ACUHO-I Economic Impact Survey

Executive Summary: Updated for 2009

Released: June 2009

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Dear ACUHO-I members,

Thank you for taking the time to review this, the results of the second economic impact survey taken by ACUHO-I. As you have all certainly experienced, the financial sands continue to shift, even just in the few short months between our two surveys. These updated results will help you to understand the state of our profession and our association. For many of us, thoughts have turned to the 2009-2010 school year and the planning that goes along with it. Please let these results serve as benchmarks to assist you in the process.

As has been the case with previous messages the association has delivered, I want to again reassure the membership that ACUHO-I and the ACUHO-I Foundation are financially sound. The boards have acted nimbly to make informed, educated decisions regarding budgets and strategic plans that reflect the new economic realities. We will manage the situation while continuing to create innovative solutions, deliver invaluable information, and proactively connect individuals as we remain a strong and viable resource for our membership.

Part of that process is this second survey. This time 287 senior housing officers answered questions in April, 2009. They shared their experiences regarding travel and hiring freezes, salary increases, making departmental funds available to other entities, construction and renovation, planned capital purchases, and the demand for on-campus housing within the next three years.

As the numbers on the following pages show, there has been a significant increase in the number of institutions reporting travel and hiring freezes. While that information is unfortunate, it does provide a foundation to help position ACUHO-I as a valuable resource that delivers the services and information most in demand by our members.

One example is The Placement Exchange. This effort was in direct response to the membership's request for a streamlined process that eliminated the time and expense of attending multiple events while also attracting the most job applicants. We continue to enjoy a solid partnership with NASPA, as well as NODA, NACA, and ASJA (now ASCA) in this endeavor. Plus, this year we are proud to add HigherEdJobs.com to our partner list, helping to extend our reach even further. The 2009 event in Seattle attracted almost 750 candidates who had more than 5,000 total interviews proving that it is indeed the place for student affairs job placement. I also want to stress that The Placement Exchange provides valuable services throughout the year with job listings and placement resources; more of which will be unveiled before the 2010 event in Chicago.

ACUHO-I also recognizes that, despite travel freezes, the desire and demand for professional development does not stop. To that end, ACUHO-I will continue to put more resources online, making them as close and accessible as your keyboard. Last month the association unveiled a new library catalog system that has received good reviews by members and will only continue to grow as a resource with member involvement. More than half-a-million pages of the digital Talking Stick have been viewed in the last year. At this time, almost 850 individuals from the college housing profession -- both the institution and corporate sides -- have joined the ACUHO-I online network to share information and resources. And the ACUHO-I blog is updated a number of times each week with news by and for college housing professionals.

Finally, 2010 will see the launch of one of the association's most far-reaching efforts: the ACUHO-I Certificate in Housing Assessment. More than two years of development have gone into creating this program. Designed to meet the training and development needs of housing professionals, the program will utilize blended learning methods and include three online, self-paced courses as well as an optional in-person capstone experience. Those who complete the program will be able to verify, validate, and increase their assessment knowledge and skills and be prepared to apply these to their daily work.

The growing number of online resources does not mean that we will lose focus on our face-to-face events. At the time of this report, I am glad to state that attendance figures for this year's ACUHO-I Annual Conference & Exposition are comparable to those for the 2006 event in Atlanta. Those who are able to attend will enjoy content-rich speakers and sessions including Robert F. Kennedy, Jr. as the keynote speaker as well as a panel discussion featuring Gwen Dungy, executive director of NASPA; Carol Graves Holladay, ACUHO-I legislative consultant; and James Wilhelm, III, executive vice president of public/private transactions for American Campus Communities. Their panel will, from three distinct angles, deepen your understanding of the current conditions within college housing and how they will affect your campus into the future.

Also, work continues in preparation of the 2009 ACUHO-I Conference Series. The ACUHO-I Business Operations Conference is a new entrant into the fold this year and will focus on elements of college housing such as assignments, finance, information technology, conference services, and more. The ACUHO-I Business Operations Conference will be held in Columbus, Ohio, on October 4-7. It will join the 2009 ACUHO-I Conference Series lineup along with the ACUHO-I Living-Learning Programs Conference (Oct. 16-18), the ACUHO-I Apartments Conference (Oct. 24-26), the and the ACUHO-I / APPA Housing Facilities Conference (Oct. 27-30).

Looking back on this information, thanks is due to David McKelfresh, executive director of Assessment and Research at Colorado State University, who crunched the numbers for us to create this executive summary. His work on this project is a sterling example of how we should all be able to apply our individual professional expertise toward the betterment of the entire profession.

In conclusion I again want to stress that the most valuable assets ACUHO-I has are its members. We know that, as a group, we have never shied away from sharing our opinions, knowledge, and resources. During these challenging times we can't afford to retreat from those qualities that make us strong. Let ACUHO-I be the means by which you connect with this worldwide network of professionals. Please continue to share your thoughts and suggestions with the Executive Board and Foundation Board members to help make our association stronger. And, finally, continue to share your challenges and solutions with each other as you engage with the profession. Brighter times are ahead. I look forward to when we, as professionals and friends, can enjoy them together.

Norbert W. Dunkel
ACUHO-I President

ACUHO-I Economic Impact Survey Executive Summary

This analysis summarizes findings from the 2009 ACUHO-I Survey, conducted in April 2009, and compares it with the results from a survey done in October 2008. The most recent survey was sent to 1,241 individuals identified in the ACUHO-I database as a Chief Housing Officer at member and non-member institutions. There were 1,217 valid e-mail addresses; 287 senior housing officers completed the survey (24% response rate), answering questions related to the following:

- Travel freeze
- Hiring freeze
- Salary increases
- Making departmental funds available to other entities
- Construction and renovation
- Planned capital purchases
- Demand for on-campus housing within the next three years

Respondent Demographics

Respondents were primarily from public institutions (60.4%) within the United States (93.7%), with 39.4% working in private institutions. Housing capacity was evenly represented with 48.4% having housing capacity more than 2,000 beds and 51.6% with capacity less than 2,000 beds.

Campus and Department Climate

Travel freeze: Almost two-thirds of respondents indicated that they are currently under a freeze on in-state travel (63.5%) and the majority of respondents indicated they are currently under a freeze on out-of-state travel (58.2%). Only one-third of respondents indicated they anticipate a freeze within 12 months on in-state travel (36.5%), and 41.8% of respondents anticipate a freeze within 12 months on out-of-state travel.

Change over time:

- The percentage of respondents indicating they are currently under a freeze on in-state travel has increased since October 2008 from 32.8% to 63.5% in April 2009.
- The percentage of respondents indicating they are currently under a freeze on out-of-state travel has increased since October 2008 from 37.1% to 58.2% in April 2009.

Hiring freeze: Almost eight out of ten respondents indicated that they are currently under a freeze for "new hires" (78.5%) and "filling position vacancies" (78.1%). Only two out of ten respondents anticipate a freeze within 12 months on "new hires" (21.5%) and "filling position vacancies" (21.1%).

Change over time:

- The percentage of respondents indicating they are currently under a freeze for "new hires" has increased since October 2008 from 44.4% to 78.5% in April 2009.
- The percentage of respondents indicating they are currently under a freeze for "filling position vacancies" has increased since October 2008 from 43.0% to 78.1% in April 2009.

Salary increases: A large majority of respondents indicated that they are currently under a freeze on awarding "raises" (80.5%), and only 21.1% indicated that they anticipate a freeze in within 12 months.

Change over time:

- The percentage of respondents indicating they are currently under a freeze on awarding "raises" has increased since October 2008 from 34.7% to 80.5% in April 2009.

1. Are you currently under any freezes in the following areas:

	Oct. '08	Apr. '09	Change
In-State Travel	32.8%	63.5%	+30.7%
Out-Of-State Travel	37.1	58.2	+21.1
New Position Creation/New Hires	44.4	78.5	+34.1
Filling Position Vacancies	43.0	78.1	+35.1
Raises	34.7	80.5	+45.8

Cost Reduction

Furloughs: Almost all respondents (96.5%) indicated that they have not utilized furloughs to manage personnel cost reduction in their department.

Reductions In Force: Over eight in ten respondents (82.3%) indicated that they have not had a reduction in force in their department as a cost reduction strategy.

Departmental Funds: When asked if they had been "required to make departmental funds available to other entities" more than 43% said "yes" and another 19% said, "no, but I anticipate it happening."

Change over time:

- The percentage of respondents indicating they have been "required to make departmental funds available to other entities" has increased since October 2008 from 34.2% to 43.5% in April 2009.

4. Have you been required to make your department funds available to other entities?

	Oct. '08	Apr. '09	Change
Yes	34.2%	43.5%	+9.3%
No	38.5	29.8	-8.7
No, but I anticipate it happening	19.7	19.6	-0.1

Top Reductions for 2009-2010

When asked "If you are planning significant reductions in expenses for 2009-2010, what are the top three areas of reductions?". October 2008 had 112 out of 308 (36%) respondents answer this question. April 2009 had 135 out of 287 (47%) respondents answer this question. Areas identified for reductions are listed below by the area mentioned "most often" to "least often" in the October 2008 survey and the April 2009 survey.

	Oct. '08	Apr. '09	% response
Personnel (staff cuts, staff salaries, restructure/reorganization)	14	34	11.8%
Travel	29	29	10.0%
Operating budget	13	20	7.0%
Capital improvements	10	14	4.9%
Facilities (Renovation & repair, new construction)	15	12	4.2%
Programs, activities and events, programming	09	12	4.2%
Training/Professional development/Retreats	08	10	3.5%
Services	05	06	2.1%

Construction and Renovation

When asked if any construction or renovation projects are being placed, or are intended to be placed, on hold during the next 12-18 months Chief Housing Officers responded in the following percentages:

	Yes	Maybe	No
New construction	15.6%	8.7%	36.2%
Renovation of existing facilities	19.7	25.4	38.7
Refurbishment of existing facilities	21.9	26.5	41.9

Change over time:

- When asked if any construction or renovation projects are being placed, or are intended to be placed, on hold during the next 12-18 months the percentage of Chief Housing Officers responding "yes" has increased in each category from October 2008 to April 2009.

	Oct. '08	Apr. '09	Change
New construction	8.8	15.6%	+6.8%
Renovation of existing facilities	13.9	19.7	+5.8
Refurbishment of existing facilities	16.6	21.9	+5.3

Planned Capital Purchases

Less than half (46.3% of CHOs indicated that they have restricted, or anticipate restricting, capital purchases (technology upgrades, system upgrades, furniture, appliances, etc.).

Change over time:

- When asked "have you restricted or do you anticipate restricting any planned capital purchases the percentage of CHOs decreased from 55% in October 2008 to 46.3% April 2009.

Demand for On-Campus Housing

The large majority of CHOs (70.9%) believe that the demand for on-campus housing will stay the same as their most recent projections, while 18.4% believe that it will significantly increase, and 10.6% believe that it will significantly decrease within the next three years.

Change over time:

- When asked "do you believe the demand for on-campus housing will . . ."

	Oct. '08	Apr. '09	Change
Significantly decrease	12.5%	10.6%	-1.9%
Stay the same	71.9%	70.9%	-1.0%
Significantly increase	15.5%	18.4%	+2.9%

Association Specific Operational Information

Do you anticipate that you or a member of your staff will be taking part in the following by attending, presenting, purchasing, using, etc.? (percent answering "yes")

	Oct. '08	Apr. '09	Change
Institutional Membership in ACUHO-I	90.3%	86.0%	-4.3%
Annual Conference & Exposition,	53.8%	46.6%	-7.2
The Placement Exchange	27.9%	29.1%	+1.2
ACUHO-I/APPA Housing Facilities Conf.	27.8%	22.6%	-5.5
Business Operations Conference	n/a	18.1%	--
Living Learning Programs Conference	26.6%	15.5%	-11.1
Apartments Conference	17.7%	9.5%	-8.2
Conference Services Conference	14.9%	n/a	--
NHTI, College Park, MD	12.4%	8.5%	-3.9
Information Technology Conference	11.5%	n/a	--
STARS Undergraduate College	11.1%	7.4%	-3.7
Professional Standards Institute	3.4%	5.1%	+1.7

n/a - not asked on survey