
Coping Strategies of Public Universities During The Economic Recession of 2009

Results of a Survey on the
Impact of the Financial Crisis on
University Campuses

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I. Executive Summary

Governors and state legislatures, working with unprecedented declines in state revenues as the result of the global economic recession, faced significant budget gaps for fiscal years 2009 and 2010.

Most states closed the 2009 budget gap with a combination of service reductions, revenue increases, and appropriation recisions. Despite the presence of \$53.6 billion in stabilization funds from the American Recovery and Reinvestment Act for the 2010 budget cycle, states again were forced to cut programs and services. Appropriations for public universities and student financial aid were not spared in most states.

In August and September of 2009, the Association of Public and Land-grant Universities (A·P·L·U) surveyed its 188 member universities about the financial situation on their campuses. Overall the picture painted by survey respondents is dreary, with 85 percent of institutions reporting a decrease in state appropriations and nearly one-half of institutions experiencing cuts of 10 percent or greater. Among the other findings:

- Fifty percent of A·P·L·U institutions report education revenues declined—even with tuition and fee increases.
- Fifty-five percent of survey respondents report that declines in state appropriations are harming their ability to hire and retain faculty and staff, invest in new technology, sustain student support services, and maintain campus infrastructure.
- Nearly 80 percent of survey respondents reported reductions in both permanent and temporary staff positions with one-half moving beyond position reductions to staff layoffs.
- Tuition and fee increases were the norm across all institutions as universities struggled to find new sources of revenue in face of increasing or stable student enrollments.
- More than one-half of the institutions responding believed more cuts in state appropriations were likely and another one-half were pessimistic about their institution's fiscal future during the next 18 months. Even institutions that escaped the most severe cuts expressed concern about the long-term ability of their state to fund higher education institutions.

The survey results indicate A·P·L·U universities are striving to protect the core education mission of their institutions, with administrative units, professional and support staff, facilities and support operations experiencing the most intense scrutiny and deepest reductions.

Decreasing state appropriations are not a new experience for public universities. State contributions to public research universities have steadily declined in real terms by more than 15 percent in the last 20 years. However, the current financial situation is especially precarious due to the magnitude of the recent cuts and the cumulative effects of decades of declining financial support.

The long-term implications of the funding cuts and the impact on public universities are of consequence beyond the higher education community. Public research universities are a critical source of students who continue to doctoral study and are the major source of bachelor's and doctoral recipients in areas of national need (e.g., agriculture, computer science, engineering, education, foreign languages). Public universities are the primary route to a bachelor's degree for minority students. It is clear public universities provide significant contributions to the national economy and the well-being of its citizens.

II. Introduction

Governors and state legislatures, working with unprecedented declines in state revenues as the result of the global economic recession, faced an estimated \$215 billion¹ in state budget gaps for 2009 and 2010.

Most states adopted budgets that closed the gaps with a combination of service reductions, revenue increases, and appropriation recisions. States reduced funds for elementary schools, public assistance, Medicaid, corrections, transportation and personnel. Despite the presence of \$53.6 billion in stabilization funds from the American Recovery and Reinvestment Act for the 2010 budget cycle, states again were forced to cut programs and services.² Appropriations for public universities and student financial aid were not spared in most states.

In August and September of 2009, A·P·L·U surveyed its 188 member universities about the financial situation on their campuses. The survey asked for information on state appropriations, tuition and fees, student enrollment, and educational revenues. It also asked institutions how they were handling budget shortfalls in both the short- and the long-term.

Overall, the picture painted by survey respondents is dreary, with 85 percent of institutions reporting a decrease in state appropriations and nearly one-half of institutions experiencing cuts of 10 percent or greater. Decreasing state appropriations are not a new experience for public universities. State contributions to public research universities have steadily declined in real terms by more than 15 percent in the last 20 years. However, the current financial situation is especially precarious due to the magnitude of the recent cuts and the cumulative effects of decades of declining financial support.

As argued in a recent A·P·L·U discussion paper on the financing of public universities,³ there is compelling evidence public research universities are already in a weakened state compared to their private counterparts in their ability to pay competitive faculty salaries, to support students entering with lower levels of academic skills, and to preserve appropriate teaching loads. These are the areas in which institutions are now forced to curtail activity even further.

In the survey, more than 55 percent of A·P·L·U institutions report cuts in state appropriations are harming their ability to hire and retain faculty and staff, invest in new technology, sustain student support services, and maintain campus infrastructure.

One university official enumerated the areas most affected by the budget shortfalls:

Not able to proceed with new graduate programs on planned schedule, lack of operating funding for critical IT and staffing needs, lack of progress on adjusting salaries to market [rates], [and] increases in health insurance costs for part-time employee.

¹ “Budgets overshadow social, political highlights,” Stateline.org, (August 18, 2009)
<http://www.stateline.org/live/details/story?contentId=419704>

² “Reports: Bleak state budgets through 2011,” Stateline.org,(June 4, 2009)
<http://www.stateline.org/live/details/story?contentId=404979>

³ McPherson, P. *Financing Tomorrow’s Public Research Universities*, unpublished discussion paper, Association of Public and Land-grant Universities (October 2009).

Tuition and fee increases were the norm across all institutions as universities struggled to find new sources of revenue in the face of increasing or stable student enrollments. Confronted with two decades of declining state support, historically public research universities have managed to hold real education revenues per student constant by raising tuition levels. In the current financial downturn, appropriations cuts were of such magnitude that education revenues went down for 50 percent of survey respondents—even with tuition and fee increases.

Survey results show A·P·L·U universities are striving to protect the core education mission of their institutions, with administrative units, professional and support staff, facilities and support operations experiencing the most intense scrutiny and deepest reductions.

Nearly 80 percent of public universities reported reductions in both permanent and temporary staff positions, with one-half moving beyond position reductions to staff layoffs. Another 80 percent of universities were investing in energy saving measures, such as replacing inefficient systems to turning off lights. These findings contrast findings of a recent financial survey by *The Chronicle of Higher Education* across public and private universities that reported institutions were “holding fast to the status quo.”⁴

A majority of institutions continue to search for cost-saving measures by reviewing all aspects of the organization. As one institution commented:

We continue to look for more savings. We recently contracted with an external consulting firm with broad experience to help us further analyze our operations. In particular, they are analyzing motor vehicle usage, sourcing policies, and custodial and maintenance practices

The strategies employed by institutions with cuts in state appropriations of 10 percent or more differed markedly from those used by institutions with less severe cuts—85 percent of institutions with larger appropriation decreases indicated the cuts were harming their ability to “maintain academic programs and course offerings for students.” More specifically, institutions experiencing larger cuts were significantly more likely to lay off permanent and temporary staff, reduce or eliminate course offerings, mandate furloughs, dissolve departments, or outsource operations and services.

More than one-half of the institutions responding believed more cuts in state appropriations were likely and another one-half were pessimistic about their institution’s fiscal future during the next 18 months. Similarly, nearly two-thirds of financial officers who responded to *The Chronicle’s* survey said they did not think the worst of the financial pressures on their institutions had passed.

A theme of uncertainty is apparent throughout the A·P·L·U survey. With 70 percent of institutions using federal stimulus money to close budget gaps in the short-term and future cuts increasingly likely, many university leaders wondered how those gaps will be closed in future years or even before the end of the current fiscal year.

Since the stimulus money replaced our usual state appropriations, there is the fear that we will take a severe hit when the stimulus money is no longer available. Our state as a whole relies on interest and dividend income for much of its revenue so this is not

⁴ “In a Time of Uncertainty, Colleges Hold Fast to the Status Quo,” *The Chronicle of Higher Education*, October 25, 2009.

likely to turn around quickly enough to return our budgets to pre-FY09 levels. At that time there will likely be a greater negative impact than we are currently feeling.

Our state financial aid program is being cut by 50 percent. This program will provide no funding in spring. Since many of these students will not be able to attend this spring, we may lose as much as \$10 million in tuition revenue. If the state passes a tax increase, this funding may be restored. Our greatest risk is whether the state will replace the stimulus funds currently in our budget. We will not know that until later this year.

Not all institution respondents were pessimistic. More than 10 percent of respondents were optimistic about their institution's future.

Environment in [our state] is unlike the remainder of the U.S. Economy is still growing, housing sales are robust, and unemployment is the lowest in the country. The only negative impact is on the endowment; however, ongoing giving is still strong in spite of the national economy.

However, even institutions that escaped the most severe cuts expressed concern about the ability of their state to fund higher education institutions in the longer term.

The university's financial environment is stable. Increases in state appropriations and estimated increases in tuition and fee revenue have enabled the university to cover budget gaps and begin implementing an academic master plan. We are concerned about forecasted drops in state sales tax revenue which fund our state appropriations and how this might affect our 2012-2013 budgets.

The long-term implications of funding cuts and the impact on public universities are of consequence beyond the higher education community. As detailed in a spring 2009 A·P·L·U discussion paper on public university competitiveness,⁵ public universities are the major source of undergraduate and graduate education in the United States—of the approximately 17 million students enrolled at four-year institutions, 74 percent were in public institutions. Public research universities are a critical source of students who continue to doctoral study and are the major source of bachelor's and doctoral recipients in areas of national need (e.g., agriculture, computer science, engineering, education, foreign languages). Public universities are the primary route to a bachelor's degree for minority students. It is clear that public universities provide significant contributions to the national economy and the well-being of its citizens.

As A·P·L·U President Peter McPherson emphasized in a recent address celebrating the Morrill Act's creation of land-grant institutions, public universities must continue to reexamine how they operate, including alternative delivery systems and greater access to students from all backgrounds. Relationships with all levels of government must be revitalized and partnerships for the common good must be renewed. At the same time, the public must reaffirm its commitment in that partnership through both the enhancement of existing funding streams and the creation of new ones.

⁵ McPherson, P., Shulenburg, D., Gobstein, H., and Keller, C. *Competitiveness of Public Research Universities and Consequences for the Country: Recommendations for Change*, unpublished discussion paper, Association of Public and Land-grant Universities (March 2009) <http://www.aplu.org/NetCommunity/Document.Doc?id=1561>

III. Description of Survey and Respondents

The *Current Financial Situation and Strategy Survey* was administered online through a link sent to academic officers at the 188 universities that are members of the Association of Public and Land-grant Universities (A·P·L·U). The survey was completed between August 12 and October 8, 2009 by 87 universities, a response rate of 46 percent. This report contains aggregate responses to the survey questions. Individual institutions are not identified.

The 87 institutions represent 41 states and the territory of Guam.

- Arkansas
- Alabama
- Alaska
- Arizona
- California
- Connecticut
- Delaware
- Florida
- Georgia
- Guam
- Idaho
- Illinois
- Indiana
- Iowa
- Kansas
- Kentucky
- Massachusetts
- Michigan
- Mississippi
- Missouri
- Montana
- North Carolina
- North Dakota
- Nebraska
- New Hampshire
- New Mexico
- Nevada
- New York
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- Rhode Island
- South Carolina
- South Dakota
- Tennessee
- Texas
- Vermont
- Virginia
- West Virginia
- Wisconsin
- Wyoming

Of the institutions responding to the survey, 73 were doctoral-granting research universities (84 percent) and 41 were land-grant institutions (47 percent). The average size of the student body at the responding institutions was 23,000 students. See Table 1 for more detailed enrollment ranges.

Table 1: Total Student Enrollment for Survey Respondents

Enrollment	% of Institutions
Less than 10,000	10%
10,000-19,999	23%
20,000-29,999	40%
30,000 or greater	28%

IV. 2009-2010 State Budget Appropriation Changes

For the 2009-2010 budget year, 60 institutions representing 32 states reported a decrease in state appropriations. Seven institutions indicated their appropriations would remain the same, and six institutions stated their state appropriations would increase. Note, some states included institutions with both increases and decreases in appropriations.

Table 2: Direction of Change in State Budget Appropriations by State or Territory

	Count	State/Territory
Appropriation decrease	32	AL, AR, AZ, CA, DE, FL, GA, IA, ID, IL, IN, KS, KY, MA, MI, MO, MT, NC, NM, NV, NY, OH, OR, RI, SC, SD, TN, TX, VA, WI, WV, WY
Appropriation increase	6	AK, GU, ND, NE, OH, TX,
Appropriation stayed the same	7	MO, NH, NY, OK, TN, VT, TX,
Appropriation not made	5	CT, KY, MI, MS, PA

The decrease in state appropriations varied widely, from less than 5 percent for institutions in states such as Alaska, Arkansas, and Montana to more than 20 percent for institutions in South Carolina and California. The average decrease was 11.4 percent. However, 33 institutions are dealing with cuts in state appropriations of 10 percent or more as shown in Table 3.

Nine institutions representing six states reported increases in state appropriations. The typical increase was near 3 percent—however, one institution reported a much larger increase of 21 percent. In some states, one institution could have experienced an increase while another institution a decrease.

Table 3: Percent Change in State Budget Appropriations for 2009-2010

	Number of institutions	Percent Change
Decrease in Appropriations		
Less than 5%	11	15.9%
5% to 9%	16	23.2%
10% to 14%	16	23.2%
15% to 19%	10	14.5%
20% or greater	7	10.1%
Increase in Appropriations		
Less than 5%	8	11.6%
5% to 9%	0	0.0%
10% to 14%	0	0.0%
15% to 19%	0	0.0%
20% or greater	1	1.4%

Number of respondents = 69

As illustrated in Table 4, more than 56 percent of institutions responding believed additional state appropriation cuts were likely in the current academic year, with more than one-third characterizing potential cuts as “very likely.”

Table 4: Likelihood of Additional Cuts in State Appropriations

	Count	Percent
Very likely	25	33.8%
Likely	17	23.0%
Not sure	20	27.0%
Unlikely	9	12.2%
Very unlikely	3	4.1%

Number of respondents = 74

The most common repercussion of cuts in state appropriations is the ability of institutions to hire and retain faculty or staff—nearly 60 percent of survey respondents reported that was the situation on their campuses.

Compensation and hiring have been frozen. Layoffs have occurred and there is now talk of furloughs. Morale is at an all time low.

More than one-half of institutions indicated appropriations cuts were affecting students by harming their ability to maintain academic programs and course offerings, student support services, and graduate student support.

One institution summarized the situation:

Our students are paying higher fees and still bearing a significant burden. Class sizes will increase and there will be fewer sections. As one example, we estimate reduction of at least 35 sections of language and composition classes affecting up to 1,000 students. Fewer teaching assistants will reduce training and employment for graduate students and support fewer course sections for undergraduates. Almost 400 part-time student jobs will be lost because campus departments no longer have the funds to hire them. This can create financial problems for the students, undermines community building between students and staff, and negatively impacts retention.

More than one-third also stated cuts were curtailing efforts to expand access to underrepresented student groups.

All state financial aid for spring 2010 is threatened; more than 5,300 of our students would be affected...

The unknown impacts of loss of state financial aid on enrollments in the future are hard to predict. The loss of state funding for state veterans grants represents an unfunded entitlement mandate that will cost the university \$3.2-3.5 million.

Decisions required by the most recent budget cuts and the prospect of more reductions are a threat to our progress. [The university] will have to consider: continuing to cap first-year enrollment; dramatically reducing high school

recruiting; fewer academic and need-based scholarships; less academic advising; and eliminating aggressive intervention systems for “at risk” students.

More than one-half of institutions reported a decline in the ability to maintain or update campus infrastructure and invest in new technology

We continue to look for more savings. We recently contracted with an external consulting firm with broad experience to help us further analyze our operations. In particular, they are analyzing motor vehicle usage, sourcing policies, and custodial and maintenance practices. Even these savings will not be enough

Table 5: Areas and Activities Harmed by State Appropriation Cuts

	Count	Percent
Hire/retain faculty and/or staff	52	59.8%
Invest in new technology	50	57.5%
Maintain student support services	48	55.2%
Update/maintain campus infrastructure	48	55.2%
Maintain academic programs and course offerings for students	47	54.0%
Support graduate students	42	48.3%
Provide extension and outreach services	31	35.6%
Expand access for under-represented groups (e.g. first generation students, lower socioeconomic backgrounds, minority students, etc)	33	37.9%
Develop private/public partnerships	22	25.3%
Secure external research funding	21	25.3%
Support ongoing research projects	21	24.1%

V. First-time Freshmen 2009-2010 Tuition and Required Fees

The current financial situation has resulted in tuition and required fee increases for both in-state and out-of-state first-time, full-time freshmen at more than 90 percent of responding institutions as shown in Table 6. Only one institution indicated that out-of-state tuition/fees would decrease for the 2009-2010 academic year.

Table 6: Changes in Undergraduate 2009-2010 Tuition & Required Fees by Residency Status

	Count	Percent
Instate Tuition & Required Fees		
Increase	79	90.8%
Decrease	0	0.0%
Unchanged	8	9.2%
Out-of-State Tuition & Required Fees		
Increase	79	90.8%
Decrease	1	1.1%
Unchanged	6	6.9%

The average increase in in-state tuition and required fees for first-time, full-time freshmen across survey respondents was 9.3 percent and the median increase was 7.2 percent. (Note that the average figure is somewhat skewed by increases of more than 20 percent at a half dozen institutions.) The most typical increase reported is between 3 and 6 percent. In fact, 60 percent of institutional respondents reported increases of less than 6 percent. These findings are consistent with the October 2009 College Board report *Trends in College Pricing 2009*⁶ that found an average increase of 6.5 percent for in-state undergraduate tuition and fees across all four-year public institutions. A detailed distribution of the percentage change in tuition from the A·P·L·U survey results is shown in Table 7.

⁶ *Trends in College Pricing 2009*, College Board, Washington, DC.
http://www.trends-collegeboard.com/college_pricing/pdf/2009_Trends_College_Pricing.pdf

Table 7: Distribution of the Percent Change for 2009-2010 In-State Tuition and Required Fees for First-Time, Full-Time Freshmen

	Count	Percent
Decrease	0	0.0%
No change	8	9.3%
Increase		
Less than 3.0%	5	5.8%
3.0% to 5.9%	38	44.2%
6.0% to 8.9%	13	15.1%
9.0% to 11.9%	9	10.5%
12.0% to 14.9%	4	4.7%
15% to 19.9%	1	1.2%
20% or greater	8	9.3%

Number of respondents = 82

The average increase in out-of-state tuition and required fees for first-time, full-time freshmen was slightly lower than for in-state at 7.5 percent and the median increase was 5.9 percent. As with in-state rates, the typical increase was between 3 and 6 percent and 62 percent of institutional respondents reported increases of less than 6 percent. The 2009 College Board tuition trend summary reports a similar average increase for out-of-state undergraduates of 6.2 percent across all four-year public institutions.⁷ The complete distribution for A·P·L·U survey respondents is shown in Table 8.

Table 8: Distribution of the Percent Change for 2009-2010 Out-of-State Tuition and Required Fees for Full-Time Freshmen

	Count	Percent
Decrease	1	1.3%
No change	6	7.4%
Increase		
Less than 3.0%	11	13.6%
3.0% to 5.9%	33	40.7%
6.0% to 8.9%	14	17.3%
9.0% to 11.9%	12	14.8%
12.0% to 14.9%	4	4.9%
15% to 19.9%	2	2.5%
20% or greater	2	2.5%

Number of respondents = 81

⁷ *Trends in College Pricing 2009*, College Board, Washington, DC
http://www.trends-collegeboard.com/college_pricing/pdf/2009_Trends_College_Pricing.pdf

VI. Changes in 2009-2010 Total Education Revenue

Despite the fact that almost all institutions increased tuition and required fees for incoming freshmen, 50 percent of institutions reported a decrease in total education revenues (the combination of net tuition receipts plus state appropriations, excluding capital appropriation and federal stimulus funds). Only 43 percent reported an increase in education revenues and most institutions reported an increase of less than 5 percent.

Of the 72 institutions that estimated the amount and direction of the change in total education revenue, the average percent increase was 5.6 percent and the median was 3.8 percent. The median increase is more typical across institutions as 23 estimated an increase of less than 5 percent. The average decrease was 5.7 percent and the median was 4.9 percent.

Table 9: Distribution of Changes in Total Education Revenue¹

	Number of institutions	Percent
Decrease: 10% to 19%	4	5.6%
Decrease: 5% to 9%	12	16.7%
Decrease: Less than 5%	20	27.8%
<i>No change</i>	5	6.9%
Increase: Less than 5%	23	31.9%
Increase: 5% to 9%	4	5.6%
Increase: 10% to 19%	4	5.6%

Number of respondents = 72

¹ "Education Revenue" is defined as the sum of net tuition receipts plus state appropriations, excluding capital appropriations and federal stimulus funds.

VII. Short-Term Budget Cutting and Revenue Enhancing Strategies

Federal stimulus funds were used by more than 70 percent of responding institutions as a short-term measure to close budget gaps or manage costs.

Other common short-term strategies can be grouped together broadly under "management of personnel expenses." Permanent and temporary staffing were the most common areas affected. At nearly 80 percent of the institutions, respondents reported reductions in both permanent and temporary staff positions and 70 percent reported reductions in lecturer/adjunct faculty positions. At half of the institutions, permanent staff were laid off. Tenured and tenure-track faculty positions were reduced at 44 percent of institutions; however, only 9 percent of institutions reported actual faculty layoffs.

Out-of-state travel was limited or frozen at 55 percent of institutions. Mandatory faculty and staff furloughs were instituted at more than 20 percent of the institutions. Other common personnel-related strategies frequently mentioned in the comments were salary freezes, a reduction or elimination of merit increases, and salary reductions for certain groups of employees. Employee recognition and professional development programs were also suspended or eliminated.

Institutions also coped by controlling facility and maintenance costs—64 percent of institutions planned to defer maintenance expenditures. A reduction in the amount of purchasing occurred at 69 percent of institutions. Institutions also delayed “non-essential” capital improvement projects.

In the short-term, academic programs and course offerings were affected at fewer institutions than staffing levels. The most prevalent strategy was collapsing courses into fewer, larger sections (58 percent). The number of elective course offerings was reduced at 43 percent of schools, while 31 percent eliminated courses all together. More severe measures such as eliminating programs (21 percent) or departments (15 percent) took place at a smaller number of institutions. Thirty percent reduced funding for student life activities.

Other strategies written in by respondents included the leveraging of revenues from auxiliary enterprises such as bookstores, food services, and student housing. Many of these entities are absorbing most costs or contributing a portion of revenues to cover overhead costs.

The complete listing of short-term strategies is shown in Table 10 with the number and percentage of the 87 institution respondents utilizing each option.

Table 10: Short-Term Strategies Utilized by Universities to Close Budget Gaps or Manage Costs

	Count	Percent
Reduce temporary or part-time staff positions	68	78.2%
Reduce permanent staff positions	67	77.0%
Reduce temporary or part-time lecturer or adjunct faculty positions	61	70.1%
Utilize federal stimulus funds	61	70.1%
Reduce purchasing	59	67.8%
Defer maintenance expenditures	55	63.2%
Collapse course sections into fewer, larger sections	50	57.5%
Limit or freeze out-of-state travel	48	55.2%
Reduce graduate assistant/student worker positions	45	51.7%
Lay off permanent staff	44	50.6%
Adjust air conditioning or heating levels	41	47.1%
Lay off temporary or part-time staff	40	46.0%
Reduce tenured or tenure-track faculty positions	38	43.7v
Reduce elective course offerings	37	42.7v
Utilize expendable endowment funds	35	40.2v
Increase incidental fees	32	36.8%
Lay off temporary or part-time lecturer or adjunct faculty	29	33.3%

Table 10: Short-Term Strategies Utilized by Universities to Close Budget Gaps or Manage Costs

	Count	Percent
Shift tenured/tenure-track faculty from elective courses to required courses	28	32.2%
Eliminate courses	27	31.0%
Reduce funding of student-life activities	26	29.9%
Eliminate programs	21	24.1%
Mandate staff furloughs	20	22.9%
Increase the proportion of out-of-state students	20	22.9%
Mandate faculty furloughs	19	21.8%
Increase the size of entering freshman class	18	20.7%
Implement or enhance an early or phased retirement program	17	19.5%
Eliminate departments	15	17.2%
Reduce salary for senior administrators	13	14.9%
Decrease staff/faculty benefits	11	12.6%
Reduce required course offerings	11	12.6%
Reduce number of scholarships	9	10.3%
Reduce size of entering freshman class	9	10.3%
Lay off tenured or tenure-track faculty	8	9.2%
Reduce amount of scholarships	8	9.2%
Lay off graduate assistants/student workers	8	9.2%
Reduce or eliminate non-revenue sports teams	6	6.9%
Request that donors allow restricted gifts to be used for other purposes	6	6.9%

VIII. Long-Term Budget Cutting and Revenue Enhancing Strategies

Nearly 80 percent of institutions responding to the survey indicated one of their long-term strategies for managing costs was to invest in a variety of energy saving measures, such as energy efficiency and sustainability measures, equipment upgrades, and more effective use and scheduling of facilities.

The majority of institutions also plan to do extensive reviews of university structures, operations, and programs including organizational structures, academic, research, outreach, athletic and student support programs, and facility operations. The most common areas slated for review are administrative structures at 67 percent and academic programs at 59 percent of institutions. As part of their comments, several institutions mentioned the need to carefully examine business processes, existing contracts, and other

business practices to “increase efficiencies and eliminate redundancies.” The comments reiterated institutions’ intentions to particularly focus on administrative support structures and services.

Targeted increases in enrollment were cited by 63 percent of schools as a long-term revenue enhancing strategy; only 10 percent of institutions planned to strategically decrease enrollment in specific areas to manage costs.

Personnel expenditures will continue to be an area of both short- and long-term focus, with about 40 percent of institutions planning to permanently change staffing levels for both professional and support staff. Changing the staffing levels of tenured and tenure-track faculty was less common and was planned at about 20 percent of institutions.

When asked about new revenue streams, the most common responses included an increased emphasis on grant funding to support graduate students and academic programs, and the implementation of differential tuition and/or fee structures—in particular for high-cost and high-demand programs. Other potential sources of revenue being considered on campuses were creating industry partnerships, expanding continuing education, and renewing focus on private fund-raising campaigns.

Table 11 summarizes the list of long-term strategies and the number and percent of the 87 institution respondents implementing each option.

Table 11: Long-Term Strategies Utilized by Universities to Close Budget Gaps or Manage Costs

	Count	Percent
Invest in energy savings (e.g., replace inefficient HVAC systems, insulation, windows, etc.)	68	78.2%
Conduct a strategic review of administrative structures	58	66.7%
Increase enrollment in specific areas (e.g., out-of-state students, online students, etc)	55	63.2%
Conduct a strategic review of academic programs	51	58.6%
Conduct a strategic review of online/distance education	50	57.5%
Conduct a strategic review of facility/plant operations	48	55.2%
Conduct a strategic review of academic support services	43	51.8%
Conduct a strategic review of tuition structures and levels	46	52.9%
Conduct a strategic review of course schedules and calendars to ensure full use of facilities	44	50.6%
Conduct a strategic review of outreach/continuing education/extension programs	43	49.4%
Conduct a strategic review of research programs	41	47.1%
Conduct a strategic review of student support services	40	46.0%
Permanently change support staff levels	36	41.4%
Permanently change professional staff levels	34	39.1%

Table 11: Long-Term Strategies Utilized by Universities to Close Budget Gaps or Manage Costs

	Count	Percent
Conduct a strategic review of athletic programs	29	33.3%
Outsource operations/services (e.g., IT services, bookstores)	25	28.7%
Permanently change staffing levels for non-tenured, adjunct faculty	20	23.0%
Permanently change staffing levels for tenured/tenure-track faculty	19	21.8%
Seek exemptions from state regulations that limit options and increase costs	19	21.8%
Decrease enrollment in specific areas (e.g., high-cost undergraduate/masters/doctoral programs, etc.)	9	10.3%

IX. Budget Cutting and Revenue Enhancing Strategies by Level of Appropriation Decrease

When comparing the short-term strategies utilized by institutions experiencing different levels of decreases in state appropriations, differences in approaches are immediately apparent. Universities with cuts of 10 percent or greater were more likely to report more drastic and permanent measures. For instance, while one-third of institutions with decreases of less than 10 percent reported laying off both permanent and temporary staff, more than three-quarters of universities with decreases of 10 percent or greater reported laying off staff. Similarly institutions with larger decreases were significantly more likely to reduce, eliminate, or collapse courses, defer maintenance expenditures, and mandate furloughs.

Long-term approaches were also different between the two groups of universities. The institutions with the larger decreases were more likely to be implementing permanent changes in staffing levels and outsourcing auxiliary operations. Strategic reviews of administrative and support structures were also more common among the institutions with decreases of greater than 10 percent.

Consistent with their choices of strategies, nearly 85 percent of universities experiencing the largest decreases indicated cuts in state appropriations were harming their ability to maintain academic programs and course offerings for students.

Table 12 outlines differences of greater than 20 percent in coping strategies between the two groups of institutions. The table is sorted in the order of the strategies with the largest difference between the groups in each category.

**Table 12: Comparison of Differences in Strategies by Level of State Appropriation Decrease
(Strategies ranked in order of largest difference between groups)**

	Appropriation Decrease Greater or Equal to 10% (N=33)		Appropriation Decrease Less than 10% (N=27)	
	Count	Percent	Count	Percent
SHORT-TERM STRATEGIES				
Lay off permanent staff	26	78.8%	8	29.6%
Eliminate courses	17	51.5%	3	11.1%
Lay off temporary or part-time staff	24	72.7%	9	33.3%
Defer maintenance expenditures	29	87.9%	14	51.9%
Lay off temporary or part-time lecturer or adjunct faculty	19	57.6%	6	22.2%
Collapse course sections into fewer, larger sections	26	78.8%	12	44.4%
Reduce graduate assistant/student worker positions	23	69.7%	10	37.0%
Eliminate departments	11	33.3%	1	3.7%
Reduce temporary or part-time lecturer or adjunct faculty positions	29	87.9%	16	59.3%
Reduce required course offerings	10	30.3%	1	3.7%
Reduce purchasing	28	84.8%	16	59.3%
Mandate staff furloughs	13	39.4%	4	14.8%
Reduce permanent staff positions	30	90.9%	18	66.7%
Reduce elective course offerings	20	60.6%	10	37.0%
Reduce temporary or part-time staff positions	31	93.9%	19	70.4%
Reduce funding of student-life activities	15	45.5%	6	22.2%
Mandate faculty furloughs	12	36.4%	4	14.8%
Lay off tenured or tenure-track faculty	7	21.2%	0	0.0%
LONG-TERM STRATEGIES				
Conduct a strategic review of academic support services	25	75.8%	9	33.3%
Conduct a strategic review of student support services	21	63.6%	7	25.9%
Permanently change professional staff levels	21	63.6%	8	29.6%
Conduct a strategic review of administrative structures	28	84.8%	14	51.9%
Permanently change support staff levels	20	60.6%	9	33.3%
Outsource operations/services (e.g., IT services, bookstores)	14	42.4%	5	18.5%
Conduct a strategic review of academic programs	22	66.7%	12	44.4%
AREAS AND ACTIVITIES HARMED BY STATE APPROPRIATION CUTS				
Invest in new technology	31	93.9%	17	63.0%
Support graduate students	26	78.8%	14	51.9%
Maintain academic programs and course offerings for students	28	84.8%	17	63.0%

X. Estimated Fall 2009 Enrollment

Overall, total student enrollment for fall 2009 was estimated to be stable or up slightly from fall 2008 at the majority of the institutions responding to the survey. However, at the nearly 30 institutions with cuts in state appropriations of 10 percent or greater, there were larger gains in the number of entering freshmen and out-of-state undergraduate students than across all institutions. (*Note all enrollment figures in this section are opening day estimates for the fall terms. Official census figures were not available at the time of the survey.*)

Total Student Enrollment

About 54 percent of institutions estimated an increase in total student enrollment as compared to fall 2008. The average increase was 3 percent. One-third of the institutions estimated relatively stable numbers for fall 2009. And, enrollment declined at 13 percent of institutions with an average decrease of 3 percent. Table 13 provides the distribution of enrollment percentage changes in more detail.

Table 13: Total Students (full-time and part-time)

Percent Change in Estimated Enrollment	Count	Percent
-10 or greater	0	0.0%
-5.0 to -9.9	3	3.9%
-1.0 to -4.9	7	9.1%
Stable (+/- 0.9)	25	32.5%
1.0 to 4.9	33	42.9%
5.0 to 9.9	7	9.1%
10 or greater	2	2.6%

Number of respondents = 77

Size of Entering Freshman Class

At 37 percent of institutions the size of the entering freshman class increased—typically by about 4 to 5 percent. At 19 percent of institutions the entering freshman class size remained relatively stable. However, 9 percent of institutions reported substantial increases in new freshmen of more than 10 percent, including five institutions with increases of between 16 and 25 percent. Smaller entering classes were reported at 29 percent of institutions with an average decrease of about 4 percent. Another 6 percent reported larger decreases of more than 10 percent. (See Table 14 for a more detailed distribution)

The subset of about 30 institutions with state appropriation cuts of 10 percent or greater was evenly split between entering class increases and decreases. However, the magnitude of the increase was 11 percent—significantly larger than the typical increase at all institutions.

Table 14: Entering Freshman Class (first-time, full-time students)

Percent Change in Estimated Enrollment	Count	Percent
-10 or greater	5	6.3%
-5.0 to -9.9	11	13.9%
-1.0 to -4.9	12	15.2%
Stable (+/- 0.9)	15	19.0%
1.0 to 4.9	16	20.3%
5.0 to 9.9	13	16.5%
10 or greater	7	8.9%

Number of respondents = 79

In-State Undergraduate Enrollment

Overall, estimates of in-state undergraduate enrollment were relatively stable with more than 80 percent of institutions reporting changes of plus or minus 5 percent. At 52 percent of institutions, enrollment increased—typically by about 3 percent. About 25 percent of institutions expected small decreases—the average decrease was just under 3 percent. The remaining 23 percent of institutions estimated in-state enrollment growth would remain relatively flat.

Table 15: In-State Undergraduates (full-time and part-time)

Percent Change in Estimated Enrollment	Count	Percent
-10 or greater	0	0.0%
-5.0 to -9.9	4	5.5%
-1.0 to -4.9	14	19.2%
Stable (+/- 0.9)	17	23.3%
1.0 to 4.9	29	39.7%
5.0 to 9.9	9	12.3%
10 or greater	0	0.0%

Number of respondents = 73

Out-of-State Undergraduate Enrollment

As shown in Table 16, out-of-state undergraduate enrollment estimates were up as compared to Fall 2008 at 56 percent of institutions. The typical increase was 6.5 percent—the largest increase within any of the student groups. For institutions experiencing the largest cuts in state appropriations (10 percent or greater) the average increase in the number of out-of-state students was 9.4 percent. A quarter of institutions estimated that out-of-state enrollment growth would remain relatively flat. Less than 20 percent expected decreases—the average estimated decrease was 4.7 percent. About 17 percent of institutions reported changes in the proportion of out-of-state students were linked to state appropriation levels. And more than one-fifth of institutions listed increasing the number of out-of-state students as a long-term strategy to mitigate budget cuts.

Table 16: Out-of-State Undergraduates (full-time and part-time)

Percent Change in Estimated Enrollment	Count	Percent
-10 or greater	2	2.8%
-5.0 to -9.9	2	2.8%
-1.0 to -4.9	9	12.5%
Stable (+/- 0.9)	19	26.4%
1.0 to 4.9	13	18.1%
5.0 to 9.9	19	26.4%
10 or greater	8	11.1%

Number of respondents = 72

Graduate Student Enrollment

Graduate student enrollment estimates for fall 2009 increased at 54 percent of institutions as compared to fall 2008, on average by about 3.4 percent. At 30 percent of institutions graduate student enrollment remained relatively stable. A smaller proportion of institutions (18 percent) estimated decreases. The typical decrease was 5 percent. Greater enrollment detail for graduate students is displayed in Table 18.

Table 17: Total Graduate Students (full-time and part-time)

Percent Change in Estimated Enrollment	Count	Percent
-10 or greater	3	3.9%
-5.0 to -9.9	3	3.9%
-1.0 to -4.9	8	10.4%
Stable (+/- 0.9)	22	28.6%
1.0 to 4.9	28	36.4%
5.0 to 9.9	10	13.0%
10 or greater	3	3.9%

Number of respondents = 77

Enrollment Levels and State Appropriation Changes

When asked if the changes in enrollment were related to changes in the level of state appropriation, 44 percent of institutions indicated that the changes were not linked. A smaller proportion of institutions reported linkages between enrollments and state appropriation levels—23 percent indicated changes in the size of the freshman class were related to changes in state appropriate levels, 18 percent indicated changes in undergraduate enrollment were related, and 13 percent linked changes in graduate enrollment to state appropriation changes. Future shifts in enrollment levels of certain student groups, however, seem likely. More than 60 percent of institutions indicated one of their long-term strategies for managing costs was to increase enrollment in targeted areas such as the proportion of out-of-state students.

**Table 18: Institutions Reporting Changes in Enrollment
Related to Change in State Appropriation Levels**

	Count	Percent
Change in size of entering freshman class	20	23.0%
Change in total undergraduate enrollment	16	18.4%
Change in proportion of out-of-state (nonresident) students	15	17.2%
Change in total graduate student enrollment	11	12.6%
Changes in enrollment are unrelated to state appropriation changes	38	43.7%

XI. Financial Environment

To gain a better understanding of the overall financial climate at A·P·L·U member universities, institutions were asked about endowment levels, the use of federal stimulus funds, and their overall outlook for the institution's fiscal future.

Endowment Funds

Nearly 60 percent of institutions indicated one of the areas most affected by endowment losses was undergraduate scholarships. Forty percent of institutions report difficulties in funding travel and supporting graduate students; and one-third reported an impact on hiring and retaining faculty and staff. Table 20 shows the complete list of categories and the institutional responses.

Table 19: Areas and Activities Affected by Endowment Losses

	Count	Percent
Maintain undergraduate student scholarships	51	58.6%
Fund faculty/staff travel	34	39.1%
Maintain graduate student support (e.g., fellowships, scholarships)	32	36.8%
Hire/retain faculty and/or staff	27	31.0%
Expand access for under-represented groups (e.g., first-generation students, lower socioeconomic backgrounds, minority students, etc)	20	23.0%
Support ongoing research projects	17	19.5%
Maintain academic programs and course offerings for students	8	9.2%
Maintain student support services	7	8.0%
Provide extension and outreach services	7	8.0%

Federal Stimulus Funding

Nearly three-quarters of institutions responding to the survey received federal stimulus funds in some form.

Table 20: Number of Institution Receiving Federal Stimulus Funds

	Count	Percent
Yes	64	73.6%
No	9	10.3%
Unknown	14	16.0%

Number of respondents = 87

Institutions were asked to describe how federal funds were being used. For some institutions in some states, the choice of how to use federal funds was made at the state level rather than by the institution. For instance, some states used federal funds to replace state funds in the state appropriations to public universities. Other states mandated institutions could only use the funds in certain areas—e.g., for capital improvement projects or deferred maintenance.

Of the 56 institutions that responded to the question of how the stimulus monies would be used, half indicated the funds would be used to offset state budget cuts or to cover operating costs. About one-quarter used the money to cover salaries or retain positions—particularly for instructional faculty. Another quarter applied the funding to capital improvement and deferred maintenance needs. One-fifth of institutions planned to use the money to mitigate tuition and/or fee increases for in-state students. Another fifth indicated their federal stimulus money did not come through state fiscal stabilization funding but through grants for research, economic development, and job creation.

Institution comments indicated an understanding that the relief from federal sources was only temporary:

One-for-one replacement of lost state funds. We do not yet know if those state funds will be restored in FY11

Other than grant proposals that are still being reviewed, the stimulus money to the State was used by the Governor to plug a hole in the base operations budgets of universities. Thus, our \$4.5M in stimulus funding passed through the state only served to support existing base operational needs.

Future Outlook

The temporary nature of the federal money was reflected in the responses to questions about the future fiscal outlook for their institutions. More than 53 percent of institutional respondents expressed pessimism about the fiscal future of their institution during the next 18 months, with only 12 percent expressing optimism.

**Table 21: Description of Institution's Fiscal Future
Over the Next 18 months**

	Count	Percent
Very optimistic	2	2.4%
Optimistic	9	10.7%
Neutral	28	33.3%
Pessimistic	42	50.0%
Very pessimistic	3	3.6%

Number of respondents = 84

XII. Concluding Comments

The survey results confirm the difficulty of the current financial situation and the continuing challenges for public research universities.

Universities are making a concerted effort to minimize the impact of state appropriation cuts on their instructional and research missions and their students. Across the board staff and administrative structures are under close scrutiny and have already borne the brunt of the cost cutting. Tuition levels appear likely to increase as the financial position of states continues to deteriorate. Rising tuition levels present their own set of challenges for universities faced with maintaining access for underrepresented students and the necessary financial and academic support to increase their likelihood of success.

For A·P·L·U institutions, the outlook for the next 12-to-18 months is fraught with uncertainties with states already facing an estimated \$45 billion in budget deficits for the 2011 budget cycle. Most universities are bracing for another set of hard decisions. As highlighted in recent article "Insult to Injury," from *Inside Higher Education* (11/2/09), university leaders are trying to balance the need for quick action with the need to develop more strategic and sustainable solutions for the long term survival and success of their institutions in a new and more challenging environment.

XIII. Appendix

2009 APLU Current Financial Situation and Strategy Survey

A. Background Information

1. Name of Institution
2. Contact Information for person completing survey.

Name
Title
Department
Email address
Phone number

3. IPEDS ID number:

B. 2009-2010 State Budget Appropriations

1. Will your state budget appropriation increase, decrease or remain the same for the fiscal year that includes the 2009-2010 academic year? Do not include capital appropriations or federal stimulus funds.

Increase (GOTO B-1)
Decrease (GOTO B-2)
Stay the same (GOTO C)
Do not know, legislative appropriation has not be made (GOTO C)

B-1. 2009-2010 State Budget Appropriations: Increase

1. By what percent will your university's 2009-2010 state appropriation increase over the 2008-2009 state appropriation? Do not include capital appropriations or federal stimulus funds. (*round to the nearest tenth of a percent and do not include a % sign, e.g., 3.5 or 4.0*)

2. Despite the increase, how likely are future cuts to state appropriations within the 2009-2010 budget year?

Very likely
Likely
Not sure
Unlikely
Very unlikely

[GOTO C]

B-2. 2009-2010 State Budget Appropriations: Decrease

1. By what percent will your university's 2009-2010 state appropriation decrease over the 2008-2009 state appropriation? Do not include capital appropriations or federal stimulus funds. *(round to the nearest tenth of a percent and do not include a % sign, e.g., 3.5 or 4.0)*

2. How likely are additional cuts to state appropriations within the 2009-2010 budget year?

- Very likely
- Likely
- Not sure
- Unlikely
- Very unlikely

4. Are cuts (or anticipated cuts) in state appropriations harming your university's ability to do any of the following? (Check all that apply)

- Secure external research funding
- Support ongoing research projects
- Provide extension and outreach services
- Maintain academic programs and course offerings for students
- Maintain student support services
- Expand access for under-represented groups (e.g. first generation students, lower socioeconomic backgrounds, minority students, etc)
- Hire/retain faculty and/or staff
- Support graduate students
- Develop private/public partnerships
- Update/maintain campus infrastructure
- Invest in new technology

Other, please describe _____

[GOTO C]

C. Instate Undergraduate 2009-2010 Tuition and Required Fees

1. Will your university increase or decrease tuition and required fees for instate (resident) first-time, full-time freshmen for 2009-2010 as compared to 2008-2009?

- Increase (GOTO C-1)
- Decrease (GOTO C-2)
- Unchanged (GOTO D)

C-1. Instate Undergraduate 2009-2010 Tuition and Required Fees: Increase

1. By what percent will 2009-2010 published tuition and required fees for an instate (resident) first-time, full-time freshman increase as compared to 2008-2009? (*round to the nearest tenth of a percent and do not include a % sign, e.g., 3.5 or 4.0*)

[GOTO D]

C-2. Instate Undergraduate 2009-2010 Tuition and Required Fees: Decrease

1. By what percent will 2009-2010 published tuition and required fees for an instate (resident) first-time, full-time freshman decrease as compared to 2008-2009? (*round to the nearest tenth of a percent and do not include a % sign, e.g., 3.5 or 4.0*)

[GOTO D]

D. Out-of-State Undergraduate 2009-2010 Tuition and Required Fees

1. Will your university increase or decrease tuition and required fees for out-of-state (nonresident) first-time, full-time freshmen for 2009-2010 as compared to 2008-2009?

- Increase (GOTO D-1)
- Decrease (GOTO D-2)
- Unchanged (GOTO E)

D-1. Out-of-state Undergraduate 2009-2010 Tuition and Required Fees: Increase

1. By what percent will 2009-2010 published tuition and required fees for an out-of-state (nonresident) first-time, full-time freshman increase as compared to 2008-2009? (*round to the nearest tenth of a percent and do not include a % sign, e.g., 3.5 or 4.0*)

(GOTO E)

D-2. Out-of-state Undergraduate 2009-2010 Tuition and Required Fees: Decrease

1. By what percent will 2009-2010 published tuition and required fees for an out-of-state (nonresident) first-time, full-time freshman decrease as compared to 2008-2009? (*round to the nearest tenth of a percent – e.g., 3.5*)

(GOTO E)

E. 2009-2010 Total Education Revenue

1. Will your university's 2009-2010 "education revenue" (defined as the sum of net tuition receipts plus state appropriations - do not include capital appropriations or federal stimulus funds) increase or decrease from 2008-2009?

Increase (GOTO E-1)

Decrease (GOTO E-2)

Stay the same (GOTO F)

Unable to determine at this time (GOTO F)

E-1. 2009-2010 Total Education Revenue: Increase

1. By what percent will your 2009-2010 "education revenue" (defined as the sum of net tuition receipts plus state appropriations - do not include capital appropriations or federal stimulus funds) increase from 2008-2009? (*round to the nearest tenth of a percent and do not include a % sign, e.g., 3.5 or 4.0*)

[GOTO F]

E-2. 2009-2010 Total Education Revenue: Decrease

1. By what percent will your 2009-2010 "education revenue" (defined as the sum of net tuition receipts plus state appropriations - do not include capital appropriations or federal stimulus funds) decrease from 2008-2009? (*round to the nearest tenth of a percent and do not include a % sign, e.g., 3.5 or 4.0*)

[GOTO F]

F. Budgeting Cutting and Revenue Enhancing Strategies: Short Term

1. Is your university implementing any of the following “shorter-term” strategies to close budget gaps or manage costs? (check all that apply)

- Reduce permanent staff positions
- Reduce tenured or tenure-track faculty positions
- Reduce temporary or part-time staff positions
- Reduce temporary or part-time lecturer or adjunct faculty positions
- Reduce graduate assistant/student worker positions
- Lay off permanent staff
- Lay off tenured or tenure-track faculty
- Lay off temporary or part-time staff
- Lay off temporary or part-time lecturer or adjunct faculty
- Lay off graduate assistants/student workers
- Mandate staff furloughs
- Mandate faculty furloughs
- Reduce salary for senior administrators
- Implement or enhance an early or phased retirement program
- Decrease staff/faculty benefits
- Limit or freeze out-of-state travel
- Reduce purchasing
- Adjust air conditioning or heating levels
- Defer maintenance expenditures
- Collapse course sections into fewer, larger sections
- Reduce elective course offerings
- Reduce required course offerings
- Shift tenured/tenure-track faculty from elective courses to required courses
- Eliminate courses
- Eliminate programs
- Eliminate departments
- Reduce size of entering freshman class
- Reduce number of scholarships
- Reduce amount of scholarships
- Reduce funding of student-life activities
- Reduce or eliminate non-revenue sports teams
- Utilize expendable endowment funds
- Utilize federal stimulus funds
- Request that donors allow restricted gifts to be used for other purposes
- Increase the size of entering freshman class
- Increase the proportion of out-of-state students
- Increase incidental fees

2. Please describe any other short-term strategies used on your campus to reduce expenses or increase revenues.

G. Budgeting Cutting and Revenue Enhancing Strategies: Long Term

1. Is your university implementing any of the following “longer-term” strategies to close budget gaps or manage costs? (check all that apply)

- Conduct a strategic review of research programs
- Conduct a strategic review of outreach/continuing education/extension programs
- Conduct a strategic review of student support services
- Conduct a strategic review of academic support services
- Conduct a strategic review of administrative structures
- Conduct a strategic review of athletic programs
- Conduct a strategic review of facility/plant operations
- Conduct a strategic review of online/distance education
- Conduct a strategic review of tuition structures and levels
- Conduct a strategic review of course schedules and calendars to insure full use of facilities
- Permanently change staffing levels for tenured/tenure-track faculty
- Permanently change staffing levels for non-tenured, adjunct faculty
- Permanently change professional staff levels
- Permanently change support staff levels
- Outsource operations/services (e.g., IT services, bookstores)
- Invest in energy savings (e.g., replace inefficient HVAC systems, insulation, windows, etc.)
- Seek exemptions from state regulations that limit options and increase costs
- Increase enrollment in specific areas (e.g., out-of-state students, online students, etc)
- Decrease enrollment in specific areas (e.g., high cost undergraduate/masters/doctoral programs, etc.)
- Utilize new funding sources or revenue streams. Please describe _____

2. Please describe any other long-term strategies used or being considered on your campus to reduce expenses or increase revenues.

H. Estimated Fall 2009 Enrollment

1. Estimate the percent change in Fall 2009 enrollment from Fall 2008 enrollment. (round to the nearest tenth of a percent and do not include a % sign, e.g., 3.5 or 4.0)

- Entering class (first-time, full-time freshmen)
- Instate (resident) undergraduates (full-time and part-time)
- Out-of-state (nonresident) undergraduates (full-time and part-time)
- Total graduate students (full-time and part-time)
- Total students (full-time and part-time)

2. Which of the Fall 2009 estimated enrollment changes are related to changes in state appropriations?
(check all that apply)

- Change in size of entering freshman class
- Change total undergraduate enrollment
- Change in proportion of out-of-state (nonresident) students
- Change in total graduate student enrollment
- Changes in enrollment are unrelated to state appropriation changes
- Other – please provide details _____

I. Financial Environment

1. Forecast your institution's fiscal future over the next 18 months.

- Very optimistic
- Optimistic
- Neutral
- Pessimistic
- Very pessimistic

2. Are losses in your institution's endowment harming your university's ability to do any of the following? (check all that apply)

- Hire/retain faculty and/or staff
- Fund faculty/staff travel
- Maintain graduate student support (e.g., fellowships, scholarships)
- Maintain undergraduate student scholarships
- Maintain academic programs and course offerings for students
- Maintain student support services
- Expand access for under-represented groups (e.g. first generation students, lower socioeconomic backgrounds, minority students, etc)
- Support ongoing research projects
- Provide extension and outreach services
- Other, please describe _____

3. Did your university receive any of the federal stimulus monies?

- Yes (GOTO I-1)
- NO (GOTO I-2)
- Unknown (GOTO I-2)

I-1. Financial Environment

1. Please list the primary ways your university used the federal stimulus money.

I-2. Financial Environment

1. Please use the space below to share any additional information on how your university is affected by the current financial environment. (For example, are your research or extension programs negatively affected?)
2. Please add any other comments or clarifying information about your university's budgetary situation.

J. Release of Information

1. Thank you for participating in this APLU membership survey.
2. APLU will not publish individual responses to these questions, only aggregate results. If you are willing to be contacted by other APLU institutions, members of the media, or interested government officials please indicate your consent by checking "yes" in the box below.

Yes, you can share my contact information

Yes, you can share my contact information but only with other APLU members

No, I do not wish to be contacted

Other (please specify)

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