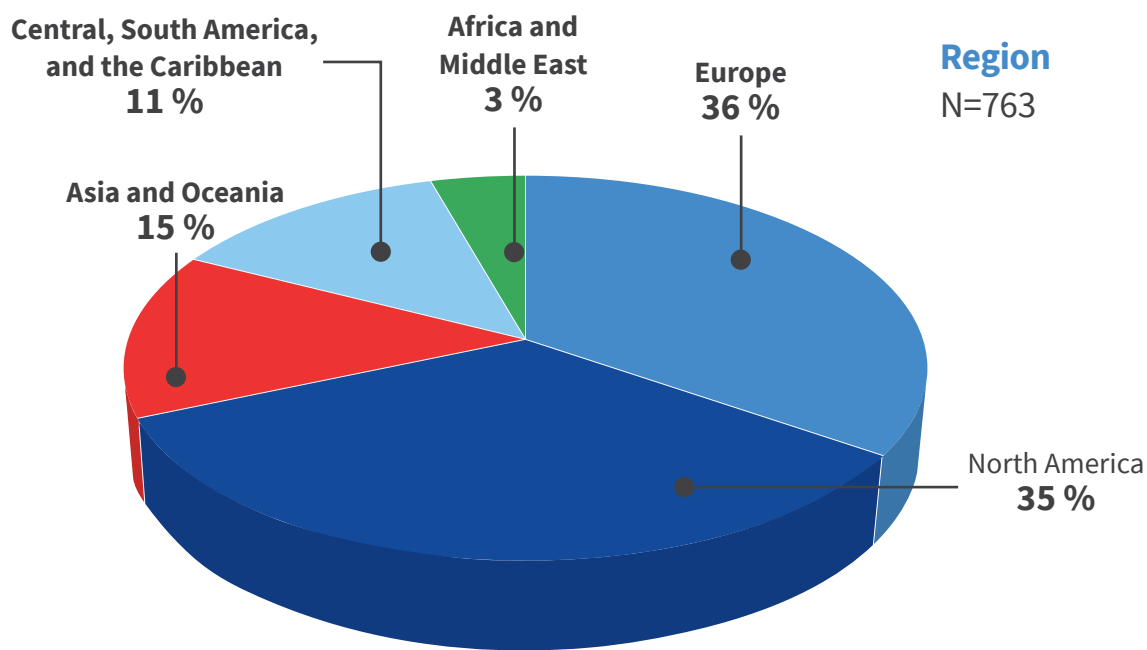
**Dr. Arturo Cherbowski Lask**

Executive Director, Santander  
Universidades México  
General Director, Universia Mexico

# Information on Respondents

The IAUP Survey was sent to senior leaders of colleges and universities from around the world via SurveyMonkey between mid-July and mid-September of 2020. While there were 801 respondents from 92 countries, a total of 763 responses from 89 countries are considered for the purposes of data analysis.

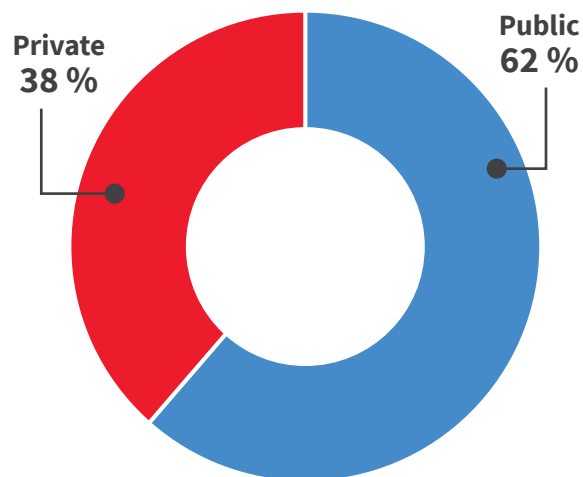
Europe (36%) and North America (35%) were the regions with the most responses, followed by Asia/Oceania, Central, South America and the Caribbean, and Africa and the Middle East.



## University Classification

N=741

Public universities were more broadly represented (62%) than private universities (38%).



In terms of number of countries, Europe was the region that was most well represented. The countries with the most responses were the USA, Mexico, the UK, Italy, India, France, Argentina, Germany, Spain, Brazil, Georgia, Chile, Japan, Thailand, Canada, South Korea, Finland, the Netherlands, China, Bangladesh, and Colombia.

Europe (271)			
<b>United Kingdom (UK) (82)</b>	Russia (5)	Austria (2)	Cyprus (1)
<b>Italy (36)</b>	Romania (4)	Belgium (2)	Denmark (1)
<b>France (25)</b>	Sweden (4)	Croatia (2)	Estonia (1)
<b>Germany (17)</b>	Ukraine (4)	Norway (2)	Greece (1)
<b>Spain (17)</b>	Bulgaria (3)	Slovakia (2)	Hungary (1)
<b>Georgia (13)</b>	Czechia (3)	Switzerland (2)	Ireland (1)
Finland (9)	Poland (3)	Albania (1)	Latvia (1)
Netherlands (9)	Portugal (3)	Armenia (1)	North Macedonia (1)
Azerbaijan (7)	Turkey (3)	Belarus (1)	Slovenia (1)

North America (267)		
<b>United States (138)</b>	<b>Mexico (118)</b>	<b>Canada (11)</b>

Asia and Oceania (105)			
<b>India (34)</b>	China (8)	New Zealand (2)	Indonesia (1)
<b>Japan (12)</b>	Australia (3)	Philippines (2)	Kazakhstan (1)
<b>Thailand (11)</b>	Malaysia (3)	Vietnam (2)	Singapore (1)
<b>South Korea (10)</b>	Taiwan (3)	Brunei (1)	Solomon Islands (1)
Bangladesh (8)	Laos (2)		

Central, South America, and the Caribbean (87)			
<b>Argentina (25)</b>	Puerto Rico (5)	Uruguay (3)	Guatemala (1)
<b>Brazil (15)</b>	Bolivia (4)	El Salvador (2)	Panama (1)
<b>Chile (12)</b>	Ecuador (4)	Peru (2)	Paraguay (1)
Colombia (8)	Costa Rica (3)	Dominican Republic (1)	

Africa and Middle East (33)			
Egypt (4)	United Arab Emirates (2)	Liberia (1)	Nigeria (1)
Lebanon (4)	Botswana (1)	Mauritius (1)	Oman (1)
South Africa (4)	Côte d'Ivoire (1)	Morocco (1)	Qatar (1)
Ghana (3)	Iraq (1)	Mozambique (1)	Saudi Arabia (1)
Tunisia (2)	Jordan (1)	Namibia (1)	Uganda (1)



# Summary of Findings

# Initial Institutional Reaction

## Readiness to Shift to Remote Education

Overall, slightly more than one third pointed out that they were ready (37%), while more than half on respondents indicated that they were somewhat ready (54%). Only a small amount (8%) felt they were not ready.

Global N=661



By region, a higher percent of universities from Asia/Oceania expressed being ready (49%), compared to Central and South America (41%), Europe (40%), Africa/Middle East (36%), and North America (29%).

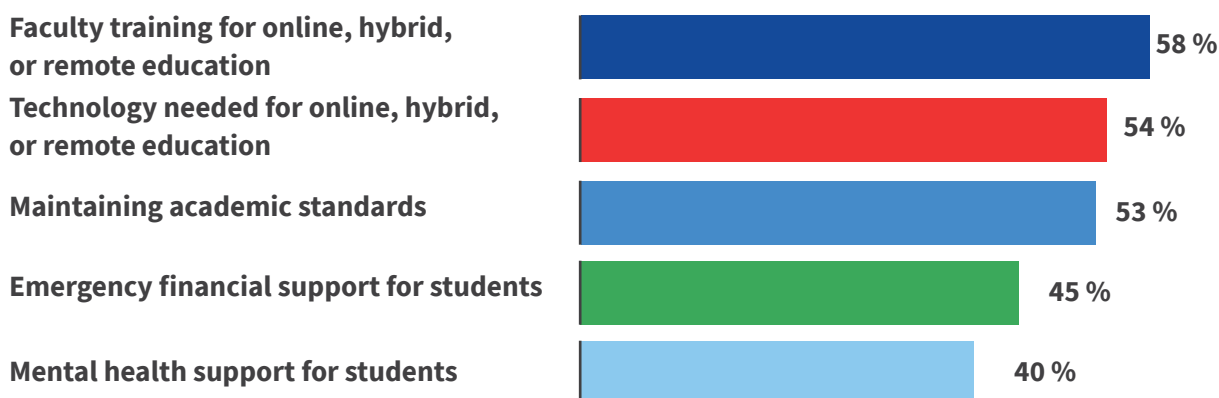
A larger percent of private universities expressed being ready to move to remote education (43%) compared to public universities (34%).

Ready Somewhat Ready Not Ready	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
	29 %	41 %	40 %	36 %	49 %	43 %	34 %
	60 %	51 %	56 %	50 %	41 %	50 %	57 %
	11 %	8 %	4 %	14 %	10 %	7 %	9 %

# Challenges as a Result of COVID-19

The Top 5 challenges expressed by respondents include faculty training, the technology required, maintaining academic standards, emergency financial support for students, and mental support for students.

Global N=518



Faculty training was listed as the top challenge across the Americas, while in Europe and Africa/Middle East it was maintaining academic standards, and in Asia/Oceania the top response was technology required. Among private and public institutions, the Top 3 challenges were the same as the overall result.

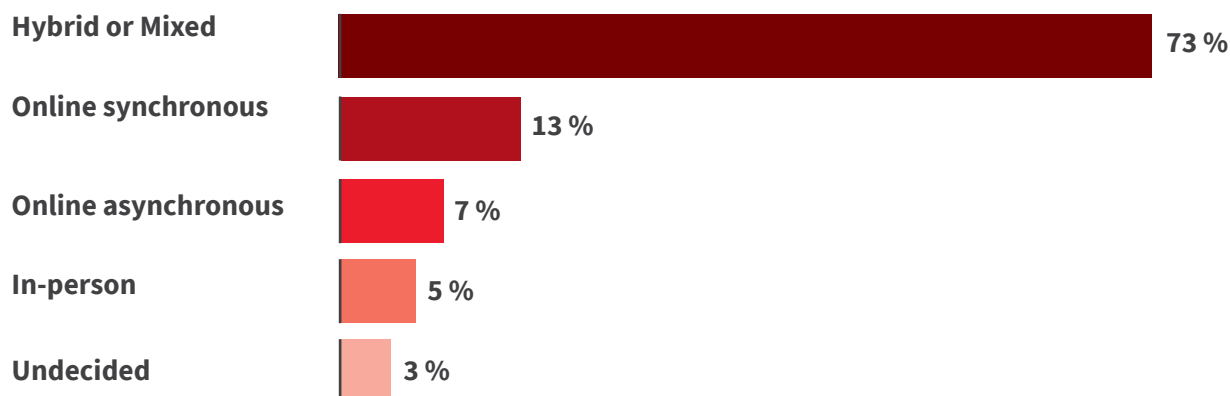
Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
1	Faculty training (64 %)	Faculty training (70 %)	Maintaining academic standards (57 %)	Maintaining academic standards (64 %)	Technology required (53 %)	Faculty training (55 %)	Faculty training (61 %)
2	Emergency financial support/students (61 %)	Maintaining academic standards (64 %)	International student enrollment (56 %)	Faculty training (50 %)	Faculty training (47 %)	Technology required (50 %)	Technology required (56 %)
3	Technology required (54 %)	Technology required (57 %)	Technology required (53 %)	Technology required (50 %)	Maintaining academic standards (41 %)	Maintaining academic standards (49 %)	Maintaining academic standards (56 %)

# Preparing for 2020-2021

## Mode of Delivery

The vast majority of respondents indicated that they were preparing for a hybrid or mixed model (73%) with only a small fraction considering the possibility of online synchronous sessions and an even smaller percentage for online asynchronous models. Roughly 5% mentioned the possibility of in person or face to face sessions and less than 3% declared they were still uncertain or undecided.

**Global** N=508



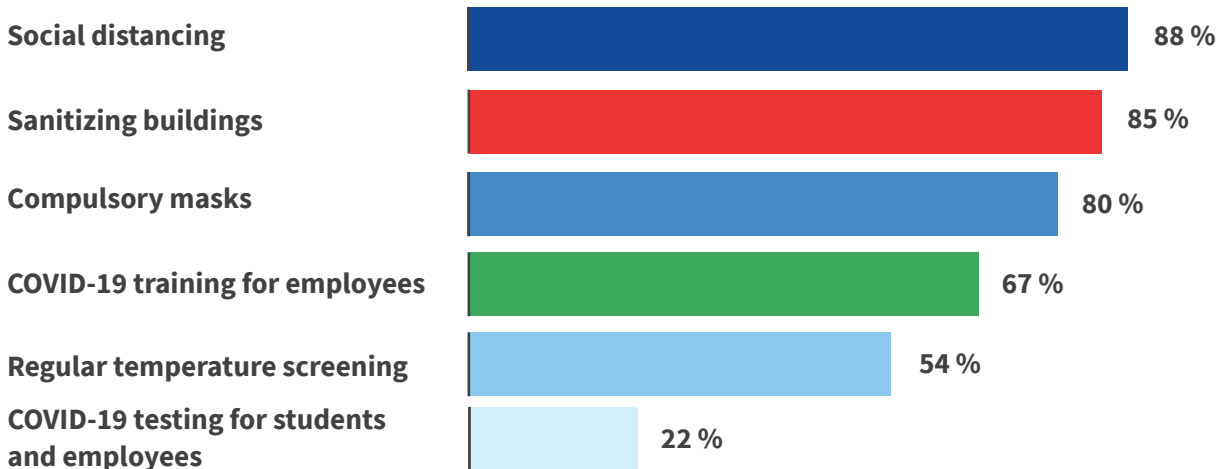
By region, Europe and Africa/Middle East were the regions where hybrid or mixed were the highest (86%). By denomination, both private and public institutions were thinking about implementing a hybrid or mixed model of delivery (74% and 71% respectively).

	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
Hybrid or Mixed	62 %	75 %	86 %	86 %	69 %	74 %	71 %
Online	32 %	18 %	7 %	9 %	19 %	18 %	22 %
In-Person	6 %	2 %	5 %	5 %	4 %	6 %	4 %

# Resuming Campus Operations

Overall, respondents indicated social distancing, sanitizing buildings, and the use of compulsory masks as the most important actions as universities prepared to resume campus operations.

Global N=493



Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
1	Compulsory masks (95 %)	Compulsory masks (97 %)	Social distancing (89 %)	Social distancing (91 %)	Social distancing (68 %)	Compulsory masks (87 %)	Social distancing (89 %)
2	Social distancing (93 %)	Social distancing (93 %)	Sanitizing buildings (83 %)	Sanitizing buildings (91 %)	Sanitizing buildings (68 %)	Social distancing (86 %)	Sanitizing buildings (85 %)
3	Sanitizing buildings (93 %)	Sanitizing buildings (83 %)	Compulsory masks (91 %)	Compulsory masks (59 %)	Compulsory masks (66 %)	Sanitizing buildings (85 %)	Compulsory masks (76 %)

By region, compulsory masks are more important in North America and Central/South America compared to Europe, Africa/Middle East and Asia/Oceania where social distancing is at the top of the list.

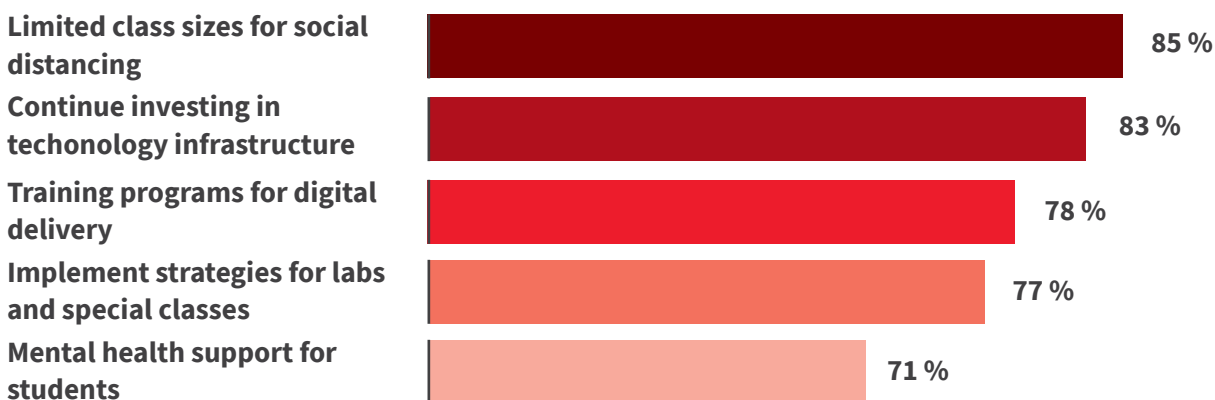
By denomination, compulsory masks were the top choice at private institutions while at public institutions social distancing was at the top.



# Preventive Measures

The Top 5 measures were limited class sizes for social distancing, investing in technology infrastructure, training programs for digital delivery, strategies for labs and special classes, and mental health support for students.

**Global** N=492



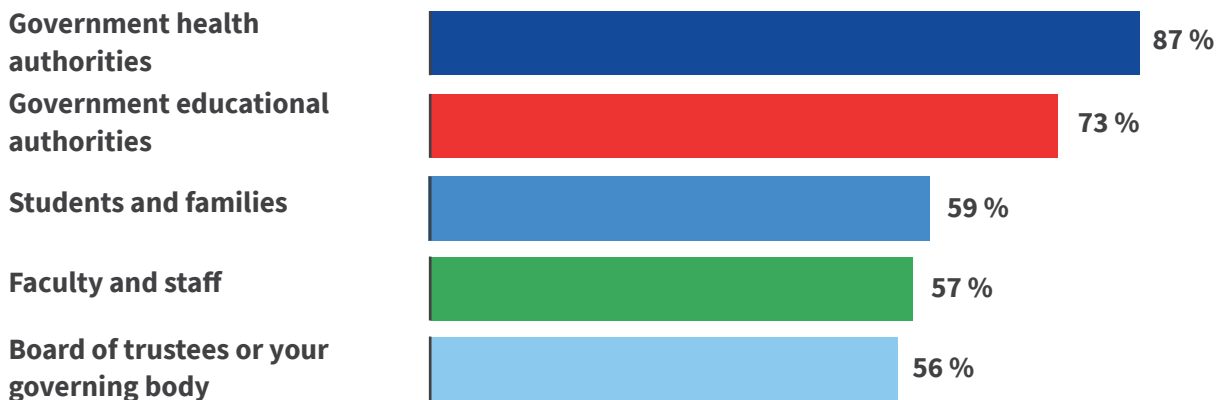
By region, limited class sizes or investing in technology were either number one or two across all regions. By denomination, the same held true as limited class sizes and investing technology were one and two, with number three for privates adjusting the budget and for publics training programs for digital delivery.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
1	Limited class sizes for social distancing (85 %)	Investing in technology infrastructure (83 %)	Limited class sizes for social distancing (96 %)	Limited class sizes for social distancing (91 %)	Investing in technology infrastructure (69 %)	Limited class sizes for social distancing (84 %)	Limited class sizes for social distancing (85 %)
2	Investing in technology infrastructure (85 %)	Limited class sizes for social distancing (80 %)	Investing in technology infrastructure (88 %)	Investing in technology infrastructure (77 %)	Limited class sizes for social distancing (68 %)	Continue investing in technology infrastructure (80 %)	Continue investing in technology infrastructure (85 %)
3	Training programs for digital delivery (84 %)	Implement strategies for labs and special classes (80 %)	Training programs for digital delivery (79 %)	Implement strategies for labs and special classes (82 %)	Adjusting the budget (68 %)	Adjusting the budget (72 %)	Training programs for digital delivery (84 %)

# Influence on Decision Making

Government health authorities (87%) are the top entity that universities consider as the point of reference to decide or not to go back to full campus operation.

Global N=487

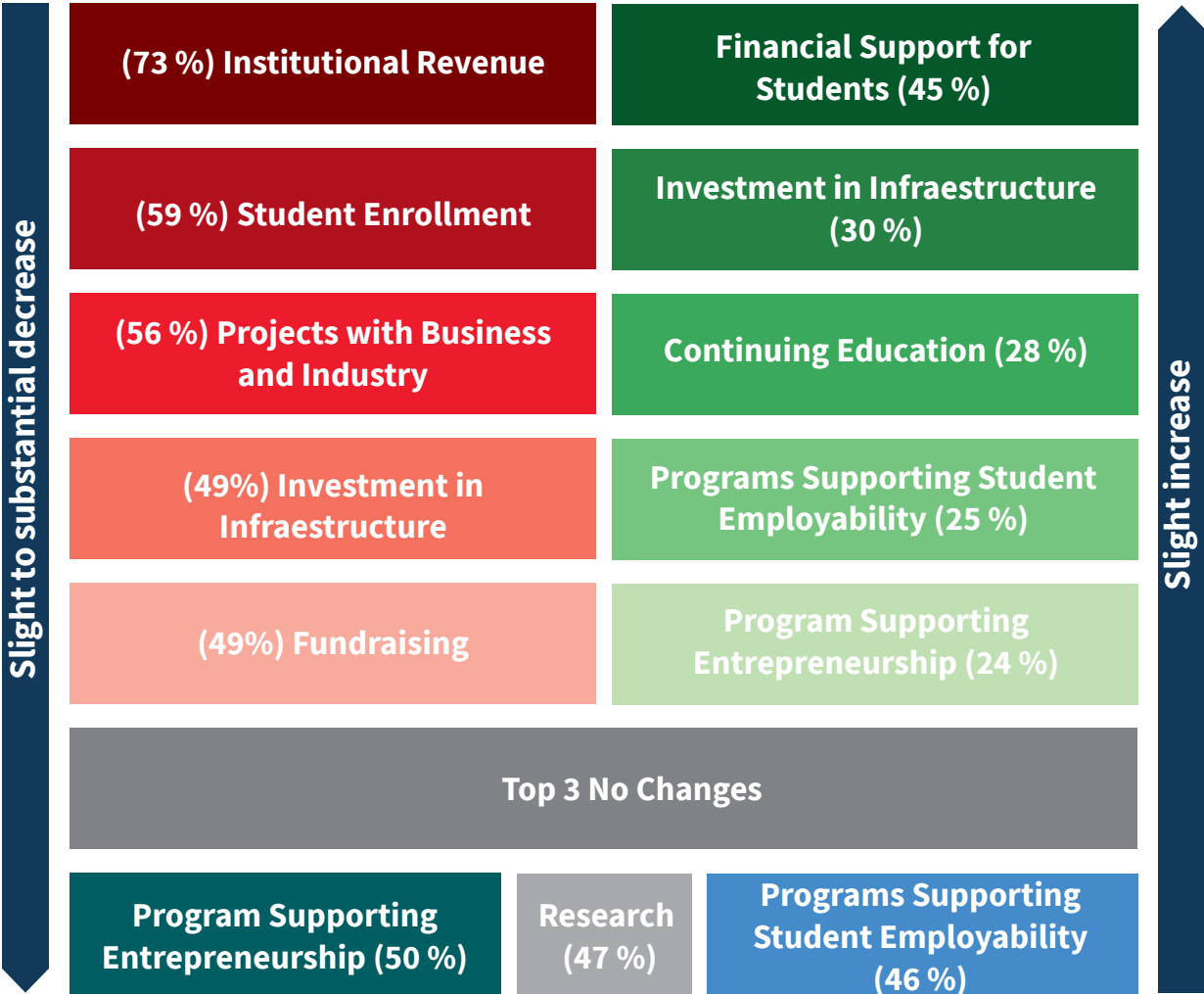


It is also the same by region, except for Asia/Oceania, where government educational authorities are the top point of reference. The third most frequent point of reference varies widely across regions, as for North America it is board of trustees or governing body, for Europe and Africa and the Middle East it is faculty and staff, and students and families for Central and South America and Asia and Oceania. Among privates and publics, the list is the same as for overall.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
1	Government health authorities (91 %)	Government health authorities (90 %)	Government health authorities (92 %)	Government health authorities (81 %)	Government educational authorities (75 %)	Government health authorities (85 %)	Government health authorities (89 %)
2	Government educational authorities (68 %)	Government educational authorities (73 %)	Government educational authorities (78 %)	Government educational authorities (76 %)	Government health authorities (67 %)	Government educational authorities (71 %)	Government educational authorities (75 %)
3	Board of trustees or your governing body (66 %)	Students and families (51 %)	Faculty and staff (61 %)	Faculty and staff (57 %)	Students and families (59 %)	Students and families (58 %)	Faculty and staff (60 %)

# Anticipated Areas of Decrease, Increase or No Change

Overall, the Top 5 areas where slight to substantial decreases were anticipated were institutional revenue (73%), student enrollment (59%), projects with business and industry (56%), investment in infrastructure (49%), and fundraising (49%). The Top 5 areas where slight increases were expected were financial support for students (45%), investment in infrastructure (30%), continuing education (28%), programs supporting employability (25%), and programs supporting entrepreneurship (24%). The Top 3 where no changes were expected were programs supporting entrepreneurship (50%), research (47%), and programs supporting student employability (46%).



Across regions, the top area of anticipated decreases was institutional revenue. This was followed by student enrollment in 4 of the 5 regions, the exception being Asia/Oceania where respondents indicated projects with business and industry. The responses for private and public universities were the same for the Top 3.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
Decrease 1	Institutional revenue (83 %)	Institutional revenue (81 %)	Institutional revenue (58 %)	Institutional revenue (65 %)	Institutional revenue (68 %)	Institutional revenue (77 %)	Institutional revenue (70 %)
Decrease 2	Student enrollment (66 %)	Student enrollment (68 %)	Student enrollment (53 %)	Student enrollment (50 %)	Projects with business and industry (56 %)	Student enrollment (64 %)	Student enrollment (55 %)
Decrease 3	Projects with business and industry (59 %)	Projects with business and industry (61 %)	Projects with business and industry (52 %)	Continuing education (40 %)	Student enrollment (46 %)	Projects with business and industry (57 %)	Projects with business and industry (55 %)

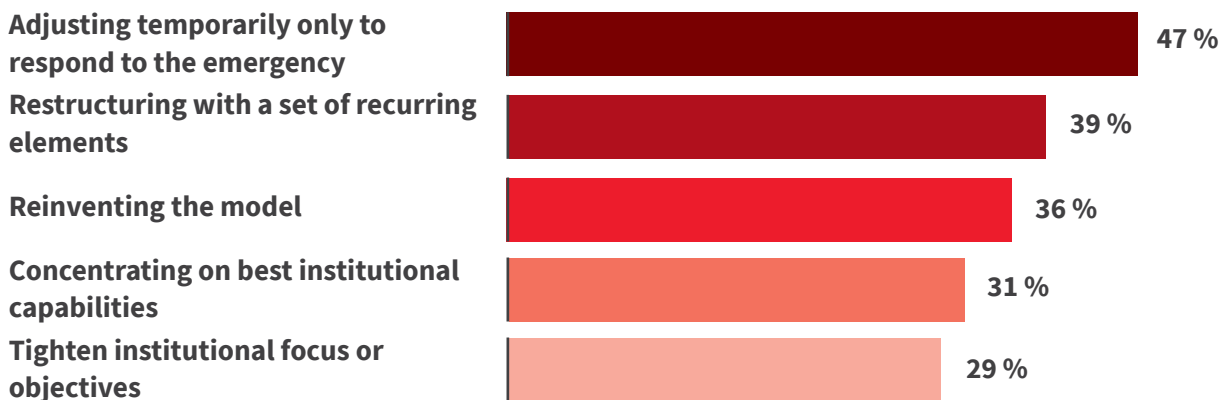
In the case of increases, the top area of anticipated increases was financial support for student in 3 of the 5 regions, with Africa/Middle East pointing out programs supporting student employability and Asia/Oceania indicating investment in infrastructure. For public and private universities, the responses for the Top 3 was the same.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
Increase 1	Financial support for students (55 %)	Financial support for students (47 %)	Financial support for students (38 %)	Programs supporting student employability (50 %)	Investment in infrastructure (35 %)	Financial support for students (51 %)	Financial support for students (41 %)
Increase 2	Continuing education (29 %)	Continuing education (35 %)	Programs supporting student employability (32 %)	Investment in infrastructure (45 %)	Financial support for students (30 %)	Investment in infrastructure (33 %)	Investment in infrastructure (28 %)
Increase 3	Investment in infrastructure (28 %)	Investment in infrastructure (28 %)	Investment in infrastructure (29 %)	Continuing education (35 %)	Programs supporting entrepreneurship (28 %)	Continuing education (33 %)	Continuing education (24 %)

# Impact on Financial Model

Not surprisingly, most institutions opined that they were adjusting temporarily as a result of COVID-19, followed by restructuring with a set of recurrent elements, and slightly less reinventing.

**Global** N=470



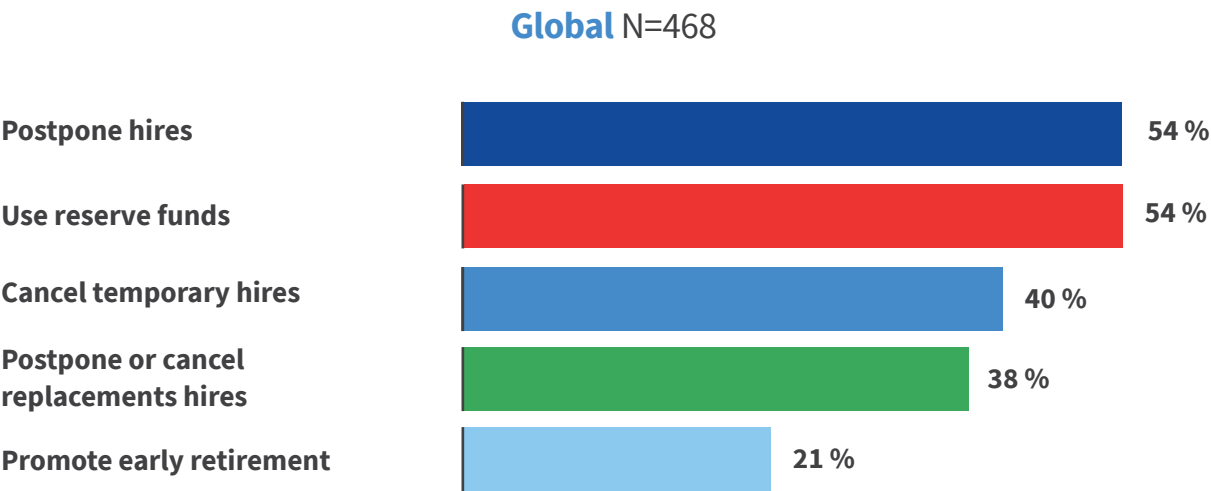
The top response was also consistent across regions. Restructuring was the second most frequent response in 3 of the 5 regions (North America, Europe and Asia/Oceania). By denomination, a higher number of privates were adjusting temporarily than were publics (51% vs 44%), while restructuring was higher among publics (42%) than privates (34%), and reinventing was higher for privates (40%) than for publics (33%).

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
1	Adjusting temporarily (44 %)	Adjusting temporarily (57 %)	Adjusting temporarily (43 %)	Adjusting temporarily (55 %)	Adjusting temporarily (52 %)	Adjusting temporarily (51 %)	Adjusting temporarily (44 %)
2	Restructuring with a set of recurring elements (42%)	Reinventing the model (52 %)	Restructuring with a set of recurring elements (36 %)	Reinventing the model (40 %)	Restructuring with a set of recurring elements (38 %)	Reinventing the model (40 %)	Restructuring with a set of recurring elements (42 %)
3	Reinventing the model (35 %)	Restructuring with a set of recurring elements (39 %)	Reinventing the model (30 %)	Restructuring with a set of recurring elements (25 %)	Reinventing the model (37 %)	Restructuring with a set of recurring elements (34 %)	Reinventing the model (33 %)



# Financial Measures

Overall, more than half of respondents pointed out that they were planning to postpone hires (54%) and use reserve funds (54%), followed by intentions to cancel temporary hires (40%), postpone or cancel replacement hires (38%), and promote early retirements (21%).



By region, postponing hires was the top response for North America and Central/South America and Caribbean, while it was the use of reserve funds for Europe, Asia/Oceania, and Africa/Middle East.

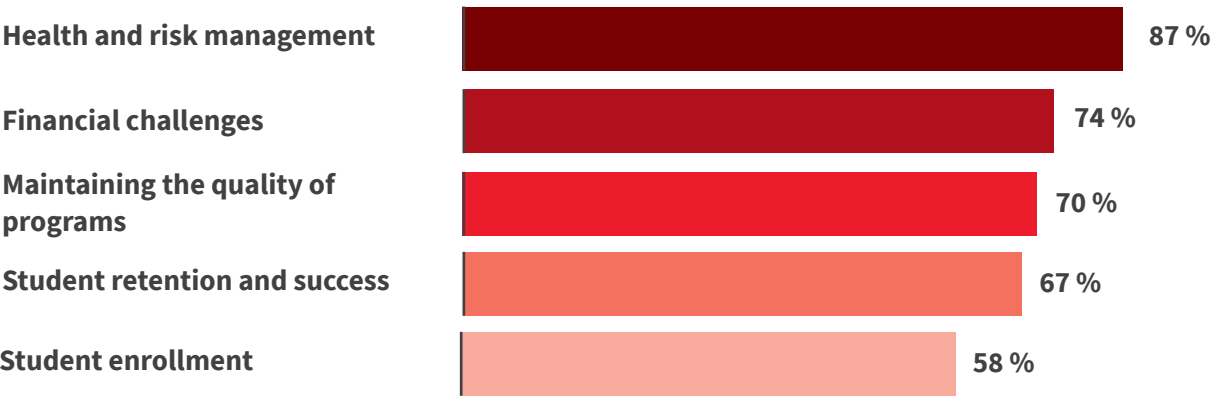
Among privates, at the top of the list was to reduce benefits (54%), while among publics it was use of reserve funds (56%).

	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
Postpone hires	70 %	63 %	43 %	40 %	32 %	54 %	54 %
Use reserve funds	53 %	46 %	56 %	50 %	56 %	50 %	56 %

# Priorities

Survey results show that health and risk management, financial challenges, maintaining the quality of programs, student retention and success, and student enrollment are the Top 5 priorities for university leaders around the globe.

Global N=461



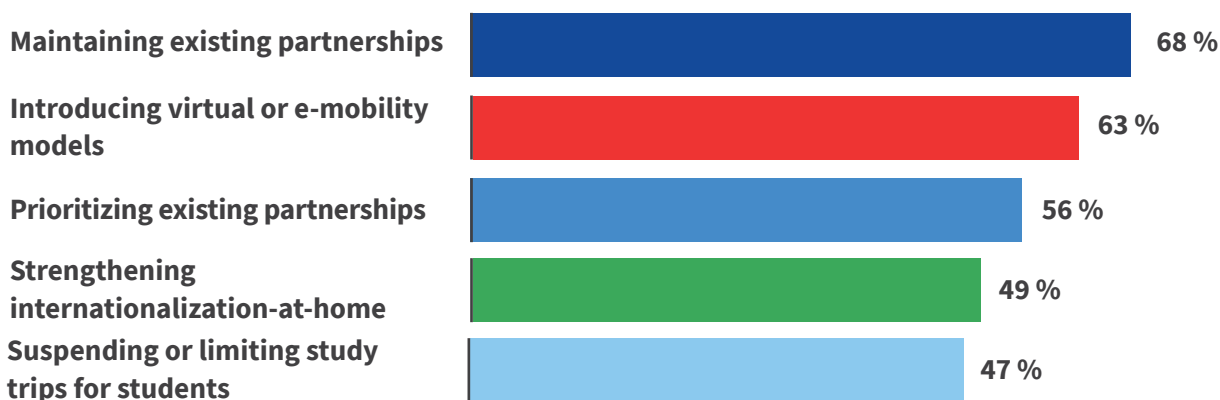
By region, health and risk management is the top response across Europe, Africa/Middle East, and Asia/Oceania, while for North America it is student retention and success, and for Central/South America maintaining the quality of programs. Among private and public institutions, the top responses are the same with slight variations in percentages.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
1	Student retention and success (84 %)	Maintaining the quality of programs (82 %)	Health and risk management (92 %)	Health and risk management (95 %)	Health and risk management (88 %)	Health and risk management (86 %)	Health and risk management (87 %)
2	Health and risk management (83 %)	Health and risk management (79 %)	Maintaining the quality of programs (73 %)	Financial challenges (75 %)	Financial challenges (72 %)	Financial challenges (75 %)	Financial challenges (73 %)
3	Financial challenges (82 %)	Financial challenges (68 %)	Financial challenges (65 %)	Maintaining the quality of programs (70 %)	Maintaining the quality of programs (59 %)	Maintaining the quality of programs (69 %)	Maintaining the quality of programs (71 %)

# Internationalization

The importance of partnerships was highlighted by the overall responses, as two of the Top 5 responses dealt with partnerships (# 1 maintaining partnerships, # 3 prioritizing existing partnerships). In addition, two of the Top 5 include alternative modes to physical mobility such as introducing virtual or e-mobility (#2) and strengthening internationalization at home (#4). Suspending or limiting study trips for students was #5.

Global N=451

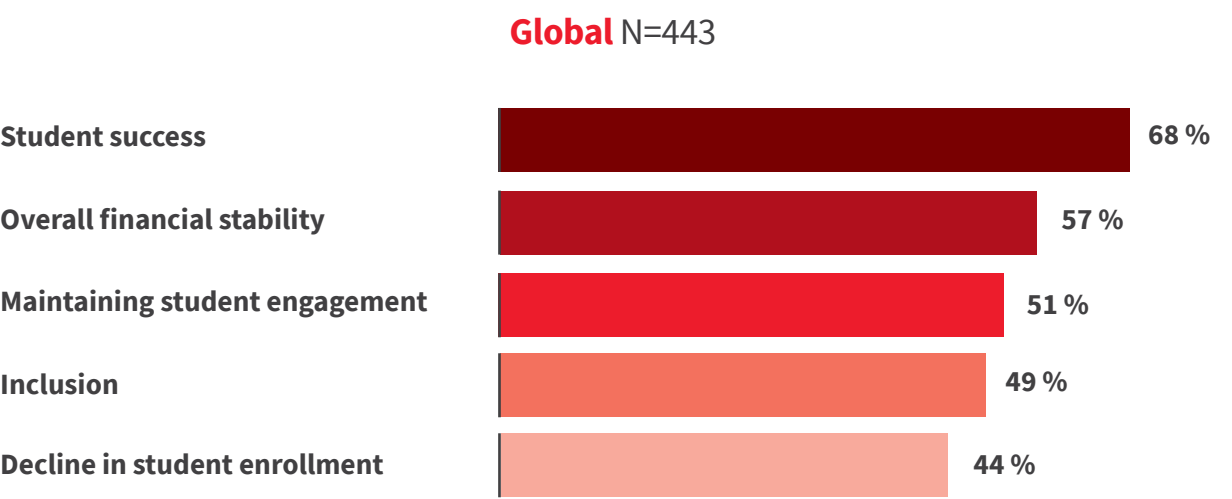


For Europe and Asia/Oceania the top response involves virtual or e-mobility, for Africa/Middle East and Central/South America and the Caribbean maintaining existing partnerships, and for North America, suspending or limiting study trips for students. For privates, the top response was virtual or e-mobility, while for publics, it was maintaining partnerships.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
1	Suspending or limiting study trips for students (60 %)	Maintaining existing partnerships (85 %)	Introducing virtual or e-mobility models (64 %)	Maintaining existing partnerships (78 %)	Introducing virtual or e-mobility models (63 %)	Introducing virtual or e-mobility models (67 %)	Maintaining existing partnerships (70 %)
2	Introducing virtual or e-mobility models (59 %)	Introducing virtual or e-mobility models (76 %)	Prioritizing existing partnerships (64 %)	Prioritizing existing partnerships (67 %)	Maintaining existing partnerships (60 %)	Maintaining existing partnerships (66 %)	Introducing virtual or e-mobility models (61 %)
3	Maintaining existing partnerships (58 %)	Strengthening internationalization-at-home (67 %)	Maintaining existing partnerships (80 %)	Introducing virtual or e-mobility models (61 %)	Strengthening internationalization-at-home (48 %)	Prioritizing existing partnerships (55 %)	Prioritizing existing partnerships (56 %)

# Concerns

Overall, the main concerns were student success, overall financial stability, student engagement, inclusion, and decline in student enrollment.



Student success was the top response across all regions. Overall financial stability was the second most cited concern across Europe, Asia/Oceania, and Central/South America, whereas for North America and Africa/Middle East it was maintaining student engagement. The Top 2 were the same among private and public institutions but there were differences in # 3 (decline in student enrollment among privates; inclusion among publics).

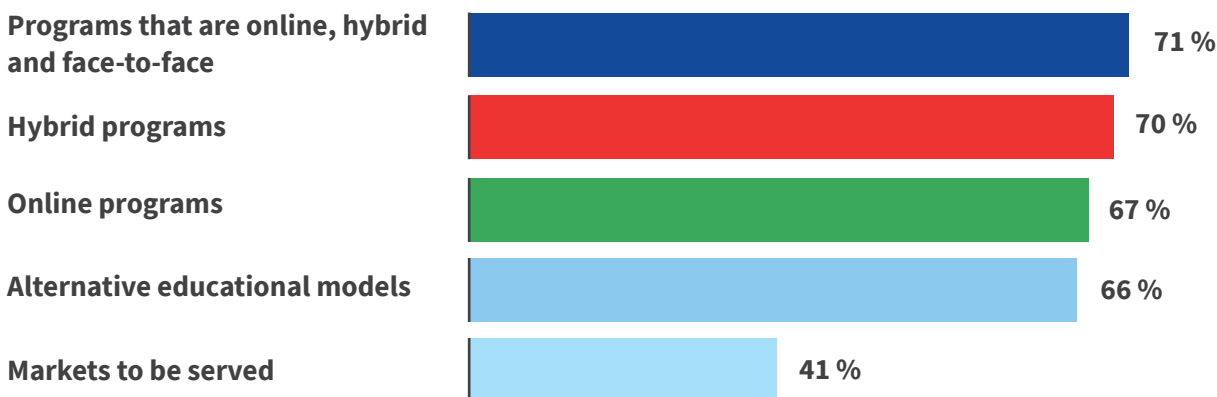
Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
1	Student success (83 %)	Student success (75 %)	Student success (55 %)	Student success (71 %)	Student success (47 %)	Student success (67 %)	Student success (69 %)
2	Maintaining student engagment (66 %)	Overall financial stability (72 %)	Overall financial stability (45 %)	Maintaining student engagment (59 %)	Overall financial stability (44 %)	Overall financial stability (60 %)	Overall financial stability (55 %)
3	Overall financial stability (65 %)	Decline in student enrollment (49 %)	Inclusion (40 %)	Overall financial stability (59 %)	Need for change in strategic priorities (39 %)	Decline in student enrollment (52 %)	Inclusion (54 %)

# Looking Forward

## Potential Transformation in 3 or More Years

Most leaders responding envision a future where institutions will be offering programs with a portfolio of modes of delivery, including online, hybrid, and F2F.

Global N=436



There are differences across regions, as the aforementioned is tops in North America, Europe, and Africa/Middle East, for Central and South America it is hybrid programs, and for Asia/Oceania online programs. For both private and public universities, at the top are programs that are online, hybrid, and F2F.

Top	By Region					Classification	
	North America	Central/South America/Caribbean	Europe	Africa/Middle East	Asia/Oceania	Private	Public
1	Programs that are online, hybrid and face-to-face (74 %)	Hybrid programs (79 %)	Programs that are online, hybrid and face-to-face (68 %)	Programs that are online, hybrid and face-to-face (88 %)	Online programs (67 %)	Programs that are online, hybrid and face-to-face (73 %)	Programs that are online, hybrid and face-to-face (69 %)
2	Online programs (73 %)	Alternative educational models (79 %)	Hybrid programs (68 %)	Hybrid programs (82 %)	Programs that are online, hybrid and face-to-face (60 %)	Hybrid programs (72 %)	Hybrid programs (69 %)
3	Hybrid programs (72 %)	Programs that are online, hybrid, and face-to-face (74 %)	Alternative educational models (60 %)	Alternative educational models (82 %)	Hybrid programs (57 %)	Online programs (70 %)	Alternative educational models (65 %)



